

The Weekly Listen: Is Twitter getting worse, digitally possessing a live player, and does Airbnb reflect travel?

Audio



On today's episode, we discuss if Twitter is actually getting worse, whether folks will want to become "Meta Verified," what it looks like to digitally insert yourself as a player into a live basketball game, whether Airbnb's recent performance is reflective of the overall travel market, what paid family leave looks like in the US and in different countries, and more. Tune in to the discussion with our director of reports editing Rahul Chadha, director of forecasting Oscar Orozco, and analyst Max Willens.



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Episode Transcript:

Marcus Johnson:

Hello, everyone, and thanks for hanging out with us for the Behind the Numbers Weekly Listen, and emarketer podcast made possible by Tinuity. This is the Friday show that reviews the most shock horror media and retail news stories of the week. I'm your host, Marcus Johnson. In today's show, is Twitter getting worse?

Oscar Orozco:

It's the Elon Musk show. When I'm on Twitter, I feel like I see tweets from him everywhere, like a cult of personality play really.

Marcus Johnson:

Will Meta Verified catch on?

Max Willens:

I don't think there are enough thirsty people out there that are looking to build their brands across the Meta family of apps for this to have much real impact their either.

Marcus Johnson:

Will people want to digitally possess a live character?

Rahul Chadha:

So this is, to me, a branding play. These entities like the NBA have to gain and keep the attention of consumers, especially younger mobile-focused digitally savvy consumers.

Marcus Johnson:

Does Airbnb's turnaround signify a turnaround for travel? And some facts about paid family leave. Joining me for this episode we have three people. We first meet one of our directors of forecasting, based out of New York is Oscar Orozco.

Oscar Orozco:

Hey, Marcus. Happy new year.

Marcus Johnson:

Hey, fella. We're also joined by one of our directors of reports editing, based out of New York, Upstate, it's Rahul Chadha.

Rahul Chadha:

Hey, Marcus. Thanks for having me.

Marcus Johnson:

Hello, hello. Finally, we have one of our senior analysts on the digital advertising and media team, based out of PA, it's Max Willens.

Max Willens:

Yo.

Marcus Johnson:

Hey, fella. So today, what do we have in store for you? Three segments, we start with the Story of the Week, is Twitter getting worse? We'll figure that out. We then move to the Debate of the Week, a relatively new segment, we've played it a couple of times, it stands in for the Game of the Week where we'll have our panel go head-to-head, so two folks per round, to try and give us the for and against arguments for three big questions we have for them, based on three news stories. Finally, we have Dinner Party Data as per usual. We talk about some random trivia, things we just recently learned. But we start of course with the Story of the Week.

Is Twitter getting worse? Shirin Ghaffary of Recode certainly thinks so, she believes that Twitter everyone warned us about is finally here. Noting that within the four months since Elon Musk took over, a number of things have happened suggesting that things are getting worse at the social media company. Number one, the app has experienced major glitches. Number two, Mr. Musk ordered engineers to change the algorithm to boost his own tweets, apparently during the Super Bowl. Number three, he briefly introduced a policy that banned links to rival social media platforms. Finally, Twitter restored the accounts of thousands of previously

suspended users with neo-Nazi and QAnon affiliations, part of that bunch, which has led to a rise in hate speech, according to researchers who spoke to the New York Times. But gents, is Twitter getting worse? Or is this all anecdotal?

Max Willens:

I think that most of this is stuff that people have made too much of. I think one of the key problems and challenges with social platforms and their rise is that they have proven themselves capable of whipping large groups of people up into such states that they can and do act on violent impulses and cause real-world harm and damage to people. So that's very true, but in lots of other respects I feel like Twitter, for most of its existence, has been defined by its shortcomings and its failures. It was always buggy.

I have all these weirdly fond memories of the Fail Whale days when the app would crash all the time. It's, to me, not surprising that someone like Elon Musk would let his inner demons get the better of him and allow the app to just turn into a stream of only his thoughts on people's timelines for several weeks. But those are all, to me, par for the course. The only other thing that I would flag, which funnily enough is not mentioned much in Miss Ghaffary's article is the fact that the ad experience is now also pretty terrible, and it's partly because they're having problems attracting advertisers, many of whom have departed since Elon Musk took over the platform.

Marcus Johnson:

Yeah. Advertisers are certainly keeping their distance since Musk took over. There's a number of stats out there that back this up, one is the 10 largest advertisers last year spent 55% less during Mr. Musk's tenure than they did the year prior. Six of them have spent nothing. These are estimates, so far this year, estimates from Sensor Tower. Another is Twitter's top 30 advertisers dropped their spending on the platform by an average of over 40%, according to Reuters. Then finally, 500 big name advertisers have paused spending on Twitter.

Oscar Orozco:

I think anecdotally, I have definitely noticed more intrusive ads for weird brands or less recognizable products at least, services being promoted locally. So you can tell the big brands have moved onto other platforms, so that's the first. But I would say to the top question, the main question you asked is that, I think the short and condensed answer for me is that, yes,

that there clearly is, Twitter is getting worse. It might be little chinks in the armor, it's nothing major just yet, but little signs of a slight slowdown or demise.

We show it with our forecasts. I would say on the user side, we're predicting about six-percent drop, about 3.5-million less monthly active users by the end of this year. Engagement numbers down four-percent. So these are small numbers, but when you add them up user by user, and that's just for the US, talk about worldwide, it's going to have an impact. The last thing I would say is Elon Musk, it's the Elon Musk show. When I'm on Twitter, I feel like I see tweets from him everywhere, it's like a cult of personality ploy really, and then that does make me a bit uncomfortable. For a startup, maybe it can work, not at the state of where Twitter is now. So that I think will boil over eventually.

Marcus Johnson:

Yeah. Oscar, you mentioned the user growth and our numbers, you said, was that four to five-million, or three-million you said that they're going to lose?

Oscar Orozco:

About three-and-a-half-million, just in the US.

Marcus Johnson:

This year?

Oscar Orozco:

This year, by the end of this year.

Marcus Johnson:

Okay. Because even if they were down anything really, the market, obviously it's a private company now, but the market hammers anything that suggests there's going to be negative growth in the works. Similarweb agrees with that, Similarweb data suggesting Twitter users' growth went from plus-five-percent year-on-year in November, last November when Musk took over, to negative-two-percent in January. So already a reversal of fortunes there. Rahul, where do you stand on everything when you try and wade through all of the commentary around how bad or good Twitter has become in the few months Mr. Musk's been in charge?

Rahul Chadha:

I don't use Twitter, so I don't have any firsthand experience. But every time I read a story like this, I always have to wonder, is being an edgelord an effective strategy for a CEO of a business like this? The other part I think too is the product team seems to be serving a constituency of one, in this case the highly opinionated Musk. But one of the challenges of a CEO is resource allocation, and if you're directing all of your developers on what's essentially a vanity project to goose your engagement, you could be ruining the effort that we spent elsewhere improving the user experience, and hopefully with an eye to some kind of business goal. That's not happening. I think the adage, "Move fast and break things" sounds cool, but it's maybe not a great business strategy.

Marcus Johnson:

You said about delegating responsibilities, it seems like he's ready to delegate the responsibility of chief executive already. He's hinted at plans that he's going to find a successor as chief executive of Twitter by the end of this year. So it seems like he's already ready to bail on the project, if you want to call it that, or the investment to some degree already. Then the other side of things, advertising doesn't seem to be going well, all the advertisers sitting on the sidelines as I mentioned. But his plan was, Mr. Musk's plan was to rely less on ad dollars, and that doesn't seem to be working out yet either. Maybe it's a bit unfair that we're judging this platform maybe a bit too harshly perhaps, given that he's only, what, I don't know, three, four, five months in to the takeover.

But things aren't great so far. Twitter has less than 200,000 paid subscription users, that's less than zero-point-two-percent of MA use, monthly active users, according to the Information. He needs to make money, this company is private and he is the richest person, or second-richest person in the world, but he did borrow \$13-billion dollars from creditors to buy Twitter. So this can't just be, Rahul, to your point, a vanity project. He's going to have to make some money at some point, if not from this company, from one of the other companies. Those other companies like SpaceX and Tesla seem to be negatively affected by his investment, so I don't know whether he can rely on those either to make up the shortcomings.

Rahul Chadha:

Sorry, just to jump in too, it's interesting that Max invoked the Fail Whale, just something I hadn't thought about in a long time. But I think that was a reflection of a time when Twitter's main problem was its stupendous growth, and that's not a problem I think it's going to

experience any time soon. I think the technical problems it's encountering have nothing to do with that issue.

Oscar Orozco:

The glitches are real. Max, you mentioned that's always been Twitter's MO, but again, anecdotally, but from even talking to friends who are users, there are almost daily issues here. How the tweets are loading, how the timeline is functioning, so glitches that ultimately might drive, and appears to already be driving people off the platform.

Max Willens:

Yeah, it's true. I'm using it not as much as I did during the height of my addiction, but I still look at it daily, and every single time I open it, something goes wrong. Not in a catastrophic way, but something ...

Marcus Johnson:

... 5000 cuts kind of way, that I think Oscar, you were hinting at.

Max Willens:

100%. But it's also true too, I think that the core users, the people who are the real addicts are going to put up with quite a bit of that, but I think where you really start to get into, to run into trouble is, as you all have pointed out on this conversation so far, they have fewer resources to innovate their way out of this problem, or to even just plug the holes that are continuing to spring in the sides of this thing. The longer this feels like a rickety, not very stable product, the harder it's going to be for them to drive either consumer or advertiser revenue. So it is, as you say, like the thousand cuts. You start to really lose a lot of blood after a while, if you don't manage to cover them up.

Marcus Johnson:

Especially when you play this, it's only been, like I said, a handful of months, you play this forward a year, two years, what kind of a state are things in if they can't turn things around? Like you said, Max, it's really hard to claw back some of that good will, some of that positive experience, when people are having consistent bad experiences. On the stage at the G0 Summit, Mr. Musk had said, "My workload has recently increased quite a lot." Really? Hmm.

Why he's shocked by that? But he expects, however, the financial health of the company to stabilize by the end of the year. That's his goal.

In 2023, he expects the company to roughly break even. For context, each of the two years before the pandemic hit, so 2018, 2019, Twitter was making over a billion-dollars in net revenue, after posting consistent losses the years prior to that. So the two years before they were in pretty good shape, the pandemic is what changed things and damaged their profits. But we'll see. That's all we've got time for the Story of the Week, time now for the Debate of the Week. Today's segment, Make the Case.

For our panel, Rahul, Oscar and Max present the for and against arguments for each of the following questions based on three news stories. One news story per question, there are two contestants face off per question. Also, the following takes don't necessarily reflect the analysts' personal views on the topic, their job is to just present the best case regardless and offer objective analysis. So question one, Instagram and Facebook users can now pay for a blue tick verification, parent company Meta has announced. Antoinette Radford of the BBC explains that Meta Verified, as it's called, will cost \$12 a month on Web15 iPhone people, starting first in Australia and New Zealand. Badges or blue ticks have been used to verify high profile accounts.

Meta says the subscription would give paying users a blue badge, increased visibility of their posts, protection from impersonators, and easier access to customer service. The change would not affect previously verified accounts, however. The question here is can Meta Verified become a successful subscription service? Oscar's going to go first, so Oscar, giving us the for argument, Meta Verified can become a successful subscription service. One minute on the clock, make the case.

Oscar Orozco:

I believe it can become a successful subscription service. I think it's a great segue from the last story, and my, my, my, all the criticism of Musk over all these months, I honestly never would have expected to see this so soon. There's been a lot of vitriol thrown his way, we discussed many of the reasons why it might be deserved, but it's interesting to see that Mark Zuckerberg is taking a page out of his playbook and has similar plans for implementing this subscription service.

I do think that Meta has it a bit easier, it's likely to have more users, more individuals willing to pay for verification. But I think that there's a lot of potential. Let me say this, especially if it moves into businesses. I know Meta has been working on designing this complete interoperability across all its apps, so I think that there's real potential here for an even larger walled garden in a way with services for users, businesses, across WhatsApp, Facebook Messenger, Facebook Blue and Instagram. So tons of potential there.

Marcus Johnson:

All right. Max, you're up. Meta Verified can't become a successful subscription service, make the case, mate.

Max Willens:

So I come at this with the thinking that this is basically not actually a subscription service at all, this is a shakedown of their creators on their platform. The key in what Mark Zuckerberg said is increased visibility, which is rather like what they said many years after Facebook invited the small businesses of the world to make Facebook pages and reach their customers. Then after a little while, they were like, "If you want to reach any of your customers, you have to pay us." That's basically what this is starting out as.

They can't do this and will not do this to the really successful visible people on the platform, but this is a way of squeezing all the wannabe celebrity influencers that are on their platform and wringing some money out of them. The reason that I say this won't be successful is that it's not going to, I think, improve the user experience of the platform, and I don't see a way, I don't think there are enough thirsty people out there that are looking to build their brands across the Meta family of apps for this to materially impact their business either.

Marcus Johnson:

All right. Let's move to our next story, next question, question two. "The NBA app is going to let you digitally possess a live player," writes Jay Peters of the Verge. He explains, "If you've ever wanted to be an NBA player, say LeBron James, with the NBA app, you'll be able to do that. Sort of." What's he talking about? Well, the NBA app is adding a feature where you can overlay yourself on another player in a live game, so it looks like you are actually that player, like you're playing the game.

Mr. Peters notes, "You'll have a friend point your smartphone at you, do a 360 scan, then you select a player who's on the court in the actual live game that you're watching, basketball game. Then your scan that your friend just did of you will be overlaid on top of that player as they move around. If they dunk the ball, it will look like you dunked it, in whatever outfit you were scanned in." You can check out our Instagram for a link to this video, it's insane. Go to [Podcast_BehindTheNumbers](#) to find that, we'll put a link in the show notes as well. We don't know when this feature will be available, but we've got Rahul and Max here to give us the for and against for this. So Rahul, you're up first. The question is will digitally possessing a live player/character catch on across media? Rahul, you're going to give the "it will" argument, make the case.

Rahul Chadha:

I think the reality is that anyone or thing that purports to offer public entertainment is competing with shorter attention spans these days, as basically TikTok. In five years time, we're not going to have any idea, it's probably going to be something none of us have heard yet. So this is, to me, a branding play. These entities like the NBA have to gain and keep the attention of consumers, especially younger mobile-focused digitally savvy consumers. I think it's a branding exercise, it rings top of mind.

So you quit messing around with the app and you're like, "Oh, yeah. Maybe I'll watch the Bulls lose this weekend." That was a dig at Oscar. But I do think a wide variety of sports' leagues, and other entities maybe I can't think of, could use this technology for the same purpose.

Marcus Johnson:

All right, Max, you're up. You're going to make the won't argument, so digitally possessing a live player or character won't catch on across media. Make the case.

Max Willens:

I'm with Rahul that this is something that might intrigue people that are not NBA fans, but the idea that it will turn them into NBA fans is, to me, just palpably ridiculous. The magic of NBA basketball, or really any high level sport, is watching people perform these incredible feats. The magic of it really is seeing someone who is bigger or faster or stronger than most of the sports' audience do these things. Artificially inserting my own un-athletic ass into a game and watching me dunk over somebody is not going to make me want to watch the sport even more, it's just going to reinforce that I'm not that athletic or that I personally can't do that. So

to me, it's a very strange ... As tech, it's super cool. I definitely was wowed by this demo video that's circulating, but the idea that it's going to have a positive impact on the NBA's business is crazy to me.

Marcus Johnson:

So Mr. Peters of the Verge was also noting, as part of some of the other new features coming to the NBA app, you'll be able to transport the game to virtual locations, suggesting you'll be able to maybe see the Blazers, the Portland Trail Blazers basketball team play on Mars, for example. For some reason, I don't know why you'd want to do that.

Max Willens:

Can I just watch a game and have it not crash? Can you guys do that? I'm an NBA League Pass person, okay? You can cut this if you want, but I've been given them my money for years and every single year the freaking app is just a horror show. It always doesn't work, and the fact that they're spending their development money on this Blue Mountain Ecard level entertainment, instead of just making something that doesn't crash in the fourth quarter, is crazy. I just think it's absolutely insane, and I'm done. Sorry.

Marcus Johnson:

Adam Silver, get together.

Max Willens:

That's right, Adam. Wake up.

Marcus Johnson:

Let's move to our third question, third news story. It's about Airbnb, now Oscar is going up against Rahul for this one. "So Airbnb posts its first annual profit as travel demand remains strong," writes Konrad Putzier of the Wall Street Journal. The travel company pointed to a rise in cross-border travel in Q4 as one of the reasons they were able to record their first ever full-year profit, first ever full-year profit for Airbnb at nearly two-billion dollars. The year before, they had lost \$350-million. Their Q4 profit was nearly double what analysts had expected, full-year revenue grew 40%, four-zero, to over eight-billion dollars. But does Airbnb's rebound signify travel demand is back? Oscar, you're going to give us the for argument here,

so Airbnb's rebound does signify travel demand is back. One minute on the clock, make the case.

Oscar Orozco:

It absolutely does. But let me say something very quickly, is anyone surprised that Airbnb's profit, is finally profitable? When just, I feel like the deals that we used to see on these types of home-sharing apps are really nonexistent now, they're pretty much priced just like a hotel. Just a point on that, so I'm not surprised by their success. But I will say, yes. It's not just Airbnb's financials that show that travel is back, I really don't think it should be a debate anymore. We've been seeing it for a while now.

It's also just the airlines, the hotels, which are doing well, the article mentioned urban travel, leisure travel in general, but travel back to Europe, the Caribbean is nearly back as well. But even niche traveling, things like national parks, which continue to see so much demand and with spending up and visitor numbers up as well. So travel is back. Ed Bastian, a quote from the chief executive of Delta, just said, "I believe our industry will see tens-of-billions of dollars of incremental demand in the next few years coming out of the pandemic." So for me, I think we should expect this out until 2024, 2025, even farther from there.

Marcus Johnson:

Very nice. So Rahul, Oscar rather unhelpfully said it shouldn't be a debate anymore, which is the very point of the entire segment. So there's really no need for you to go, mate. But if you did have any thoughts, just any musings on this?

Oscar Orozco:

I'm trying to win the debate. Come on.

Marcus Johnson:

Why this doesn't signify a rebound? Make the case.

Rahul Chadha:

Sure, if there is one. It's completely possible that this is just revenge travel, it's a spike due to pent-up demand, a decline in coronavirus related health concerns has just released the pressure valve. So once everyone gets the trip they postponed for two to three years over with, they're going to get home, take a look at their bank account, take a look at ongoing

inflation, worry a little bit about whether they're going to have a job in a month, and sober up financially and maybe get a little bit tighter about their travel plans.

Marcus Johnson:

Yeah. Not bad, okay. That's all we've got time for, for the Debate of the Week. I did want to quickly go back to something here though, so the NBA app. This, you have to go, listeners, you have to go and see this video. Were you guys also just stunned by-

Rahul Chadha:

It was incredible. I'm not a basketball carrying person and I was like, "This is amazing." I would totally mess around with this, which is why I was like, I don't know if it would, I don't know how repeatable it is across different types of media, the best application I could think of was there, which was a sports league. But I was just like, "This is cool." I know I'm super dating myself here, but it reminded me of NBA Jam, I'm sure the better analog is Y2K or whatever the new game is called. I don't know.

Marcus Johnson:

It did look like that, like it was going to go, "He's on fire." So I thought maybe, so it was very cool, incredibly dystopian, moderately offensive, because if you're a basketball player and you try really hard to make it all the way to the NBA, you're one of the best 400 to 500 players on the planet, and someone's like, "Yeah, I'm just going to take your face off and add me." That seems a little bit unfair to them. However, I was thinking would people want to do this for movies? You could put yourself in the movie and be the main character? I was having a tough time-

Rahul Chadha:

Commercials.

Oscar Orozco:

I don't know. I was thinking the same thing. It's tough to think about applications.

Marcus Johnson:

Oh, interesting. Commercials, maybe you're the person using the product. Wow. Just mind-blowing though. You guys have got to check it out, Podcast_BehindTheNumbers and we'll

post the video there, or just go to the Verge's site if you want. However you find it, you've just got to see this video, it's surreal. All right, that's all we've got time for, for the Debate of the Week. Time now for Dinner Party Data. It's the part of the show where we tell about the most interesting thing that we've learned this week. We'll start with Oscar, what have you got for us, mate?

Oscar Orozco:

Well, the talk of all this travel has got me in the mood to look up some interesting stats on travel. So I've seen a lot of stats on Americans' top travel destinations around the world, their favorite countries, and no surprise there, our neighbors to the north, neighbors to the south. Italy, France, yeah. Italy, France, nothing too interesting there. But I was interested in finding out, when tourists come here, what their favorite, not states, but favorite places or most visited places are.

So I found an article from Newsweek, they compiled it by looking at travel tourist agencies statewide, and I wanted to run through the top 10, well, top I would say up until four, and then see if you guys can help me figure out one to three. So number 10 was Faneuil Hall Marketplace in Boston, I've never been, but apparently it's a lot of fun. So 18 million visitors there. Nine, Disneyland in California, no surprise. Then we had Lincoln Park in Chicago, beautiful. So that right into eighth, 20 million visitors.

Marcus Johnson:

More than Disney?

Oscar Orozco:

More than Disneyland.

Marcus Johnson:

In California, okay.

Oscar Orozco:

That was in California, yeah. But the next, Disney World just had 400,000 more. So yeah, pretty close. People love Chicago. That was seven, so 20 million visitors. Yep, Chicago's great. So sixth was Grand Central Terminal here in New York City. That shocked me, it's a terrible place to go.

Marcus Johnson:

It's beautiful. It is terrible, there's too many people.

Oscar Orozco:

Yeah.

Marcus Johnson:

Go at night.

Oscar Orozco:

Well, there's the one big nice room, and then the rest, not too much to see, but number six. Number five, Golden Gate Park in San Francisco, 24 million visitors. No surprise there, gorgeous park as well. Number four, Union Station in DC, that really ups the number of visitors from 24 to 40 million, 40 million people. It's a really beautiful station, better than Grand Central, I think. Probably controversial now. The last three, guys, any guesses? Any guesses where most-

Marcus Johnson:

Central Park?

Oscar Orozco:

Central Park, yes. Number two, 42 million visitors. Can't blame them.

Max Willens:

Does Times Square count? Or is that too big of a space?

Oscar Orozco:

No, that counts, that's number one.

Marcus Johnson:

Nice.

Oscar Orozco:

Number one, 50 million. Also, our office is near there-

Marcus Johnson:

The Vegas Strip?

Oscar Orozco:

Yes, how did you get that?

Marcus Johnson:

Is that one?

Oscar Orozco:

Yes, that's three. I thought you guys were going to say Grand Canyon.

Marcus Johnson:

I am one of those foreign people, so I know how those foreign people think. When they're visiting America, there's four places. There's New York, there's California, there's Florida and there's Nevada, which is Vegas.

Oscar Orozco:

Vegas, yeah. I came out of this-

Max Willens:

We're the last, a bit disappointed.

Oscar Orozco:

Grand Canyon, 22nd. Only five million visitors.

Marcus Johnson:

Wow.

Oscar Orozco:

Yeah, that's got to-

Max Willens:

That is pretty wild, yeah. Horrendous.

Oscar Orozco:

Cool stuff, cool stuff.

Marcus Johnson:

Broke my heart though to hear that, you said when Americans are visiting places, England wasn't on the list.

Oscar Orozco:

It is, I just didn't say it.

Marcus Johnson:

Great weather?

Oscar Orozco:

Exactly.

Marcus Johnson:

To get away from the weather, the bad weather outside? Max, you're up, mate.

Max Willens:

So I have, I guess a Dinner Party Datum, instead of a bunch of numbers, I have one, which is the number of books that have appeared on Amazon with ChatGPT listed as a coauthor in the last six months. It is now over 200, I expect that number will grow considerably in the next few months. Someone at Reuters astutely pointed out earlier this week that there has been a gigantic boom in the number of people that are using ChatGPT to just crank out books. There's self-help books, there's children's books where you can have something like DALL-E do the art and ChatGPT write the story, and in the space of like three hours, you've got a children's book about whatever you think a child might be interested in reading.

This I think is both fascinating and funny, but I also just think it's completely bizarre. I feel like one of the joys of reading, I feel like a lot of this episode I've been talking about the real reason people do things, but to me one of the big reasons you read is to spend time learning about the mysteries of people and how we are, and sometimes learning how someone thinks. With ChatGPT, you get none of those things. You get what a machine that has learned and

memorized a lot of stuff can tie together. It would be a fun thing to do a ChatGPT book club, but to me, it's super weird that people are cranking these out and hoping for an audience on the other side.

Marcus Johnson:

Yeah. I don't know if you could say with any real confidence that it's going to be factually accurate. Like how sentences are constructed for fiction, or whether the facts are right for nonfiction.

Max Willens:

I do love the idea of giving a bunch of ChatGPT written children's books out to kids, I feel like the parents would not be super warmly received.

Marcus Johnson:

Rahul, you're up, mate.

Rahul Chadha:

Yeah. So I stumbled over a really cool data visualization courtesy of Axios about the Ford F-150, which has been the best-selling vehicle in the US for more than 40 years now I think.

Marcus Johnson:

Wow.

Rahul Chadha:

But it was about its cab-to-truck-bed ratio, which is basically inverted between its launch in 1975 and 2021, which was the most recent data it had. So in 1975, the vehicle was 36% cab and 64% bed, and in 2022 it is now, well, I guess in 2021 model year it's 63% cab and 37% bed. So almost a perfect inversion and flip-flop of that ratio, which is ... As somebody who lived without a car for nearly 20 years, and then moved away from the city and got a car and started driving again, the change in the size of the average pickup truck is pretty dramatic I think, as someone who's driving around in a Hyundai Elantra, which is not a big car.

But I think it's interesting, so in tandem with this visualization, Axios cited some survey data from Strategic Vision, which found that 87% of F-150 owners use their trucks frequently for shopping or errands. Only 28% use them frequently for personal hauling, and seven-percent

use them frequently for towing. So when you think about the way these trucks are marketed and the way that people are actually using them, there's a pretty wide gap there, which I thought was fascinating.

Marcus Johnson:

Yeah.

Oscar Orozco:

I have to see this visually.

Marcus Johnson:

I've never seen anyone put anything in the back of a truck, ever. Kids once, which was a questionable move in how much they love their children, and a dog I guess. But that's it, no one's hauling anything. All right. The number one vehicle though, that's fascinating. All right, I've got one for you real quick, it's about paid family leave. So parents working more than ever, the share of US mums who are working either full or part-time has gone from 50% to 70% since the '70s. Half of two-parent families, half of them, 50% of them now include two full-time working parents. So half of all the parents include two folks, two parents who are working full-time.

So that's the context, so is America helping out with paid family leave? No. Over 120 countries around the world, 120 provide paid maternity leave and health benefits by law, including most industrialized nations, that's according to the International Labor Office. The US is not one of those countries. Estonia offers 86 weeks of paid leave, Norway, Latvia, Slavonia mandate over 50. Portugal, Chile, Denmark mandate over 20, and many others as well, I can't list them all here. The US mandates zero, that's nationally. America only mandates 12 work weeks of unpaid leave for the birth of a child and the care of a newborn. But these 12 work weeks of unpaid leave only applies to workers in companies with over 50 or more workers.

Some US states do provide paid maternity benefits, so Rhode Island, Hawaii, New Jersey, California and New York, they do mandate paid maternity leave, but there's no national law requiring paid family leave. This next figure though is probably one of the most shocking ones, only one in seven Americans know this, know that the US Federal law does not guarantee any paid leave for new parents. However, more optimistically, according to YouGov America, 70%

of people in the US support requiring employers to offer paid parental leave for all working parents.

Max Willens:

Let's do it, let's all do it please.

Oscar Orozco:

Studies have shown that mothers should actually take leave a few weeks before giving birth as well, for the health of her and the baby.

Marcus Johnson:

That's such a great point, and that leads me onto to this final thing. So Sweden is one of the gold standards of paid family leave, the pregnant parent can begin to take parental benefits 60 days prior to the expected birth, Oscar, speaking to your point. The other parent gets a temporary leave in connection with the child's birth or adoption for 10 days before. Parents in Sweden get 480 days, just short of 500, 480 days of paid parental leave when the child is born or adopted, that's about 16 months. They're split, so about 380 days of parental leave must be taken before the kid turns four, but you can spread it out however you want to. Speak to your employer about this. But yeah, 380 days can be taken before the kid turns four, the remaining 100 can be saved and taken before the kid turns 12.

They can be split quite, quite a bit more evenly between the parents as well, as opposed to one parent getting all of them. I think also, they can take days off at the same time as well, a certain number, a small number of days they can take off at the same time. Yeah. Absolutely brilliant, something to strive for.

Max Willens:

I'm moving to Estonia.

Marcus Johnson:

We lost Max. That's all we've got time for, for this episode. Thank you so much for being around, gents. Thank you so much too, to that very soon-to-be new Estonian, Max.

Max Willens:

Always a pleasure, Marcus. Thank you.

Marcus Johnson:

Thank you, Rahul.

Rahul Chadha:

Cheers. Thanks, guys.

Marcus Johnson:

And thank you to Oscar.

Oscar Orozco:

Thanks for having me, Marcus.

Marcus Johnson:

Thank you to Victoria who edits the show, James who copy edits it, Stuart who runs the team, and thanks to everyone listening in. Join us on Friday, March 3rd for our next virtual summit, Attention. It's call Attention, seizing the retail media opportunity. The half-day virtual event kicks off with an exciting keynote from our principle analyst Andrew Lipsman on retail media's growth, featuring a very special guest from Walmart Connect. The summit continues with deep discussions on topics like connected TV advertising, social advertising, and first-party data, featuring Insider Intelligence analysts and guests from brands like Ghiradelli Chocolate, e.l.f Beauty, M&T Bank, the Hershey Company, the Vargo Group, and more.

It all wraps up with an interactive ask-the-analysts panel and a live production of the Behind the Numbers: Reimagining Retail show, which is one of our many podcasts. Visit InsiderIntelligence.com/events and register today. The link will be in the show notes. You can of course also head to BehindTheNumbers_Podcast Instagram page to check out that video of turning yourself into an NBA player live during the game. We'll post that there, we've also got our new Behind the Scenes segment called the James Question, charts and some outtakes, all kinds of stuff there on our Instagram page. We'll see you guys on Monday for the Behind the Numbers Daily, an emarketer podcast made possible by Tinuity. Happy weekend.