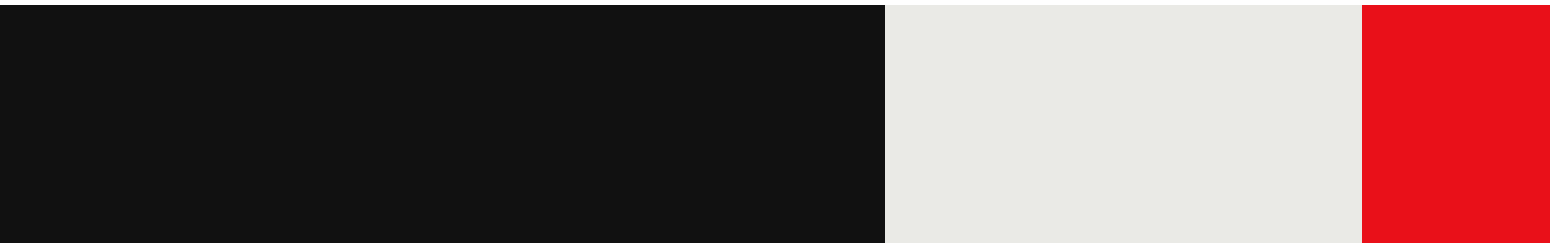


The Daily: HBO Max + Discovery+ = Max, Montana is about to ban TikTok, and ChatGPT the travel advisor

Audio



On today's episode, we discuss whether there's room in people's streaming lives for the new service "Max," the significance of Montana preparing to become the first state to ban TikTok, why Expedia wants ChatGPT to be your travel advisor, a March Madness finals ratings surprise, YouTube TV launching its multiview feature, where the tradition of sports jersey numbers being retired came from, and more. Tune in to the discussion with our forecasting writer Ethan Cramer-Flood, director of Briefings Jeremy Goldman, and director of forecasting Oscar Orozco.

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Episode Transcript:

Marcus Johnson:

Hello everyone, and thanks for hanging out with us for the Behind the Numbers Weekly Listen, an e-Marketer podcast made possible by Cint. This is the Friday show that is obsessed with

Jeremy's new dog except Oscar, who thinks that dogs are the main problem with society.

Oscar Orozco:

Hey. Not true.

Marcus Johnson:

For pictures of Clementine, Jeremy's new dog, check out Instagram page [behindthenumbers_podcast](#). I'm your host, Marcus Johnson. In today's show, HBO Max combines with Discovery+ to create Max.

Oscar Orozco:

The origin story of these streaming platforms was to look so much different than your typical cable subscription, and we've talked about how it's starting to come full circle and they're now starting to resemble what cable really has always been.

Marcus Johnson:

Montana becomes the first state to approve a full ban of TikTok.

Ethan Cramer-Flood:

You'd think that they would've tried to ban it tomorrow, or at least in the very near term, but they purposefully set it up to not get implemented for almost an entire year, which suggests that they're not really thinking that they're going to be leading on this.

Marcus Johnson:

Expedia wants ChatGPT to be your travel advisor.

Jeremy Goldman:

It is a bit of a race in order to ensure that you're not just embedding these tools to learn from them, but to do so in a way that's additive to the user experience.

Marcus Johnson:

Something about college basketball, YouTube TV launches a multi view feature. And why do we retire jerseys in sports? Join me for this episode. We have three people. Let's meet them.

All based in New York. We start with our senior forecasting writer, we call him Ethan Cramer-Flood.

Ethan Cramer-Flood:

Hello. Hello.

Marcus Johnson:

Hello, sir. We're also joined by one of our directors of forecasting. He's referred to as Oscar Orozco.

Oscar Orozco:

Hey everybody. Thanks for having me, Marcus.

Marcus Johnson:

Hey, fellow. And finally, we have our senior director of briefings. We refer to him as Jeremy Goldman.

Jeremy Goldman:

It's great to take a break from house training a puppy with you guys.

Marcus Johnson:

Thanks for being here, sir. Thank you for being here, you three and listeners. What we have in store for you today, we start with the story of the week, we're talking about a new streaming service called Max. We then move on to the game of the week. Our contestants will go head to head to try to give us the best takeaways they can from each of the four stories we have for you to win the championship belt. Then we move to dinner party data. We talk about a little random trivia to close out the show, but we start with of course, the story of the week.

HBO Max plus Discovery+ equals Max. As of May 23rd, there'll be a new streaming service on the block as Warner Brothers Discovery combines owned properties, HBO Max and Discovery+ to become Max, a new streaming service less than three years after HBO Max was launched. The new Max service is blue and white instead of purple, and the A in Max will have a white dot in the middle, similar to the O in HBO. Pricing, what's going on? The new service will run you 10 bucks a month with ads, 16 without, that's the same as HBO Max. Now there's also a Max Ultima ad free tier for \$20 a month, including four concurrent streams, 4K, UHD

resolution and up to a hundred offline downloads. Content-wise, you'll be able to find everything Game of Thrones, TV favorites like Friends, recent hits like Succession, and the Last of Us, a new Harry Potter TV series, DC Comics things, et cetera, et cetera. Jeremy, I'll start with you because you recently wrote a piece about this and suggested it as a topic for us to discuss. What's your take on this new Max service?

Jeremy Goldman:

Well, I think it's really interesting to take two different services and combine them when they've got such different demographics. That's pretty much like the first thing that I think about. The demographics don't overlap all that much between these two. HBO Max has been known for these really big can't miss type of shows, and Discovery+ can best be described as the type of stuff that you leave on in the background while you're doing something else. Do you want to watch Dr. Pimple Popper? A few seasons of which they go ahead-

Marcus Johnson:

No, no one wants to watch that.

Jeremy Goldman:

Put it on the backburner-

Oscar Orozco:

No, thanks.

Jeremy Goldman:

I know, but yeah, I think that that's one of those... there's almost like a... it's so crazy it'll work or it's very confusing as to how you kind of put these things together and service all the right content to the right people at the right time, which has been a bit of a pain point for a lot of HBO Max subscribers already.

Marcus Johnson:

We talked about these two audiences, not necessarily making sense in terms of putting them together, but one reason they are doing this is because of time spent goals. Discovery+ content is much more throw it on and have it on in the background as opposed to HBO Max, which is much more lean forward. New York Times [inaudible 00:05:10] by John Koblin noting

Warner Brothers Discovery executives hoping Discovery+'s more passive programming options will increase the viewers time on the app and reduce churn. That's definitely something it needs to work on. Time spent on the app, according to Nielsen, 1.3% of time people spend watching TV in America was spent with HBO Max in February, 1.3%. YouTube was eight, Netflix, seven, Hulu and Amazon Prime, 3% each. HBO Max was closer to Peacock and Tubi, so definitely something they're trying to focus on. Time spent on platform. Oscar, will this work though? Does this new service make sense to you?

Oscar Orozco:

I think the time spent, the engagement story is really important and I think it's one of the major reasons why I think this rebrand does make sense. It does. What does, for example, Netflix do so well? It provides all sorts of different types of programming. We spoke about demographics, it does that whether it's for kids or young adults or adults, and I think this rebrand does help. It really does. It provides these deeper layers of hubs. We know that the HBO brand with its pedigree, prestige will be the main focus, but we'll see this type of programming that will make people kind of browse around and click on things, watch a couple episodes, move on something else. Right now, HBO Max as it is not thought of as that type of platform, what Netflix provides.

So I think that's a main thing. And I mentioned the prestige of the HBO brand. I think there's a lot of concern about that being lost, but I don't think of it that way. I think kind of like what Disney + does so well with its different... the Pixar, the Marvel, the Star Wars hubs. I think maintaining HBO as that premier hub there will be big for it. It'll start looking a little bit like Disney + and I think that, in many ways, it's is muse and then what it wants to be.

Marcus Johnson:

Yeah, you mentioned the different demographics. Part of the reason for doing this was because the HBO brand just wasn't hitting with kids. It was holding things back a bit. The company admitting after 50 years of being marketed as a premium adult service, the HBO name was limiting to consumers, particularly to children. So this hopefully bringing that group of folks into the fold as well. Ethan, will this work?

Ethan Cramer-Flood:

Yeah, just yesterday, the evening, I was having a conversation with my girlfriend talking about this decision because she is an HBO Max subscriber and I told her what was going to happen

and she said, "Wait, they're taking the label HBO off the app?" And I think for HBO fans, that's a shocking, nonsensical decision. And then she asked, "Is something wrong with how HBO is doing?" And I said, no. And I think what this conversation demonstrates is that the priorities have changed during the streaming era and the standards by which success is judged have changed. HBO itself has been doing well this whole time and by the standards of how they used to run their operation, they're fine. They're in fine shape, they're successful by their own way of thinking, but this is no longer good enough, particularly when your parent company is Warner Brothers facing an enormous amount of debt.

And when suddenly the idea of being in fifth place, which is where according to our metrics, HBO Max is among total US viewers, that's no longer good enough. Whereas in the past, I think HBO would've been completely content to be an elite service that a minority of viewers watch because their self-sustaining and they can get their subscription revenue, they can make the shows they want to make, they can win the awards they want to win, and they will happily go on their merry way. That's just not good enough anymore.

You all talked about their very limited total time spent metric, and that has to do with the fact that their total viewership is much lower, right? They're in a distance fifth place compared to Netflix, Amazon, Hulu, and Disney +. So they got to get those total viewer numbers up in order to inch up on the time spent figure, which means that this is in many ways an advertising play also, right? If you're going to try to sell advertising now, you need to have more people watching. So this is the situation that they found themselves in, and I don't know if it's going to work, to be honest. I think a lot of HBO viewers are going to wonder what's going on, and probably a lot of Discovery viewers are going to wonder what's going on, and this is a risk, but this is probably one they felt they had to tick.

Jeremy Goldman:

And Marcus, I think building on what Ethan just said, so much of it is going to be about the user interface and surfacing the right content to people because ultimately there's going to be... especially in North America, less user growth for a lot of these major streaming platforms. So because of that, it just becomes more important to reduce churn rather than just to focus on growth alone. And they're thinking that having a unified interface is just going to allow them to reduce churn, which is a major issue with after you binge-watch Succession, you can say, great, let me just go cancel. I'll renew when I want to, and I'm switching over to Apple TV+ to get Ted Lasso.

Oscar Orozco:

And quick note, I think what Ethan was alluding to as well, it's a topic we've discussed here is just the origin story of these streaming platforms was to look so much different than your typical cable subscription, and we've talked about how it's starting to come full circle and they're now starting to resemble what cable really has always been. So it's really kind of ironic when you think of it that way.

Marcus Johnson:

Yeah. Subscriber ambitions, Warner Brothers Discovery, expecting to have 130 million Max subscribers by 2025, that would still be a hundred million fewer than the current number of paying subscribers for Netflix or Disney's offerings, that obviously includes Disney+, Hulu and ESPN+. HBO Max, nearly a hundred million now. Balance sheet goals as well, Ethan mentioned that they had to make this move because, not in the best financial shape either, Warner Brothers Discovery thinks that streaming division will break even by next year and be profitable in two years. In the most recent quarter, streaming lost over \$200 million, but that is better than a few months ago and was seen as a win by some analysts. This has all happened so fast as well, gents. I went and looked at when the merger was between Discovery and Warner Media to form Warner Brothers Discovery, it was just a year ago.

Jeremy Goldman:

Yeah, about like 390 days, give or take.

Marcus Johnson:

Yeah, so it's quite impressive. They've been able to do this as fast as they have done when you put it in that context.

Ethan Cramer-Flood:

I think this was always the plan, right?

Marcus Johnson:

Yes.

Oscar Orozco:

Absolutely, yeah.

Marcus Johnson:

Yep. Current HBO Max subscribers will be moved over automatically. Discovery+ as well as being included on Max, will also stay as a standalone service as well.

Ethan Cramer-Flood:

You have to assume the price increases are a part of the long-term plan. They very specifically did not announce an increase now because they want everyone to absorb this and let it wash over them, but if it's successful and indeed it reduces churn [inaudible 00:12:12], new Max is destined to become something more sticky and more of a time waster, which is what they're going for, then eventually the price increases would come and that gets them to where they want to be.

Marcus Johnson:

Yeah. Adding Discovery+ content to HBO Max, a huge value add there, keeping it at the similar price but plenty of runway to bump that price up as Ethan mentioned. Good points, folks. That's what we've got time for for the story of the week. Is time now for the game of the week, today's game, what's the point? [inaudible 00:12:43] four stories and [inaudible 00:12:44] contestants, Oscar, Ethan, and Jeremy tell us what they think is the main takeaway of the story. Okay answers get one point, good answers get two, and answers that give you the same feeling as finally figuring out what that song was that was in your head for so long, answers that leave you with that feeling, they get you three points. Each person gets 20 seconds to answer before they hear this.

If you run long, technical foul, minus two points. Two techs gets you ejected like Draymond Green from the game, whoever has the most points wins, gets the last word. Let's play. We start with Jeremy for round one. Montana becomes the first state to approve a full ban of TikTok. [inaudible 00:13:21] Bobby Allen of NPR, the Republican controlled Montana House of Representatives sent the bill on Friday to the Republican governor who can now sign the measure into law. Mr. Allen explains that the bill makes it illegal to download TikTok in the state with fines of up to \$10,000 a day for any entity, think Apple or Google's app stores or TikTok itself, that makes the video streaming app available. If sign into law, the state ban would not start until January, 2024, but Jeremy, Montana becoming the first state to approve a full ban of TikTok potentially. What's the point?

Jeremy Goldman:

The point here is that bans of TikTok are most likely going to be led at the state level. Montana is the first, I'm predicting it's not going to be the last. There are a number of other states that are looking at bans. It's just easier to sign something into effect at a state by state level, and I'm predicting that's where we're going to see most of the action over the next few months.

Marcus Johnson:

Ethan?

Ethan Cramer-Flood:

Yeah. The point of this article to me was that they're not really banning TikTok because the legislation which has a limited chance of actually passing court review was by design not going to be implemented for eight more months, which to me, [inaudible 00:14:38] a lot of questions. If they were seriously concerned about national security or Montana security, you'd think that they would've tried to ban it tomorrow, or at least in the very near term, but they purposefully set it up to not get implemented for almost an entire year, which suggests that they're not really thinking that they're going to be leading on this and that it might be a little bit more of a political move, maybe designed to build momentum, maybe trying to get the dominoes to fall, but they're not actually going to be at the forefront of this by the time we get to 2024.

Marcus Johnson:

Yeah, to Ethan's point, the federal court challenge from TikTok expected before this law would take effect, Oscar?

Oscar Orozco:

Yeah, I'd normally roll my eyes at state implemented polarizing legislation like this because it is, but we keep talking about this at the federal level, there's a lot of rumblings that something could occur. I was looking at a recent survey from NPR and Marist that found that, well, a little over 70% of adults said they were at least minimally concerned or thought that TikTok could pose at least a minor threat to national security. So also, 57% of people said they supported a federal ban. So I'm interested to see how this plays out, and I do think it appears there's widespread American voter support for something like this.

Marcus Johnson:

Yeah. Another study, recent Pew Research survey found 50% of Americans supported a TikTok ban versus 22% who opposed it, said two and a half times more Americans supported the ban versus no ban. And also in the meantime, advertisers still spending despite a potential ban, two numbers to support that. One from Sensor Tower, advertisers spending on TikTok grew 11% in March and one from Capterra, three and four marketers were increasing TikTok spend next month, plan to next month. Let's move to round two. We start with Ethan. Expedia wants ChatGPT to be your travel advisor writes Jacob Passy of the Wall Street Journal. He explains the new ChatGPT feature within Expedia's app currently in beta, iOS users first, let's people plan trips by talking to a chatbot. Travelers can ask for recommendations in categories like destinations, flights, or hotels, and will be able to book directly off some of the recommendations. But Ethan, Expedia wanting ChatGPT to be your travel advisor. What's the point?

Ethan Cramer-Flood:

Given my experience with ChatGPT and generative AI in general, and its propensity to completely hallucinate solutions, I think the point of this article is that in the future when you are on Expedia or any other travel website using this functionality, you better make sure that it hasn't just completely fabricated your destination or made up a hotel that doesn't exist or maybe is sending you off on a vacation to a country that isn't real. So you're going to end up having to do just as much research as you probably would have had to anyway, given that even the journalist who wrote this article said in his very first exploration experiment with it, it produced factually incorrect travel information. So I think we got ways to go here.

Marcus Johnson:

Congratulations, next week you're off to the United States of England.

Ethan Cramer-Flood:

Exactly.

Marcus Johnson:

Oscar.

Oscar Orozco:

I was very interested in the second article you shared, which is about plug-ins, the plug-ins for ChatGPT, and they were basically commercializing the service, putting it into apps like OpenTable and Klarna. I really thought it was analogous two decades ago where businesses had to decide whether they would take part in the worldwide web, getting online, putting their services, their products online, and it felt like a way to force brands to take part in this because or else they're kind of falling behind, they won't be able to participate. So I find that interesting. I do think it's a way to democratize the way generally of AI works, and I do really feel like that 12 months down the line, most brands will be participating in these plugins and adding them to their own apps.

Marcus Johnson:

Jeremy?

Jeremy Goldman:

Yeah, I think one of the key takeaways for me is that it is a bit of a race in order to ensure that you're not just embedding these tools to learn from them, but to do so in a way that's additive to the user experience. I know Oscar just mentioned the Klarna example, OpenTable is another one too. And for one of our briefings, we covered Instacart, ultimately improving the CX by allowing people to write questions in and then getting a list of things that they might need to create a particular recipe. So ultimately, it's a matter of doing these things, learning from them, understanding that they're not going to be perfect. But again, if you're building a plugin, there's guardrails there that are not necessarily there when you're just a random human being who's typing into a ChatGPT interface, so that's something to be mindful of also.

Marcus Johnson:

It isn't possible to book on the chat platform apparently, but I wonder if you need to, I wonder if the first iterations of these are going to be used for research, inspiration because people use social platforms just for looking at things. Some people buy on these platforms or go to other sites through these platforms, but maybe it's just for inspiration to start with. All right, the halfway mark, Ethan out in front with five points, Oscar and Jeremy tied for second on four. We move to round three. We start with Oscar, March Madness finals ratings set a record high for women, record low for men, notes Brad Adgate of Forbes. According to ESPN, the women's final, which saw Louisiana State defeat Iowa 102 to 85 averaged nearly 10 million

viewers peaking at 13, making it the most watched women's college basketball game ever and the most streamed sporting event, women's or men's to date on ESPN+.

In contrast, the men's championship game, Yukon beating San Diego State on CBS averaged a record low 15 million viewers down 15% from last year's Kansas versus North Carolina game. Overall, the men's tournament audience was also down. This is becoming a trend. Four of the least watched men's basketball championship games have been played since 2018, [inaudible 00:20:43] pointed out. But Oscar, March Madness finals ratings, setting a record high for women, a record low for men. What's the point?

Oscar Orozco:

Focusing on the women's tournament, I was one of those people watching all the games. I think I tuned into all of them. It was a hot year for women's college basketball. I think one of the main reasons was Caitlin Clark, really the narrative behind her taking her home state team deep into the tournament. She's one of the best players maybe ever seen in the sport at the college level, but we're also seeing a lot of growth in women's sports around the globe, momentum with women's soccer. So there's just more interest, more respect for women's athletics, and I think it's just really the tip of the iceberg here. I think there's going to be more and more momentum behind that moving forward.

Marcus Johnson:

Jeremy?

Jeremy Goldman:

Oscar took my point, so I'm going to pivot. It is important to note the women's sports, obviously there's been the growing interest in it in recent years, but I would also say that there are a number of different factors that go into how any particular sporting event goes. And there were all of these really interesting upsets earlier on in the March Madness tournament on the men's side, which then obviously means that you have a matchup that people didn't necessarily expect at the end. So that can be basically, those upsets can be good for most of the tournament, but bad for the end of it.

Marcus Johnson:

Ethan?

Ethan Cramer-Flood:

Yeah, these guys got it. Sports all over the world, the popularity is driven by superstar players and big teams. I've been watching Caitlin Clark highlights for two years. I'm a big sports nerd just as much as I'm a nerd on these other topics. So it was great to see the rest of the world, or at least the rest of the country, get on board with that. Her presence led to this directly. I think it probably will be sustainable because with women's sports, women's basketball tends to be that once an audience is introduced, they do tend to stick around, so these leaps will probably hold. On the men's side, I don't think the decline is quite as meaningful, these things go in cycles. Right now there's a great deal of parity once the big name teams and the big stars have a year where they all show up and everybody wins and they all charge the final four, you'll see the men's March Madness numbers probably tick back up as well, but there is parity, and when there's parity, that's a blessing and a curse to Jeremy's point.

Marcus Johnson:

This was Louisiana State's first title and the highest scoring championship game to date. I had to double take. Scoring a hundred points in a college game is real hard. Well, that's incredible too. Yeah, because in a men's NBA game, they get 48 minutes, and normally they get pretty much always they get into the hundreds but to do that in a college game is just 40 minutes is incredibly impressive. So the highest scoring championship game on the women's side to date. Also, this year's women's championship viewership more than doubled last year's game between South Carolina and Yukon, which averaged just below 5 million viewers, obviously still coming out of the pandemic. So TV viewership isn't back to where it was per se, but still just an incredible increase.

Let's move to our final round, double points, round four, and Ethan still out in front by one point, Oscar and Jeremy just behind [inaudible 00:24:01]. We start with Jeremy for round four, YouTube TV launches a multi view feature for simultaneous streaming of live sports content rights. Yourself Jeremy, in a piece you recently put out, YouTube TV people will be able to watch up to four preselected streams at the same time with the screen splitting into quadrants. Multi view will start with sports content and expand from there. You point out Jeremy, YouTube TV launching a multi view feature. What's the point?

Jeremy Goldman:

So to me, the point is that this is actually something that we even covered again right afterwards because Apple TV 4K introduced a multi view in beta shortly thereafter, and this is something that's going to increasingly become table stakes, where we used to think that we only had eight seconds where we could spend on attention and we were quickly becoming goldfish. That's not true. The answer is now that we can't spend time on anything and focus on anything, and we really have to be doing multiple things simultaneously, including following like a baseball game and a soccer game at the same time. So the platforms that are going to allow us to follow the most simultaneous events, often live sports generally are going to be the ones that are going to win out.

Marcus Johnson:

Ethan?

Ethan Cramer-Flood:

The point is that this is bad news for sports bars, but good news for me because where has this been? I hope it catches on, and I hope the chairman's right, that this becomes so popular for YouTube TV that it spreads to all of the other platforms as well, especially for those of us that are probably going to continue to not have YouTube TV. But this is tailor-made for NFL Sundays in the US. It's tailor-made for March Madness, we just discussed, this is the kind of experience that those of us that have spent our lives at sports bars have been seeking to emulate this entire time. I think this is going to be a massive hit, and I don't know what's taken so long,

Marcus Johnson:

Oscar?

Oscar Orozco:

Listen, it's a fun new feature. I'm not as excited as everyone else here. If I want that kind of experience, I'd go to a sports bar, I don't need it at home. It's totally just for sports, sports matches, and when there's multiple games at once that you want to see and you have people over things like this. I have to admit though, I laughed out loud when I was picturing, aside from sports, I was thinking, what other content would I want to watch like this? So I laughed picturing someone trying to watch four movies at once or something like this. That's not going to happen. So cool feature but that's about it.

Marcus Johnson:

Yeah, I was also trying to figure out what other content you could watch. I wonder whether you're going to be able to sync headphones to this. So one person could listen to the sound of a film, someone else could be in the same room with headphones in, earbuds in listening to the sound of a basketball game. But I also wonder what this does to advertising, because isn't that just a horrendous proposition for advertisers to be like, we're going to put these ads on a screen where someone can look away from them when there's ads on and tune into other content right there?

Jeremy Goldman:

Absolutely.

Ethan Cramer-Flood:

And by definition, the sound is off on three out of the four channels that are playing.

Marcus Johnson:

Yeah.

Jeremy Goldman:

Well, and by the way, you also have to think about who's making money off of this and you have YouTube TV, which is selling basically subscriptions to their premium offering and Apple TV is kind of doing the same thing. So they have ancillary sources of revenue, so they're incentivized to do this. The question is, does it become something that everybody else has to do, even if they don't really want to do it because they know it's going to impact their ad revenues?

Oscar Orozco:

Yeah, you'd have to most simultaneously black out three of the four screens and focus on one or something when the ad comes out. There'd be some thinking behind this for it to work.

Marcus Johnson:

All right, that's what we've got time for the game. Quick count of the points lets me know that Ethan is this week's winner of the game of the week. So close, so close. 11 points for Ethan, 10

for Jeremy and Oscar tied just behind in second place. Ethan gets the championship belt and of course the last word.

Ethan Cramer-Flood:

I think that's a blowout, 11 to 10, 10. They weren't even close. I dropped a 40 point triple double like Caitlin Clark. That's how I roll on these things so you all better be ready.

Marcus Johnson:

Brutal.

Oscar Orozco:

Oh, man. Next one's going to be even better.

Jeremy Goldman:

Do we take away point for conduct?

Marcus Johnson:

Ethan's the Dillon Brooks of the weekly listen.

Ethan Cramer-Flood:

Yeah, you need more trash talk on this.

Marcus Johnson:

I know. Okay, that's what we've got time for the game of the week. Time of course for dinner party [inaudible 00:28:32]. This is the part of the show where we tell you about the most interesting thing that we've learned this week. Ethan won the game of the week, so of course he starts. Ethan, what you got for us?

Ethan Cramer-Flood:

Sure. I have a viewership data point that is related to our kickoff conversation about HBO because I thought it was indicative of why they are maybe seeking more viewership or why they feel like they need to do a little bit better. So last year when HBO rolled out House of the Dragon, successful follow up to Game of Thrones, they announced [inaudible 00:29:21] fanfare that the first episode drew 10 million viewers and it was the most successful, the

season one episode one in HBO history. Of course the show is very successful and that seems like a good number. My contrasting or comparative data point is that over on Amazon, right around the same time, a show called The Rings of Power was also out and that was the Lord of the Ring's new content, a show that ultimately was not deemed to be so successful or not all that well received.

That first episode got 25 million viewers. Even though over time it was considered to be much less successful than House of the Dragon, but the HBO show was never really able to get much more than 10 million a pop because that's about where they max out. So if your show is on HBO, that's about as good as you are ever going to do because the total amount of people in the entire world who have access to it is just so much less than the total amount of people that have access to Amazon Prime. So well over a hundred million people. Even though Rings of Power didn't do that well, well over a hundred million people saw at least some of Rings of Power over the course of that season's run. And it's just, even though the Game of Throne sequel was incredibly successful, its viewership just is not going to be that high. So they're looking at getting more people so that they can then sell ads.

Marcus Johnson:

Let's be real though, both were disappointing, weren't they?

Oscar Orozco:

I disagree.

Marcus Johnson:

That was so terrible. We just want to see the dragons fight. Just every episode should just be the dragons fighting. I don't need storyline, character development.

Oscar Orozco:

Yeah, maybe that wasn't as great as the original Game of Thrones, but I thought the Amazon show [inaudible 00:31:05] the Rings was was fine, [inaudible 00:31:06].

Ethan Cramer-Flood:

I had a fun time watching Rings of Power. I was completely satisfied. I understand why some people thought it was boring or too slow. I get where they're coming from, but I was ready to

just sit there and meditate with that. That's fine with me. And then apparently, hundreds of millions of people also were too.

Marcus Johnson:

They're just having dinner in a cave the whole time.

Ethan Cramer-Flood:

I got time for that. I got plenty of time for that, let's have some dinner.

Marcus Johnson:

All right, Oscar, you're up mate.

Oscar Orozco:

You guys know I like to talk about or cite any interesting study I'll read in a journal or something like this. So there was one, it was published in the Journal of Open Mind by psychology researchers and professors at UC Berkeley. And essentially it was a study that tries to get to the bottom of why humans disagree so often. Why do we talk past one another? Why do we argue about everything? What the study found was even questions like, is a dog more similar to a chicken or an eagle? Is a penguin noisy? Is a whale friendly? Even things like that would cause very heated discussions. So what's at the heart of this? They found, for example, like take penguins, the probability that two people selected at random would share the same concept about penguins was at around 12%. So 12%, so there was a lot of differences.

People couldn't agree on things like whether they thought penguins were heavy or whether they were nice, things like this. Now, when it came to asking participants to guess what percentage of people would agree with their individual responses, no surprise here, participants tended to believe often incorrectly that roughly two thirds of the population would agree with them when the reality is that that's not anywhere as near as that, normally it's a lot less. So what does this all really mean? To me, it means that ego and things like this can get into people's ways, but that there are ways to stop an argument before it gets too heated. For example, asking the question, what do you mean? Can go a long way to preventing a dispute from going completely off the rails. People are different, so we're always going to have different disagreements. But I also thought about how vital education is and how important it is for peoples, of course to be educated because I do think that that would

lead for perhaps our most basic concepts to maybe be a bit more aligned, so it's an interesting study there.

Ethan Cramer-Flood:

Man, I read three sentences to prepare for this segment, and Oscar read like a hundred-page words.

Oscar Orozco:

I did. I get heavy into these studies, but it was like it took me an hour. It took me an hour, you're right.

Marcus Johnson:

Let's take this show a little more seriously Ethan, please. How heavy is a penguin? Who knows that? Who's picking up penguins?

Oscar Orozco:

A lot of people had different opinions and were arguing about them.

Marcus Johnson:

How would you have any opinion?

Oscar Orozco:

I don't know.

Marcus Johnson:

I don't know. Let's go look at how much they weigh.

Jeremy Goldman:

It's a trick question, you're not supposed to pick them up.

Marcus Johnson:

There's a story there, Jeremy.

Oscar Orozco:

That's true.

Marcus Johnson:

Jeremy is banned from his local zoo. Very good. That's very interesting. I think the reason people can't agree with it is yeah, people don't listen. No one listens to each other anymore. You can disagree, but bloody listen to what the person is saying and then have a different point of view. That's fine, but listen.

Oscar Orozco:

Exactly. That was part of the point here. So yeah, we're not going to learn though.

Marcus Johnson:

Yeah, no, we won't, humans are the worst. All right, Jeremy, you're up.

Jeremy Goldman:

Oh, what'd you say? I wasn't listening.

Marcus Johnson:

Oh, for crying loud. Put the penguin down.

Jeremy Goldman:

Yeah, no. So in all seriousness, I thought, and to bring it back to our data, and I think it was interesting, I was writing something the other day about looking at interests in live streams because Netflix had a livestream that did not go well. Found some interesting data that we had and it didn't apply because it was livestream shopping. And I still thought, well, hey, this is great data to share here. So who do you think is more interested, generally speaking in the US and livestream shopping, woman or men?

Oscar Orozco:

Men?

Jeremy Goldman:

Men are, correct. See, because you know this stuff better than most people. But what's really interesting is that QVC and HSN and a lot of other places, they basically started TV shopping

in a pretty similar format and they really did not do all that well with male audiences. But generally speaking, male audiences outstrip females in terms of how interested they are in livestream shopping, both in terms of how much they've used it before, whether or not they use it regularly, whether or not they're interested in it, even if they haven't tried it yet. And this is from the insider intelligence e-commerce survey that we conducted in February that I believe, [inaudible 00:35:51] an anniversary on a monthly basis. And I think the other thing that is interesting to me about this is just the fact that you have a lot of younger people who are interested in this, but the cohort that actually is most interested in livestream shopping are people kind of all in the middle, like the 35 to 54 people who didn't necessarily grow up again with QVC.

Ethan Cramer-Flood:

Do you think that it's possible that some men in that age cohort just want to avoid actually going shopping?

Jeremy Goldman:

Absolutely. That's part of it. But then again-

Ethan Cramer-Flood:

That sounds like the attractive option for me.

Jeremy Goldman:

... if you want to buy... that's so true, but if you think about a standard e-commerce don't even bother me type of the stereotypical male, you would think that they would kind of lean towards that rather than a livestream, engaging with the livestream were generally takes a little bit longer in order to transact.

Marcus Johnson:

Interesting.

Ethan Cramer-Flood:

That's true.

Marcus Johnson:

Very nice. Very nice. All right, I've got one for you real quick. Who had the first jersey number to be retired in sports and why? So in sports, you'll often see giant jerseys hanging from the rafters of arenas or around stadiums. When an athlete has excelled over a long period of time, his or her jersey is retired, that means a jersey with the same number is never given to anyone else on that team, but where did this tradition come from and who had the first jersey number to be retired in sports? According to a 2014 Mental Floss article by Nick Greene, he notes that it originated in Canada, specifically with the Toronto Maple Leafs and Ace Bailey, a lightning fast winger who played in the late 1920s and early '30s. December 12th, 1933, Bailey in the Leafs played in Boston against the Bruins. That would be the last of his career.

The Bruin's legend, Eddie Shore was hip checked hard by Rod Horner. Shore wanted to get even, but mistook Bailey for Horner, flipping him in the air landing on his head, he was unconscious and bleeding. Horner goes over and knocks out Shore, both players, Bailey and Shore are carried off the ice. Bailey was rushed to the hospital with a cerebral hemorrhage and doctors thought that he would die. He survived, but would never play hockey again. The next month, January 24th, 1934, the NHL board of directors organized a game to be played for Bailey's benefit between the Maple Leafs and a team of the league's best players. Bailey was there shaking hands with all the players, including the chap who had leveled him, Eddie Shore, a gesture of sportsmanship that earned rapturous cheers from the Toronto crowd. Before the game, Maple Leaf's owner Conn Smythe announced to the crowd, "No other player on a maple leaf hockey team will ever again wear the number six," marking the first time in pro sports history that a team retired a player's jersey.

Ethan Cramer-Flood:

All right, Canada.

Oscar Orozco:

Yeah.

Marcus Johnson:

Go Canada. Yes.

Oscar Orozco:

That's cool. I absolutely love when they retire jerseys, there's nothing more... I'm not a player, but I would feel like for them, there's nothing more sort of inspiring and just meaningful when

they're retired. I would've guessed maybe Jackie Robinson, so I was surprised. That's pretty far back.

Ethan Cramer-Flood:

I thought maybe Lou Gehrig, which would've been [inaudible 00:39:28]-

Oscar Orozco:

He was the first in baseball.

Ethan Cramer-Flood:

Okay. There you go.

Marcus Johnson:

Yeah. That's what we've got time for this episode. Thank you so much, guys for hanging out today. Thank you so much, Oscar.

Oscar Orozco:

Thanks.

Marcus Johnson:

Thank you to Jeremy.

Jeremy Goldman:

Pleasure as always.

Marcus Johnson:

And thank you to Ethan.

Ethan Cramer-Flood:

Oh, I won. I'll come back anytime if I get-

Marcus Johnson:

This week's winner of the game of the week. Thank you to Victoria who edits the show.

Oscar Orozco:

[inaudible 00:39:48].

Marcus Johnson:

A rivalry is born. Thank you to Victoria who edits the show, James, who copyedited it, and Stuart who runs the team. Thanks to everyone listening, you can head to Behind the Numbers underscored podcast for our behind the scenes segments called the James question. We've got outtakes there, or a picture of Jeremy's new dog, Clementine. We'll see you guys on Monday, hopefully for the Behind the Numbers Daily. It's an eMarketer podcast made possible by Cint. Happy Weekends. Did you actually want your last word or was that the last word?

Ethan Cramer-Flood:

I don't know that's a thing.

Marcus Johnson:

I told you right at the start of the show.

Ethan Cramer-Flood:

What do other people do on the last-

Jeremy Goldman:

That was a funny last word [inaudible 00:40:32].

Oscar Orozco:

Yeah, that was a good last word.

Marcus Johnson:

I just don't want to cut you off in case you had something else.

Ethan Cramer-Flood:

I have nothing more valuable to say other than trash talking Jeremy and Oscar.

Marcus Johnson:

Okay, perfect.