Streaming Services
Social + Consumer Insights
The streaming service market is hot, and companies want a piece of the consumer budget. With limited digital entertainment budgets and new innovators making a splash, not every service will survive. Consumer voices will decide their fate.

Inside, we reveal who streaming consumers are, what they talk about most, and the content they love.

1. How do consumers talk about streaming platforms?
2. What makes a streaming service standout?
3. What content are viewers passionate about?
In negative posts about Hulu, consumers mention mounting costs and frustrating ad interruptions. Streaming services should focus more on social conversations about consumer experience.

Netflix leads in subscribers but trails in consumer sentiment

Netflix dominates both in subscribers and “watching” mentions. Although it’s new to the game, and therefore lagging in subscribers, Disney+ has gained a respectable amount of the “watching” conversation.

<table>
<thead>
<tr>
<th>Sentiment</th>
<th>Number of Subscribers (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positive</td>
<td>50%</td>
</tr>
<tr>
<td>Negative</td>
<td>0%</td>
</tr>
</tbody>
</table>

Top Positive Associations
- Started
- Series
- Night

Top Negative Associations
- Stop
- Commercials

DEEP DIVE

Hulu’s sentiment skews more negative than others

Both Apple TV+ and Amazon Prime have a smaller percentage of “watching” conversation relative to their subscribers. They are seen as nice add-on services, but not consumers’ go-to place to watch content.

PRO TIP: The “watching” metric used for this insight was built by searching for consumers using phrases such as “watch” or “watched” or “binged” or “viewed”. Custom metrics using specific social terms can be used to establish insights and benchmarks.
Disney+ made a splash overtaking Netflix but needs sustainable social conversation

While Netflix leads the industry, social conversations offer clues on how to compete. Disney+ stole a significant portion of Netflix mentions online during its launch and remained the second most mentioned streaming service since.

Exclusive content from Disney+ drove conversation

Topical analysis shows that Disney+ popularity is driven by offerings like *The Mandalorian* and other Star Wars content, nostalgic TV shows, and Disney classic movies.
Must-watch content can vary by who recommends a show

For average subscribers, the content described as “must-watch” is almost exclusively originals. Reviewers use the moniker for mainstream epics like *Game of Thrones*. Documentaries win over both groups.
Culture Shock! *Tiger King* and *Don’t F**k with Cats* are Millennial Bingers

Popular streaming documentaries have key attributes that keep audiences watching. These programs blend elements of pop culture and shocking moments reminiscent of reality/live TV, adding a more authentic voice than the traditional documentary.

<table>
<thead>
<tr>
<th>TYPE</th>
<th>VOLUME</th>
<th>TOP EMOTION</th>
<th>SENTIMENTAL CONTENT</th>
<th>% POSITIVITY</th>
<th>TYPICAL VIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Tiger King</em> Docuseries     1,244,154</td>
<td>Surprise     86%</td>
<td>58%</td>
<td>Older Millennial Male</td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Miss America</em> Documentary 569,602</td>
<td>Love        88%</td>
<td>72%</td>
<td>Gen Z Female in New York</td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Killer Inside: The Mind of Aaron Hernandez</em> Docuseries 512,924</td>
<td>Surprise     90%</td>
<td>46%</td>
<td>Millennial Male</td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Don’t F**k with Cats</em> Docuseries 394,415</td>
<td>Surprise     86%</td>
<td>25%</td>
<td>Millennial Female</td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Cheer</em> Docuseries 109,675</td>
<td>Sadness     90%</td>
<td>69%</td>
<td>Younger Millennial Female</td>
<td></td>
<td></td>
</tr>
<tr>
<td><em>Game Changers</em> Documentary 102,678</td>
<td>Trust       91%</td>
<td>84%</td>
<td>Gen X Midwest Male</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ANALYST PERSPECTIVE**

A New Reality: documentary preferences have evolved

Reality shows remain more popular on traditional TV, but documentaries on streaming services receive more mentions on social media. This is likely due to their more topical (and less educational) nature. However, it is notable that reality TV is still an emerging genre in the streaming space, which is part of why it receives less conversational volume. As streaming reality TV emerges, content with a greater level of authenticity and cultural relevance— a key factor in streaming docuseries’ popularity— can be expected.
Release schedules have an impact on longevity of social conversation

Between programs that release weekly and all at once, there’s a clear trend: weekly releases garner more sustained conversation. This leads to new audience discovery and an opportunity for long-term conversational volume.

**Release Date’s Impact on Social Conversation**

<table>
<thead>
<tr>
<th>NAME</th>
<th>DROP TYPE</th>
<th># OF WEEKS OF SOCIAL CONVERSATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dollface Season 1</td>
<td>Single drop</td>
<td></td>
</tr>
<tr>
<td>Letterkenny Season 7</td>
<td>Single drop</td>
<td></td>
</tr>
<tr>
<td>Ozark Season 3</td>
<td>Single drop</td>
<td></td>
</tr>
<tr>
<td>Shrill Season 1</td>
<td>Single drop</td>
<td></td>
</tr>
<tr>
<td>Stranger Things Season 3</td>
<td>Single drop</td>
<td></td>
</tr>
<tr>
<td>Veronica Mars Season 4</td>
<td>Single drop</td>
<td></td>
</tr>
<tr>
<td>Castle Rock Season 2</td>
<td>Weekly</td>
<td></td>
</tr>
<tr>
<td>Handmaid’s Tale Season 3</td>
<td>Weekly</td>
<td></td>
</tr>
<tr>
<td>Mandalorian Season 1</td>
<td>Weekly</td>
<td></td>
</tr>
<tr>
<td>The Act Season 1</td>
<td>Weekly</td>
<td></td>
</tr>
</tbody>
</table>

Release schedule appears to have a role in success, but doesn’t make or break it. Smash hits like Stranger Things are trend outliers.

**Key Question:** What impact does a release schedule have on a series?

**POST VOLUME FOR POPULAR FANTASY SHOWS**

The Witcher, The Mandalorian and Watchmen are all fantasy shows based on established content. The Witcher launched all episodes at once. The others were released weekly, enabling them to extend the timeframe of social conversation and build hype. The Witcher may have gained more traction had it been a weekly release.
SOCIAL PERSONA

The Mid-Gen Z Book Lover

Streaming services like Hulu and Netflix recognize the segment of Gen Z niche book lovers. Both create hit shows based off of books with established fans. This is a growing opportunity for streaming brands.

Gen Z especially loved the Netflix/CBC show *Anne with an E* and launched a passionate campaign to save the show from cancellation.

ANNE WITH AN E

MOVIE LAUNCHES

Hulu and Netflix shows based on popular Young Adult books came with a passionate immediate audience:

*Looking for Alaska* - on Hulu

*All the Bright Places* - on Netflix

TOP HASHTAGS

#BOOKSTAGRAM
#BOOKWORM
#BOOKISH
#BOOKNERD
#BOOKLOVER

CANCELLATION

of series announced.

NETFLIX RESPONDS

Lack of interest within the 25-54 age range lead to cancellation of show.
Netflix and Hulu streamers watch alone while Prime streamers watch with family.

Volume of conversations that mention “watching” increases across the board during holidays. In general, Netflix and Hulu over-index for watching alone, while Amazon and Disney are more often watched with family.

<table>
<thead>
<tr>
<th>&quot;WATCHING WITH&quot;</th>
<th>Netflix</th>
<th>Amazon Prime</th>
<th>Hulu</th>
<th>Disney+</th>
<th>AppleTV+</th>
<th>Total Streaming</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sample</td>
<td>66,528</td>
<td>2,151</td>
<td>4,283</td>
<td>13,651</td>
<td>192</td>
<td>65,944</td>
</tr>
<tr>
<td>Alone</td>
<td>45%</td>
<td>20%</td>
<td>44%</td>
<td>39%</td>
<td>22%</td>
<td>46%</td>
</tr>
<tr>
<td>w/ Family</td>
<td>31%</td>
<td>65%</td>
<td>38%</td>
<td>42%</td>
<td>44%</td>
<td>31%</td>
</tr>
<tr>
<td>w/ Pets</td>
<td>13%</td>
<td>2%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>13%</td>
</tr>
<tr>
<td>w/ Significant Other</td>
<td>11%</td>
<td>13%</td>
<td>8%</td>
<td>9%</td>
<td>24%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Key Watch Times: Disney+ and Netflix thrive during winter holidays.

Streaming platforms boosted watch time during the holidays. Disney+ and Netflix capitalized on family-friendly movies Noelle and Klaus, respectively. Here are the top mentioned holiday programs associated with each:

- Top Winter Holiday Content by Service:
  - Netflix: Noelle
  - Amazon Prime: Love Actually
  - Hulu: A Christmas Carol
  - Disney+: Noelle
  - Apple TV: N/A

Galentines day anyone? There is an opportunity for single-focused content around Valentines Day and family-focused content around Thanksgiving.
HBO Max is set to succeed, but what about Peacock?

With the launch of two new streaming services, an already crowded streaming market will become more competitive to win over the consumer dollar. HBO Max and Peacock both have built in consumer bases with their parent companies and top rated shows they have secured for launch.

Both Peacock and HBO Max skew significantly towards males. This gives them a unique opportunity to reach different audiences because services with the largest number of usage (Netflix, Hulu, and Disney+) all skew female. 

Friends versus The Office; HBO snagged the #1

With cult favorites Friends and The Office exiting Netflix to go to HBO Max and Peacock respectively, which show will draw more allure and potential users?

HBO Max Peacock Apple TV+
TOTAL CONVERSATION VOLUME
HBO Max 276,229 Peacock 235,437 Apple TV+ 5,538

SOCIAL POSTS MENTIONING WATCHING THE OFFICE & FRIENDS

Friends leaves Netflix.

INFEGY 10 // 14
Conclusion

Streaming services, entertainment brands, and their agencies need to understand how the world watches and more importantly, what they say about their streaming experiences.

Using social listening technology, you can begin to understand the why-- the motivations for subscribing, the content consumers want, and the when, where, and with whom people watch.

With an always evolving space, it will take listening closely and intently on what consumer voices say about their experiences to thrive.

To recap, here are 5 ways brands and agencies can use social data to uncover insights from social data:

1. Learn what makes a streaming service successful and how to compete in a crowded space.
2. Understand what drives people to watch and the types of content consumers want most.
3. See which platforms consumers stream from and how they describe their experiences.
4. Compare viewers by demographics and why and when they watch.
5. Discover the most popular streaming content-- from documentaries to established programs.
Methodology

The featured data is derived from the social listening insights available in Infegy Atlas since 2007. The primary query date range for this report is 03/01/2019 to 03/01/2020. Data was pulled using research within the platform using the brand conversations in our database. The conversational data includes content pulled from:

- Social media channels
- Blogs and user-created articles
- News publications
- Forums
- Review sites
- Comments
- Other online channels where users discuss the related topics

The featured brands, personas and channels were chosen for further analysis based on industry trends as well as top themes and interests in our proprietary database.

Sources

- Most popular video streaming service based on share of audience demand for digital originals in the United States in the 1st and 3rd quarters of 2019, Parrot Analytics, December 2019
- Apple TV Plus could have more subscribers than Disney Plus, Michael Grothaus for Fast Company, January 2020
- Market Experts Predict which Streamers will Fail and why, Brandon Katz for Observer, September 2019
- What Disney Learned from Its First Failed Streaming Service, Kelly Konda for We Minored in Film, April 2019
- The Witcher’s success is held back by Netflix’s release strategy in a post-Game of Thrones world, Chaim Gartenberg for The Verge, December 2019
Get results. Choose the best technology.

Beyond volume and sentiment, Infegy Atlas helps researchers get to the heart of what consumers think and discuss, and how they feel about topics and brands through nearly instant analysis of millions of social conversations.

**RESULTS YOU CAN TRUST**
93% sentiment accuracy and 97% recall — backed by the largest validation test ever published in the industry.

**FLEXIBILITY**
Unlimited search queries and data access going back all the way through 2007, allowing you to perform more research and pivot more quickly.

**AUDIENCE SEGMENTATION**
Default and customizable audience segments that enable users to create social media focus groups to perform more targeted research and deeper discovery.

**CONTEXT**
Deeply understand complex nuances, including emotions like trust and themes such as purchase intent, automatically.

**EVENT DETECTION**
Sophisticated statistical analysis of more than 125 metrics that highlights the key drivers within conversations and identifies the most important events.

**SPEED**
Through the API or the UI, return advanced contextual analysis within seconds of hitting submit.
Infegy is the leading SaaS data analytics company that helps global agencies and enterprise partners understand their consumers to make more informed business decisions.

Our cloud-based social media intelligence platform, Infegy Atlas, is powered by Infegy’s best-in-class Natural Language Processing and machine learning technology to provide real-time insights leveraging social media data from the more than 400+ million sources.

With a focus on translating the voice of the consumer into actionable intelligence, Infegy Atlas has been utilized to determine what moms think about sugar content in breakfast cereals, what drives sales for nail polish, and if the PlayStation 4 will outsell the Xbox One.

Ready to see the software used to create this report in action? Get a personalized demo of Infegy Atlas.

REQUEST A DEMO

frontdesk@infegy.com
facebook.com/infegy
twitter.com/infegy
linkedin.com/company/infegy
infegy.com