

The Weekly Listen: The biggest question facing TV, Apple's ad backlash, a tactile internet, and video ads inside Roblox

Audio



On today's podcast episode, we discuss the most substantial question facing TV at the moment, the right way to advertise AI's advantages, how haptics could change how we use the internet, whether advertising can find a home inside of games, which countries drive, cycle and take public transport the most, 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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more. Hello everyone and thanks for hanging out with us for the Behind the Numbers Weekly Listen and eMarketer podcast made possible by a win. This is the Friday show that thought people were giving out real fish at a wedding as a party. Favor. Rahul, that would've been pretty cool.

Rahul Chadha (00:45):

Gold. I mean, maybe I just go to fancier weddings than you guys.

Marcus Johnson (00:50):

It was goldfish for folks who are wondering, Victoria got, I'm your host, Marcus Johnson. Oh, the snack, the not real fish,

Victoria Grace (01:03):

The snack that smiles back.

Marcus Johnson (01:06):

Is that their catchphrase?

Victoria Grace (01:07):

Yeah, the snack that smiles back goldfish.

Ross Benes (01:10):

I love goldfish because they're so delicious.

Marcus Johnson (01:13):

Both are true.

Victoria Grace (01:14):

What?

Rahul Chadha (01:15):

That's probably from like 20 years ago. That

Ross Benes (01:18):

Could be from the nineties.

Rahul Chadha (01:22):

That was with Ross I

Blake Droesch (01:24):

The laziest slogan of all time too. That's the goldfish release Sell themselves.

Marcus Johnson (01:29):

I'll be honest, Marcus Johnson in today's show, what's the biggest question facing TV right now? The backlash to Apple's iPad Pro advertisement. Can we create a tactile internet? Will ads inside the world of Roblox work and which countries drive, cycle and use public transport the most? Join me for this episode. We have three people. Let's meet them. We start with our senior analysts covering everything digital advertising and media based just north of the city, apparently living under a rock. It's Ross Venish.

Ross Benes (02:10):

Hey Marcus. Good to be under this rock.

Marcus Johnson (02:14):

It's probably better than not, to be honest. It's not great out here. We're also joined by senior analyst based in New York City and he covers retail and e-commerce for us. He's called Blake Dros.

Blake Droesch (02:26):

Hey Marcus. How's it going?

Marcus Johnson (02:27):

Hello? Hello. Very good sir. And we finally have one of our directors of reports editing. He is based in mid to upstate New York, depending on who you ask, it's Rahul Charter.

Rahul Chadha (02:40):

Hey Marcus, thanks for having me.

Marcus Johnson (02:42):

Hey chat. What do you want me in store for you? Three segments. We start of course with story of the week we'll talk about the biggest questions facing tv. Then we move to the game of the week. What's the points? Our contestants, we try to win pretend points for a pretend belt and we end with dinner party data. Our random trivia segment. We start of course, of course for the story of the week.

Marcus Johnson (03:07):

What's the biggest question facing TV right now? Recent Wall Street Journal articles suggest the tenor of TV ad deals is difficult to predict as we head into the upfronts where media companies pitch their TV networks and streaming platforms to advertisers. The piece suggests there are a few potential culprits in terms of the biggest questions facing tv. Number one, big economic questions. Chief investment officer at Group M us. Matt Sweeney says interest rate cuts have a significant impact on the ability of folks to borrow a home for home for car loan, et cetera, which impacts people's budgets and how marketers approach budget expectations for this year's upfront. So big economic questions could be one. Two, sports and streaming media companies are trying to ensure their valuable sports lineups survive the migration to streaming with ad revenue intact. And number three, measurement, malaise the TV industry struggling with how to measure audiences as the old ways of watching break down. But the question, I mean it could be any of these three or something else. I'll start with Ross, you probably covered TV the closest for Ross. What do you think is the biggest question facing TV right now?

Ross Benes (04:20):

The amount of ad inventory that's going to be available in a few years because as everything shifts to streaming, you're just going to have less inventory because ad loads are lighter in streaming and a lot of viewers, especially on Netflix, prefer the ad free option. So Madison and Wall a consultancy, they forecast that over the next four years, the amount of total linear TV and streaming inventory is going to fall by about a fourth. And TV's historically been used for big reach and general product awareness. So as there's less ad slots available, marketers are going to have to adjust. It's a pretty big question to overcome in the next few years.

Marcus Johnson (05:00):

Are we assuming that prices will increase to make up for some of that shortfall in terms of the value of the market?

Ross Benes (05:07):

Well, yeah. The prices on streaming are higher than linear TV for the most part. So when you replace the linear TV with streaming, the CPM is going to be higher, you have more data measurement options on streaming.

Marcus Johnson (05:21):

Is there anything that could change that trajectory at the moment in terms of available inventory? Anything that is coming around the bends that we're not paying attention to, which could help open up some more inventory.

Ross Benes (05:33):

If a large chunk of Netflix users went to ad supported and they raised their ad loads up, that would reduce it. So it might not end up being a fourth when all things are set and done, but on the current trajectory, that's what we're looking at.

Marcus Johnson (05:46):

Yeah, because got looking at, we have some numbers for TV and CTV in terms of the ad market in the us and even though as you would expect the TV portion is falling from this year, it's about, call it 60 billion business, about 59 next year, it's going to drop to about a 51 billion business. So quite a significant drop as it loses some of those major events this year. And then it's just going to go down and down every year. But CTV making up for some of that shortfall, most of that, all of that shortfall because this year if you add CTV with tv, you get an 88 billion business and in four years if you add the two together, you still get an 88, 80 9 billion business. Blake, what to you is the biggest question facing tv?

Blake Droesch (06:34):

Yeah, I think it's interesting. It's this idea of the fact that money isn't necessarily at a brand level moving just from linear to connected tv. It's, it's the fact that it's moving from linear to a more fragmented state. So one of these articles in the Wall Street Journal had a quote from the head of media at Hershey who said basically there's no longer that single lever that you can pull. And he was referring to the role that television once played in advertising and how their share of advertising dollars going towards TV fell from 80% to 30% in five years, which is a drastic reduction and probably very similar to what a lot of the other big is happening with a lot of the other big brands. But that when you go from the 80 30, that money is not going just

to connected tv, it's going to social, it's going to retail media networks. So I think if you're one of these media companies, the question is necessarily how are you convincing these big brands to give you their brand marketing dollars when the brand marketing options are becoming more sophisticated on platforms like social platforms like retail media,

Marcus Johnson (07:54):

What does that look like? Ross, I'll come back to you. In terms of moving those dollars from traditional to CTV, is it a kind of, are the new advertisers coming in because to Blake's point, it is different moving from tv C, TV V because of how fragmented it is. And so what does that transition look like in terms of where advertisers are putting their money?

Ross Benes (08:17):

You're seeing a lot of brands push money. Huge brands push money from TV to streaming. I think that's the bigger part. McDonald's is doing a lot more streaming than they used to. That's just one example. There are of course upstarts, especially with Amazon launching an ad tier on Prime video, you're going to see a lot of small sellers who have been ready advertising on Amazon through search ads to sell their products on there, have some streaming ads, but I think most of the budget in TV is big brand awareness stuff from regional and national advertisers.

Marcus Johnson (08:55):

Rahul, we'll end with you. What you is the biggest question facing TV right now?

Rahul Chadha (09:00):

I think it's kind of similar to what Blake said, but just restated a little differently, which is just the loss of scale and reach that linear TV historically afforded advertisers. I think now they're just trying to figure out where to put their money and the reality is that a level of reach is not coming back. And Ross has written about this too, how sports functions is a really important part of the media mix, I think for advertisers because that's probably the only place where you're going to get something akin to linear TV's, historical reach. And so you're seeing all these streaming properties bidding up on sports rights. Ross has written about probably the fact that women's sports is undervalued in this new kind of environment, which I think is really interesting insight. And like Blake said, people are, the media mix is just changing. People are

redirecting their dollars where they're seeing ROI and stuff instead of trying to figure out where to put their money for brand marketing as a challenge for sure.

Marcus Johnson (10:00):

Yeah, Zach Goldner forecasting team was saying, talking about women's sports being undervalued. I think the NBA trying to renegotiate their contract to something to the effect of 60 to 70 billion new deal, so about six or 7 billion I think per year. Whereas A-W-N-B-A, it was a \$50 million a year business I believe, and now they're trying to double that to a hundred million. So a hundred million for WBA has renegotiated contracts they're trying to work on versus the six or 7 billion that the NBA is asking for. So that's a very interesting part of this to watch as well because yeah, it does seem like sports. I mean I'll then with that question, anyone who wants to jump in, Ross, Blake, Rahul, I mean in terms of sports fragmentation, is that just going to get worse? I mean looking at some of these contracts, especially the NBA, it's going to be a game over here on Netflix. Do I also have to have Hulu for a couple of games and where the playoffs going to be? We've seen the same in baseball and football as well. Is this going to get worse or are we going to have to see a snapback to games being more centralized and making it easier for advertisers to reach bigger audiences and people to watch these games?

Ross Benes (11:14):

I think it's going to get worse because the leagues have incentive to sell rights to more companies so they're not beholden to any one broadcast partner if that partner has issues and they also can make them all bid against each other. And then with NBA and MLB, especially the most games by far are still available on regional sports networks or on regional broadcast stations. So if you want to watch the Mets this season, you might end up using five different services on a given week. If there's a game on Apple and there's a game on Amazon or whatever

Marcus Johnson (11:52):

Or you skip it, you're probably not missing much really? Are you with the Mets?

Ross Benes (11:57):

Blake might have a different take on that.

Marcus Johnson (11:59):

Blake agrees. Let's move on time now for the game of the week. Blake does not agree he hates me and he's probably well within his right to, that's it for the story of the week time now for the game, today's game, what's the point? Rahul, Ross and Blake will answer four nope. Three questions about three news stories. Okay. Answers get one point good answers, get two and answers that give you the same feeling as when someone you only met once remembers your name not happened to anyone. Okay,

Ross Benes (12:35):

I wish I could remember people's names better. I keep seeing the same dad at the playground and I remember his daughter's name and he's like, Hey Ross. And I'm like, Hey, guy. But it's happened

Marcus Johnson (12:46):

Enough

Ross Benes (12:46):

Times that I can't ask for the name. I've seen him like four times.

Marcus Johnson (12:50):

That's why the English invented mate, because we don't remember no people's names and the Australians took it from us. Yeah, go on.

Ross Benes (12:59):

Maybe I'll try that even though I'm not English or Australian.

Marcus Johnson (13:03):

Yeah, I wouldn't I it probably won't go well, but yeah, answers leave you with that or answers that leave you with the same feeling as getting a free pet as a party favor, although I don't want to fish a new dog. That'd be a good wedding. Anyway, we're going to play a game and I'm going to make up points. Let's start with round one who we got first. Ross Round one, Apple's iPad Pro ad backlash. Apple has apologized after a backlash over an ad showing objects including musical instruments and books being crushed by a hydraulic. Press writes, Joel, just Silver and Tom Gerkin of the B, B, C. The ad was supposed to show how creativity was being compressed into the latest iPad, but instead many have said it shows how tech is

stifling or destroying creativity. The Ask call notes that the criticism is particularly pointed because of the concerns in many of the creative industry is about AI taking people's jobs. But Ross, what's going to be the right way to advertise the advantages of ai?

Ross Benes (14:14):

Well, I just find that the most interesting part of this ad is that Apple made it themselves and now that there's a backlash, agencies can say, well, if you're a big brand, don't go and do this yourself. Look how terrible it worked out for Apple. So this is kind of like a big pitch that agencies can use to market their own service against in-housing.

Blake Droesch (14:38):

Yeah, I didn't really, I mean, find the commercial all that offensive. I mean, I think I basically more or less understood the point, but I think it really speaks volumes about the anxiety about ai. I think technology has advanced the arts in many ways in terms of making things like photography or music production more accessible to the everyday person. I think that it's not necessarily the backlash against that aspect of technology, but what the elephant in the room was, so to speak with the ad, even though there was really no mention of ai. I think it just, especially in the creative world as Ross mentioned in the creative advertising world as well, it just sort of rubbed people the wrong way from that underlying element.

Marcus Johnson (15:34):

Rahul?

Rahul Chadha (15:35):

Yeah, I mean I think the AI question is a tough one. How do you create messaging that focuses on the aspects of technology or AI that'll be additive or augment our jobs or recreation just the way we live our lives without drawing attention to the fact that a lot of people are probably going to lose their jobs or livelihood of doing this? I don't know. That's probably why I don't work at an ad agency, but I do think it's, I don't know. I guess I also kind of thought of the adage of no, there's no such thing as bad press. I can't remember the last time I thought or heard about one of Apple's marketing campaigns. I think back when they were launching the iPad, sorry, the iPod, there was a lot more focus actually on their marketing campaigns, their advertising strategies. And I think it's a little instructive too that Tim Cook hasn't taken the ad down off of his Twitter from what I understand, and I don't know how many views it has now,

but I bet it's pretty substantial. I think they got a lot of weird roundabout earned media from this.

Marcus Johnson (16:35):

So one question of do people really not like the ad because there's conjecture or there's different people's kind of takes on this different articles we saw, but there is some research on consumer sentiments. According to a company Zappy, the ad made just 27% of consumers feel happy. That's nine points lower than the benchmark average. And then system one, which measures emotional response and brand impact found Apple's ads stirred negative emotions for consumers. But how much does this actually matter? Because Apple's stock price is up eight points in the past month during which the ad was featured. So this probably won't have too much effect. Maybe it will sell more iPads to Rolls Point. And again, a lot of media from this.

Blake Droesch (17:22):

I would imagine that the overwhelming majority of people who are in the market for an Apple product have heard nothing about this commercial.

Rahul Chadha (17:31):

It's

Marcus Johnson (17:31):

Probably true. It was an Atlantic article summed up what happened quite beautifully. I think reading watch Apple Trash compact human culture. What was the company thinking? And Damon Beez and Charlie War write that. The message was that the iPad is powerful and quite thin. But good Lord, apple read the room.

Marcus Johnson (17:56):

That's fair. Let's move to story two all tied up, two points a piece heading into round two. We start with Blake creating a tactile internet. What the hell are we talking about? Well, imagine if you could touch your phone screen to feel the texture of that shirt you might buy or how that new wood flooring might feel. It's Jennifer a Kingston of Axios. She notes that Northwestern University engineers built touchscreens that let us feel a variety of sensations, like something that's rough that led to a spinoff company called Canvas, has since closed down, ran out of

money, but it had developed an iPad size tablet that let you touch the screen and feel smooth versus unshaven, skin corduroy, fabric, sandpaper, striations or grid. But Blake, how could haptics change how we use the internet?

Blake Droesch (18:50):

I don't think that it will change anything in.

Marcus Johnson (18:55):

Okay, moving on

Blake Droesch (18:56):

In the future. Rahul, to elaborate slightly further, I think that maybe for something like accessibility or being able to feel your way around a phone when you're driving so you can change the song without looking down, maybe something like that. But if you think of how far we are from things like VR and AR actually really moving the needle in terms of helping people shop online and things of that nature, I don't think this technology is going to get anywhere soon in where it's actually going to be able to help someone feel what a piece of clothing might be like before they buy it.

Marcus Johnson (19:38):

Rahul?

Rahul Chadha (19:40):

Yeah, I mean I think once the novelty wears off, I'm not sure what the practical application is. If I want to feel a stubbly face, I can just touch my own ID down my phone for the experience. I don't know. Yeah, it's a technology. I think it's in search of a problem to solve. And I think from an advertising perspective, whoever's first out the gate might get some attention for using the technology, but after that I think there's probably not a lot of practical applications for its use in marketing. At least

Marcus Johnson (20:09):

Russ,

Ross Benes (20:11):

Maybe eventually video games and shopping would be kind of cool with this sort of future. If it could one day do the things that it says it can do, which right now it really can't. I don't think it would change most internet usage. A lot of times you're just using it for information or for work. You don't really need to have to screen to look up something about a movie or some statistic that you're going to use in your workplace. But shopping on Amazon might be kind of cool to touch those curtains before you buy 'em, get a sense of what they're like.

Marcus Johnson (20:47):

The thing is, I guess you touch curtains when you open and close them, but not many people have velvet curtains, even though I'm sure that's the nicest thing to touch. You just want something that looks good, right?

Ross Benes (21:00):

I think you want something that goes up and down easily.

Rahul Chadha (21:04):

I think even from a clothing shopping perspective, I was thinking about when you're looking at a photo of a shirt, you don't actually know what the color is going to be like in real life. And I'm like, is there going to be some kind of analogous experience here where it's like, oh yeah, this feels like corduroy, but does it feel the actual pants that I'm thinking about buying? I'm pretty skeptical of that actually.

Marcus Johnson (21:23):

Yeah, corduroy is tough to pull off.

Ross Benes (21:27):

I'm just going to leave it at those pants last forever though.

Marcus Johnson (21:29):

It's going to leave it at that.

Ross Benes (21:30):

You can't put holes in the knees.

Rahul Chadha (21:32):

I mean you can't beat the noise corduroy makes when you walk around too. It's really satisfying and irritating to everybody else.

Marcus Johnson (21:40):

All tied up heading into round three ads inside the world of Roblox. That's where we end the game. Roblox uses battle tornadoes and raise pets. Will they watch ads? Two asks. Suzanne Ika and Sarah Edelman of the Wall Street Journal, the online entertainment company. Roblox has teamed up with ad tech firm PubMatic to help juice sales or video ads on its platform, which averages 78 million daily users. The article explains that within Roblox there are millions of animated 3D realms to hang out in and play games. Last year the company started testing a small number of video ads, which appear on virtual billboards only for certain users. PubMatic will help brands buy video ad inventory through a traditional online bidding process to be seen by over 13 year olds. Some creators that opt to show the ads get a cut of the take. But Rahul start with you can advertising find a home inside of games.

Rahul Chadha (22:40):

Games in general, I dunno, but Roblox specifically, the ad format is a little confusing to me from what I understand, they're playing video ads on a billboard. So to me it's akin to walking around on the street and if a billboard outside started playing an ad, would you just stop whatever you were doing to watch it? It's like, I don't think so. Even if you're in a immersive game environment, the viewability aspect of the ads is a little confusing to me. I'm not really sure who's going to stop whatever they're doing in the game environment to watch an ad. It doesn't make a lot of sense.

Marcus Johnson (23:11):

Well, yeah, I mean, so Raul's point about the question I've said at home inside of games, this question, I mean is story is on Roblox, I just saw EA Electronic Arts, they make FIFA Star Wars games there. They said that they want to bring ads to AAA video games as well. And so it does seem like there's more movements on games inviting ads into their world. Ross, what do you think

Ross Benes (23:33):

If an ad is coming into AA game that people are paying good money for? It has to not be intrusive. So you could have things like, and they already exists. If you play NBA 2K, you could

see all the merchandising and stuff that you would actually see in an NBA game for real. See that there in your video game, but you can't just throw a 32nd Papa John's ad in the middle of playing when someone's paid 60 bucks. That's just going to irritate gamers hardcore. You can do that on a mobile game, but AAA game, you got to be pretty cautious about the user experience.

Marcus Johnson (24:09):

I mean, the NBA is starting to do it in between free throws, so maybe everything's on the board, but it is annoying.

Ross Benes (24:16):

They're going to do it between free throws and when you're playing 2K, you're screen small and show a Honda Civic ad.

Marcus Johnson (24:24):

Blake.

Blake Droesch (24:25):

Yeah, I mean I think all these types of gaming ads can potentially serve one very niche audience, but we've just been talking about ads and video games in so many different forms for so many years at this point, and it never really seems to evolve beyond serving the audience that is in it, which are usually younger people with limited spending power that are influential culturally more than they used to be. So I suppose there is some value in serving that audience, but ultimately gaming has not become this super mainstream thing that there was speculation that it was going to a few years ago during the pandemic. So I think a lot of expectations have been tempered around advertising in that market in general.

Marcus Johnson (25:25):

Yeah, it looked like eSports was going to take over the world and it hasn't. There are a lot of people who are casual gamers, a significant number of folks in the states, but you're right, it's not as widespread as we once thought it would be. However, the dollars are really getting up there. It's a larger market than you might think. We estimate US game advertising could reach 10 billion next year for context. That's more money that advertisers will spend on out of home ads, all of them and nearly as much as they'll spend on radio ads, which is in decline, but still a

significant portion of them or a decent slice of the market. So game advertising next year approaching 10 billion mark bigger than each of those separately static ads already exist. Brands can buy portal ads inside Roblox. They're billboards that hangover or next to portals that players use to move from one experience to the next.

Marcus Johnson (26:21):

So they already exist, but this would add a video component and yeah, Roblox needs to do everything it can to move close to profitability. They made \$800 million in Q1. That's up 22% year on year, but they're not yet profitable. They make most of their money from selling virtual bucks. Players used to buy avatar outfits and vehicles and stuff, so advertising could help them there. That's what we've got time for the game of the week. This week's winner close game. But Blake is this week's winner of the game in the week with seven Rahul and Ross tied with six apiece. Congratulations to him. He gets the championship belt and the last word.

Blake Droesch (26:55):

Oh wow. This is actually the second time in a row that I've won. I feel like I'm on a hot streak, so well just two. Let me give a shout out to another team that's kind of on a hot streak. The New York Mets, you say the keep it a Gabe or two around 500, which is much better than anyone thought that they would be able to achieve so far, including a really sweet walk off home run on Sunday night Baseball by Brandon Nimo. So shout out to him and yeah, go Mets I guess joined. I

Marcus Johnson (27:29):

Cut this

Blake Droesch (27:29):

Part, the show before the season tanks in July. Nothing good

Ross Benes (27:32):

Come from it. Didn't Diaz just blow a save last night?

Blake Droesch (27:38):

Yeah, but we can cut that.

Marcus Johnson (27:41):

No, we'll keep that in. We lost

Blake Droesch (27:43):

About 50% of our audience already. Phil is good.

Ross Benes (27:45):

Philly good. They're good. They're very

Blake Droesch (27:46):

Good. Yeah.

Marcus Johnson (27:47):

If by some miracle you're still listening to the show, it's time now for dinner party data.

Blake Droesch (27:52):

I'm pretty sure Diaz also blew a save on Sunday night too, but then yeah, he did. They came back with a walk off. Yeah. Okay.

Ross Benes (28:00):

He blew a SVA against the raise too. There's

Blake Droesch (28:02):

More. Yeah. Yeah.

Marcus Johnson (28:09):

This is the part of the show that tries to talk about the most interesting thing we learned this week. Let's start with Blake because he won the game.

Blake Droesch (28:18):

Yeah, so this is some interesting data that I found from Global Web Index that it actually looks at a 10 year period and it ranks the trends or the topics that 16 to 24 year olds were talking about online. So they first did this poll in 2013 back when I was in that demographic, and they redid the poll last year in Q2 of 2023. So I'll read off the top five for the top topics in 2013. Number one were mobile phones. Number two were films. Number three, computers, number

four music and number five, fashion and clothing in 2023. 10 years later, music was the top trend. Films number two, mobile phones, number three, fashion and clothing number four and books made it into the top five from sixth place. So I think that the interesting thing here was mobile phones and computers are just less of a novelty. So those were in the top five with mobile phones being number one back in 2013. But I just think younger people, they're more commonplace. It's like every day they're not really talking about the technology itself anymore. And they've resumed to talk more about things like the culture that's being facilitated through technology. So music, films, even books. So I thought that was interesting.

Marcus Johnson (29:50):

Yeah, there was more to talk about when we were younger, when it came to mobile Divine. I mean now it's just the same form factor that's like an inch bigger or smaller. But I mean 2013, it wasn't like the razor was a thing, but yeah, you definitely had other things to discuss when it came to phones. Very good, Ross.

Ross Benes (30:13):

So I was curious how many dogs are mutts? I've in the past talked about the most popular breeds, but just specifically looking at mutts, this is from the Humane Society and it just shows there's a slight uptick in mutts from 51% in 2018 to 54% in 2022. It's the most recently available data. So just over half of dogs are mixed breed roughly. This is just us.

Marcus Johnson (30:45):

Okay. Your two wonderful little creatures are,

Ross Benes (30:50):

Yeah, so I guess I reflect the national norm. I have one mutt and one dog that seems like she's a purebred. So one and one

Marcus Johnson (31:01):

Very nice. Victoria gets furious when Ross kicks them out of the room. Are they in the background somewhere?

Ross Benes (31:08):

Yeah, the beagle is right here by my elbow. I don't know where the other guy went.

Marcus Johnson (31:14):

Who knows. I'd like to think to make a sandwich, but probably not. Rahul, you're up.

Rahul Chadha (31:24):

Yeah. I stumbled across some interesting information about jeans, Americans, about

Marcus Johnson (31:29):

Gen

Rahul Chadha (31:30):

Jeans, like blue jeans.

Ross Benes (31:32):

Oh, blue

Rahul Chadha (31:33):

Jeans. I'm going to read this, but it's so cool.

Ross Benes (31:34):

I think meant like DNA,

Marcus Johnson (31:38):

Not d, NA

Ross Benes (31:39):

23 and interested denim.

Rahul Chadha (31:41):

Yeah. I'm like, I don't want my biometric information out there. I'm going to read this as I wrote it, but it's so cheesy, so I'll try not to laugh. But America's love affair with denim is unlike raw denim, not fading denim.

Rahul Chadha (31:58):

No raw denim fish out of us. It got sick, fades. Fades in this rock. Sick fades, bro, you bad. But I remember a couple years ago, I feel like everybody was like prognosticating the death of jeans at the hands of joggers and stuff. And I'm not a young person, so I have no idea what people actually wear anymore. But you gov data from March show that only 8% of respondents never wore jeans. And I was surprised that this, a quarter of them wore jeans every day. And one rationale for the longevity might be their ability to kind of adapt to the fashion trends of the moment. Google searched that to show that queries for skinny jeans have plummeted, but those for baggy and wide leg jeans have skyrocketed, which I think is the preferred, I think it's actually kind of cool. Everybody dresses like they're in a nineties skateboarding video. From my perspective now, all the kids, I'm like, I'm with that.

Blake Droesch (32:46):

Which is interesting because my generation of skateboarders ushered in the skinny jean before it was really thing if

Marcus Johnson (32:56):

Just took

Blake Droesch (32:56):

Ivo and now Yeah, exactly. And now it's sort of reversing again.

Marcus Johnson (33:04):

I don't believe that survey at all. I think everyone who responded currently wearing jeans looked down, saw they were in joggers and went, I'll put jeans. All right folks, we've got one for you. Quick. Which countries drive cycle and use public transport the most? Alright, I'll let you guess. This was by region, but I'll let you guess which country, region, country drives the most. Don't do that. America, you know, it's you

Blake Droesch (33:35):

La, Southern California.

Marcus Johnson (33:37):

Oh, I was going to say California. Oh, well I meant of the world, which region of the, but yes, LA is in America and so it counts what share of our trips are by car. 92% of Americans and

Canadians in this instance North America and they don't use, don't include Mexico here. 92% of Americans and Canadians, weekday trips are by car. In second place was southern Europe with 50% according to the A, b, C of mobility research paper by Raphael Prieto, cual, complexity Science hub and Juan p OA of ar, VT university. So 92% of trips in America owned by cars versus if you take European in its entirety, it's just 43% for cars. Then in America, 4% of trips are by public transport compared to 32% in Europe. And then 4% of trips in America are walking or cycling versus 30% of trips in Europe. It's too much. Car America, I don't want to hear. It's a big country. There are other big countries. Alright, number two, what country cycles the most? Any guesses?

Blake Droesch (34:53):

Which country? Netherlands.

Marcus Johnson (34:54):

Country. Yeah, the Netherlands. Yes. Bang. Bang. Very good. According to a 2021 study published in the journal, transport reviews, 26% of all trips around the Netherlands are on a bike. Japan is second with 12. Then Germany with nine. Nine percent's too low to be third. That doesn't speak well. The fourth through whatever. And then lastly, which country uses public transport the most?

Blake Droesch (35:25):

Japan

Marcus Johnson (35:25):

Is a tough one, but that's a good guess. No, but I think you're in the right realm in terms of your logic.

Blake Droesch (35:34):

Is it South Korea?

Marcus Johnson (35:37):

All so close, but no,

Rahul Chadha (35:40):

I'm just going to go to the motherland.

Marcus Johnson (35:41):

Is it India? No, it's not. No, but India has, did I have that here? India has, it's like nearly 30 million people by train daily. I might have made that sense

Rahul Chadha (35:59):

To me. There's a lot of people there. And the British built a lot of train, train, track.

Marcus Johnson (36:02):

That seems slow now. I've said it. Hang on. Oh, I don't have it here to hands. I'll find it later. We'll talk later Rahul about that. But the answer is Hong Kong, according to the Guinness World records, around 81% of all transport trips in the city are made via public transit, where each day there are over 12 million public transit passengers, according to 2019 figures. Why? Hong Kong has double the population density of Manhattan? Yuck. It's too many. In 2017, by comparison, 56% of New Yorkers took public transit, the highest share of any state. Number two, Victoria was

Victoria Grace (36:50):

What? Sorry? I was answering emails.

Marcus Johnson (36:53):

Oh my goodness.

Victoria Grace (36:54):

We have a pickup afterwards. New Jersey?

Marcus Johnson (36:57):

It is. New Jersey. Jersey City.

Victoria Grace (36:59):

Thanks, Blake. Jersey City

Marcus Johnson (37:01):

Was second, 51%. And then Victoria

Victoria Grace (37:05):

Ho Bogan, third

Marcus Johnson (37:06):

Place, union City.

Victoria Grace (37:08):

Oh,

Marcus Johnson (37:10):

In Jersey, 48%. Boston and San Francisco, 35% each. Rounding out the top five.

Victoria Grace (37:14):

Union City has great Spanish food.

Marcus Johnson (37:16):

US Census, huh? Okay.

Victoria Grace (37:20):

Just saying

Marcus Johnson (37:21):

Thanks V. That's what we've got time for episode before it goes completely off the rails.

Thanks. Thank you. I didn't thank anyone. Thank you to Blake. He won. Always a

Rahul Chadha (37:33):

Pleasure.

Marcus Johnson (37:33):

Thank you to Ross. Thanks Marcus. Thank you to Rahul. Cheers. Thanks friend. And thank you to Victoria who edits the show. Stuart runs the team. Sophie does our social media, and Lance who runs our video podcast. Thanks to everyone for listening in. We hope to see you on

Monday for the Behind the Numbers Daily New Marketer podcast Made possible by Walmart Connect. Happiest of weekends.