Rahul Chadha, Ross Benes, and Blake Droesch

The Weekly Listen: Amazon's next big hit, is SEO dead, and a subscription-only X?

Audio

On today's podcast episode, we discuss what Amazon's next big hit is, whether X (formerly Twitter) might become a subscription-only platform, whether SEO is already dead, if most retailers will stop offering free shipping, the shortest commercial flight you can take today, and more. Tune in to the discussion with our director of reports editing Rahul Chadha and analysts Ross Benes and Blake Droesch.

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Episode Transcript:

Marcus Johnson (00:00):

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(00:26):

Hello, everyone, and thanks for hanging out with us for the Behind the Numbers Weekly Listen: an eMarketer Podcast made possible by Awin. This is the Friday show that is rocking a Feeler sweatshirt. Very nice, Blake, I'm expecting you to have your podcast notes written on an Etch A Sketch, of course.

Rahul Chadha (00:44):

Wow.

Marcus Johnson (00:44):

Going all '90s. Blake said, "Could we finish this episode on time?" because he has to go and feed his Tamagotchi, which I get. They're hard to keep alive. Did anyone keep them alive for longer than 24 hours? The answer is no.

Ross Benes (00:56):

I had a GigaPet, slightly different than a Tamagotchi.

Marcus Johnson (00:59):

Oh.

Blake Droesch (01:00):

I was more of a Pogs guy.

Marcus Johnson (01:01):

Now we're talking, very nice, very nice.

Ross Benes (01:04):

Well, GigaPet did not last long though either.

Marcus Johnson (01:05):

No. No, no, no. This is going to be a good show. I can tell. I'm your host, Marcus Johnson. In today's show, Amazon's searching for its next big hit.

Blake Droesch (01:13):

The idea that they're going to be able to come in and be a disruptor to the point that it has done in the past with these other pillar industries, it's very unlikely.

Marcus Johnson (01:25):

Will X/Twitter become a subscription-only platform?

Ross Benes (01:29):

Less than a fifth of US population uses Twitter. In other countries, the penetration rate is even lower, and that's including the inflated numbers that they have from bots. You're going to ask these people then to pay for the service. A lot of these people don't even use it that much to begin with.

Marcus Johnson (01:43):

Is SEO dead?

Rahul Chadha (01:45):

When dealing with AI search engines is about creating content that answers more complicated questions. I think that's the only way you're really going to be able to win a position in the AI-derived search results.

Marcus Johnson (01:56):

Our free returns a goner, and what is the shortest commercial flight that you can take?

(02:10):

Join me for this episode. We have three people let's meet. Then we start with our director of reports editing based in the northern part of New York, it's Rahul Charter.

Rahul Chadha (02:18):

Hey, nice to be here.

Marcus Johnson (02:19):

Hello. They're also joined by one of our senior analysts on the retail and ecommerce team based in New York City, it's Blake Droesch.

Blake Droesch (02:26):

Hey, everybody.

Marcus Johnson (02:27):

And, finally, we have one of our senior analysts on the digital advertising and media team, he's just above the city, and his name is Ross Benes.

Ross Benes (02:35):

Howdy.

Marcus Johnson (02:36):

Hello. Folks, we have the story of the week for you. We're talking about Amazon's next big hit. Then we'll go to the debate of the week where our panelists will try to present the best for and against arguments from three different stories we have for you. And then, finally, we will talk about some random trivia and dinner party data. But we start, of course, with the story of the week.

(03:00):

Amazon searches for its next big hit. The tech giant has built three wildly successful businesses. It's been toiling for years to find a fourth pillar. Sebastian Herrera and Nate Rattner of the Wall Street Journal, they explain that the first three pillars, each bringing in tens of billions of dollars in annual revenue, are its online shopping marketplace, number one, Prime membership program, number two, and cloud computing unit, number three, AWS.

(03:31):

Together, those three units account for close to 90% of Amazon's sales, but there have been many attempts to try to find a fourth pillar for the company, a fourth major revenue stream, and those have included healthcare investments, things like buying pharmacy startup PillPack. They were working on telehealth service called Amazon Care. That's now been shut down. They bought a host of primary care practices called One Medical, so a bunch of things in healthcare. In-store shopping experiments, they bought Whole Foods, $14 billion six years ago. They closed some bookstores in four-star locations, so some things there, and then also entertainment and hardware efforts. They've been trying to dominate the smart home with the Amazon Echo devices. They sunset their home security drone, a home robot, smart health ring, but some investors are starting to lose patience, the article notes.

(04:20):

Gents, why do you think Amazon hasn't been able to find a fourth hit, if you will?

Rahul Chadha (04:27):

When you list all of the initiatives that Amazon has launched over the past however many years, it feels quite a lot like they're trying to boil the ocean. I think it's possible you can spread your efforts too thin, even if you are Amazon. I think you could make the argument that their advertising business already is a fourth pillar. I think, well, I'm guessing its share of its total revenues is relatively small compared to probably their revenues from their Marketplace or Amazon Web Services. The profit margins for the digital advertising business are pretty staggering, I think, comparatively speaking. The marginal cost of digital ads is pretty minimal, I think, compared to their business units.

Marcus Johnson (05:03):

Well, when I wrote this question, that was exactly what came to mind. I was like, "Wait, isn't advertising already a fourth pillar?" because they make more money from advertising than they do from Prime memberships. Now, in terms of it being influential, Prime memberships is obviously really, really important, but that's one thing. They make more money from advertising already. And then the second thing here, in two years' time, they'll be approaching Meta's share of us digital ad revenue, Meta's share. There's 18% share of digital ad pie in the US for Meta, 15, just three points less, for Amazon in two years time. Two years ago, it was half the size. Put another way, Meta, obviously, is Facebook and Instagram and others, but mainly those two, Amazon already makes more money from ads than Facebook. It feels like that is a fourth pillar, no?

Blake Droesch (05:52):

Yeah. I think, just to take one step backwards, Amazon was really able to become dominant in its eCommerce marketplace because of the fact that it was developed at the time when eCommerce itself was maturing rapidly, and I think it's now trying to approach markets that are already established. But I do think that media and advertising together will be that fourth pillar because of what it's doing on the media side. There still is some maturity, particularly in sports and digital transformation, which it's already making inroads on, and it's more about building its media and advertising on top of its existing eCommerce platform, which all connects into the greater flywheel.

(06:41):

It's not necessarily about building pillars anymore, I think, for Amazon. It's about adding new offerings that go on top of its current pillars that are going to continue to perpetuate the flywheel. I think it's just really looking at its business development differently than a lot of analysts had when it was really building and evolving in these rapidly maturing industries.

Ross Benes (07:05):

No, I was just going to add to what everyone else has said. When you proposed this question, I agreed that Amazon already has another pillar in advertising. Some of these businesses that the article lists are complementary to each other or almost the same thing. When you talk about Amazon's entertainment and streaming ambitions, that goes into advertising. And our forecast that has them growing at such a high rate where they'll eventually eclipse Meta, that was done before Amazon announced that they're forcing ads into Prime Video and they're making advertising the default, which is terrible for users, but will be great for their ad business. There's going to be a lot of people who are going to find ads one day and not realize why that came to be because they've had an ad-free experience for so long.

(07:50):

But, when Amazon starts pushing heavily into this next year, they're going to be one of the big streaming and advertising companies. When you have Fire TV and Freevee and their DSP, and now you have Prime Video ads and the stuff they're doing with sports, not to mention all the search advertising they have as a retail media network, they're going to be a juggernaut. It's really a true triopoly and they'll probably actually be the number two company before long, in the US.

Marcus Johnson (08:17):

Right. It seems like there either is a fourth pillar, if you want to separate it out, or you could say forget the fourth pillar because advertising, like you were saying, is built on top of eCommerce and media, and so it's just enhancing or strengthening that third pillar. Maybe they should just focus on those three and not so much on all these other experiments. I only listed some of them. There's a lot of others that haven't gone particularly well for the company.

(08:42):

I wanted quickly, gents, your take on this last piece of news. Rachel Wolfe, who writes for our retail briefing, was noting Amazon could launch standalone grocery and healthcare subscriptions as well, and also explore adding primary care services via One Medical, which they bought, to the existing suite of Prime benefits, So it'd be enhancing that prime pillar. Rachel was saying that, with Prime growth slowing, Amazon faces a choice between adding more features, which could require it to raise fees, and launching standalone memberships that offer consumers more entry points to its service, but risk diluting the Prime brand and its overall value proposition. What do we think about the direction of Prime? Should they just enhance it by adding some of these things or have them as standalone entities?

Blake Droesch (09:32):

Well, I think when you look at grocery and healthcare, this is a perfect example of two industries that are already super established, and if Amazon wants to carve out a slice of these industries, particularly with grocery within the digital grocery niche, then, yes, it's still an area worth investing for them. But the idea that they're going to be able to come in and be a disruptor to the point that it has done in the past with these other pillar industries, it's very unlikely. I think, in terms of just for grocery alone, if Amazon wants to ever seriously compete with Walmart and all the other brick-and-mortar grocers, it's going to have to invest billions of dollars into opening new stores or else it's just never going to be able to compete. There's a difference between what could potentially be a growth vehicle for Amazon, like increasing food and beverage and household good sales on the website, versus actually becoming a formidable disruptor in a very, very large and established industry.

Marcus Johnson (10:36):

All right. Well that's where we leave it for today. With regards to the story of the week. Let's move to the debate of the week. Today's segment, make the case, where our panel, Rahul, Ross, and Blake present the for and against arguments for each of the following questions based on three news stories. Two contestants face off per question. The following takes don't necessarily reflect the analyst's personal views, except Blake. He believes everything he says and will defend it to the death. He's a tough colleague to be around, to be honest. I'm kidding, of course. The panel's job is to just present the best case regardless and offer objective analysis.

(11:19):

We start with question one, Rahul going up against Ross. We're talking about Musk suggesting X or Twitter might become a subscription-only platform. Our briefings writer Daniel Constantinovich notes that X/Twitter owner, Elon Musk said that the platform is moving toward a subscription-only model, calling it, "The only way I can think of to combat vast armies of bots." Question here is should X/Twitter become a subscription-only platform? Rahul is going to go first. Rahul, it does make sense for X/Twitter to become a subscription only platform. One minute on the clock courtesy of V, who edits the show. Make the case.

Rahul Chadha (12:00):

I don't think they'll have any other option. Watching their advertising efforts is like watching a clown car being set a flame and then driven off a cliff. I think Musk himself admitted that the company's ad revenues are down 60%. The Times has reported that it's missing its weekly sales target, that ad sales staff are troubled by a rise in hate speech on the platform. We've got Musk picking fights with entities like the Anti-Defamation League. I think brands are running away from the platform's toxicity and ineptitude. It's like we think of brand safety as advertisers not wanting their content to be shown around toxic content, but what if the platform itself is toxic? And, when it comes to subscriptions, I don't know how else they're going to make money.

Marcus Johnson (12:40):

Ross. It doesn't make sense for X/Twitter.

Ross Benes (12:44):

Before I get into the that, Rahul said it was a clown car driving off a cliff. What if there was water under that cliff, would that extinguish the fire of the clown car? It could be counteracting disasters there.

Rahul Chadha (13:00):

Are you going to make me think through my metaphor? I'm not even sure who the clowns are. Are those the advertisers or-

Ross Benes (13:04):

The car would be sinking pretty fast, so [inaudible 00:13:06]-

Rahul Chadha (13:06):

Everybody in the car's going to die, right?

Ross Benes (13:08):

Okay. We've established that. Just thought the cliff might help the fire.

Marcus Johnson (13:13):

Ross is like, "I need more context, okay? [inaudible 00:13:16]."

Ross Benes (13:16):

If it's hard ground under that cliff, then I get what you're saying, but what if it's just the river?

Rahul Chadha (13:21):

If the flames don't kill you, the fall will, right?

Ross Benes (13:24):

Yeah. It depends on the cliff, but, yeah,

Marcus Johnson (13:25):

The metaphor got too technical.

Ross Benes (13:28):

Anyways, I can start my thing.

Marcus Johnson (13:30):

Yes. It doesn't make sense, is what you're arguing, for Twitter to become a subscription-only platform. Make the case?

Ross Benes (13:35):

Well, most people don't use Twitter or don't like Twitter. The media class, they are outliers in the US population. Less than a fifth of US population uses Twitter. In other countries, the penetration rate is even lower, and that's including the inflated numbers that they have from bots. You're going to ask these people then to pay for the service. A lot of these people don't even use it that much to begin with. There's just a lot better ways to spend your money. I'm sure the people in the press would pay for it because they seem to have nothing better to do with their time than to waste time bitching at each other on Twitter, but most people are not going to pay for Twitter. It's just going to be a small pool of people who are interested in that product.

Marcus Johnson (14:17):

Well, so there was that survey from digital marketing services company iTech that Daniel pointed to, nine out of 10 folks not willing to pay for an X subscription. If they had no other choice, maybe some would let up, but right now, pretty much everyone's saying absolutely not. But, yeah, to Rahul's point about ad revenue and going off this metaphorical cliff with who knows what at the bottom, US ad revenue down 60%, according to Musk, as Rahul mentioned. Our March revision estimating that Twitter's US ad revenues would fall nearly 30% this year, having fallen 3% last year. The ad picture's looking bad.

Ross Benes (14:52):

Think about how much we talk about Twitter. Microsoft Bing makes more ad revenue than Twitter, For the amount of revenue it generates and the amount of people that use it on a daily basis, it's got to be one of the most overblown products of our lifetime. It's like how, and I'm guilty of this, it's like how Succession got so much press, but was probably watched by a few hundred thousand people.

Marcus Johnson (15:17):

Eight people. Yeah.

Ross Benes (15:19):

It's targeting the people who are most discussed in the news, celebrities and politicians and media members, but if you get outside of a city where most people are working in those industries, and you especially talk to people who don't have advanced degrees or maybe don't have college degrees, they are not on Twitter.

Marcus Johnson (15:40):

Yeah. Yeah. Every time I look at the-

Blake Droesch (15:41):

That's millions of millions of people.

Marcus Johnson (15:44):

... share, yeah, the share of digital ad pie that Twitter has, I always have a bit of cognitive dissonance, because I'm like, "These numbers can't be correct based on how much we talk about them." They're already about 0.7, 0.8% share for Twitter, and with this negative 30% ad revenue growth in the US that we are forecasting, that takes them down to about 0.5%, and they definitely get way more of the conversation. It's definitely true.

(16:08):

Let's move to our second question. We're going to have Rahul going up against Blake, and we're talking about SEO being dead. SEO is dead long, live AO. "If you're not optimizing for artificial intelligence algorithms, you are already behind," writes Don Reisinger of Inc. Mr. Reisinger has been using Google's AI-first search engine, which he admits is still in beta, and notes that it represents a major change in how search results are displayed. He explains that, instead of simply showing results at the top of the page, Google AI search tries to answer your query, give you context, and let you ask follow-ups. The question here being is algorithm optimization, AO, or search engine optimization, obviously SEO, more important at this point?

(16:54):

Rahul, you're arguing that algorithm optimization AO is already more important than SEO, as Mr. Reisinger is trying to make that point, we think, in this article. One minute on the clock, make the case.

Rahul Chadha (17:07):

Yeah. I think, as you mentioned it, by AO, we mean changing your SEO strategy to account for the changes wrought by AI. Then this is a no-brainer. Google's use of AI, in terms of products they've already modeled for the wider world, result in content that's synthesized from several sources, but it does include links to the sources. That gives marketers some chance to win the click-through traffic. But I think the lesson for marketers is that you can't compete with the AI for easily answered questions. I think the SEO strategy, when dealing with AI search engines, is about creating content that answers more complicated questions. I think that's the only way you're really going to be able to win a position in the AI-derived search results.

Marcus Johnson (17:49):

Blake, SEO is still more important than AO, algorithm optimization. Make the case.

Blake Droesch (17:56):

Yeah. Who knows what the future is going to hold, but right now this Google AI search is still in beta, no one's using it, and there's money to be made right now. Why wouldn't businesses still be focusing on SEO? Plus once the mass adoption ramps up of AI search, the ballgame is going to be completely different. There's going to be a whole set of nebulous tools to try and figure out how to optimize your rankings and your search performance. It's something that I think is still far off, and it can pay to obviously be forward-thinking and be abreast of the new developments, but to completely throw any type of SEO optimization and strategy into the trash can right now in favor of something that's probably still many years off in terms of consumer adoption seems like a big mistake to me.

Rahul Chadha (18:53):

Yeah. I would just add to that, I feel like even this debate, I know, for the purposes of the podcast, you have to create a pro and against, but I really do think this sounds more like an evolution. I think the fundamental principles of SEO are going to remain in place, it's just about creating good content, and that the Google algorithm continues to be a value. But I think, yeah, people who are interested in SEO are just going to have to evolve their strategies.

Marcus Johnson (19:15):

Ross, any thoughts here? Of course not, because he didn't read the article.

Ross Benes (19:19):

Yep.

Marcus Johnson (19:21):

Bloody hell, Ross. That's the level of commitment you can expect from this podcast. Good arguments, gents. Let's move to question three, and we're going to have Blake going up against Ross. Are free returns a goner? H&M is the latest retailer joining Zara, Uniqlo and others to move away from free online returns. Our retail briefings analyst, Rachel Wolfe, explains that H&M will charge shoppers 2.50, $2.50 a package. I don't know why I had to confirm that, just in case you thought it was $250 a package. That's too much. It's just $2.50 a package. Maybe that's too expensive for some folks too. Although in-store returns will remain free, and members of H&M's free loyalty program will get free returns, from what I understand.

(20:03):

But the question is, are we heading towards a world where most retailers don't offer free returns? Blake is going first, one minute on the clock to argue, most retailers will offer free returns. Make the case.

Blake Droesch (20:15):

Yeah. I think we're in a period where there's a little bit of a course correction where retailers, mainly following suit and trying to compete with Amazon, were offering free returns basically under any circumstances, and there was a lot of abuse of that policy. People were doing what is called color stacking, where they'll buy various colors and sizes of one product and then return everything that they didn't like and keep the one item. This was just creating a system and a culture around returns that was definitely cutting into the margins for a lot of retailers.

(20:55):

But, at the same time, free returns is a very important part of the customer experience, and if your competitor is offering it and you're not, that can be really detrimental to you as a brand. I think we're going to see a little bit of a pullback, where most retailers are going to offer free returns in some capacity. You might have to do a little bit of the legwork, as in bringing it back to a store or a drop-off location, but it is going to continue to be a competitive advantage for retailers who are offering it, so I think that there's still going to be an impetus for a lot of retailers to offer it.

Marcus Johnson (21:31):

Ross, most retailers won't offer free returns. Make the case.

Ross Benes (21:35):

Well, in general, there's been a push, especially for digitally-focused companies, to show profit and not to just be focused on user retention or on user growth. Offering free returns cuts into those profits, and it just feels like most internet services are getting worse for consumers. They're cutting back perks that they originally offered so that you would get hooked on using the service, and I just feel like free returns are one of those things that was really nice to have and it's going to be taken away from you soon.

Marcus Johnson (22:07):

Like subsidized ride-hailing services-

Ross Benes (22:10):

Yeah, exactly.

Marcus Johnson (22:11):

... from investment companies, yeah, no more of that, or streaming services that were actually in fact cheaper than cable, also gone. Yeah, we estimate that online returns volume will grow around 4% this year and each of the next few years. That's going up. How do people return items? We estimate most folks, about 60 million-odd, will use a courier or postal service, but that number is flat. Third-party drop-off is really the only method that we see growing currently at 45 million, getting closer to 50 by the end of our forecast in a number of years.

(22:48):

All right, folks, very nice, very nice debate of the week. That's what we've got time for for that segment. Let's move to our final one. It's dinner party data.

(23:01):

This is the part of the show where we tell you about the most interesting thing we've learned this week.

(23:15):

And we start with Blake.

Blake Droesch (23:18):

Student loan payments are going to resume at the beginning of October. CivicScience ran a poll asking, "If your student loan payments resume in October, have you reduced/anticipate cutting spending on any of the following? Select all that apply." The number one activity was dining out, so expect potential restaurants to take a hit once the payments resume, followed by buying clothing, entertainment, nebulous entertainment, and travel. The activities and purchases that student loan payments are least likely to impact are buying gas, buying personal care items, and streaming services and subscriptions. I guess holding onto the little delights of ad-supported streaming through our good friends at Amazon, Amazon Prime, is the one form of entertainment that's least likely to be affected.

Marcus Johnson (24:20):

They've already kicked in? They kick in soon?

Blake Droesch (24:22):

October 1st.

Marcus Johnson (24:23):

Okay. And what have we baked into how much this is going to affect the retail space, Blake? We've mentioned that this is going to have somewhat of effect, but do you seeing it having a small, medium, large size effect on the retail space when these kick back in?

Blake Droesch (24:40):

Yeah. I think it potentially has a massive effect on the economy in general. I'm weary of giving it a specific directive because I'm not an economist, but I think, in terms of retail spending, yeah, it definitely could take a hit. You have so many people who haven't had to repay their student loans, which many people have speculated have really kept retail sales strong over the last couple of months, even amidst this period of inflation, and it could potentially be a really significant variable that starts to impact retail sales, certainly at the beginning of next year, but potentially even hitting the holidays as well.

Marcus Johnson (25:25):

It definitely seems, anecdotally, when you talk to people who are going to have to pay back student loans, it's not a small amount. It's a good couple of hundred from pretty decent paychecks. And I just did a quick, in-the-moment research just now, end of 2022, Federal

Reserve reporting 44 million Americans have student loan debt. That's about one in eight. Do I have that right, about one in eight? Let me make sure I've got the math on that, divided by ... yeah, about one in seven Americans who have student loan debt and the average federal student loan debt balance is $38,000.

Blake Droesch (26:05):

Yeah. I think that paired with potentially another round of interest rates coming up at the end of the year and all of this news about the pandemic era savings dwindling for Americans, it definitely, I think, causes some concern in the overall economic outlook going into next year.

Marcus Johnson (26:24):

This is supposed to be the fun segment, but ...

Blake Droesch (26:28):

Oh, sorry, I forgot-

Marcus Johnson (26:29):

[inaudible 00:26:29] write down.

Blake Droesch (26:29):

... that this was supposed to be the fun ... I thought the fun segment was at the beginning of the episode when Marcus was making fun of my outfit. I thought that was the fun part. Oh, okay. All right.

Marcus Johnson (26:38):

Rahul, save us.

Rahul Chadha (26:40):

Oh, geez. That's a lot of pressure.

Marcus Johnson (26:44):

Well, you got me.

Rahul Chadha (26:45):

This [inaudible 00:26:46] comes courtesy of the CDC. The US marriage rate rebounded from a historic low of 5.1 per 1000 people in the US in 2020 to 6.0 per 1000 people in 2021.

Marcus Johnson (26:45):

Getting married? Are married?

Rahul Chadha (27:01):

Getting married.

Marcus Johnson (27:03):

Getting married, okay.

Rahul Chadha (27:06):

That makes sense when you think about, in 2020, the sheer number of weddings that must have gotten canceled that year. I think the rebound is actually a little sad, but we're still nowhere close to the historical high. The CDC has been tracking this data since, I guess, 1910. And also why is the CDC tracking marriage data? What does that say about the way we conceptualize marriage and exercise-

Ross Benes (27:25):

It's a disease.

Rahul Chadha (27:26):

Exactly. I didn't want to say it out loud, but Ross went there.

Marcus Johnson (27:29):

Thanks, Ross, for spelling that ... yeah,

Rahul Chadha (27:30):

I'm a happily married man, I just want to say, in case my wife is listening. But so the historical high, which is 16.4 weddings, marriages, per 1000 people ,was recorded in 1946-

Marcus Johnson (27:43):

Wow.

Rahul Chadha (27:43):

... which, coincidentally, was the year after World War II ended, which, again, makes sense. There's a lot of pent-up demand, if people were overseas serving the military and came back home, finally got to get hitched.

Marcus Johnson (27:54):

Interesting.

Ross Benes (27:56):

It was hard to get married during the pandemic even if you wanted to though. New York City Hall was probably one of the least efficiently operated places I've ever encountered in my life. They shut down for the five boroughs. They didn't allow walk-ins appointments at the time, because I was getting married at the time. We tried to go through the city and we had to use an outside facilitator. The appointments would go live on the website at 9:00 AM on Thursday, and it was harder than getting a COVID vaccine in the early days. It'd be gone by 9:01 if you hit refresh on your browser. There was ineptitude by municipalities that made it hard to get marriage certificates during COVID, even if you wanted to. And they were dealing with a lot of issues, so I guess I shouldn't be too hard on them, but it was unbelievable how poorly run it was.

Marcus Johnson (28:43):

Yeah. I wonder how much backlog there still is, people who were trying to get married, marriage trying to book venues that were already difficult-

Ross Benes (28:50):

I hope it would have cleared out. That was almost three years ago.

Marcus Johnson (28:54):

Ross, you're up mate.

Ross Benes (28:56):

This last weekend, the Miami Dolphins just absolutely destroyed the Denver Broncos. They put up 70 points on them, and it was the first time since the AFL-NFL merger in 1970 that a team had scored 70 points in a game. They were two points from the all-time NFL record, which was set in 1966 by Washington. And I wish they would've set the record because Miami had the ball with under two minutes and they could have scored, and they should have just kicked the field goal-

Marcus Johnson (28:56):

Should've gone for it.

Ross Benes (29:25):

... to rub it into Sean Payton's nose. They could have at least tried for a touchdown, if not a field goal, but they just let the clock run out because they already had 70 points, but it's one of the worst beat downs in NFL history. They had over 350 yards rushing and passing, which has never been done, and their 726 yards of offense was just nine yards shy of the all-time NFL record set by the 1951 Rams, so very rare. The NFL right now is super pass-heavy. It's never been more difficult to play defense than it is now. The league is artificially designed for offenses to thrive. That's why passing records fall every year. Average, run-of-the-mill quarterbacks are throwing for more yards than Dan Marino used to. However, given all that, we haven't seen 70 points and 700 yards of offense in 60 years.

Marcus Johnson (30:20):

Yeah, that was surprising that both can be true, that it is much more of a pass-heavy, offense-friendly game now, but we've not been close to breaking that record in quite a while. To anyone who played against to Tua Tagovailoa, [inaudible 00:30:38], or Tyreek Hill this week in fantasy, commiserations is what I'll say.

Ross Benes (30:42):

Yeah, they put up half a season's numbers in one day.

Marcus Johnson (30:45):

They should have gone for it though. I agree with you.

(30:48):

All right, folks, I got one for you real quick. I just came back from a wedding. One of the legs of the trip was only about 40 minutes on the plane, so I was wondering what is the shortest commercial flight you can take? But we'll start with the very first flight that anyone was ever able to take. We're obviously talking about the Wright Brothers. So according to NASA, after several unsuccessful attempts, on December 17th, 1903, is when it happened at Kill Devil, that's a terrible place to try to fly a plane, Kill Devil Hills near Kitty Hawk, North Carolina, poorly chosen location. Orville Wright completed the first powered flight of a heavier-than-air aircraft known as the Wright Flyer. Gents, any ideas how long it was in the air?

Rahul Chadha (31:32):

31 seconds. Also, does a not-heavier-than-air airplane exist?

Marcus Johnson (31:38):

Yeah, that's a good point.

Ross Benes (31:39):

I don't know if you played Sonic the Hedgehog, but if you get in one of those-

Marcus Johnson (31:39):

We'll be doing that some-

Ross Benes (31:42):

Bubbles, you'll float in the air. I think someone must have been in one of those bubbles.

Marcus Johnson (31:49):

31 seconds is too long. It's too generous. It lasted just 12 seconds.

Ross Benes (31:54):

Wow.

Marcus Johnson (31:54):

Traveled about 40 yards, that's also about 40 meters for metric people, reached a top speed of seven miles per hour. You could have walked alongside it just as fast. This was the first of four flights that day. Their final flight of the day bested their first try, not difficult, by traveling nearly three American football fields, or soccer fields, in just under a minute, 59 seconds. And so, coincidentally, that is the same flight time as the shortest flight in the world today, which is a long-established air route between two of the Orkney Islands, Westray and Papa Westray, just above Scotland. The distance is less than two miles, and the actual flight is often less than a minute. Buy a boat, Scotland. What are we doing? Who's getting on this plane? [inaudible 00:32:45].

Rahul Chadha (32:45):

It sounds dangerous.

Marcus Johnson (32:46):

The boat?

Rahul Chadha (32:47):

The flight. It can't be a large airplane. It's like what is this rinky-dink airplane that they're flying over?

Marcus Johnson (33:00):

Let's see what it looks like. Yeah, it looks very unstable. It's just one person at a time. I made that up. That would be cool though. You'd feel like you were in a private jet for a while. The longest nonstop flight-

Rahul Chadha (33:11):

Not for a while-

Marcus Johnson (33:11):

No.

Rahul Chadha (33:12):

... for a very, very short period of time.

Marcus Johnson (33:15):

For less than a minute. The longest nonstop flight in the world is Singapore to New York's JFK. That covers 9,500 miles. That's 15,000 kilometers. That's the longest nonstop flight in the world. Australian airline Qantas is currently testing flights known as Project Sunrise, linking Sydney with New York and also London, a route going to London, both covering upwards of 10,000 miles.

Rahul Chadha (33:43):

You happen to know how long the flight is, the flight time from New York Singapore?

Marcus Johnson (33:47):

Oh, good question. Let's have a look, in moment research, 18 hours and-

Rahul Chadha (33:47):

Yikes.

Marcus Johnson (33:52):

... 40 minutes.

Blake Droesch (33:54):

Brutal.

Marcus Johnson (33:55):

12 is enough. That's all we've got time for this episode. Thank you so much to my guests. Thank you to Blake.

Blake Droesch (34:00):

Always a pleasure.

Marcus Johnson (34:00):

Thank you to Rahul.

Rahul Chadha (34:00):

Thank you, sir.

Marcus Johnson (34:02):

And thank you to Ross.

Ross Benes (34:05):

Thanks Marcus.

Marcus Johnson (34:06):

And thank you to Victoria, who edits the show, James, who copy edits it, and Stuart who runs the team. Thanks to everyone for listening in.

(34:11):

You can find us on Instagram at insiderintelligence, one word. We've moved. We're not podcast_behindthenumbers or I've forgotten what it ... I never knew what it was in the first place. But, thank God, we've moved to a simpler place. We are now insiderintelligence, one word, for all the behind-the-scenes content you can possibly inhale. We'll see you guys tomorrow. Nope, we won't. It's the weekend. We'll see you Monday instead for Behind the Numbers Daily: an eMarketer Podcast made possible by Awin. Happy Weekend.