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Listening in: Investigating Social Media Activity in the Streaming Service Industry

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Introduction

In this paper, we examine the social media activity surrounding three different brands (Hulu, Netflix, and Disney+) using two different and complimentary techniques. In Study 1, we use a popular social listening tool to examine quantitative data of different kinds including the share of voice of these brands as well as the major geographic markets and languages associated with these brands' social media activity. These are three of the biggest brands in the over-the-top (OTT) industry and all three of these companies offer streaming services that are highly popular with consumers around the world. To get a better sense of the quantity and quality of the social media posts around these brands, we gathered and studied Twitter data for a four-week period using the Awario social listening tool. Building on this analysis, we then conduct a qualitative analysis of each brand's social media activity using a netnographic, qualitative content analysis of branded social media posts that occurred during the aforementioned 4-week observation period in April 2020.

This thesis begins with a literature review that focuses on the larger issue of big data and examines the various tools and techniques that firms use to interpret and act on their big data resources, especially social media posts by their fans and customers. We then move to a brief overview of the OTT industry to provide context for the data we have collected and to explain the competitive landscape in that sector. Next, building on the quantitative insights obtained in Study 1, Study 2 examines branded social media posts for these three brands and highlights the qualitative differences in tone, focus, and content that appear in posts that occurred during the observation period. Lastly, we conclude by briefly discussing the analytical approaches that were used for this research and considering the ways that marketers can use multimethod research techniques to acquire richer insights about their customers and their competitors.

Literature Review

In today's world, the amount of data being produced and consumed is staggering. To simply search a topic on a search engine produces millions upon millions of results, from every source imaginable. In addition to sheer volume is the range of information we have available. The different kinds of data we have at our disposable can be incredibly useful, albeit overwhelming at times. When a consumer or firm wants more information about a certain product, perhaps to buy or to see how it is doing on the market, there is a plethora of different pathways to take to find this information. These include help forums, social media celebrity endorsements, online communities, different product reviews on every website the product is sold, citations, etc. All of these different types of data can be confusing and hard to measure, but the proper management of big data is an issue that is far too important to simply ignore. The data produced by consumers is absolutely vital to a company, as it is an incredible way to gauge exactly what consumers like, what they want, and how the firm can deliver that to them. Possibly the most effective tool for a company to really tune in on and understand their consumers' needs is relatively new: social media.

There are numerous studies that show how companies use all the big data that is available to them. Lamberton and Stephen (2016) explore the new ways available to marketers to reach, inform, and sell to customers on digital media platforms in, "A Thematic Exploration of Digital, Social Media, and Mobile Marketing: Research Evolution from 2000 to 2015 and an Agenda for Future Inquiry". These authors note that between 2000 and 2015, social media was truly coming to fruition and becoming entrenched in consumers' lives. They choose to divide these years into three eras: 2000 – 2004 in which digital media shaped and facilitated buyer behavior, 2005 - 2010 in which consumers shaped digital social media marketing (DSSM), and 2011 – 2014, which the authors call the age of social media. This is the way, they classify how DSSM evolved over time, from era 1 where consumers discovered that the internet could be used as a place for individual expression, to era 2 where consumers took hold of the internet as a tool to interact with each other, and finally, to era 3 where we see the rise of what they call the "connected consumer". The authors' main takeaway is that "DSMM now represents a mainstream subfield within marketing on the academic side, drawing interest across methodological and philosophical boundaries."(p.168) These early formative years, in which DSSM moved from being a tool to influence consumers to being influenced by consumers, are important, because they influence how we still use and analyze social media. In other words, "we are rapidly entering a "postdigital" world in marketing, where the siloed thinking that divided marketing into "digital" and "traditional" (or everything else) is being replaced".(p.168) Very soon, there will be no sense in separating "traditional" marketing from "digital" marketing – it will all just simply be marketing.

Similarly, Lamberton and Stephen (2016) explain how customers can become more empowered and engaged when brands interact with them. This also offers them new tools in their search, evaluation, and purchases going forward. Furthermore, what they refer to as "E-word-of-mouth" has proven to have more of an impact on social media marketing since it has the capacity to have a larger reach in an online setting and influence future decisions and perceptions in accordance to various brands, relative to traditional word of mouth, Essentially, traditional word of mouth has always been an important marketing tool to getting the word out there, but now word of mouth in an online setting travels and evolves so quickly that it is almost impossible to track. Lastly, social media can “serve as a productive and useful tool for organizations or brands in developing, sustaining, and maintaining emotional and social relationships with customers…” Since customers as well as potential customers are incredibly active on social media platforms, firms have an opportunity to connect with them and improve their customer relationship management. However, the limitations of this study include the question of how exactly firms can use all the big data available to them as well as how they should best measure it.

In the new age of social media, where consumers and firms alike look to take advantage of the nearly endless stream of available content, the ways that firms use social media can greatly influence their brand image. Schivinski and Dabrowski (2016) investigate the impact of social media communication via Facebook on consumers, using both user-generated and company-generated content in, “The Effect of Social Media Communication on Consumer Perceptions of Brands”. In this study, the authors investigated 504 Facebook users and 60 brands in the non-alcoholic beverage industry, clothing industry, and the mobile network operators industry.

They begin by noting how social media has taken a turn from being a one-way form of communication, such as it was in the early eras explained by Lamberton and Stephen, into a multi-faceted stream coming from all directions and connecting everyone everywhere. Their research methodology consisted of a survey, asking respondents to respond to different facets of their social media attitudes such as brand equity, purchase intention, and perceptions of firm-created, and user-created media.

Some of their major findings are that firm-created social media has a positive effect on consumer's brand attitude and that user-generated content has a positive impact on brand equity as well as brand attitude. Despite the fact that many existing studies find no strong positive link between social media content and the generation of sales, a major implication of these findings is that both of these kinds of content are positively (albeit indirectly) related to consumers' purchase intent. Therefore, it is paramount for brands to take advantage of social media to drive financial performance. As stated, "Firm-created social media communication does not directly affect brand equity, but indirectly influences consumer perceptions of value based on brand attitude." According to these findings, marketing managers should focus on building positive brand associations and on exploring brand characteristics that influence the consumer's attitude towards the brand. This main takeaway highlights the absolute importance of firms being active on social media and taking part in interacting with their consumers. A company that is active and takes advantage of having a voice on social media can greatly influence its consumers, strengthening its brand image and brand reputation. The authors conclude with the idea that the objective of firm-created social content is to intensify consumer brand awareness and attitudes rather than to compete with other social media content generated by peers. By increasing attitude and equity, purchase intent is, in turn, increased.

How, one may ask, is all of the available data used by a company? These vast amounts of content, created by consumer and brands alike, are no doubt having an effect on consumers' behavior. Whether that effect is more sales, more followers, or a better brand image, all this social media data needs to be used. In “The power of social media analytics”, Fan and Gordon (2014) introduce the main ways in which social media data can be interpreted.

The first, known as opinion mining or sentiment analysis, “leverages computational linguistics, natural language processing, and other methods of text analytics to automatically extract user sentiment or opinions from text sources at any level of granularity (words or phrases, up to entire documents)”. Methods in this core technique include simple word counting, lists of positive or negative terms used to describe something that can be counted, and more complex methods that can include distinguishing sentiments about more than one item in the same text document. However, they warn that “both sophisticated and simple methods of sentiment analysis can be either effective or flawed. For example, although sentiment analysis is increasingly common, sampling bias in the data can skew researchers' results.

Another way to make sense of big data is topic modeling, which is a technique, “used to sift through large bodies of captured text to detect dominant themes or topics”. This technique employs different kinds of advanced statistics and machine-learning in an attempt to discover abstract topics that occur in one or more documents. This is a way to classify and give meaning to large amounts of data, whether that be tweets, Facebook posts, or text messages. Specifically, topic modeling seeks out a common theme between these messages. Similarly, trend analysis is “used to predict future outcomes and behaviors based on historical data collected over time” and is typically used to help in forecasting.

Additionally, social media posts do not just consist of text. They often include visuals and graphics to help convey their message and increase their appeal to their target demographic. Visual analytics is “the science of analytical reasoning facilitated by interactive visual interfaces”. In other words, giving quantitative meaning to a qualitative piece of media and drawing conclusions based on that. At the core of visual analytics is the fact that computational methods for things such as data reduction and displaying correlations among different data sources, as well as letting users manipulate data helping to display visual analytics, and letting users physically manipulate data displays all underlie visual analytics”. A common way to facilitate this, but certainly not the only technique, is a display or dashboard that allows the user to interact with the data. The goal of visual analytics is to summarize large collections of social media posts

However, the existing techniques mentioned above are not going to be sufficient forever. In fact, one could argue that they are not even sufficient now. The tremendous volume of big data as it stands today already challenges social media analytics. Languages add further complications as firms amass and analyze social media conversations around the globe. Today, data is not simply lists or numbers, but rather consists of complex documents of text, language, and various forms of visual media that can be interpreted in many different ways. Tweets, posts, and text messages abound by the billions. This digital deluge will not stop anytime soon and neither will the complexity of the content found in said posts.

Looking into the future, it is safe to say that social media is here to stay and that the amount of social media data produced will not slow down anytime soon. However, most marketers agree that social media is not being used to its full potential. Therefore, new ways to gain insights from social media are needed. One such technique that is worth considering is social listening.

“Social Listening for Customer Acquisition” a report written at the Singapore Management University, outlines how social listening tools may be used to generate sales. The researchers set up a tool that first “fetches the social media data” and then “processes the data by calculating the users’ relevance score to the product and their off-line friend network.” (p. 2). In this way, they were able to analyze tweets by users to gauge whether or not a particular person would be interested in a certain product based on the content of their tweets, as well as a network-based analysis that targets a loyal customer to a product or brand and then looks to target their neighbor in the network using a relevance score. They conclude that, “we could assist corporations to find and reach potential customers on social networks with ease.” (p.6). While these researchers developed their own model to analyze social media data, many firms lack these kinds of research capabilities. Luckily, there are now several companies that offer "off the shelf" social listening tools to business customers.

One of the companies on the forefront of the social listening trend is TalkWalker. They offer a social listening tool that analyzes brand mentions, protects brands by running sentiment analysis in 25 different languages, allows the company to analyze and follow trends using historical data and trend prediction, visual listening using visual analytics, and real-time social listening 24 hours a day and 7 days a week. They also provide a multitude of services, like time-lapse graphs and social channel analytics, to help firms get the most from their social media analysis. Another company is Hootsuite, a company that is more geared to helping companies manage their social media accounts but that also offers some social listening capabilities to its clients.

Social listening tools offer a variety of different ways in which to track and measure activity on social media. For example, one particular tool called Awario utilizes many different metrics such as total mentions, reach, social sentiment, key themes, top influencers and more. These are invaluable for identifying trends and for comparing one brand to another side by side. Tools like this work to collect the massive amount of data out on social media and amass it into one single place, and then convert it into reports that are easily understandable. Some tools are free, while most are fee-based and cost thousands of dollars per year. Some collect historical data, letting the user amass data that was live before setting up a search, while others don't and just collect data from the point that the search was set up. However, despite these differences, these tools are all similar in that their goal is to make sense of what consumers are saying about brands on social media.

One company that uses social listening to its advantage for risk mitigation and service response is HelloFresh. They are the world's leading meal kit company, delivering up to 56.5 meals to 1.84 million active customers in just three months from July 1st to September 30th, 2018. Before using the Talkwalker tool, HelloFresh favored a manual approach to social listening and measurement. Its teams spent many hours manually collecting and analyzing data, but often missed important mentions in which the brand was not directly tagged. For such a large company, this is a massive waste of time and resources. Previously, no software was used at all in the company's social media research efforts and they were not able to efficiently track potentially dangerous activity on social media. Hence, HelloFresh's responses to issues that emerged on social email were delayed or even nonexistent.

With Talkwalker, the company is now able to track over four times more brand mentions on the web as a whole and, according to a case study on the TalkWalker website, has also been able to build a comprehensive alerting and reporting system to identify its most relevant posts. This system includes real-time alerts and various weekly reports that enable HelloFresh to more quickly respond to consumer complaints. For example, if there are similar complaints in a specific area – like an unseasonable heat wave - they can be addressed right away. This allows the company to more easily get ahead of the problem and solve it, which helps customers and simultaneously builds the brand's reputation as being quick, responsive, and willing to help out consumers if something goes wrong with their delivery.

Another company that has successfully utilized a social listening tool is Jaguar. The company had noticed declines in visits for routine maintenance at their dealerships. The firm discovered that the reason behind this decline was that Jaguar owners were going to non-authorized independent mechanics and handy men for repairs. This was a serious issue, as these technicians did not always have the training necessary to properly service the Jaguar vehicles, which in turn led to increased product complaints and a more negative perception of the brand. To address this problem, Jaguar enlisted help from a firm called Infegy Atlas. This firm used social listening technology to monitor the social media conversations that were taking place in several of Jaguar's key markets around the world. In this way, they were able to identify the motivational factors that lead some customers to use independent workshops for repairs versus Jaguar dealerships and to shed light on the most common kinds of problems that Jaguar customers experienced. Jaguar then used the social listening data it collected to create a SWOT analysis. This study highlighted their strengths as having high levels of trust, high perceptions of quality, and competitively priced service offerings. Jaguar's weaknesses consisted of qualitative factors such as concerns about service quality and timeliness in the US and UK. In addition, this analysis revealed opportunities to develop campaigns targeted to female customers in the UK and to adapt experiential service elements from Germany to other markets. Finally, Jaguar identified threats related to increasing awareness and adoption of independent mechanics for service as well as a higher frequency of electronic problems in the US market. These findings, derived specifically from social media studies, allowed Jaguar to better position the brand after purchase services to align with the identified motivational factors for each territory. They were also able to selectively elevate the aspects that were important to each consumer group that they identified by using market specific language and imagery in their advertising campaigns.

Found on the website of Awario is a case study that highlights one of its clients' success stories. This study is titled, "How Hilton uses social listening to win customers" (Awario 2020). Worldwide, Hilton is a powerhouse of a company with over 4,100 hotels in 91 countries. The company monitors all its brands on Twitter, the platform from which most of their social media activity and mentions come from and aims to resolve all customer issues within 12 hours. Using the Awario tool helps Hilton to pick out customer complaints and distinguish them from neutral and positive mentions on Twitter. In this way, the company can identify problems more rapidly and respond to these problems more quickly and effectively.

Building on its use of social listening, Hilton also launched @HiltonSuggests, a service similar to an online concierge. @HiltonSuggests was designed to target a younger demographic and aimed to be more authentic and less "salesman like". To achieve this goal, Hilton enlisted its employees and empowered them to give their best local advice to anyone who asks. In this case, Hilton uses social listening to quickly determine the kinds of questions that its customers are asking and to match these questions with locals, who are capable of providing a high-quality solution. Thus, Hilton is proof that engaging with customers, whether they post positive responses or not can be an effective strategy for providing better customer service and enhancing a company's reputation.

As the examples above illustrate, social listening tools like TalkWalker and Awario provide new ways of monitoring customers' social media activity. It is no longer an option to forego social media if a company intends to succeed, as many of the most influential conversations that influence customer perceptions are now taking place on social media. Social listening tools can help firms in a variety of ways such as helping them to identify opportunities to engage with consumers, discovering pain points from those who take to social media to complain, and identifying potentially damaging product and service issues as quickly as possible None of this could be done manually, unless an entire team were dedicated to searching social media around the clock, looking for problems. In this sense, social listening tools provide firms with a systematic and user-friendly way to more accurately monitor social media activity and obtain a deeper understanding about how customers react to the brand and the products and services it offers. As social media continues to grow, it is our duty as marketers to use all the tools at our disposal to serve our customers. With social listening tools, companies can reap the benefits of being connected to social conversations at all times instead of being blindsided by negative posts or being caught off guard when something harmful is posted. As these examples show, a well-crafted social media strategy can be an asset to any company, and a social media listening tool can help a firm develop such a strategy.

Overview of the Streaming Services Industry

The streaming services Netflix, Hulu, and newcomer Disney+ have become deeply entrenched in our lives; some say even more so than cable. Streaming TV shows for a monthly subscription has become a model that most of us are familiar with and most people subscribe to at least one if not several streaming services. The convenience of having one's content ready to be streamed on any device is proving to be more desirable than what most cable networks have to offer. For a small monthly fee, anyone can have access to HD content whenever and wherever they want. There are quite a few services to choose from, but from the bunch a few offerings stand out. Netflix, the former movie rental company that revolutionized the way people could borrow movies, has become the frontrunner of the OTT industry. The very word "Netflix" has become synonymous with watching streamed content. Next to come on the scene was Hulu, not quite as well known as the pioneer but certainly a company with its own strengths. The newest service to be introduced is no stranger to the competitive landscape. With the strength of its years of content creation experience across the big and little screen along with ownership of some of the most beloved names like Star Wars and Marvel, Disney+ has everything it needs to become a streaming powerhouse in its own right.

Netflix is known as the innovator in the streaming industry. The company was first founded in August of 1997 as a movie rental business. The company's business model was different from typical video rental stores in the way that it sent you a DVD in the mail, eliminating the need to go to a video store. Since then, Netflix has become a household name based on its breakthrough success in the entertainment streaming arena. For example, the number of paid subscribers in the United States jumped from 20.51 million in 2011 to 61.04 million in the fourth quarter of 2019 (Netflix, 2020). In order to provide some financial context for Netflix, its income statement for the year of 2019 reveals that it booked $20.2 billion in revenues. Of this, the firm's operating income is 2.6 billion with an operating margin of 13%. The operating income refers to total revenue less cost of goods sold, selling and admin expenses, research and development, depreciation, and other operative expenses. In other words, it is their total revenue with the cost of operation taken out, leaving them with the income they receive from operating normally. Netflix's income has also been steadily rising, going from $6.8 billion in 2015, to $8.830 billion in 2016, and so on ever increasing until 2019 (Netflix 2019). These figures clearly show that Netflix is still reaping the rewards for being the first mover in this industry and has become even more popular by continuing to innovate and develop new content for consumers, like they did when they made the move from sending out DVD’s to becoming a streaming service provider. Netflix started streaming in 2007, and since then has had exponential growth due to the technology, comfort, data driven platform it created, all of which help to explain their sustained success.

Hulu, on the other hand, came on the heels of Netflix. Also founded in 2007 by NBC Universal and News Corporation, it was released to the public in 2008. In their early years, they had a sizeable amount of content that came directly from network and cable TV shows and then put right on to Hulu the next day. Despite large fees for the networks, the number of people streaming Hulu content continued to grow – and they have since tried to rival Netflix with their own catalog of content. This shift was to directly compete with Netflix. There are differences between the two, such as one offering more movies or tv shows than the other, but the biggest difference between the two is the library they have to offer. Only one provider can have the rights to a show at any given time, and so there lies the monumental difference between providers. Hulu has also trailed behind Netflix in terms of adoption, going from .9 million subscribers in 2011 to 30.4 million in 2019 (Walt Disney, 2020). Looking closely at Hulu's financial information also paints a different picture versus Netflix in terms of its corporate structure. Hulu LLC operates as a subsidiary of the Walt Disney Company instead of as its own, fully independent company. In terms of leadership, Reed Hastings is the co-founder, chairman, and CEO of Netflix and has been leading the company since 1998. Hulu, however, has changed hands (and CEOs) quite a bit. The company was founded in 2007 by a consortium of investment firms and stakeholders from Fox, Disney, and Comcast. In 2019, Disney acquired 21st Century Fox, giving them 60% ownership of Hulu. They would also come to acquire an even greater stake in the company from AT&T as soon as 2024

Lastly, the newest addition to the streaming industry has been a service created by Disney. Disney+ launched on November 12th, 2019 and had already acquired 26.5 million subscribers in the United States as by the end of 2019 (Walt Disney, 2020). Note: This number reflects only the subscriber growth that took place over the last one and a half months of 2019. At this time, Netflix had 20.51 million and Hulu had .3 million. Therefore, Disney+ is already outstripping both the pioneer and the follower in terms of subscriber growth.

As far as financials for the Walt Disney Company, the parent company for both Hulu LLC and Disney+, there is no competition. While Disney does not break out revenues to separate Disney+ and Hulu, the industry giant recorded $7.5 billion in revenues in December of 2019 – a

26.5% growth over 2018 (The Walt Disney Company, 2019). While Hulu may be known as a follower in the OTT industry and Disney+ as a newcomer, Walt Disney's new initiative has set up the company to successfully compete with Netflix. However, Netflix's original shows and movies, produced and streamed by them, have become favorites for viewers. Critically claimed and incredibly popular, some are even award-winning programs such as Stranger Things, 13 Reasons Why, Fuller House, Orange is the New Black, House of Cards, You, La Casa de Papel, and The Umbrella Academy. This impressive foundation of content helps make the Netflix fan base very dedicated to them. While Hulu does have some original shows, such as the Handmaid's Tale, Little Fires Everywhere, and Normal People, its original content creation efforts pale in comparison to the shows produced by Netflix.

What is the draw to Disney+? That comes down to a few factors. First is the price: Disney+ has launched at $6.99, which is significantly cheaper than Netflix's Basic plan at $8.99 (with only standard definition and the ability to stream on one screen). Hulu, on the other hand, starts at $5.99 for its Basic plan but unlike the other two OTT services, this service is not ad-free. In contrast, priced at $6.99, Disney boasts an ad-free streaming service with an additional trump card included: All of Disney's content.

What exactly does Disney own in terms of content? Of course, classic Disney movies such as Aladdin and Pocahontas come included with the service as well as newer Disney movies like Frozen II and Moana. These offerings, however, just scratch the surface. On the front page of the Disney+ website, the company highlights the following franchises: Disney, Pixar, Marvel, Star Wars, and National Geographic. All of these names by themselves claim incredibly large catalogs with huge numbers of followers. Some are known to be incredibly loyal, like Star Wars and Marvel fans. Classic Pixar and Disney films hit all the right nostalgic notes for older audiences and new productions have the potential to capture the imagination of younger audiences as well. In a world where audiences can be fickle and the success of a particular show is far from assured, Disney+ is well-positioned to compete with Netflix using its huge library of content that has already been made, released, and (in many cases) extensively marketed to ensure success. Disney+ is also a highly flexible OTT option. For example– there is an option to bundle Hulu, Disney+, and ESPN+ for $12.99 a month.

When looking at the OTT industry, it would be remiss not to see how OTT services fit within the larger TV program production and distribution industry. According to First Research's industry analysis, there are a few key takeaways worth noting. Looking at data from the year 2018, worldwide, there are 21,054 companies existing in this industry; 20,491 are considered small with under $5 million in revenues, 483 are considered to be medium with between $5 and $50 million in revenue, and only 80 companies are large enough to make over $50 million in revenue. This means that only .0038% of companies that produce / produce and distribute television programs, television commercials, or videos made over $50 million in the year 2018. (First Research, 2019).

Also, according to this industry overview, international industry growth in this sector is being fueled by home video platforms, specifically OTT services. This, of course, includes all of the streaming services – including Netflix, Hulu, Disney, as well as Amazon Prime, SlingTV, CBS All Access, etc. (First Research, 2019). This suggests that the OTT industry, despite being relatively new compared to traditional television, is proving to be both incredibly lucrative and thriving industry. With this in mind, the next section of this thesis seeks to explore some of the characteristics that set each OTT service apart from its competition. In order to develop a richer picture of how fans around the world respond to each of these streaming companies, we will now examine the social media conversations that occur around each brand by taking a close look at them using Awario, an industry-leading social listening tool.

Study 1: Examining Social Media Activity using the Awario Social Listening Tool

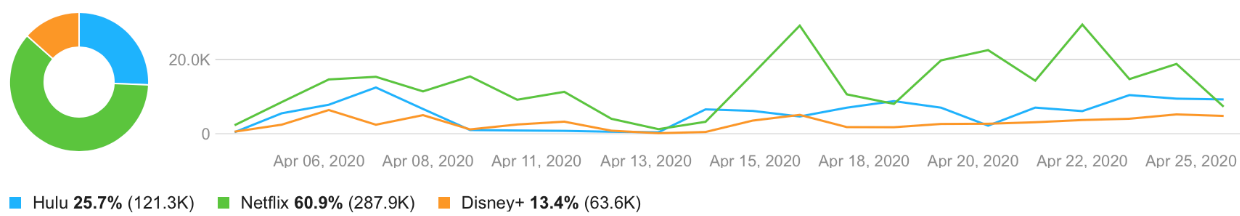
To analyze the social conversations that take place around the three biggest companies in the OTT industry, we used the social listening tool Awario. This tool provided us with all the data and statistics that will be analyzed in this section of the thesis. Using this tool, we aim to take a deep dive into the data we obtained to see what similarities and differences are present in terms of these brands' social media activities, the kind of conclusions a marketer could derive from them, and how the resulting insights could be used to make informed marketing decisions.

The method that we employed involved the collection of Twitter data for a 4-week period between April 5th, 2020 and April 26th, 2020. This approach provides us with a total of more than 472,000 mentions in total. Of these, Hulu accounts for more than 121,000 of the total mentions, or 25.7%. Netflix had 287,900, or 60.9%, and Disney+ accounts for 63,600 thousand, or 13.4%. Using only Twitter data allows a more thorough analysis of the geographical, linguistic, and top influencer data. Specifically, Instagram and Facebook do not allow tracking of language and location for their posts and these companies do not freely share data about individual accounts with outside parties. Twitter data does not suffer from these restrictions, making it an especially valuable source of data for an analysis like this.

Mention Statistics:

The Awario tool allowed us to acquire several different kinds of data. The first of these are the mention statistics, which consist of numerical and graphical representation of how many mentions each brand gets over the time frame in question. This is a way to see, on a macro level, how many mentions each brand gets on any given day and to track how this statistic changes over time. Seen below in Figure 1 is the mention statistics graphic for this time range:

Figure 1: Total Mentions for Hulu, Netflix, and Disney+ (4/5/20 - 4/26/20)

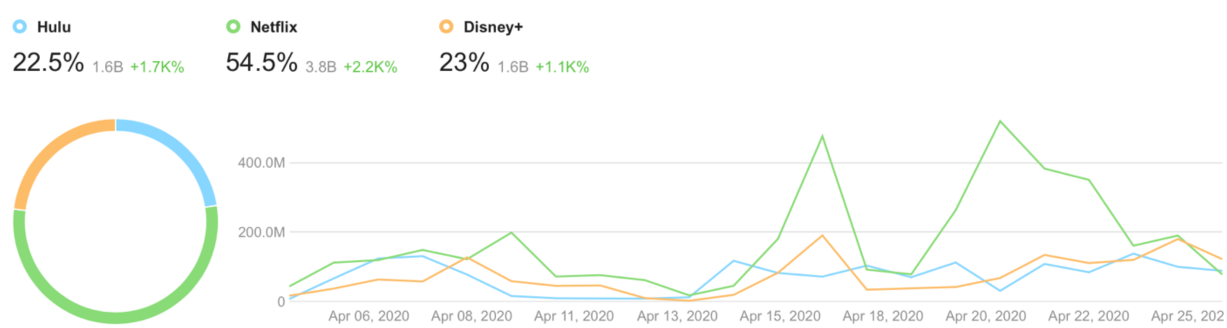


The pie graph represents the overall mentions percentages for the three brands in question. Hulu (in blue) represents 25.7%, Netflix (in green) has 60.9%, and Disney+ (in orange) accounts for 13.4% of the mentions in this time period. The lines, with corresponding colors, represent the peaks and troughs in mentions over our time range. As this graphic shows, Netflix remains well above the rest, with significantly more mentions but also with more noticeable highs and lows on certain days. Disney+ remains consistently near the bottom, more or less a completely flat line with little variation. Hulu is somewhat in the middle of the two, rising above Netflix on April 14th but more or less staying in between the two other brands.

Just a quick glance of this output provides the marketer with critical information. For example, it is apparent from the pie graph alone that Netflix accounts for more than half of all mentions. From this, we can conclude that Netflix continues to hold its pioneer advantage not only in terms of total number of users but also in terms of social media mentions. This is incredibly beneficial, as social media acts as “word of mouth” for most consumers and to see Netflix appear again and again will continuously remind them of it. This pioneer advantage is especially important since Disney+, as a powerhouse brand with no shortage of content and iconic brands, has fallen somewhat flat in this regard. There are fewer people discussing Disney+ than Hulu on most days, never rising above Netflix in this time frame at all. The data from this graphic does, however, suggest that Disney+ is trying to hold its own against the much more established Hulu in terms of social mentions, but cannot yet rival this competitor.

Looking at reach, however, tells a different story. Figure 2 illustrates the reach of the three brands:

Figure 2: Total Reach for Netflix, Hulu, and Disney+ (4/520 –



Similar to the share of mentions depicted in Figure 1, Netflix has the most reach and the most growth with more than half of total reach. Hulu and Disney+, however, are much more similar in terms of their reach versus in terms of their mentions. In fact, Disney+ actually holds a very slight lead over Hulu in reach. Therefore, despite Disney+’s and Hulu’s relatively small number of mentions, these brands are more successful in terms of reaching a large number of customers. These results suggest that, on average, the individuals, who mention Disney+ have a larger social following than those who mention Hulu, thereby making the reach of these two brands very similar although the number of mentions made about each brand is quite different.

Geographical and Linguistic Analysis:

In addition to data that sheds light on a brand's share of voice, Awario also provides statistics focused on the countries and languages that are most relevant to the individual brands we examine. Seen below are the geographical data for, from left to right, Hulu, Netflix, and Disney+:

Figure 3: Geographical Analysis of Netflix, Hulu, and Disney+ (4/5/20 – 4/26/20)

United States	13.7K	41.5%	United States	3.1K	19.3%	United States	6.4K	21.4%
United Kingdom	470	1.4%	United Kingdom	851	5.2%	France	3.4K	11.4%
Japan	368	1.1%	India	651	4.0%	United Kingdom	2.0K	6.7%
Indonesia	352	1.1%	Brazil	601	3.7%	Canada	664	2.2%
Afghanistan	348	1.1%	Canada	345	2.1%	Spain	643	2.1%
Other	17.7K	53.8%	Other	10.7K	65.7%	Other	16.8K	56.2%

These visuals depict the countries where most of a brand's social mentions originate (indicated by a darker color), as well as the percentage of total mentions that each country makes up. Looking at each brand starting with Hulu (in blue), the United States provided 41.5% of its mentions (i.e., about 13,700. Second is the United Kingdom with only 470 mentions at 1.4%. This is a very significant drop from the United States to the United Kingdom. From this it can be assumed that the US is where their brand is being talked about the most and therefore where it is the most popular. Advertising on social media would be more likely to be successful in the US as opposed to the UK, Japan, Indonesia, or Afghanistan since the percentages of mentions are simply not significant (i.e., below 2% in each of these markets).

Next, looking at Netflix, once again the US is the darkest color signifying that this is where the highest concentration of its mentions are. Over the period in question, the US made up 3,100 or 19.3% of worldwide mentions, while the UK accounted for 852 or 5.2% of total mentions. While this is not as drastic a difference as Hulu, it is still apparent that the US is the largest single source of Netflix's online conversation. However, when compared to Hulu, Netflix mentions are not as dominated by one market, as demonstrated by the fact that the U.S. accounts for only a bit more than 19% of Netflix's mentions versus over 40% of Hulu's mentions. In short, this data indicates that compared to Netflix, Hulu is the more U.S.-centric, brand, at least in terms of its customers' level of social media engagement.

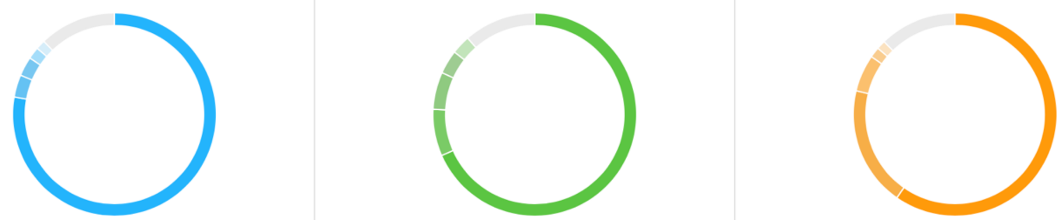
When looking at the number of U.S. mentions, Netflix and Disney+ are quite similar with 3.1K and 6.4K respectfully. However, Disney + has one factor that makes it quite different from Hulu or Netflix. Looking at the country analysis, there is one other country that is significantly darker for Disney+ than for the other two brands. After the US with 6,400 thousand mentions (21.4%), France accounts for 3,400 mentions (11.4% of its global total). Visually, the Awario tool lets the marketer know that France accounts for a significant amount of social mention activity.

This suggests that unlike the other brands, Disney + is especially popular in France. One possible explanation for this concentration of Disney+ mentions in this market is that France is home to Disneyland Paris, a complex founded in 1992 that is located only miles away from Paris. Disneyland Paris includes two theme parks, various resorts and hotels, a golf course, shopping, dining, and an entertainment venue. Disneyland Paris is the only resort outside of the US owned by the Walt Disney Company and its almost thirty-year presence in France may explain the higher concentration of Disney+ discussions on French social media than in other markets. In short, the presence of individuals in France, who have visited the park for decades and who closely identify with the "Disney experience" may be driving this increased mention activity and may mean that France, as a whole is a market that is especially receptive to and excited about the new Disney+ offering.

The "other" portion of mentions in this infographic indicates that most nations are not significant sources of social media mentions unto themselves. This is revealed by the large number of the countries on the map that are very light in color. Therefore, the macro trend that can be seen is that the US is the biggest market for all three brands. Despite Netflix and Hulu having the UK as the country in which they have the second most mentions, it might not be wise for either of these brands to specifically tailor a large portion of its tweets to those particular markets, as there simply isn't enough mention activity in them. On the other hand, the number of mentions Disney+ has in France is indicative of a viable market. Compared to Netflix and Hulu, France is relatively close to the US in mentions, with 21.4% in the US and 11.4% in France. Therefore, when producing content for Twitter, for Disney+ it may be a prudent for marketers to keep the French twitter audience in mind.

Moving on to the linguistic analysis, the infographic below depicts the top languages for, in order from left to right, Hulu (blue), Netflix (green), and Disney+(orange):

Figure 4: Language Analysis for Netflix, Hulu, and Disney+ (4/5/20 – 4/26/20)



English	25.6K	77.8%
Japanese	1.2K	3.6%
Indonesian	1.0K	3.1%
Romanian	628	1.9%
Spanish	495	1.5%
Other	4.0K	12.2%

English	11.1K	68.4%
Spanish	1.2K	7.4%
Portuguese	962	5.9%
French	614	3.8%
Indonesian	489	3%
Other	1.9K	11.5%

English	17.9K	59.7%
French	5.7K	19.1%
Spanish	1.8K	5.9%
German	498	1.7%
Italian	425	1.4%
Other	3.7K	12.3%

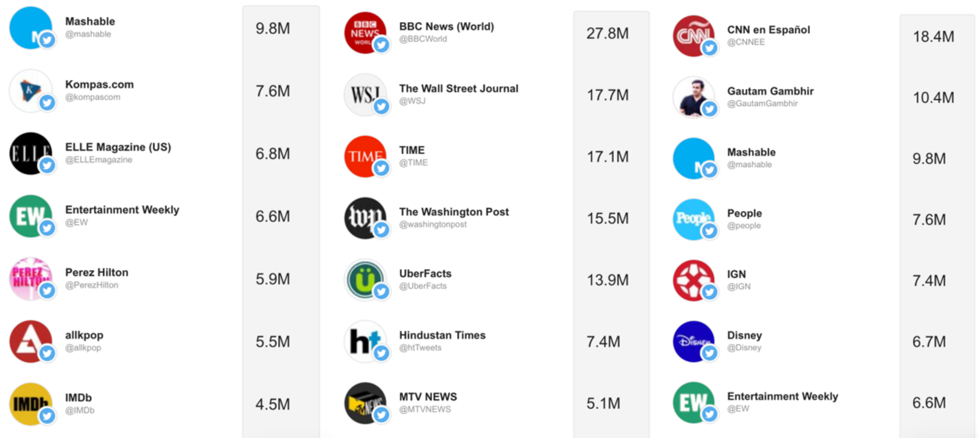
As seen above in the linguistic analysis, there is a pattern of English being the top language for all three brands and French being a significantly more important foreign language for Disney+ than for the other two brands. This is a parallel to the geographical analysis that appears above. Interestingly, Hulu and Netflix have a large gap between English and their second most used language (74.2% and 61% respectively). For this reason, it may be potentially unwise for these brands to market themselves using non-English tweets. On the other hand, for Disney+ there is a much smaller gap between English and French (40.6%). Hence, creating some corporate tweets that target the French audience in their native language might be a more viable strategy for Disney+.

This output also reveals that Hulu is the service that is dominated by the highest percentage of English tweets (i.e., 77.8% of total mentions are made in English versus 68.4% for Netflix and 59.7% for Disney+). Therefore, despite belonging to Disney, the linguistical data tells a different story in terms of its brand perception. For Hulu, the language that is second to English, Japanese, accounts for only 3.6% of mentions. This is drastically different than the data around Disney+ and it suggests that a Hulu strategy of focusing its efforts on foreign language tweets may not prove to be effective. The same could be said of Netflix as well, with Spanish, the second most prominent language, accounting for 7.4% of global social mentions. On the one hand, these results seem to suggest that an "English only" Twitter strategy might be most appropriate for two of the three brands considered in this analysis. The true answer, however, may be more nuanced than this. For instance, although it may not make sense for Hulu and Netflix to post a large proportion of their *original* tweets in a foreign language, it may nevertheless be effective for both brands to *respond* to their customers in their preferred languages, especially for important languages like Japanese and Indonesian (in the case of Hulu) and Spanish and Portuguese (in the case of Netflix).

Top Influencers:

The Awario tool also provides data about the top influencers of a certain brand, that is, the accounts that have the largest audiences. Information about key influencers can reveal a lot about a brand and provide insights into how best to reach and connect with potential customers. Below are the seven top influencers for, from left to right, for Hulu, Netflix, and Disney+:

Figure 5: Top Influencers for Netflix, Hulu, and Disney+ (4/5/209 – 4/26/20)



These are the largest accounts which mentioned each brand during the time frame in question. The number to the right of each influencer describes their audience size, or how many people have viewed their tweets mentioning the respective streaming service. They may have only mentioned each streaming service even once or twice, but in this case, it is the audience that is important. Hulu's top influencer is Mashable, with an audience of 9.8m followers. Mashable focuses its content on technology, lifestyle, and entertainment news and describes itself as a global, multi-platform media and entertainment company. Mashable mentioned Hulu only once, yet their reach was enough to be their top influencer. Second is Kompas.com, an Indonesian newsletter with 7.7m followers. Many of Hulu's other top influencers seem to be focused on entertainment and fashion, such as Entertainment Weekly with 6.6m followers and IMDb with 4.5m followers. By and large, Hulu's top influencers seem to be very large, mainstream media companies with a sizeable number of followers.

Looking at Netflix, their top four influencers are incredibly prominent and iconic news providers. BBC News (World) has 28m followers, The Wall Street Journal has 17.7m followers, and The Washington Post has 15.7m followers. The audiences for these influencers are also substantially larger than Hulu’s. For instance, even the fourth most prominent influencer on Netflix’s list has a greater number of followers than Hulu’s number one influencer. By being mentioned by these absolutely huge news providers, either for better or for worse, Netflix remains relevant and in people’s Twitter feeds. This once again proves that Netflix retains its pioneer advantage, not only by being mentioned by these enormous accounts but by having such a large audience of customers who potentially see these posts. However, Netflix influencers are fundamentally different from Hulu influencers. While many of Netflix's influencers are well-respected news outlets, Hulu's are more directly associated with the entertainment industry. This could be due to Netflix’s first mover advantage or dominant market position, or due to the kind of content that Netflix and Hulu are producing. This difference might also be the result of social media posts that highlight Netflix's business strategy or its presence as an industry disrupter rather than focusing on a particular kind of content. This would be consistent with the idea that Netflix is not only an entertainment platform but also a leading tech company and cultural force.

Lastly, the top influencer profile for Disney+ comes out somewhere in the middle between Hulu and Netflix in terms of audience as well as the type of influencer listed. For example, Disney +'s top influencer is the Spanish language version of CNN with 18.4m mentions, followed by Gautum Gambhir (a member of parliament from East Delhi) with an audience of 10.4m, and Mashable with an audience of 9.8m. It is important to note, as well, that Disney is one of its own top influencers. Since the Disney account already has an impressive following unto itself, it would befit them to promote their own streaming service. Therefore, they enjoy the benefits of being such a large powerhouse company without having to go elsewhere for reach. All in all, across Disney+’s top influencers there is a mix between leading entertainment and news outlets, showing that their reach is quite diverse compared to Hulu and Netflix.

When looking at the data provided by Awario, it is important to keep in mind that social listening data cannot always offer complete insights into the different kinds of topics that are being discussed on a brand's social media channels. The Awario data discussed above allows each company to measure to what degree its brand is being discussed, which languages and key markets these discussions are taking place in, and what kinds of key influencers are mentioning its brand. In addition, by collecting data about its competitors in Awario, each company can see how its social media activity compares to that of its competitors. For example, Netflix is likely pleased that its brand dominates the social media landscape like no other, whereas Disney+ is no doubt proud that it has generated an active social media following that can rival Hulu's despite being in existence for less than six months. In many cases, however, marketers can benefit from combining quantitative data like social listening output with additional data such as a qualitative examination of the social media activity around a particular brand. To achieve this goal, we look at tweets relating to these brands in a qualitative light. Specifically, we investigate tweets using these brands' hashtags over a four-week period in spring 2020. This qualitative analysis reveals that there are patterns that start to emerge within the firm-generated content of a particular brands, and across all brands in this period. In addition, this analysis suggests that there are important differences in the ways in which the consumers themselves talk about these three different brands. We discuss these patterns in greater depth in the section that follows.

Study 2: Examining Social Media Activity using a Qualitative Analysis

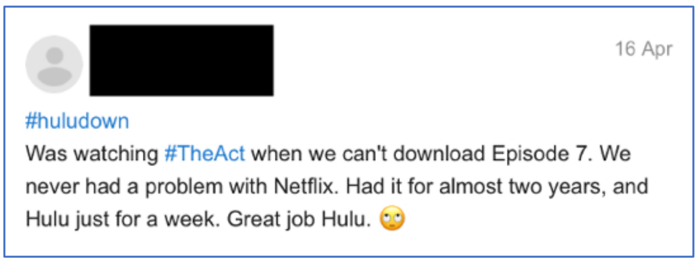
Study 2 was completed using the same time period as study: 4/5/20 – 4/26/20. As before, this is a study of Twitter data exclusively, as other platforms do not provide as much data (e.g., geographical location, language used). Here, three types of tweets in this time frame have been identified as being much more common than any other: service problems, traditional promotional messaging, and content discussion. In this study we will look at each of these individually, identify patterns that occur, and explain what they might mean for marketers.

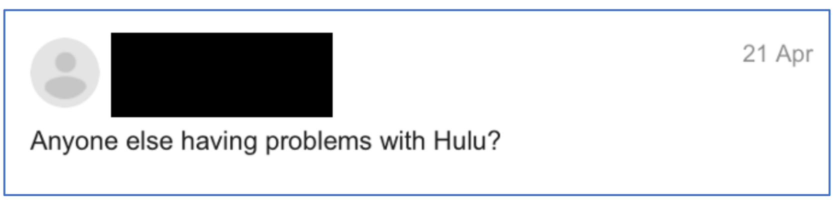
Service Problems

One type of tweet that recurred quite often during this period of time are conversations on the topic of service and connectivity issues. It is important to realize that with the nature of the OTT industry, such complaints are bound to happen. Whether the issues that come up are a product of the user's WIFI network, a server / software issue on the company's end, or a problem with an internet service provider (ISP) like Verizon or Comcast, it is apparent that users will turn to social media to voice their concerns and to elicit a response from the OTT company.

These tweets are especially abundant during the focal time frame, as this occurred during the Covid-19 pandemic in which much of the world was confined to their homes. Naturally, streaming services provided much needed entertainment and escape from what was going on and consequently more people used these services for a longer period of time each day. Large numbers of patrons streaming content at the same time are bound to cause usage and technical problems and understandably, upset customers. Although all OTT providers had the occasional tweet about connectivity issues, there were many more complaints directed towards Hulu than towards Netflix or Disney+. While a few service failure tweets will likely appear on a company's social feed (even in the best of times), Hulu seemed to have a much higher percentage of such posts than either Netflix or Disney+. Specifically, Hulu’s mentions were noticeably skewed towards posts about two types of service issues. The first are from customers expressing their frustrations or looking for a response from Hulu:

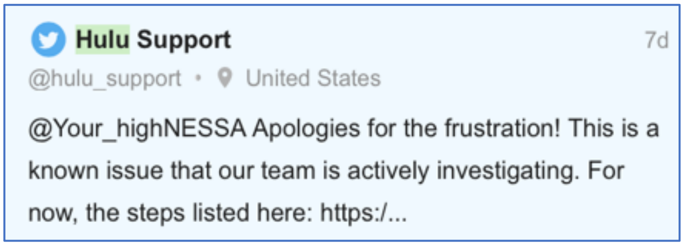
Figure 6: Examples of Service-Related Hulu Tweets:

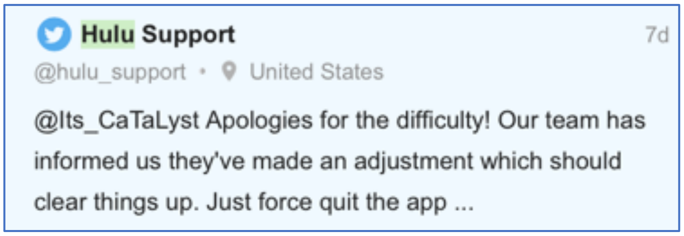


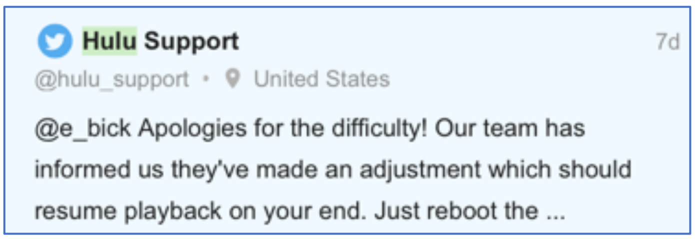


The second type of posts are the responses from Hulu Support. These all seem to be very similar in nature; first starting with an apology, and then providing instruction on how to solve the problems. Below are examples of said tweets:

Figure 7: Examples of Hulu Support Tweets:







The scenario in which Hulu is in could be considered similar to that of HelloFresh. When HelloFresh received complaints, they used a social listening tool in order to find the root of the problem and then solve it. Because the complaints were from the same geographic area going through a heat wave, they were able to reach those customers and then apologize and make the situation right. As an added benefit, since this was done over social media HelloFresh was able to show that they were a company that valued its customers, listened to them, and was willing to make them happy. Hulu has found themselves in a very similar situation; due to circumstances out of their control, their customers have taken to social media to vocalize their complaints and Hulu is attempting to respond adequately to the service failures that these customers experienced.

As far as the quality of the posts by Hulu Support, most of them were one of a few standardized "ready-made" templates. The three tweets above show how similar they actually are, and the rest do not stray too far from this template. They always begin with an apology, comment on how their team has been working on a solution or making some sort of an adjustment and end with a very simple way of troubleshooting i.e. force quitting or checking your settings. Despite their relatively fast replies, never more than a day or two, they lack a certain personal touch that consumers may be more responsive to. Once Hulu Support has tweeted back at a complaint, there is almost never a follow up from the consumer who had the issue. Perhaps their proposed solution didn't work, they managed to work it out themselves, or the reply from Hulu Support was too impersonal to warrant a response. Likely, though, the interactions between the company and its customers took place outside of Twitter, so it is very difficult to assess how consumers' rated Hulu's efforts to respond to their needs.

"Traditional" Promotion

As expected, there is also a sizeable number of tweets from all three brands that aim at promoting their own content. They are promoting themselves in a traditional sense, using their own brand's social media account to keep followers up to date with new shows and movies being added, what content may be in the works, and other happenings that would interest their customers. Below is an example of Netflix doing just this, promoting its new film Extraction:

Figure 8: Example of Netflix Traditional Promotion

There is no shortage of this type of tweet from Hulu, Netflix, or Disney+. One thing Netflix does very well is show off the big-name actors on their social messaging. As above they use Hemsworth starring in Extraction – Hemsworth is an iconic household name. Seen below, in promoting their show Time to Hunt, Netflix highlights a star from the movie Parasite hot off the heels of the film winning numerous awards at the 2020 Oscars such as best picture and best director, as well as the Willoughbys that feature a long cast of big names even before describing what the film is about:

Figure 9: Example of Netflix using Celebrities:

Netflix is evidently able to get real stars to collaborate with them on their streaming content; this then translates as social media posts that are able to catch the eyes of those who are fans of these names. Therefore, someone who is a fan of Chris Hemsworth would be much more likely to watch Extraction. Celebrity power and big names are often effective at getting attention, especially on social media.

However, Disney+ takes this strategy a step further and uses all of its resources to market itself on social media. In other words, they take advantage of all their sub brands and subsidiary social media accounts to promote its service. As mentioned earlier, Disney has a lineup of incredibly popular and powerful brands that have very loyal fan followings unto themselves. For example, Disney owns both Marvel and Star Wars, both of which are huge brands with a large catalog of their own branded content.

During this specific time frame, the Star Wars twitter feed was especially active; May the 4th was approaching, colloquially known as Star Wars Day. Here are two examples of Star Wars Twitter taking advantage of this holiday and promoting its content on Disney+:

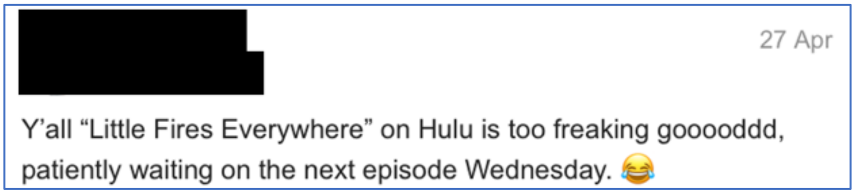
Figure 10: Example of Disney+ Star Wars Tweets

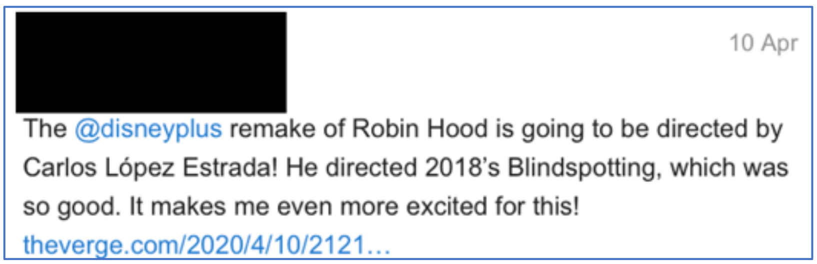
However, it is not only the Star Wars Twitter feed promoting Disney+. The breadth of Disney's social media presence is astounding. For example, the company manages separate accounts for Disney, Disney+, Disney Animation, Walt Disney Studio, Disney Parks, Disney's Frozen II, Pixar, Disney and Pixar's Onward, among others. All of these accounts have impressive followings; Star Wars with 4.4m, Disney Animation with 3.2m, Pixar with 11.6m, even Frozen II with over 148 thousand just by itself. All of these huge accounts have the ability to promote each other, and a common thread between every single one is that they all contain content that streams on Disney+. As previously discussed, Hulu has a distinctly different social media presence versus Disney + or Netflix, yet as a subsidiary of Disney, the company reaps a marketing benefit by being promoted as part of the Disney Bundle that includes Hulu, Disney+, and ESPN+. In this sense, Disney goes beyond just promoting itself via a single corporate Twitter feed by effectively leveraging the power of its various sub brands and using them to better connect with its customers and encourage user-generated conversations around the content it produces.

Content Discussion

Lastly, the third kind of post that was incredibly common on all three brands' feeds were tweets on the subject of the content itself. Within this category there are also several different kinds of conversations people are having across brands and across shows. The type of post that occurs the most often are tweets from customers announcing that they have enjoyed a show vocalizing their approval to others in the community. A few examples of this type of post appear below:

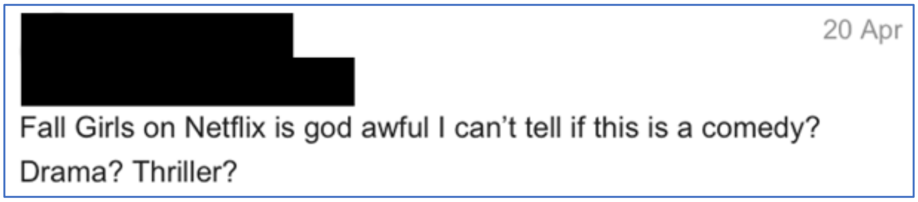
Figure 11: Example of Content Discussion:

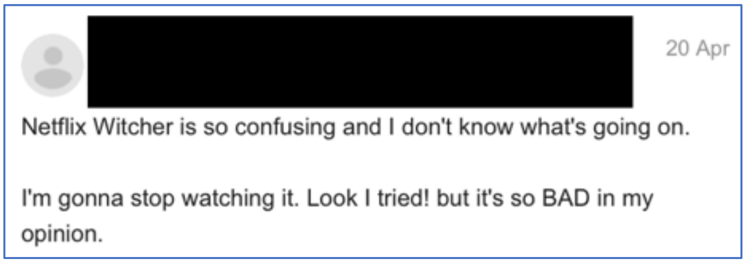




This sort of positive word of mouth is incredibly important for an OTT brand to receive on social media. On the one hand, these customer responses play an essential role in attracting attention to a brand's content and helping the brand gain new subscribers. In addition, social conversations like these can help existing customers find new content and improve their user experience, thus forging greater brand loyalty and providing a lasting financial benefit to the company. On the flip side, however, there are tweets that are negative in nature about a provider's content:

Figure 12: Example of Negative Content Discussion



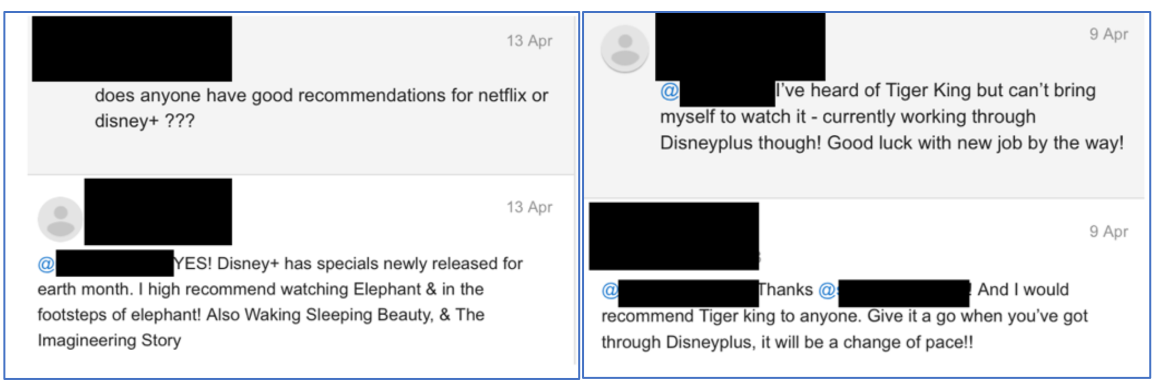


Just like positive word of mouth has the potential to reach consumers and persuade them that one brand's content is better than another brand's, negative social media posts can achieve the opposite effect. Similarly, just as a positive tweet can reach thousands of people, so can a negative one. The OTT industry is one in which subscribers can very easily make the switch or cancel any provider they want whenever they want. There is no penalty for leaving (e.g., no long-term contracts or early termination fees). Therefore, this sort of word of mouth on social media becomes incredibly important in an industry where consumers can freely move from one OTT provider to another.

One may expect the brands to respond to negative backlash, however the only responses that come up are those responding to service issues. It is also common for brands in other industries to respond to something positive about their content but responding to negative comments clearly isn't part of Hulu, Netflix, or Disney+'s social media presence unless it is a problem with connectivity or service. Responding to negative feedback can be a very effective tactic and has the potential to make customers feel heard – for example, giving content recommendations to consumers who didn't like a particular show or movie. While this is more prevalent in other industries, these brands seem to be just too big to be able to respond to all of their negative feedback – so they most likely just don't respond to any at all.

Lastly, the third type of discussion post that came up numerous times were those created by consumers, who were looking for suggestions and recommendations from other customers. What is unique about this type of post is that they are not typically brand specific; a person looking for new content is typically willing to switch to a new provider (or may already be paying for multiple OTT subscriptions). These customers are usually looking for either a new show, movie, or completely new provider in an ongoing effort to discovery better content. Below are two conversations between consumers on what to watch next:

Figure 13: Example of Twitter Conversation Between Customers



These two conversations illustrate someone who wants more content and turn to the online community for recommendations. Despite Netflix, Hulu, and Disney+ providing no shortage of suggestions based on algorithms based on what each person has watched and liked, consumers still turn to their peers for what to watch next. As seen in the above tweets, people will ask about specific shows or broad suggestions just by alluding to the service providers they have.

As this qualitative analysis reveals, social media word of mouth highlighting service issues, discussing specific pieces of content, and looking for recommendations is in no short supply. Moreover, both positive and negative user generated content of this kind can be incredibly useful for OTT brands and can enable them to better support their customers and develop new content for their users. For a provider, this type of interaction over social media can be very useful to find trends. In other words, if there is a sudden surge in conversations around a new show, then that is a good indicator that show was well received. If there is a sudden outpouring of negativity for a certain show, then it may be time for the provider to rethink what could be causing it and why people are responding negatively to a particular piece of content. In fact, the "why" behind customers' viewing decisions is an important insight that OTT companies can take and combine with the wealth of other data they collect about their users' viewing habits. Netflix, for example, is able to access a wealth of information about their customers' viewing behavior via its in-depth data analytics capabilities. Specifically, Netflix (and the other OTT companies are able to determine when you pause, rewind, or fast forward a show, what days you watch content, the date you watch, what time and where you watch it, what device you use, ratings given, browsing and scrolling habits, and searches. However, these analytics don’t give Netflix the “why” that underlies these behaviors. Social conversation and activity, however, can provide more details to flesh out why a certain consumer maybe left a show right in the middle of an episode, or why they watch more on certain days. Listening in on consumer’s conversations can give more depth beyond just analytics. (Neilpatel)

Conclusion

Even though much of social media data consists of images and videos (i.e., unstructured data) and is typically more difficult to analyze than concrete and precise hard facts and figures (structured data), there is much to be gained from amassing and studying social media content. Conversations on Twitter can be very useful for marketers as a way of listening in on how consumers think and feel about a marketer's brand and about its competitors. As demonstrated in Study 1, data from a social listening tool can reveal patterns about geography, linguistics, and mentions volume that take place in a particular time period. This can reveal to marketers where and when the most activity is occurring relevant to their brand, the brand's share of voice relative to its competitors, and the emerging service issues that need to be dealt with to maintain customer satisfaction. I addition, as Study 2 shows, the mostly structured data that social listening tools provide can also be combined with qualitative insights gleaned from carefully studying the content of a brand's social media posts. Indeed, a multi-method approach like the one adopted for this honors thesis offers marketers important benefits and allows them to develop a richer understanding of their brand's social media presence and help them to better understand and connect with their customers.

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