


The Weekly Listen: Can an AI pin replace the smartphone, shopping Amazon on Instagram, and the next big social app

Audio



On today's podcast episode, we discuss whether Humane's new AI pin is about to become as ubiquitous as the smartphone, just how much ground brick-and-mortar retail will give to online shopping, the next big social media app, if folks will start shopping on Amazon right from their Facebook and Instagram feeds, how news consumption on social media is changing, which airlines carry the most passengers, and more. Tune in to the discussion with our vice president of content Suzy Davidkhanian and analysts Max Willens and Yory Wurmser.

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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 Suzy needs to pull herself together. Suzy, you're all over the map.

Suzy Davidkhanian:

How is it just me?

Max Willens:

We're all pretty messy. This has been a massive [inaudible 00:00:45].

Marcus Johnson:

Apart from Yory. This is the show that feels as though Yory wouldn't mind being somewhere else. Literally anywhere else.

Suzy Davidkhanian:

Yory's winning.

Marcus Johnson:

Anyway, I'm your host, Marcus Johnson, who's also reluctantly here. In today's show, Humane's wearable pin is here, but can it replace the smartphone? Maybe. Are bricks and mortar going anywhere? Is Lapse the next big social media app, do people want to shop on Amazon from their social media feeds, how news consumption on social media is changing, and which airlines carry the most passengers in the world.

Joining me for this episode, we have three people. Let's meet them. We start with our vice president of content who heads up our retail and e-commerce team. Based in New York, it's Suzy Davidkhanian.

Suzy Davidkhanian:

Hi. Thanks for having me and for filming in the studio at the office. It's so exciting.

Marcus Johnson:

I would say it's a pleasure to have you, but that's not entirely true. It's been a rough start, folks.

Suzy Davidkhanian:

Come on.

Marcus Johnson:

We've been trying to start this episode for about a year. We're also-

Suzy Davidkhanian:

Come on.

Marcus Johnson:

... joined by our principal analyst who covers everything technology. We call him Yory Wurmser.

Yory Wurmser:

Hey, Marcus. Hey, everyone.

Marcus Johnson:

There he is based in New Jersey. And finally, we have with us one of our senior analysts who is typically hanging out in Philadelphia, but he is currently in our New York studio with Suzy recording this episode. He's on our digital advertising and media team. It's Max Willens.

Max Willens:

Yo.

Marcus Johnson:

Bang. There he is.

Max Willens:

It feels a little sillier doing it in this environment, but here we are.

Marcus Johnson:

Just as silly as normal.

Max Willens:

Touche.

Marcus Johnson:

What do we have in store for you? Well, we start with the story of the week. We're talking about Humane's wearable Ai Pin. What does that look like? How good is it? We then move to the Game of the Week, where our contestants will go head to head to head to try to give us the best takeaways they can from each of the four stories we have to try to win the championship belt. And we end with some random trivia. We refer to that segment as Dinner Party Data. But we start, of course, with the story of the week.

Humane's wearable pin is here, but can it replace the smartphone? Computing company Humane has officially and efficiently, both, they've launched its Ai Pin, an OpenAI-powered wearable. This was noted by a lot of people, but David Pierce of The Verge. The device, developed by a couple who were former Apple employees, is a \$700 two-inch square, and it's about 40 grams. It's a magnetic pin, no screen, and it sits on your chest like a Star Trek badge, says Aaron Tilley of the Journal. Good comp. It comes in two parts, a square device and a battery pack that magnetically attaches to your clothes. You control it using your voice. It's got a 13-megapixel camera. Use hand gestures to control it as well. And there's a small built-in laser projector that displays information on the user's palm. Users will also have to pay \$24 a month for a Humane subscription, which gets you a phone number and data through T-Mobile. The device ships early 2024, but pre-orders have already begun.

What can it do? Well, it's not always on. Just to let folks know, you have to touch the device to wake it. But when you do touch it to wake it up, it could do a number of things. Its main use is to access an AI assistant that uses ChatGPT to conversationally ask it questions. Think a search engine. It can remember past queries as well and notes to self. Voice-based messaging and calling. You can say, "Catch me up," and there's a feature there that summarizes your email inbox for you. You can get nutritional information by holding up the camera to a piece of food, and there's also real-time translation, playing music, all kinds of stuff. Yory, you cover tech for us so I've got to start with you. What'd you make of this new device from Humane, this new Ai Pin?

Yory Wurmser:

Yeah, I mean I think it's a really cool device. I think the technology's really interesting. It's a re-imagination of a mobile device, so I think that they're consciously not trying to replace the smartphone, but more complement it. It is one of several devices out there right now, or a couple devices, that are trying to imagine how mobile will get changed with generative AI. So you have Meta's Ray-Bans 2 Story smart glasses that also connect to Meta AI. They are using voice to interact basically with the virtual assistant. Humane's pin is doing the exact same thing. It's basically a way to screenlessly interact with AI.

To me, it's almost a concept device. I don't think it's going to sell a lot. It's too expensive. I think it has limited utility, but it has a ton of cool features that will probably end up in other devices down the line. So I'm super fascinated by it. I can't wait to get my hands on one, but I don't think it's going to be a big seller.

Marcus Johnson:

Interesting. So you think the price is the main thing holding it back?

Yory Wurmser:

I think price and utility. It doesn't really do anything that a smartphone can't do. It just does it in a new way.

Marcus Johnson:

Interesting.

Yory Wurmser:

So I think some of those user interfaces might come in handy down the line, but I don't think it as being transformative enough for what it can offer that a lot of people'll buy it.

Marcus Johnson:

Right. Suzy?

Suzy Davidkhanian:

No, I was just going to say I'm definitely not an early adopter. And I don't have a gigantic budget, but I also didn't understand how this works. It's a pin. Am I going to keep touching my sweater to figure out how to make it work? And then it's tied to T-Mobile. I have to pay a monthly fee. I also have to pay \$700 for the gadget itself that isn't that small. Even though

they're saying it's small, from the pictures it didn't look like it was an invisible gadget. None of that. I think they just slapped on AI and tried to pretend like it was going to be Google Home on my body. And by the way, the name is weird, right? Humane.

Max Willens:

Well, they call it the Pin, right?

Suzy Davidkhanian:

But the company name is Humane.

Max Willens:

The company name. Yes.

Suzy Davidkhanian:

Humanish, sort of like a humane... Right? Or am I making that up?

Max Willens:

No, I mean I think the idea is that it [inaudible 00:06:52]-

Marcus Johnson:

Humanish was taken.

Suzy Davidkhanian:

Right? And kind of a weird name.

Marcus Johnson:

Sorry, Max. Go on, mate.

Max Willens:

No, I mean I think the points you guys have both made are right, but I also feel... I think Yory's point about it being a prototype is right. But to the price point, an iPhone costs \$1,200. If they can get a deal with a wireless carrier where you can finance them and you're just essentially paying \$20 a month for your pin in the background, people are going to be fine with it.

When we talked about this the first time on the show, I was one of the guests and what I said then is what I feel now, which is that I feel like there's certain contingents of people for whom this is going to be very appealing. One are people who hate how much time they spend thumbing through their phones, and the other is affluent parents who want to give their children digital connectivity without giving them screen access. So I think the thing that's going to really determine whether this thing sinks or swims, though, is the extent to which it can build an ecosystem of support function. So for example, if there's a way in which you could have it give you turn-by-turn direction. So if you're just walking around, you go, "Hey, find me a coffee shop nearby and tell me how to get there," right now I don't think it's capable of doing that. But if it could get there in the near future, I think that would be pretty powerful.

Marcus Johnson:

Right. It's working on that, I believe. It says they're intending to work on navigation and shopping capabilities as well.

Suzy Davidkhanian:

But-

Marcus Johnson:

And also planning to give developers ways to build their own tools.

Suzy Davidkhanian:

How will that work? It's just going to give me directions out loud when I'm in the street, and everybody's going to know I'm lost?

Max Willens:

Well, you could... Potentially, you sync it with-

Marcus Johnson:

Everyone probably already knows.

Max Willens:

... a Bluetooth device and it tells you that way. But I think that the point there, really, is the extent to which it can build an app ecosystem, right, and I think the thing that is potentially

going to hamper that is it's really hard to see a world in which you could incorporate advertising revenue into them. And so then you're really just left with a world where people are going to content themselves with spending a dollar or \$5 to add a capability. And I don't know if the economics of [inaudible 00:08:58] work potentially, so that's a question that I have.

Marcus Johnson:

I wonder if they add a headphone to it, so maybe you can throw a headphone in and speak to things. So you can talk to it, but then when it's replying to you, you'll just be able to hear it just yourself. Sorry, Yory.

Yory Wurmser:

Yeah, no, I was going to say that one of the interesting things about it is it doesn't have apps. And I think that's one of the ways it's really pointed to where the future is going. I think with these virtual assistants, there'll be plugins to the virtual assistants that'll give you the information you need, but you're not actually going to an outside app to get what you need. And I think in that way, it's really pathbreaking and I think you're going to see more smartphone virtual assistants have that type of engagement as well.

Suzy Davidkhanian:

But it's obtrusive, no? A pin on your person with an earbud so that you can hear what it's telling you or you can communicate with it. And then there's no screen, so you're just randomly touching the pin to activate it. I don't know.

Max Willens:

Well, it has that cool light thing. You can project stuff onto your hand, which I think is an interesting form.

Suzy Davidkhanian:

But you're holding your hand like this to your chest? I don't know.

Max Willens:

Or just down at your pocket. I don't know.

Suzy Davidkhanian:

Oh, like you lean forward.

Max Willens:

Yeah.

Suzy Davidkhanian:

I just can't conceptualize it. And in retail, if it's too hard to use, nobody's going to do it. So that's where I stand.

Max Willens:

It's-

Marcus Johnson:

It... Go on, Max.

Max Willens:

No, I was just going to say it's not intuitive. It's definitely something that there's going to have to be a critical mass of early adopter nerds just trying it.

Marcus Johnson:

Yeah.

Suzy Davidkhanian:

Yory.

Max Willens:

Hey listen, if you get an-

Marcus Johnson:

Suzy.

Max Willens:

Hook me up. I'll play with one for couple of weeks.

Suzy Davidkhanian:

Wait, did you want it to be you?

Marcus Johnson:

Well-

Max Willens:

Yes.

Suzy Davidkhanian:

[inaudible 00:10:32] yeah.

Marcus Johnson:

It is a different form factor, and anytime... I mean, when the smartphone came out, a lot of people weren't ready to pinch and swipe and scroll and use a device that no one was really used to. And then we got used to it. And I think this is such a different form factor. To Yory's point, there are different folks trying to work on different types of form factor to replace the smartphone.

And yeah, you could, when you want to, just listen to it. You could put headphones in. The way it works, I believe, is the sound creates a pocket of sound very close to your neck, shoulder area. So it's not projected. You can turn it up so it projects the sound, but I guess the idea is that it whispers almost as though you had a headphone and you put the headphone not in your ear, but close to your head. You could hear it, but you couldn't hear it-

Suzy Davidkhanian:

I mean.

Marcus Johnson:

Not everyone else could hear it as well.

Suzy Davidkhanian:

It's just so... I don't know if I'm going to put your Yory on the spot here, but how many people use a home smart device speaker? What percentage? I feel like it's not-

Marcus Johnson:

I think it's quite high.

Yory Wurmser:

It's pretty high. Yeah. I mean, I don't have the exact percent, but it's, what, 20, 30%?

Marcus Johnson:

I was going to say I think it's, yeah, around a quarter of folks have a smart speaker. Yeah.

Suzy Davidkhanian:

But that's not really high, right? If you think about it. That's not a really-

Marcus Johnson:

Well, that's have a smart speaker at home. In terms of people who use Google Assistant, it's about 80 odd million people who lose-

Suzy Davidkhanian:

On your phone.

Marcus Johnson:

Yeah, Siri, Alexa. It's all around the, I think off the top of my head, 70 to 80 million range with Google upfront.

Yory Wurmser:

Yeah. And then for other assistants, it's more than that. I mean, I think it's around 150 million or something like that. So.

Suzy Davidkhanian:

So people are already using it on a device that they already have, right?

Yory Wurmser:

Yeah.

Marcus Johnson:

Right.

Suzy Davidkhanian:

So are they going to buy a pin?

Marcus Johnson:

[inaudible 00:12:09] -

Yory Wurmser:

[inaudible 00:12:09] they won't. Yeah, I agree.

Marcus Johnson:

Yeah, can you get to use this different... So, I mean, I pose the question of can it replace a smartphone. The thing is, Humane is not actually trying to replace the smartphone. They don't think that their device will. The founder was saying that. They're hoping that it will... And they're probably saying that because they know people aren't going to want to replace their smartphone for this, because it's almost too hard for people to think of getting rid of their smartphone. So they're hoping that it can live alongside this.

And Erin Griffith of the New York Times was saying Humane's Ai Pin, meant to fade into the background of everyday lives, and it's supposed to get you in and out of interactions quickly. The goal is to replicate the usefulness of the smartphone without any of the bits that make us all addicted, like the dopamine hit of dragging to refresh a social media feed, swiping to see a new video. The device is also designed to route your queries to the right tools. As Yory was saying, you don't have to download any apps or manage any apps, which is pretty good. So it's trying to live alongside the smartphone, something that you can use to do smartphone-related tasks but you don't have to pull your smartphone out, and can... Similar to the PC. The PC is not something that died because of the smartphone, but it's something that we use for certain types of activities when you want more real estate on the screen.

But yeah, it's got some obstacles. The price, the subscription that comes with it. A new OS called Cosmos, so people are getting used to that. You have to have a new phone number with the device as well because it comes with its own wireless plan, so that's not ideal. But there is a world where version two of this, it does look a lot better. It does have navigation, does have shopping, potentially. Ina Fried of Axios saying if the device could access your email, documents, calendar, the device could really help you out through life. You could ask it questions and not have to always look at your phone to figure out what time your flight is or if

it's on time, to see where the nearest coffee shop is, et cetera, and bring you more into the real world.

Big hopes, though, for Humane. A hundred thousand pins are expecting to sell, or hoping to sell, in their first year. For context, Apple sold nearly four times as many iPods in the year after its 2001 launch. So we'll see.

Suzy Davidkhanian:

I mean, iPods were a net new kind of thing, right? How many Google Glasses have been sold?

Marcus Johnson:

I think one. You have one, right?

Suzy Davidkhanian:

Just putting everybody on the spot right now.

Marcus Johnson:

You have a pair.

Suzy Davidkhanian:

Yep.

Marcus Johnson:

And then I think that's everyone.

Suzy Davidkhanian:

That's it.

Marcus Johnson:

I think that's everyone. Just one. That's all we've got time for, for the Story of the Week. It's time now for the Game of the Week. Today's game, what's the point?

I read out four stories. Yory, Max, and Suzy have to give us the main takeaway of the story. Okay answers get one point, good answers will get you two, and answers that give you the

same feeling as when you finished your last exam and you realize you have the whole summer in front of you. You guys remember.

Suzy Davidkhanian:

Hmm.

Marcus Johnson:

Is that not a good one?

Suzy Davidkhanian:

It's fine.

Marcus Johnson:

Okay.

Max Willens:

I'm basking in the idea right now.

Marcus Johnson:

I feel like we should have summers off still. Stuart.

Suzy Davidkhanian:

Yes.

Marcus Johnson:

Get on that. Answers that leave you with that feeling will get you three points. You get 20 seconds to answer before you hear this. Yeah, don't you dare run long. Otherwise, you lose points. Repeat offenders, Suzy, will be destroyed.

Suzy Davidkhanian:

It's never me.

Marcus Johnson:

Most points wins. Let's start round one, and Yory's first. Brick and mortar isn't going anywhere, right? Simon's Property Group, who own a ton of malls, just had a very strong quarter, which is a sign not just of the strength of its portfolio, but also of the importance of brick and mortar as a retail channel, writes our retail briefings analyst, Rachel Wolff. She says that whilst consumers may be as enthusiastic about in-person shopping as ever, their habits and expectations have changed significantly. But Yory, brick and mortar retail not going anywhere. What's the point?

Yory Wurmser:

People still want to try on stuff. They still want to experience stores. I think that the way brick and mortar is evolving to become a better experience, I think, is what's going to make it thrives or keep it thriving or actually make it thrive again.

Marcus Johnson:

Perfect. That's much better than what's about to happen. Suzy, try your best.

Suzy Davidkhanian:

Yeah. You know why? Because there is no point. I don't know why we keep having this conversation. Retail is a store's business. Even in our forecast, it's 80% of sales.

What I do think is changing, though, is the composition of retail space. So I don't just mean in terms of the experience in the store, I also mean there are only a certain number of malls that are the A++ malls. There are lots of other different types of retail space, like the strip malls, the streets downtown. There's just a different look and feel for retail stores, but stores will never be dead. We should stop even asking ourselves that question.

Marcus Johnson:

Max.

Max Willens:

Yeah, I think the point Suzy made is exactly right. I think what's interesting, though, about the differentiation of the kinds of retail environments we have is that I think retailers are going to have to be careful, especially the ones occupied by big boxes, that they don't just turn into basically fulfillment centers that are also showrooms. There's something depressing about walking around in a Target that's pretty empty and there's just a never-ending stream of

people showing up to get stuff that someone has picked out for them or that they ordered on the internet. And so figuring out how to balance that is going to be really important. But to Suzy's point, they're not going anywhere.

Marcus Johnson:

Hmm. Yeah, why do folks head to stores instead of shopping online for clothes at least? To try on the product, 63% of folks saying that, seeing the thing in real life, 59% of folks saying that, and because they want the thing quickly, 56% of folks saying that. This was research from Digital Commerce 360 and Bizrate Insights survey from this past summer. Very nice, folks.

Oh. And yeah, Suzy what you were saying. Yeah, in-store retail still accounts for 84% of overall sales and 81% of holiday sales this year. So it's most sales.

Right, let's move to round two. We start with Suzy. Is Lapse the next big social media app?

Lapse, a new photo app with the tagline friends not followers, has entered the fray. "Can it last?" questions Madison Malone Kircher of the New York Times. She explains that Lapse encourages folks to take photos and develop them, air quotes, in the app. So think of disposable cameras. When the pics are ready several hours later, their takers can decide if they want to post them for their Lapse friends or bank them for private viewing. Photos can be altered and... Sorry, can't be altered. No, they can't. And there are no visible like counts. The app launched in 2021, actually, but just was rereleased and has shot to number two in the US on the Apple App Store's free charts. Suzy, is Lapse the next big social media app? What's the point?

Suzy Davidkhanian:

No, there's no point.

Marcus Johnson:

Oh, okay.

Suzy Davidkhanian:

That's it. No.

Marcus Johnson:

There's no point on this one either. Okay.

Suzy Davidkhanian:

Well, I-

Marcus Johnson:

Very negative for this segment.

Suzy Davidkhanian:

I mean, really honestly, if you're relaunching and you get to number two but it took that long and you had to do this whole new buzz, is it really going to be the next new thing? But more importantly, I think it's trying to solve for a lot of problems in a way that consumers aren't asking for it to be solved, like the likes and the reactions and the number of pictures that I have control over. So there's that angle of it. Is it really fixing a problem that exists? Plus, social platforms only work if there's both communication and... For me, they only work if there's a component of communication and entertainment, and this one doesn't seem to be that. Plus, you need to get a huge network effect, right, for it to be the it platform.

What I do think is very clever is that they're doing like, "You can only join if you're invited, and five people that you invite also join." So you don't actually just invite them. They have to join. So it might have a little bit more success in creating that network effect, but I think it's still too hard.

Marcus Johnson:

Hmm. Max.

Max Willens:

Yeah, without the network effect, it's just like a group chat curiosity. And I think that that's really going to hamstring them. The other issue here, too, is that without the scale and with the friends and family only effect, you're really putting an upper limit on the advertising upside. And what I think is interesting is that there's a version of this where maybe if this was an app, basically, that everyone spent a dollar on or \$3 on or had to spend a dollar a year to keep going, that might be an interesting thing. I mean, that ARPU is not sustainable for a social network. But to me, this does not have long-term upside as a social platform because of the scale problems we've talked about already.

Marcus Johnson:

Hmm. Yory.

Yory Wurmser:

I'm going to be a little more optimistic. I'm not sure if this-

Marcus Johnson:

Thank goodness.

Yory Wurmser:

I'm not sure if this app is going to be a hit, but I think there's room for an app that's less complicated than something like what Instagram's become or TikTok or any of the other existing social networks or social media. There's room for an app like that. That's why BeReal has took off for a while. That's why this is taking off. So I don't know if it's going to stick, but I think there's room there.

Marcus Johnson:

Mm. All right. At the halfway mark, Max has five, Suzy has four, Yory has three. That's mainly my fault because I didn't tell Yory what we were actually doing on the episode. It's like Yory showing up to a basketball pickup game dressed as a hockey goalie. And I'm going, "Yeah, I should've told you what sport we were playing." I'm sorry, Yory. It's entirely my fault. But hang in there. Stick with it. We still got two more rounds to go.

Round three, we start with Max. Shopping Amazon from your social media feed. Facebook, Instagram, and Snapchat users can now shop Amazon directly from their feeds, writes our briefings writer, Daniel Konstantinovic. The social platforms users will be able to buy select products directly from Amazon all within their feeds. So Instagram users, for example, can see real-time pricing, Prime eligibility, estimated delivery times, and product details from within the ad of the thing in the app. Max, shopping Amazon from your social media feed. What the hell is the point?

Max Willens:

I think the point is that someone at Amazon saw that viral tweet of that young person saying, "I don't Google, I TikTok," and this is them just trying to keep abreast of evolving consumer shopping and product search behaviors. I think that the thing that's going to limit the effectiveness of this is the kinds of products that are available for sale there.

I mean, all the products, or a lot of the products, that went viral for sale on Tiktok were novel and strange and off the wall in a way that maybe Amazon has those products for sale, but it's not what people think of Amazon for. They think of Amazon as a place that they can go and buy more diapers or a place to go buy more toothpaste or to buy some sneakers on Prime Day when they're heavily discounted. They don't think of it as a place to find cool, novel, weird stuff. And to the extent that they can ensure that that's what is put on sale on the social platforms, that will maybe combat that a little bit. But I think this is more about just trying to keep abreast of consumer changing search habits.

Marcus Johnson:

Mm-hmm. Yory.

Yory Wurmser:

Yeah, I basically agree with Max. I think the type of products are going to be not universally appealing. But what it does do, what this partnership does do, it makes everything very seamless, not just you ordering in one click, but also just the backend delivery. So I definitely think it's going to spur a lot of social commerce. I don't think it's going to be transformative, but it definitely will make a difference.

Marcus Johnson:

Hmm. Suzy.

Suzy Davidkhanian:

So I actually am very positive about this one and I think it's very clever for both brands because they both needed help. Amazon, as you said Max, is not a place for discovery. You go, you buy what you need, and you move on. They've been trying to figure out how to become more discovery cool. They're not. So being tied to Meta, like Instagram or Facebook, will help them with that component. Maybe not as cool as Tiktok, but still in that component of cool factor.

And then on the other end, we know that consumers have a tough time trusting social with their credit card details, and there's a lot of friction when it comes to buying online when you see something on Instagram. And for Instagram, for example, they have to hold onto the inventory, and that's expensive for them. So I think it alleviates some of the friction and the ineffectiveness of social shopping on these platforms and it helps Amazon be cooler. It's a win.

Marcus Johnson:

Very nice, folks. Two points each for that round, which leaves the rankings currently in the same order. Max with seven now, Suzy with six, Yory with five. But it's double points round four. Of course it is. And so [inaudible 00:24:58] play for.

Suzy Davidkhanian:

Yory, be ready. You're going to win.

Marcus Johnson:

Or nothing to play for. One of two. Max is up last. [inaudible 00:25:05]. Suzy, second. Yory, you're first. Round four, how news consumption on social media is changing.

Today, half of US adults get their news at least sometimes from social media. Half, according to some new Pew research. The social platform American adults are most likely to consume news on is Facebook. That's all adults. 30% do so. 26% do so on YouTube, 16 on Instagram, 14% on Tiktok, and 12% of American adults consume news on X. Used be called Twitter. But Yory, how news consumption on social media is changing. What's the point?

Yory Wurmser:

It's making people rely on news sources that are less verified, so I think it's going to have a pretty big impact on our political culture, just that people are being informed that way. But we'll see.

Marcus Johnson:

Mm-hmm. Suzy.

Suzy Davidkhanian:

I do think that the idea, like Yory was saying, is that more people are relying on unvetted sources of news is a bit scary.

Marcus Johnson:

Mm-hmm. I mean, yeah. It was 52% of people getting their news on social media. And now, it's 50. And that, in 2020, was an election year, and so maybe that's why people were a bit more tuned into the news. So yeah, it's interesting how it hasn't really moved over the last couple of

years. You could put it down to a rounding error in terms of when they did the study and what was going on in that particular year. Max, what's the point [inaudible 00:26:27]?

Max Willens:

I actually think that they're... I mean, the top-line number not moving is notable, but I think what is notable is that if you look at the individual networks, you see notable movements like Facebook going down, but Tiktok, Instagram, and Twitch all shot way up. And I think that that speaks to something that's really, really important, which is that those are all broadly platforms that are aimed at and rely on young people. And so the fact that there is an uptick in news on those platforms, because all those platforms rely on algorithms to surface and distribute stuff, it shows that there is appetite for news among young people.

It's, to Yory's point, very worrisome that an awful lot of it is probably coming from either secondhand or unvetted sources, but I think that this is something that's very encouraging, especially when you think about the fact that Meta in particular is trying everything in its power to take news out of its experience and out of its product. So to me, the big takeaway is that there is appetite for news among Gen Z even though we think of them as just whatever we think of them.

Marcus Johnson:

Choose your own adventure. So I had a few takeaways from this actually. I thought it was fascinating. And so the first one is, I mean people who use X or Twitter for news, they didn't drop as much as I was expecting to, especially [inaudible 00:27:54].

Max Willens:

They can't help themselves.

Marcus Johnson:

Given the turmoil swirling around the company since Elon Musk took over. Me and Max spoke about Twitter and X yesterday with Jasmine, and I was saying that a lot of people use it for news. And it'd be interesting to see how much that's dropped since he took over. People on Twitter use it for news the most versus people who are on Facebook who don't use it for news as much. And so it's the number one app in terms of most news consumed by its users. 53% of people are doing so, and that hasn't really moved at all in the last year, which I thought was quite interesting.

Tiktok, now in joint second for news amongst its users. Tied with Facebook, which is incredible because in the last three years, Facebook shares fallen from 54 to 42 in terms of people getting news from Facebook. And Tiktok's went from 22 to 42, so it's jumped massively. Facebook's come down, and now they're neck and neck in second place for news consumption amongst its users.

And then finally, very few older users use social networks for news. About 30 to 50% of people under the age of 50, about 30 to 50% use it for news. So a healthy amount. But over the age of 50, almost no one. It's very, very small number of people using it. So a lot of discrepancies between platforms, between ages. I thought it was quite interesting.

All right, folks. That's all we've got time for, for the Game of the Week. Count the scores. It's very easy because they're very low. I'm not going to lie. Okay. It wasn't our best game, Suzy.

Suzy Davidkhanian:

Well.

Marcus Johnson:

Max is this week's winner of the Game of the Week.

Suzy Davidkhanian:

Whoo.

Marcus Johnson:

Congratulations to him. He crushed it. He didn't need to get many points to win. Let's be honest. Well played, Max. It was like an AFC North battle. Low scoring, but hard-nosed.

Max Willens:

My goodness.

Marcus Johnson:

You win the championship belt.

Suzy Davidkhanian:

I don't know why we keep playing.

Max Willens:

Does that make me the Cincinnati Bengals?

Marcus Johnson:

Because you make me. You make me. You say, "I'm only going to be on the show if it's a game."

Suzy Davidkhanian:

Oh yeah, that's true.

Marcus Johnson:

That's why we keep playing.

Suzy Davidkhanian:

That's true.

Marcus Johnson:

There we go. Max. Sorry, mate.

Max Willens:

Does that make me the Cincinnati Bengals? Because that makes me upset. I don't really want to-

Marcus Johnson:

Maybe the Steelers.

Max Willens:

Eh.

Marcus Johnson:

You're Pennsylvania. No? Okay. I guess you're close to Philly, but not Pennsylvania [inaudible 00:29:56].

Max Willens:

I did for a time. I spent a lot of years torturing my wife and threatening to move our family to Pittsburgh, which she knew I wasn't going to do it but-

Marcus Johnson:

She hasn't left you yet because of that?

Max Willens:

Well, if she's going to-

Marcus Johnson:

Kidding, Pittsburgh.

Max Willens:

... it'll be over something else.

Marcus Johnson:

I'm kidding. Great town.

Max Willens:

Yeah.

Marcus Johnson:

You get the last word.

Max Willens:

Oh, well. Go Steelers. No, I don't know.

Marcus Johnson:

Says no one.

Max Willens:

I think that the Pew thing is really, really interesting, but partly because I think that there's this... Every year, the Reuters Institute puts out this study about who's reading the news, who's consuming news, and there's this hand wringing about young people and whether they care

about news or whether people care about getting information. I think that seeing these little glimmers that prove that people do actually care about getting information about what's going on around them, it's always heartening. So even if it's got to be in a strange, scruffy format like short-form video, it's better than nothing.

Marcus Johnson:

It's also one of those things where you question the definition of news, you know? You could ask one person-

Max Willens:

Yep.

Marcus Johnson:

... and they would say these sources. Another person would say these sources. Some more credible than others. You're getting your news from just one individual who you think is giving you the news versus an established, credible, vetted institution. Similar to screen time. Screen time can vary depending on your interpretation of screen time. What you're doing on screen time, I should say, with that screen time. So yeah, it is really interesting. But I wonder if because the definition could be changing, how much do we need to take that into account.

Suzy Davidkhanian:

Yeah, I feel like that was very optimistic.

Marcus Johnson:

Who's that? Me?

Suzy Davidkhanian:

No, Max.

Marcus Johnson:

Oh, Max? Yeah.

Suzy Davidkhanian:

Yeah.

Marcus Johnson:

It's a weird look for him.

Max Willens:

It's out of character for me. I apologize. Yeah.

Suzy Davidkhanian:

Really?

Marcus Johnson:

It's not really on brand for Max.

Suzy Davidkhanian:

No.

Marcus Johnson:

What happened to you? All right.

Suzy Davidkhanian:

It's because he's sitting with me here in-

Max Willens:

I know.

Suzy Davidkhanian:

... the same room.

Max Willens:

It's this warm [inaudible 00:31:41].

Marcus Johnson:

Get out of that room. Run.

Suzy Davidkhanian:

Yeah, that's that's exactly what it is.

Max Willens:

It's enveloping me.

Marcus Johnson:

That's all we've got time for, for the Game of the Week. We move to Dinner Party Data. This is the part of the show where we tell you about the most interesting thing we've learned this week. And we start with Max because he won the game very easily.

Max Willens:

Sweet. I have data about alcohol consumption during Thanksgiving. I feel like some people do think of Thanksgiving as being a sloppy, sodden holiday, but it turns out it's not. The American Addiction Centers, they polled a thousand US adults about when they do all their drinking. And the thing that surprised me is that relative to all the other American holidays, Thanksgiving has the lowest share of people that binge drink of all the US holidays. It will surprise none of you that Mardi Gras comes in first. New Year's Eve comes in second. But Labor Day came in higher. Memorial Day came in higher. Halloween, which at my ripe old age doesn't apply to me anymore, but I remember getting pretty sloppy on Halloween when I was younger. But the-

Suzy Davidkhanian:

But of drinking age.

Marcus Johnson:

Younger?

Max Willens:

Yes. Yeah, sure.

Marcus Johnson:

He's getting lit.

Max Willens:

That's right. Get wavy.

Marcus Johnson:

Whilst trick or treating.

Max Willens:

So the-

Marcus Johnson:

Put the candy away. Got any booze?

Max Willens:

The percentages are very low. So the percentage of people who binge drink, which they define as five or more drinks in under two hours, on Thanksgiving is just 15% of men and 11% of women. So.

Suzy Davidkhanian:

Wait, what was it? Five drinks in two hours?

Max Willens:

In under two hours.

Suzy Davidkhanian:

Oh my God.

Marcus Johnson:

Wow.

Max Willens:

Yeah.

Marcus Johnson:

That's really moving, isn't it?

Max Willens:

Yeah, that's-

Marcus Johnson:

Is it?

Max Willens:

That shows you're serious.

Marcus Johnson:

[inaudible 00:33:37].

Max Willens:

You're really-

Suzy Davidkhanian:

It's a lot.

Max Willens:

... excited about thanksgiving. So if that's your plan for later this week, just know that you are not alone, but pretty close. Most people don't do that, so tighten it up. Happy Thanksgiving.

Marcus Johnson:

Oh, God. All right.

Suzy Davidkhanian:

Mine too was about thanksgiving.

Marcus Johnson:

Suzy.

Max Willens:

Good.

Suzy Davidkhanian:

But not quite-

Marcus Johnson:

Good luck.

Suzy Davidkhanian:

... not quite the same.

Max Willens:

I'm sure you probably have something a little sunnier.

Suzy Davidkhanian:

I mean, only because Thanksgiving is celebrated in the US and it is a holiday dedicated to gratitude. And I have so much to say about this, so I'm going to be really quick. It is not the only country that celebrates. There are quite a few other... Not quite a few. There are other countries that celebrate, including Canada, that had come before the US. Japan, Germany, Grenada, Liberia. I could keep going. But I think what's more interesting is Campbell's did a survey with one poll of 5,000 Americans. Can you guess how many percentage of... I'm very excited. Can you guess how many percentage of people want-

Marcus Johnson:

Settle down.

Suzy Davidkhanian:

... to just eat the side dishes and not the turkey?

Max Willens:

Oh.

Marcus Johnson:

55.

Suzy Davidkhanian:

Yeah, 54.

Marcus Johnson:

Oh.

Yory Wurmser:

Nice.

Suzy Davidkhanian:

So close. And how many prefer the side dishes to the turkey?

Max Willens:

70%. [inaudible 00:34:57].

Suzy Davidkhanian:

Yeah, 67. Have you guys seen this study?

Max Willens:

No, but that tracks.

Suzy Davidkhanian:

Oh, I love turkey.

Max Willens:

I do too. My wife does not, but I love it.

Suzy Davidkhanian:

I just love everything about Thanksgiving dinner. Can you guess what... I know.

Marcus Johnson:

Suzy, do you need a moment?

Suzy Davidkhanian:

So sad. I just-

Marcus Johnson:

Focus.

Suzy Davidkhanian:

I mean, it's been a long day.

Marcus Johnson:

Lock it.

Suzy Davidkhanian:

I need a martini too. Can you guess what the number one side dish is? It overtook stuffing.

Max Willens:

Overtook?

Marcus Johnson:

Going to say cranberries.

Suzy Davidkhanian:

Mashed potatoes.

Marcus Johnson:

Yes.

Suzy Davidkhanian:

Stuffing number two, mac and cheese-

Marcus Johnson:

Mashed potatoes.

Suzy Davidkhanian:

... number three.

Max Willens:

Hmm.

Marcus Johnson:

[inaudible 00:35:34].

Suzy Davidkhanian:

Mac and cheese, number three, was not even in the top five for 2022. And the last fact I'm going to leave you with is six out of 10 are planning to celebrate Friendsgiving.

Max Willens:

Yeah, that sounds about right.

Suzy Davidkhanian:

Are you part of the four?

Max Willens:

No, I-

Suzy Davidkhanian:

Sounds like you [inaudible 00:35:51]. Oh, Max.

Max Willens:

It's not what we do. Well, I'm hosting this year. So once it's all over, I'm throwing everybody out of the house.

Suzy Davidkhanian:

That's it. You're done.

Max Willens:

Yeah.

Suzy Davidkhanian:

Yeah. Got it. Oh, you're going to be part of that 15%?

Max Willens:

Yes. I mean, I can't say for sure. Five in two hours is a lot.

Suzy Davidkhanian:

It's a lot, a lot.

Marcus Johnson:

It's a lot.

Suzy Davidkhanian:

Kids, nobody should be doing that.

Marcus Johnson:

Yeah.

Max Willens:

Yeah, no kidding.

Suzy Davidkhanian:

Adults too. Nobody should be doing that.

Marcus Johnson:

I don't think any kids are listening to this podcast. But probably no adults at this point, to be honest. This is a rough segment. Yory, what have you got for us?

Max Willens:

Just a guy with bow tie and suspenders reading the Wall Street Journal.

Marcus Johnson:

Yory, help us out, mate.

Yory Wurmser:

Well, so I saw an article last week on the fact that there aren't as many bugs being hit on a windshield. So with everyone road tripping for Thanksgiving, I was thinking, "Okay, I'd look up what percentage of insects have gone down." And it's actually 45%. There are 45% fewer insects.

Marcus Johnson:

Who's measuring this?

Max Willens:

I'm just going to say that this is made up. I don't want to impugn anybody, but how do you even measure that?

Suzy Davidkhanian:

Wait.

Marcus Johnson:

Yory, you didn't do the homework and find any dinner party... Just say so, okay? Don't make up a study on the spot.

Suzy Davidkhanian:

Wait, what was the story, that... Wait, 45% less bugs end up on windshields?

Yory Wurmser:

No. So, I mean, there's-

Suzy Davidkhanian:

Guys, you didn't let him finish.

Max Willens:

Just the Silent Spring thing.

Yory Wurmser:

People have anecdotally said that there are fewer bugs on windshields than there were when they were kids.

Marcus Johnson:

Fair. It feels like it.

Yory Wurmser:

So I looked up a study and apparently, that there are 45% fewer insects globally because of pesticides and global warming.

Marcus Johnson:

Ah. [inaudible 00:37:18]. People.

Suzy Davidkhanian:

Oh.

Yory Wurmser:

It's a big deal. But as you're driving somewhere warm and you notice you have a clean windshield, that's why.

Max Willens:

Oh my God.

Suzy Davidkhanian:

That's sad too.

Marcus Johnson:

This is a depressing segment. Jesus. Happy Thanksgiving.

Max Willens:

When you're having your sixth drink in two hours-

Suzy Davidkhanian:

And you go count-

Max Willens:

... bring up the bugs.

Suzy Davidkhanian:

Yeah, you go count-

Max Willens:

Which are all dead.

Marcus Johnson:

Oh, jeez.

Max Willens:

And getting deader.

Marcus Johnson:

All right.

Suzy Davidkhanian:

But those lantern flies are everywhere, so they're surviving.

Max Willens:

I think... Yeah. I mean, maybe-

Marcus Johnson:

Oh, [inaudible 00:37:47] so good.

Max Willens:

... that's what we should turn this around to, is just how incredibly satisfying it's to kill lantern flies.

Marcus Johnson:

Kill them?

Max Willens:

And how easy.

Suzy Davidkhanian:

Yeah, you're supposed to.

Max Willens:

Yeah.

Marcus Johnson:

Like a lightning bug?

Max Willens:

No, these are... They're red and-

Suzy Davidkhanian:

Yeah, they're horrible.

Max Willens:

... brown-spotted.

Marcus Johnson:

Oh. I was going to say lightning bugs are beautiful.

Max Willens:

No, no, no. Yeah, no, those are amazing. No, spotted lantern flies are what they're called. They're an invasive species. They're from Japan?

Suzy Davidkhanian:

Not Canada.

Max Willens:

But yeah, they're everywhere and they're wretched. And in Philly, they practically-

Suzy Davidkhanian:

Eat your trees.

Max Willens:

They do, but the city officials are exhorting people to kill them.

Suzy Davidkhanian:

You can get fined if you don't kill one.

Max Willens:

Is that right?

Suzy Davidkhanian:

No. But they-

Max Willens:

You see? We've already... We've shredded the contract of this podcast, and now we're just going to be lying to each other for the next 30 minutes.

Marcus Johnson:

We're all over the place.

Suzy Davidkhanian:

No, everybody's trying to get to their drink.

Marcus Johnson:

All right, I've got one for you real quick. We have to end the episode. Everyone's already left. If you haven't, then I've got one for you real quick. We'll let you get on your way.

Which airlines carry the most passengers as of 2022? Any guesses? One guess each. Go.

Suzy Davidkhanian:

Yes. British Airways.

Marcus Johnson:

No.

Max Willens:

Ryanair.

Marcus Johnson:

Oh, Ryanair was third. That is a good guess. Unlike Suzy's, which is terrible.

Suzy Davidkhanian:

Air Canada.

Marcus Johnson:

I said one guess each. I said one guess each. So.

Yory Wurmser:

Delta.

Marcus Johnson:

That is also a good guess unlike Suzy's. Delta was second. Second place.

Suzy Davidkhanian:

United.

Marcus Johnson:

Suzy, enough. No, okay? That's not on there. So let's go up from five. So fifth place, Southwest. Fourth place, United. And then the low-cost European airline from Ireland, Ryanair Group, 168 million people. However, they were ranked third-

Max Willens:

All of them upset.

Marcus Johnson:

... third in passengers. Possibly. Third in passengers and 13th in terms of revenue. Delta was second with 170 million, so just a few more. And then they were actually the... recorded the biggest operating profit. And then American number one. 200 million. They also made the most money.

Suzy Davidkhanian:

So wait, what was the question? How many people are they carting around?

Marcus Johnson:

Yes. Most passengers moved around in 2022. So US airline companies accounted for four of the top five by passenger numbers. Makes sense. It's one of the most populated countries in the world. The busiest domestic airline route was Atlanta.

Suzy Davidkhanian:

New York, Chicago.

Marcus Johnson:

No, Atlanta to Orlando.

Suzy Davidkhanian:

Oh, that's weird.

Marcus Johnson:

Somehow.

Max Willens:

It's super weird.

Marcus Johnson:

Just ahead of Vegas to LA, which makes a bit more sense. And yeah, worldwide, full-year 2022 traffic was nearly 70% of 2019 pre-pandemic levels according to the IATA. So, yeah.

Max Willens:

It blows my mind that we haven't gotten to-

Suzy Davidkhanian:

Reached.

Max Willens:

... the other side of that pre-pandemic threshold. That's crazy to me. Maybe this was in the article or wasn't, Marcus. Is that basically because of China? I feel like all the travel that I know of in the US and Europe, it feels as chaotic and horrible as it did in 2019, but-

Marcus Johnson:

Yes. That wasn't referenced in this article, but I looked at these numbers up about six months ago, or maybe it was last year at this point-

Suzy Davidkhanian:

Wait, you're giving us-

Marcus Johnson:

... and they had mentioned that China, yeah.

Suzy Davidkhanian:

... old data?

Marcus Johnson:

They're not traveling as much.

Suzy Davidkhanian:

Did you just give us old data?

Marcus Johnson:

No, this is the latest data. I'm just saying that the... Oh, Jesus.

Max Willens:

Marcus checks this number every three months. It's very important to him.

Marcus Johnson:

Yeah. I don't have a life. Anyway, let's move on to the end of the show. Thank you so much to my guests. Today, it was a rough episode, but we got through it. Thank you so much to Suzy.

Suzy Davidkhanian:

I hope you have me again.

Marcus Johnson:

Probably not. Thank you to Yory.

Yory Wurmser:

I'm glad to be here. Sort of.

Marcus Johnson:

Thank you to Max.

Suzy Davidkhanian:

That was not true. That didn't... Yory, come on to.

Marcus Johnson:

Glad to be here.

Suzy Davidkhanian:

You had fun. Come on.

Marcus Johnson:

Max, thank you to you, the winner of the Game of the Week.

Max Willens:

Always a pleasure, Marcus. Thank you, guys.

Marcus Johnson:

And in the spirit of Thanksgiving, I want to say how thankful I am that I get to work with Victoria, who edits the show. She does basically everything. She edits the show. She helps produce it. She publishes it. She schedules the episodes. She works with our sponsors and so much more, so huge thank you to her. For Stuart, who runs the team, I'm only medium thankful. I'm also thankful, though, to James, who copyedits it, and Sophie, who runs our social media.

I'm definitely thankful for everyone who takes time to listen to the show, takes time out of your lives. We really, really appreciate it. We don't exist without you. We hope that everyone has a terrific Thanksgiving.

You can hang out with Sara Lebow, if you like, tomorrow for Re-Imagining Retail. Last episode before Thanksgiving. She'll be talking with analysts Blake and Sky about how creators drive

people to buy things. We'll hopefully see you guys, though, next Monday for the Behind the Numbers Daily, an eMarketer podcast.

Happy long Thanksgiving weekends, American people. Everyone else, you will have to be in on Thursday. Happy Thanksgiving to Canadians for Monday-

Suzy Davidkhanian:

October.

Marcus Johnson:

... the 14th of October.

Suzy Davidkhanian:

Thank you. Thank you for saying that.

Max Willens:

Better late than never.

Marcus Johnson:

[inaudible 00:42:42].

Suzy Davidkhanian:

No, it's early.

Max Willens:

What? Oh, yes.

Suzy Davidkhanian:

We're earlier.

Max Willens:

Yeah.

Suzy Davidkhanian:

Nice try.

Marcus Johnson:

No, but he's saying that it's better that I say happy Thanksgiving.

Suzy Davidkhanian:

You wished me a happy Thanksgiving in October, so don't worry.

Marcus Johnson:

It was a month ago. Yeah.

Suzy Davidkhanian:

Yeah, I remember clearly.

Marcus Johnson:

Okay. Did you wish me a happy Thanksgiving for being from England for our Thanksgiving?

No, you didn't.

Suzy Davidkhanian:

You don't have one? I checked.

Marcus Johnson:

Okay, fair enough. We don't, but we could've.