


The Weekly Listen: What happens if TikTok is (or isn't) banned in the US, what marketers get most wrong about consumers, and more

Audio





On today's podcast episode, we discuss what would happen if TikTok is (or isn't) banned in America, what marketers get most wrong about consumers, will AI smartphones be impactful right out of the gate, will most companies eventually ask employees to be in the office five days a week, the world's favorite drinks, and more. Tune in to the discussion with our analysts Blake Droesch, Bill Fisher, and Carina Perkins.

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Episode Transcript:

Marcus Johnson:

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Hello, everyone, and thanks for hanging out with us for the Behind the Numbers Weekly Listen, an eMarketer podcast. This is the Friday show that thinks it's weird if you walk around the airport without luggage.

So here's what happened. I dropped a rental car off the other day. I was walking through the terminal to the train to get back home. I was just carrying a little bag of chips, or crisps, as if that was all that I'd packed for vacation.

No one else?

Blake Droesch:

Where was your stuff?

Marcus Johnson:

Well, I dropped it off at home and then I was taking the rental car to the airport, but I had to walk through the airport to get to the train to come back home again, but I decided to bring a snack.

Carina Perkins:

I walk through the airport quite a lot.

Marcus Johnson:

Without luggage?

Carina Perkins:

I go to the train station without luggage, yeah.

Marcus Johnson:

Huh. Wait, wait. Without anything, it's probably fine. With just a bag of chips?

Blake Droesch:

Well, what kind of chips?

Marcus Johnson:

Good question.

Carina Perkins:

I mean, if it was like the Payne oven fries, you would look a bit weird.

Marcus Johnson:

Yeah, they were some kind of kettle chips, fancy chips.

Carina Perkins:

Crisps, Marcus. Crisps.

Marcus Johnson:

Probably looks even worse. Sorry, crisps. Either way, crisps or chips, it looked weird.

I'm your host, Marcus Johnson. In today's show, will TikTok be banned in January, and what happens if it is? What marketers get most wrong about consumers. Will AI smartphones be impactful out of the gate? Will most companies eventually ask employees to be in the office five days a week? And what are the world's favorite drinks?

Joining me for this episode, we have three people. Let's meet them. We start with our senior analyst covering everything retail and e-commerce. Based in New York, it's Blake Droesch.

Blake Droesch:

Hey, everyone, good to be here.

Marcus Johnson:

We also have someone with the same title and the same area of coverage, but they are based across the pond in the UK on the South Coast. It's Carina Perkins.

Carina Perkins:

Hi, Marcus. Thrilled to be back.

Marcus Johnson:

Hello there. And based just down the road from her in England is our principal analyst who covers the UK. He's also the host of our Around the World Behind the Numbers show. It's, of course, Bill Fisher.

Bill Fisher:

Hello there.

Marcus Johnson:

Hey, chap. So what do I have in store for you? We start with the Story of the Week, we have a debate in the middle, and we end with some random trivia. Let's get to it. We start, of course, with the Story of the Week.

TikTok fights its ban in court. "What happens if it is and isn't banned in America? Will TikTok be banned in January? That question is headed to court," writes Sapna Maheshwari of the New York Times. The short history, on April 24th, President Biden signed a bill requiring Chinese-owned TikTok parent ByteDance to sell to a US owner within a year or to shut down by January 19, 2025.

Why? Because the US is nervous that the Chinese government could use TikTok to access sensitive information about Americans or to use the app to spread propaganda. TikTok argues that banning the app violates American's First Amendment rights to free speech and says the government's national security concerns are "speculative," and the US government thinks it's not violating the First Amendment because it is targeting TikTok's control by a foreign adversary, it says, rather than protected speech on the app and that users can use another app if they want to, another social app.

Legal experts expect a decision around November-December time and are convinced the case will reach the Supreme Court. Clinical Professor of Law at Cornell Law School Gautam Hans thinks an appeal is likely either way.

Let's go to Bill first. Will it get banned?

Bill Fisher:

If it does, I'm not moving to the US. Let me put it that way.

Marcus Johnson:

Bill's a superuser to put it mildly.

Bill Fisher:

If it does get banned, I mean, the obvious thing is we're looking at a huge shift of advertising dollars out of the platform that've got to go somewhere else. I think in the US, it's over \$10 billion in ad revenues this year, 2024. So I mean, that's the key thing from a platform position.

I mean, we've seen various strategy shifts from other social platforms to offer something akin to the TikTok experience. So they're touting for those audiences if they are looking to go somewhere else.

From TikTok's perspective, I think if there is a ban, it will double down on some of its other strong-performing regions. So I actually wrote about TikTok marketing in Western Europe recently, and it was just really interesting to dig into what the company's up to in Western Europe, particularly in the TikTok Shop area. So in June, it dialed back its plans for TikTok Shop in Europe. A month later, it revealed that these plans were back on the table. So launches are going to happen in Spain and Ireland next month with potential more launches in the region later this year.

So TikTok is steeling itself as well. So yeah, if it gets banned, I think that they're the key things that are going to happen.

Marcus Johnson:

Yeah, yeah. That \$10 billion is an important one. That \$10 billion in revenue, ad revenue this year for TikTok is what we estimate, and growing. Next year, \$13 billion. For context, that's about 13% of all social network ad spending in the country. Put another way, TikTok is the fifth-largest digital ad platform in America just behind Microsoft, accounting for about 3.5% of marketer's budgets. So it's no small amount of money, and like I said, it's growing.

Carina, what do you think happens here?

Carina Perkins:

Yeah. I mean, I agree with pretty much everything Bill said. I think Meta really stands to be the biggest beneficiary. There was a survey from a marketing company called MGH, which found that nearly 60% of TikTok users would begin using Reels regularly if TikTok were banned, and our own analysis has suggested that Meta could gain around a quarter of TikTok's projected ad revenues. YouTube would also be a beneficiary.

I think there is a big potential disruption for retailers who are using the platform. So 67% of consumers discover and purchase products directly through TikTok, but a recent survey by

First Insight found that despite 96% of retailers being aware of the potential disruption, only 28% have a specific contingency plan in place.

So I think if TikTok is banned, it's going to have big implications, not only for the social media sector, but also for retail.

Marcus Johnson:

Yeah, those TikTok folks are going to have to go somewhere. I doubt that they'll just take that time and apply it to going outdoors. They'll probably move to a different platform. And there's a lot of people. 112 million Americans use TikTok. That's 42% of all smartphone-owners in the country, so it's a significant audience that's going to have to find another home for that TikTok time.

Blake, how do you see this thing playing out?

Blake Droesch:

Well, I think it's interesting. I don't think that necessarily the Justice Department will be able to get through the courts based on the threat alone that they're posing, the threats that they're posing basically being that TikTok or ByteDance has the potential to distribute misinformation or give data to China. But I think there are aspects of these accusations that are sealed that only the judges have that are being withheld from the public, and if that includes any credible, actual wrongdoings that can be linked to ByteDance, then I think the judges might lean in favor of the Justice Department. But I think as it stands, basically just on the threat alone, that's going to be tough to basically get through all of the courts.

And I think with that being said, I don't necessarily think that TikTok has a particularly strong case when it comes to the First Amendment. It seems like that's a defense that is not really related to what the accusations are. So I don't know if either side really has a super strong argument, so it could potentially come down to the things that the public does not know at this point.

Marcus Johnson:

I'm with you on neither side seems to have the strongest case. However, the pushback against the argument that TikTok doesn't have a case is that America's tried to ban TikTok before, and maybe this was irrespective of TikTok's actual case, but America tried to ban TikTok before and it didn't work, once at the federal level, once at the state level.

At the federal level, Ms. Maheshwari with the Times was pointing out former President Trump was trying to ban or force the sale of TikTok in 2020 with an executive order citing national security concerns, but federal courts blocked the Commerce Department from carrying out the ban, in part on First Amendment grounds. And at the state level, Montana passed a law last year that would have barred TikTok from operating in the state, citing security concerns, but a federal judge blocked it, saying, "It most likely violated the First Amendment and a clause in the US Constitution."

So TikTok does have that on its side, that it's been tried before and the First Amendment seems to keep cropping up as a way to say, "Hang on, America. You're not allowed to do this."

Support for a ban also is way down. 32% of people supporting a ban of TikTok, that's down from 50% in March of 2023 according to Pew Research Center. Most people, 39%, now are not sure, but when you look at people who have an opinion, 32% support the ban, 28% oppose it, so those numbers are a lot closer than they previously have been.

Blake Droesch:

Yeah, and I think that's also a really important thing to consider because TikTok is big business in the US now. It employs a lot of Americans and there are a lot of Americans, creators, that rely on TikTok for income and to live on. And then on top of that, you have the however many millions of Americans that are using the app.

So it is fairly ingrained into the US economy at this point. I mean, it would impact a lot of lives if it was to just go away. So I think that a level of indifference from the public on whether it should be banned or not could be influential. If this current attempt at banning or forcing a sale fails, whoever is in the White House over the next couple of years is going to basically be faced with a decision of is this worth continuing to battle against TikTok to try and get it banned, or is the public opinion either pro-TikTok or indifferent to the fact that it's really just not worth their time pursuing?

Marcus Johnson:

Yeah, yeah. Because the president can kick this can down the road, I think an extra three months past this January 19th deadline of sorts, so we'll see if they do that.

Really quickly before we finish this Story of the Week, you were talking about what happens if it does get banned, lots of users having to find another platform, lots of advertisers having to

reallocate dollars, but what happens if it doesn't? I was wondering if this encourages other foreign-owned social media and messaging apps to test out the US market because if it does get banned, maybe a lot of apps say, "Is it worth my time going to the US because if I get so big to a certain size, it's going to invite this government scrutiny?" It depends on, obviously, which country owns that app because the relationship with China is at the heart of this contention.

All right, folks, that's all we've got time for the Story of the Week. We move now to the Debate of the Week. Today's segment, Make the Case, where our panel Blake, Bill, and Carina present the for and against arguments for each of the following questions based on three news stories. It's two contestants per question and the gang are putting their personal feelings aside and offering objective analysis.

Question one, Bill against Blake. What marketers get most wrong about consumers?

"Marketers are not representative of the average consumer, according to a new report from iHeartMedia and Pushkin Industries," writes our Daniel Konstantinovich. He notes that, "The research showed significant differences in priorities and lifestyles of marketers and the consumers they're trying to reach, which could explain why nearly half of consumers feel ignored by media and advertising. In one example, the report found that whilst most consumers think carefully about spending decisions beginning at \$100, marketers apply the same scrutiny to themselves starting at \$1,000."

The question is, what do marketers get most wrong about consumers? Bill is going to argue what marketers get most wrong about consumers is geography/geo-awareness.

Bill, 60 seconds on the clock. Make the case.

Bill Fisher:

Okay. What I mean by this is that marketers are often located in commercial cultural hubs, right? So taking the UK as an example, London is the epicenter of most agency brand, any kind of marketer activity. London accounts for a little over 10% of the population. There are big cities around the rest of the UK, but London's the only megacity in the UK. Meanwhile, over a fifth of the UK population lives in rural areas.

So marketers need to remember the vast majority of the population see something entirely different when they step out the door than they do, and this needs to be reflected in

campaigns, which it very often isn't.

Marcus Johnson:

Very nice. I thought it was going to be a terrible answer because when I read it, I was like, "What the hell are you talking about?" But Bill said, "Chill out, Marcus, and just read it out. I'll explain."

Bill Fisher:

Trust me.

Marcus Johnson:

That went better than expected.

Blake is arguing what marketers get most wrong about consumers is feelings towards inclusivity. Make the case.

Blake Droesch:

Yeah, I think there's this idea among marketers that there actually is a potential to improve representation. It's obviously something that's been talked about a lot over the last few years. Marketers and advertisers, they know they have a problem. I think the whole industry is aware of what Bill just mentioned. It's a valid point, but in terms of what can actually be done to improve it, a lot of those efforts have failed.

All of these attempts that we've seen over the last couple of years that try to become more inclusive and more representative often come off as pandering. And if you look at a lot of the criticism that brands face during events, for instance, Pride Month, just missing the mark on trying to actually relate to audiences, and in the worst cases, feeling like they're exploiting this push towards inclusion to try to basically sell more products.

So it's very difficult, and I think so far, there's really not many examples of brands that have improved representation and inclusivity in a very efficient way.

Marcus Johnson:

Yeah, but I mean, Blake, to that point, just pulling up some research right now, there's some data here which shows the reasons why US LGBTQ+ adults feel that LGBTQ+-focused ads

seem insincere, this is from last year, the number one reason was, "Only happens during or around Pride Month." So unless you-

Blake Droesch:

Right, and to clarify too-

Marcus Johnson:

Please.

Blake Droesch:

... this is a market that is a major market and it tends to be within the realm of the metro urban areas, and I think marketers also have a hard time reaching people who are outside of their bubbles as well, right? So it's really all around.

Marcus Johnson:

Yeah, yep. That data from a Collage Group, but there is some more data. This is actually from that report from iHeartMedia and Pushkin Industries showing that folks will spend more on companies that they align with. According to the report, 75% of consumers will pay more for brands that share their values.

All right, folks, let's move to question two. Blake versus Carina. Will AI smartphones be impactful out the gate?

Now, Brian X. Chen of the New York Times notes that Apple just announced Apple Intelligence, a suite of AI services and its first major entry into the AI race. The new AI services are built into its latest phones, iPads, and Macs coming out this fall. The tech will help people create summaries of web articles and write responses to text messages and emails. Apple's voice assistant, Siri, will also be more conversational.

In one example, they say that you could get an email from a colleague asking you to push back a meeting, but say you have concert plans that overlap, so your phone could check your calendar, your concert confirmation, and the Maps app to see if you would be late for the show if you agree to the new meeting time. So pulling all these apps together to help you out in your daily life.

Will AI smartphones be impactful right out of the gate though? Blake is arguing that they will be. Make the case.

Blake Droesch:

Yeah, I think they have to. If the AI technology is really ingrained in the features that people use every day, then it will have an impact whether consumers or users actually want to interact with the technology or not.

I think some of these extreme examples, like the one that you just offered up which is very specific, I think the technology's not actually there yet where that type of AI is going to be able to serve that type of very specific utility in an efficient way right off the bat. But in terms of basically just improving the existing functions, such as Siri or word choice recommendations, I think that AI is going to have a positive impact on that right out of the bat, and these are already tools that users are interacting with, so it will inevitably increase adoption of these types of AI technologies.

Marcus Johnson:

Carina, arguing AI smartphones won't be impactful out of the gates, make the case.

Carina Perkins:

Sure, and I came at this from a completely different angle, so I'm not actually really arguing against what Blake said at all. So I guess it depends what we are thinking about what it will be impactful on. Will it be impactful on consumer adoption of AI? Yes, I agree with Blake that it absolutely will be because, as he says, people who are using them will be interacting with AI, whether or not they want to.

I approach this more from is it going to have any impact on phone sales and the companies selling them because they're touting this as a major feature? They're all shouting about it. And on that count, I don't think so so much. I think that it will take a little while for consumers to really see AI as a priority in the phones that they're choosing.

So I found a September 2025 Kantar survey that found only 6% of smartphone buyers said that AI was a key reason for choosing a phone, and a more recent CNET survey found only 18% of consumers say AI integrations are their main motivator for updating their phone, and only 6% would be willing to pay extra money for AI features.

So I think that it will, as Blake said, inevitably have a bit of an impact, but what's a much bigger influence over choice of phone still is battery life, storage, and better camera features.

Marcus Johnson:

I mean, to add some data to support what you were saying about how open consumers are to forking out for AI capabilities, yeah, they don't seem terribly sold on AI just yet. This chart here showing just 15% of consumers had a high inclination to buy a smartphone based on AI features. That's a recent survey from Canalys.

The other problem here is that smartphone replacement cycles have gotten a lot longer. The time between replacing an iPhone has expanded to nearly five years, up from three in 2018, according to investment bank TD Securities. People used to fork out for larger screens, thinner screens, 5G phones when they came around. Will AI have the same impact? It remains to be seen.

Another quick thing here as well from Mr. Chen of the New York Times saying that, "This could be dicey for privacy-minded Apple as well. In this new paradigm," he says, "your Windows computer will take a screenshot of everything you do every few seconds, and iPhone will stitch together information across many apps you use, and an Android phone can listen to a call in real time to alert you to a scam."

And so Apple in particular needs to be careful because it's been able to pull all these features together to make your lives easier, it is having to rely on a ton of data across your device. It is saying that most of that is stored on the device, but for some of the bigger projects that it's undertaking, it's going to have to pull stuff from a server.

All right, folks. Let's move to our final question here, Carina versus Bill. Question three, will most companies eventually ask employees to be in five days a week?

So, "Amazon is making its employees come back to the office five days a week starting in early 2025," writes Jay Peters of The Verge, noting that employees have been required to work from the office three days per week for over a year now. Employees with an approved exception can remain remote. A Wall Street Journal piece points out that Amazon is joining a group of large companies, like UPS, JP Morgan, Chase, and Boeing that have called at least some of their workers back to the office full-time.

Amazon CEO Andy Jassy says, "We've observed that it's easier for our teammates to learn, model, practice, and strengthen our culture. Collaborating, brainstorming, and inventing are simpler and more effective. Teaching and learning from one another are more seamless, and teams tend to be better connected to one another." So that's why they're doing it apparently.

Will most companies eventually ask employees to be in five days a week? Carina is arguing that most companies will eventually ask everyone to be in five days a week. Make the case.

Carina Perkins:

Sure. So according to Virgin Media's Movers Index, 40% of companies returned to a five-day week in the office last year.

Marcus Johnson:

Wow.

Carina Perkins:

And a recent survey by KPMG found 64% of CEOs globally and that 63% of those in the UK predicted return to in-office working full-time by 2026, so that's what I'm going to base my entire argument on.

Having said that, I do think that there will be plenty of companies that don't mandate a five-day return to office, particularly those that were operating remote working ahead of the pandemic and potentially have workforces that are quite spread out. And I think that those that do mandate a five-day week are going to face big backlash from workers because of the expensive commuting. And I found a Bloomberg Intelligence survey that said 73% of workers in London say they would leave their job if they were no longer able to work from home at some point during the week, so I thought that was quite staggering.

Marcus Johnson:

And you said backlash because of the expensive commuting, Amazon has asked folks to relocate as well. Last year, the company told many employees that they would have to relocate to what they call "main hub locations," like their Seattle headquarters or offices in New York and San Francisco.

Bill's arguing most companies won't eventually ask employees to be in five days a week. Make the case.

Bill Fisher:

Whew. Well, Carina had some pretty damning numbers there that just blow the argument out of the water, right? It sounds, whatever it was, 60-some percent?

Carina Perkins:

64.

Bill Fisher:

64%, okay. I suppose technically that is a majority. Is it most? I'm going on semantics. I'm going to say no, most won't mandate this.

I think there is a caveat there. I think for some companies and employees and employees within certain companies, I think it might make sense to come in five days a week, but I just think we've moved beyond this very rigid and quite frankly discriminatory days of old. So there will be some employees, incredibly good employees, who firms would likely lose if they were to mandate this requirement for five days in the office. I think that the flexibility afforded to new parents, for example, one example, means that companies can retain that talent and still get the same output. I mean, there are numbers that point to the fact that companies are more productive when people aren't having to do the commute every day, for example.

So Amazon mentioned approved exceptions. I think those exceptions could actually turn out to be quite large.

Marcus Johnson:

Great arguments, folks. We're reading it for this news articles, for this story, this round. It's hard. I think one of the conclusions was it's hard to get a read on what most companies are doing because I found two other data points.

One, the average office occupancy in 10 major US cities has lived at around 50% for months according to data from security provider Kastle Systems. They've been tracking this for a while. And then two, as of this quarter, Q3 2024, 33% of US companies required employees to come to the office full-time according to Flex Index. This is a software firm that tracks return-to-office efforts. Among tech companies with over 1,000 employees, only 7% had such a requirement. So the size and the industry of the company also will determine the likelihood of everyone being back in the office.

But yeah, I wonder if this move could inspire other companies to do the same. Rob Sadow, CEO of Flex Index, that company I mentioned who tracks this stuff, thinks the move could prompt other tech companies to follow suit.

That's all we've got time for for the Debate of the Week. Nicely done, folks. Let's move now to the final segment of today, Dinner Party Data.

It's the part of the show where we tell you about the most interesting thing we've learned this week. Carina?

Carina Perkins:

So I'm going for some interesting facts about TikTok, which are also taken from the Pew Research Center.

Marcus Johnson:

Look how happy Bill is.

Carina Perkins:

So more than half of teens, 58%, use TikTok daily, including 17%, and I think that includes Bill, who say that they're on it almost constantly, but only about half of US adult TikTok users have ever posted a video on the platform. And of all the TikTok content posted by American adults, 98% of publicly accessible videos come from the most active 25% of users. Four in 10-

Marcus Johnson:

That one is shocking, yeah.

Carina Perkins:

I thought that was amazing. Four in 10 TikTok users say they regularly get their news there. And a majority, it's a small majority, 59% of Americans see TikTok as a major or minor threat to US National security, including 29% who see the app as a major threat.

Marcus Johnson:

Bill's part of the folks, the share of folks who have never closed the app. Fascinating.

Bill Fisher:

I have posted a video or two.

Carina Perkins:

I was going to ask, what have you posted videos about or we allowed to ask?

Bill Fisher:

It's kind of a joint account with my kids. So they were doing... Have you ever heard of Dude Perfect? They're a group of influencers that do these highly improbable feats, like they'll try and throw a Frisbee from 500 meters away from a letterbox and get it through, that kind of thing. So we've had a couple of tries from one of those.

I've got an excellent video of my son on a trampoline doing a somersault and throwing a basketball into the hoop from about 15, 20 meters away.

Carina Perkins:

Wow.

Bill Fisher:

Yeah.

Marcus Johnson:

Did you get in? You said throwing it? Oh.

Bill Fisher:

Yeah, he got it in.

Marcus Johnson:

Oh, I thought he was throwing it at it.

Blake Droesch:

It wouldn't be that impressive.

Marcus Johnson:

No.

Bill Fisher:

Right.

Carina Perkins:

I'm sure we could all try and fail.

Marcus Johnson:

Bill's voice in the background, "Good job, son. Good effort."

Very nice. Let's move to Blake.

Blake Droesch:

So also semi-related to today's discussion about returning to work, some interesting data from YouGov about suit ownership and how often Americans are wearing suits these days. So 44% of US adult citizens say that they've never worn a suit, about 10% say that they'll wear a suit once a year, and 16% say that they wear a suit less often than once per year.

Obviously, the numbers for wearing suits is slightly higher among men than it is among women. Most American men own at least one suit. 33% of American men don't own a suit at all. So if the return-to-work trend continues, you'll probably see those numbers go up a little bit, but then again, most people do not wear formal attire to work anymore. According to the survey, 47% wear business casual clothes to work, but an equal percentage, another 47%, will also wear casual street clothes to work, whereas just 22% will wear business professional clothes.

Marcus Johnson:

I wonder what the limit is. What can you wear before you get fired, like sweatpants? A onesie?

Blake Droesch:

I think, I mean, Marcus was always pretty casual around the office-

Marcus Johnson:

I did a onesie once.

Blake Droesch:

... when he did come in. Yeah, I think I saw maybe one time he was wearing those old-school pajamas and a cap, like he was out of a Dickens novel or something like that. It was weird and it was also very late at night. I thought maybe he had been sleeping there. It was a weird situation.

Marcus Johnson:

It felt right. Very good. Let's go to Bill.

Bill Fisher:

Okay, I'll round this out because my story relates to the final thing we spoke about, which was AI. So we've had TikTok and wearing suits in offices.

Have we ever heard of a lipogram? Anyone know what a lipogram is? Okay, so this is a form of writing where a letter or letters are omitted. In 1939, a chap called Ernest Vincent Wright produced the most famous lipogram. It was a 50,000-word novel called Gadsby, and it does not contain the letter E once, which is quite-

Marcus Johnson:

I have heard of this.

Carina Perkins:

Wow.

Bill Fisher:

Yeah, it's quite an achievement, right?

Marcus Johnson:

That's insane.

Bill Fisher:

It took him five and a half months to write. As an amazing achievement as it was, I've attempted to read a bit, and it is awful. It's really difficult, but it did get me thinking.

Marcus Johnson:

E is crucial.

Bill Fisher:

I thought, "Surely this is something that generative AI can produce easily." So I asked ChatGPT to write me a 500-word short story without using the letter E. There were 18 in the initial output. I told it it got it wrong, try again. This time, it was only 183-words long and it contained four Es. I asked it again. This time, it had 45 Es.

ChatGPT cannot do a lipogram, so there you go. We beat generative AI when it comes to lipograms.

Marcus Johnson:

Why did he do it though? What was he... Was it just like a happy accident? He was like, "Ah, I don't think I've used E in this"?

Bill Fisher:

I think not.

Marcus Johnson:

Or did he sit down and think, "No, I'm going to not use E. I'm sick of E"?

Bill Fisher:

No, he got quite a lot of coverage even before this published. So he obviously went out to make a little bit of a name for himself, I think.

Carina Perkins:

When was it published?

Bill Fisher:

1939.

Carina Perkins:

Wow.

Marcus Johnson:

Very nice.

All right, folks, I'm going to talk to you quickly about the world's favorite drinks. We'll start at the global level. Over 2 billion people worldwide consume alcohol regularly. That's about 8 billion people in the world. It's about 25%. According to the World's Health Organization, the most popular type of alcoholic beverage was spirits, 45%; beer, 35%; wine, 12%; and then 7% for other. Heavily skewed by what folks drink in Asia. A lot of spirits there. In the Americas, it was over 50% beer, over 30% spirits, 14% wine. In Europe, it was 40% beer, and spirits and wine had about 30% each, according to a Bruno Venditti piece in Visual Capitalist.

Top five selling beers in the US, Blake, can you guess one that's in the top five?

Blake Droesch:

Modelo is the top-selling beer in the US.

Marcus Johnson:

Bang. Modelo Especial. Bud Light, Michelob ULTRA, Coors Light, and Corona Extra, according to NIQ. This is from March 2024.

Top five selling beers in the UK, from the same source, Bill and Carina, can you get one in the top five each?

Carina Perkins:

Heineken?

Marcus Johnson:

No.

Carina Perkins:

No? Wow.

Bill Fisher:

Peroni?

Marcus Johnson:

No.

Bill Fisher:

Wow.

Blake Droesch:

Guinness?

Carina Perkins:

Stella?

Marcus Johnson:

Stella's number one, yes. Guinness, no. Stella, Bud, Carling, Foster's, and San Miguel, according to that same source.

And then I've got for you the top five most popular beverage brands. Popular, this is, in the US, according to YouGov. Popular is defined as folks with a positive opinion of the brand. In the US?

Blake Droesch:

Coca-Cola.

Marcus Johnson:

No! Dole, Lipton, one and two, Tropicana and Welch's, joint third, and joint fifth, there was quite a few folks: Ocean Spray, Canada Dry, 7Up, Sprite, Sunkist, Minute Maid, and Lipton Ice Tea.

Top five most popular beverage brands in the UK. This is brands. Guesses?

Carina Perkins:

Innocent?

Marcus Johnson:

No.

Carina Perkins:

That's Coca-Cola.

Marcus Johnson:

You guys have to get this one.

Bill Fisher:

Fanta?

Marcus Johnson:

Otherwise, I'll be very disappointed. No. Come on. What's the best drink that we have to offer?

Blake Droesch:

Is it Twinings?

Marcus Johnson:

No. There are two tea brands though in the top five.

Bill Fisher:

Fridge? Fridge? No?

Marcus Johnson:

Unbelievable. Give me your passport. Send your passport to me. Unbelievable. Robinsons.

Carina Perkins:

Oh, yeah. Okay.

Bill Fisher:

Oh.

Marcus Johnson:

Squash! Orange Squash. Robinsons, then Schweppes, PG Tips, and in joint fourth, Yorkshire Tea and Sprite. Bill, aren't you from Yorkshire?

Bill Fisher:

Uh, no.

Marcus Johnson:

Okay, fair enough.

Bill Fisher:

I'm from Lancashire.

Blake Droesch:

Can you explain to the audience what Robinsons is?

Marcus Johnson:

It's like a, what would you say, concentrate?

Carina Perkins:

Yeah.

Marcus Johnson:

A fruit concentrate? You mix it with water.

Carina Perkins:

A fruit concentrate drink.

Marcus Johnson:

Yeah. One part juice, like 10 parts water, whatever.

Blake Droesch:

So it's actually interesting that in both the US and the UK, juices were way more popular than I would've thought.

Marcus Johnson:

Yeah, a Sprite was the only one that made both lists across the countries.

Carina Perkins:

I love a Sprite.

Marcus Johnson:

But yeah, so disappointed in you two. Unbelievable. Well played, Blake.

That's what we've got time for for today's episode. Thank you so much to my guests. Thank you to Blake.

Blake Droesch:

Always a pleasure.

Marcus Johnson:

Thank you to Carina.

Carina Perkins:

Thanks, Marcus.

Marcus Johnson:

Thank you to Bill.

Bill Fisher:

The Lancastrian Bill. Thank you for having me.

Marcus Johnson:

I knew that. I had no idea. Thank you to Victoria. She edits the show. Stuart runs the team. Sophie does our social media. Lance runs our video podcast. Thanks to everyone for listening. We hope to see you on Monday for Behind the Numbers Daily. That's an eMarketer podcast. Happiest of weekends.