

QUID

# INSIGHT BRIEFING

Proactive Streaming Services: What's Driving Consumer Sentiment, Loyalty & Churn



## The Questions:

The streaming industry is more competitive than ever. With rising subscription costs, more players in the market, and shifting consumer expectations, we asked:

- What are the biggest reasons consumers choose one platform over another?
- Which platforms are winning on content, pricing, and reliability — and why?
- What are the top reasons people cancel or switch streaming services?
- Which emotional drivers and cultural trends are shaping the streaming category?



## Methodology:

To answer these questions, Quid analyzed consumer conversations across Instagram, Facebook, Twitter, blogs, and forums (primarily Reddit).

- **Timeframe:** January 1 – December 31, 2022
- **Geography:** U.S.
- **Language:** English
- **Volume:** Over 248,000 organic mentions across platforms
- **Focus:** Netflix, Disney+, Hulu, HBO Max, and competitors like Apple TV+, Peacock, ESPN+, and Amazon Prime Video

# The Insights

## CONTENT IS KING — AND SO IS COST



Programming drove the highest overall conversation with top mentioned content surrounding intriguing documentaries showcasing perspectives outside of the norm, fiction content such as the Marvel Series, Wednesday, Stranger Things and Star Wars as well as live sports. Customers see value in this content, with Disney+ ranking high in consumer passion related to cost and value due to offering Star Wars and Marvel while Live Sports consumers are also positively perceiving streaming pricing, saying it is more cost effective than cable.

## NETFLIX LEADS VOLUME, BUT NOT LOVE



The biggest points of frustration amongst streaming consumers were service interruptions, content removals and cancellations. HBO was perceived as the least reliable streaming service, with customers sharing the app frequently crashes and dissatisfaction with the user interface. Content removals and cancellations were a point of frustration across the board, though Netflix garnered the most negative sentiment largely due to the cancellation of “Warrior Nun”.

## DISNEY+ EARNS HIGHEST PASSION



The top 4 streaming services dominate the space making up more than 90% of consumer conversation amongst the competitive set – Netflix, Disney+, Hulu and HBO. Netflix was the clear leader, garnering top conversation volume and engagement, though consumer sentiment was the lowest compared to competitors largely due to price increases causing its first dip in subscribers in over a decade.

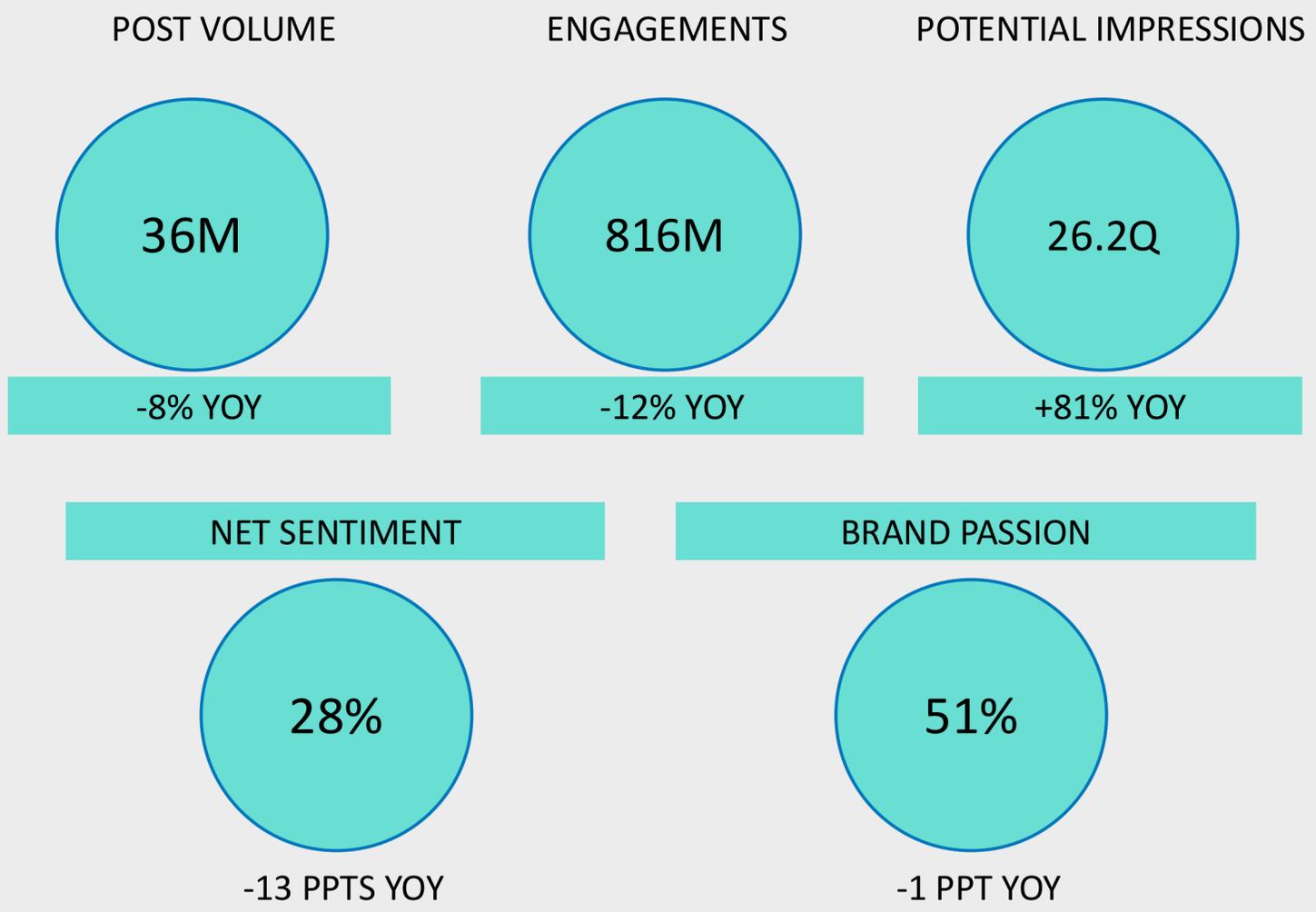


## KEY FOCUS AREAS OF ANALYSIS

- 1 Benchmarked Social Metrics
- 2 Timeline
- 3 Top Sources
- 4 Influencers
- 5 Sentiment Drivers
- 6 Customer Conversations
- 7 Custom Theme Analysis
- 8 Top Brand Identification
- 9 Top Brand Analysis

Impressions continued to grow (up over 80% to last year) while the balance of top line metrics are down. Q2 and Q3 generated the highest engagements and post volume while Q4 experienced a surge in impressions.

### 2022 METRICS



KPI	Q1	Q2	Q3	Q4
POST VOLUME	8.4M	10.1M <span>+20% QoQ</span>	9.3M <span>-9% QoQ</span>	8.2M <span>-12% QoQ</span>
ENGAGEMENTS	170.2M	217M <span>+27% QoQ</span>	226.5M <span>+4% QoQ</span>	207.1M <span>-9% QoQ</span>
POTENTIAL IMPRESSIONS	4.9Q	5.9Q <span>+20% QoQ</span>	5.9TQ <span>+0% QoQ</span>	9.4Q <span>+58% QoQ</span>
SENTIMENT	32%	23% <span>-9 PPTS QoQ</span>	30% <span>+7 PPTS QoQ</span>	28% <span>-2 PPTS QoQ</span>
BRAND PASSION	51%	48% <span>-3 PPTS QoQ</span>	51% <span>+3 PPTS QoQ</span>	52% <span>+1 PPTS QoQ</span>

Popular content teasers and releases drove increases in volume and sentiment. The lowest sentiment occurred in April when news emerged that Netflix had its first subscriber loss in over a decade.

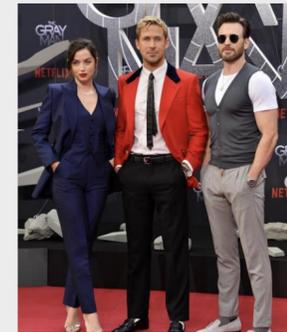
Netflix's First Subscriber Loss in Over a Decade



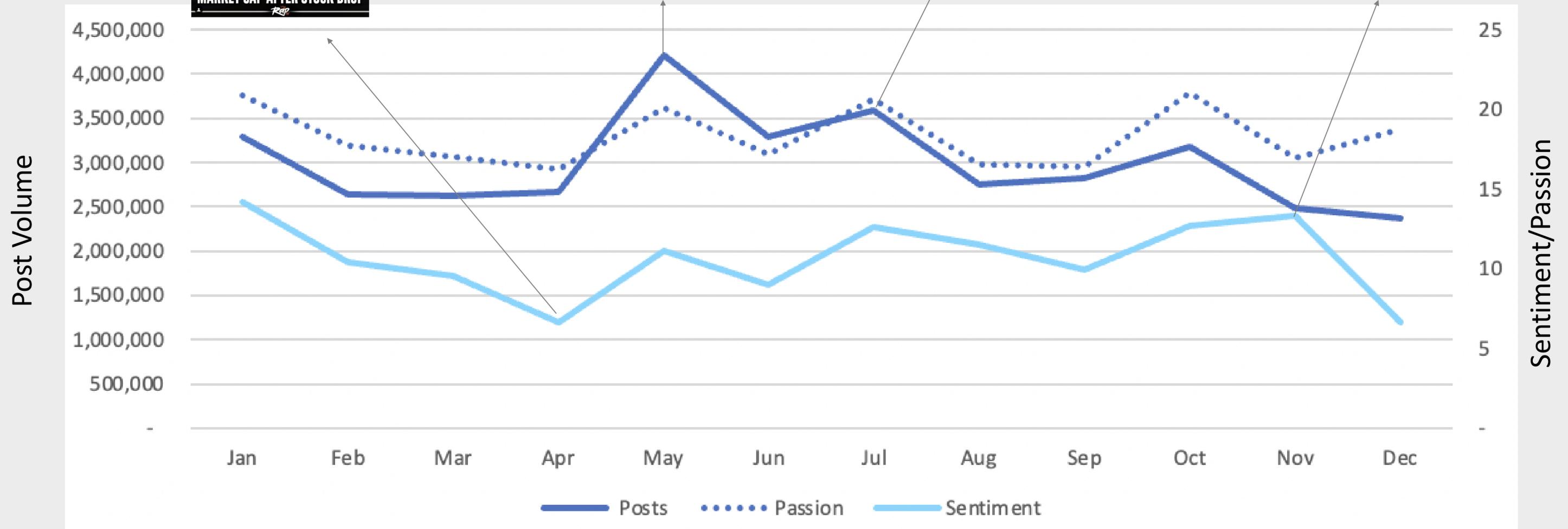
Teaser for Squid Games 2



The Gray Man Streaming on Netflix



Disenchanted Streaming on Disney+

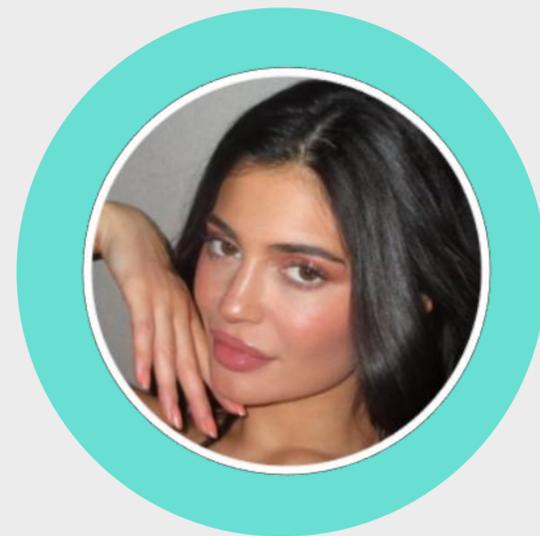


Timeline Analysis

Twitter dominated share of voice, accounting for more than 78% of total conversation, while forums are a growing source of fan discussion.

Source	Mentions	%SOV	% Change in %SOV (YoY)
Twitter	28,182,763	78.30%	-1.91%
Forums	4,061,781	11.28%	+1.76%
Blogs	1,950,257	5.42%	-0.84%
Instagram	1,560,640	4.34%	-0.98%
Facebook	220,682	0.61%	-0.01%
TikTok	16,916	0.05%	+0.03%

Celebrities drove the highest engagement within streaming services conversation; fans engaged when stars are promoting TV shows, sharing behind the scenes moments and expressing gratitude.



**Kylie Jenner**  
**389M followers**

*2 posts mentioning streaming services*  
**15,886,620 engagements**

*Promoting the Kardashians launch on Hulu*



**Kris Jenner**  
**52M followers**

*67 posts mentioning streaming services*  
**15,175,972 engagements**

*Promoting the launch of each episode of the Kardashians on Hulu*



**The Weeknd**  
**55M followers**

*34 posts mentioning streaming services*  
**14,965,903 engagements**

*Pre and [post-promotion](#) of his show "The Idol" on Hulu*



**Chris Hemsworth**  
**56.4M followers**

*34 posts mentioning streaming services*  
**14,788,653 engagements**

*Sharing behind the scenes moments on set during the filming of Extraction 2 and promoting the release of his new show "Limitless With Chris Hemsworth" on Disney+*



**Robert Downey Jr.**  
**55.4M followers**

*34 posts mentioning streaming services*  
**9,544,485 engagements**

*Appreciating Netflix and The Academy for inviting him to the Governor's Ball and the release of a documentary about his father on Netflix, "Sr."*

Service interruptions and content removals/cancellations drove the most negativity while customers shared the highest positivity for their favorite TV shows.

**Movies**

Customers shared delight for their favorite movies with Glass Onion and Marvel movies as the stand outs.



**Removing Content**

When streaming services remove TV shows and movies customers shared significant frustration.

**Service Interruptions**

Customers shared passionate dissatisfaction when there are interruptions in their streaming services.

**Favorite TV Shows**

Customers shared their picks for the best shows on streaming services with Severance (Apple TV), Ozark (Netflix) and Stranger Things (Netflix) as the top picks.

**Netflix Subscribers**

News that Netflix lost subscribers spurred significant conversation with previous customers sharing why they cancelled the service and current customers sharing anxieties that this will cause the streaming service to cancel loved Netflix original content.

**ESPN+**

Customers were delighted by ESPN+, sharing it is their favorite streaming service for sports.

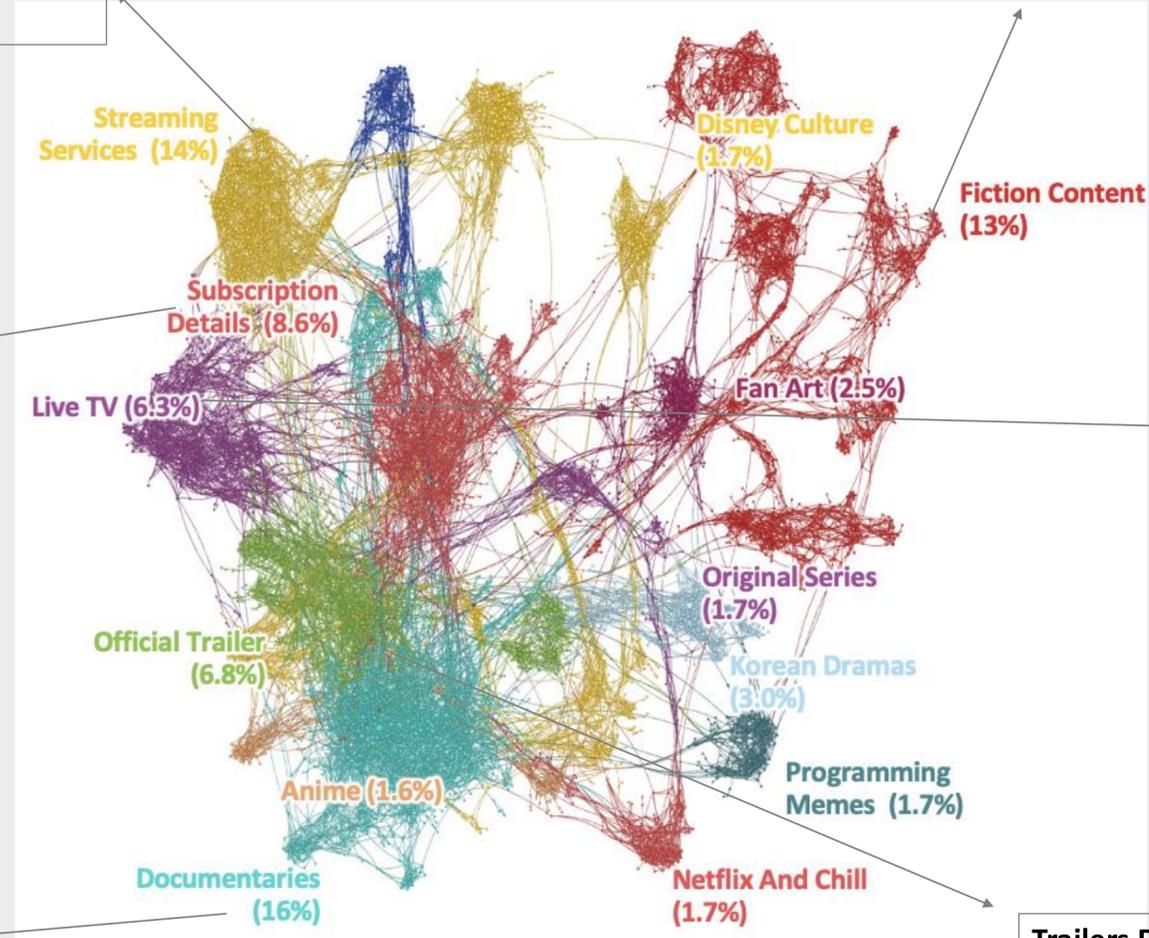
# Sentiment Drivers

Programming drove the highest conversation with documentaries, fiction and live sports as the most mentioned categories. Account sharing was the most central conversation theme with customers talking about the ability and limitations to share services with friends and family.

**Comparing Services**  
Customers are discussing the differences between streaming sources with Netflix and Disney+ as the top mentioned services.

**Popular Fiction Programming**  
Most mentioned content included Marvel Series, Wednesday, Stranger Things and Star Wars.

**Consumer Conversation Network**



**Account Sharing**  
Customers are talking about their ability or lack of ability to share account access on streaming services, this is the most central topic across conversation.

**Live Sports on ESPN+**  
Customers love the option to watch live sports on ESPN+, with many sharing that live sports was the only reason they held onto cable before there were sufficient streaming options.

**Intriguing Documentaries**  
Fans are loving documentaries that showcase perspectives outside of their own, focusing on celebrities, criminals and niche topics.

**Trailers Driving Anticipation**  
Trailers drove excitement with "House of the Dragon" ranking as the most anticipated series post trailer.

**Conversation Drivers**

Documentaries	16%
Streaming Services	14%
Fiction Content	13%
Subscription Details	8.6%
Official Trailer	6.8%
Live TV	6.3%
Korean Dramas	3.0%
Fan Art	2.5%
VPN Services	2.0%
Netflix And Chill	1.7%
Halloween	1.7%
Original Series	1.7%
Disney Culture	1.7%
Programming Memes	1.7%
Anime	1.6%

\*Social media network colored and labeled by conversation clusters. See how to read a Quid network on slide 23.

TikTok fans shared their favorite character moments and create spin-offs of iconic scenes and thematic music. Hulu’s AR filter was widely used, with #HuluChippendalesDance featured in over 12.5B videos.

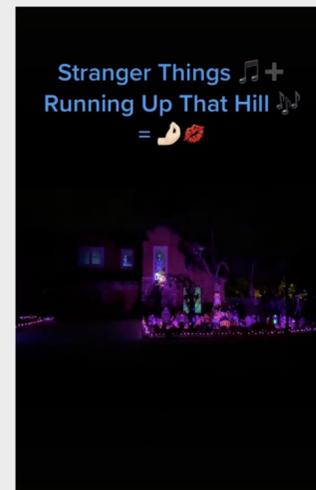
### Top Terms for Streaming Services on TikTok



Streaming conversations on TikTok are primarily about content, fans discussed their favorite series namely Stranger Things and Wednesday. Hulu’s Chippendales Dance Augmented Reality filter was a hit – the hashtag was used over 12.5B times.

### TikTok Streaming Conversation Themes

#### Stranger Things

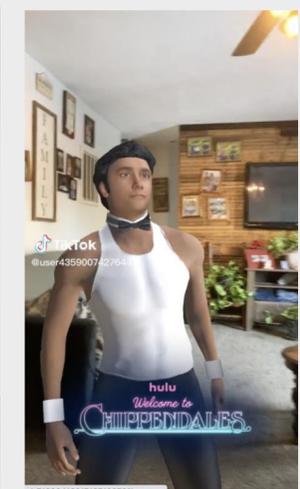


Using “Running Up that Hill” in Creative Ways



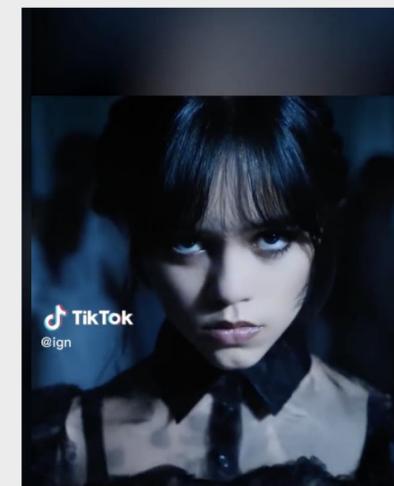
“Upside Down” Reenactments

#### Hulu Chippendales Dance



Dancing with the AR filter

#### Wednesday



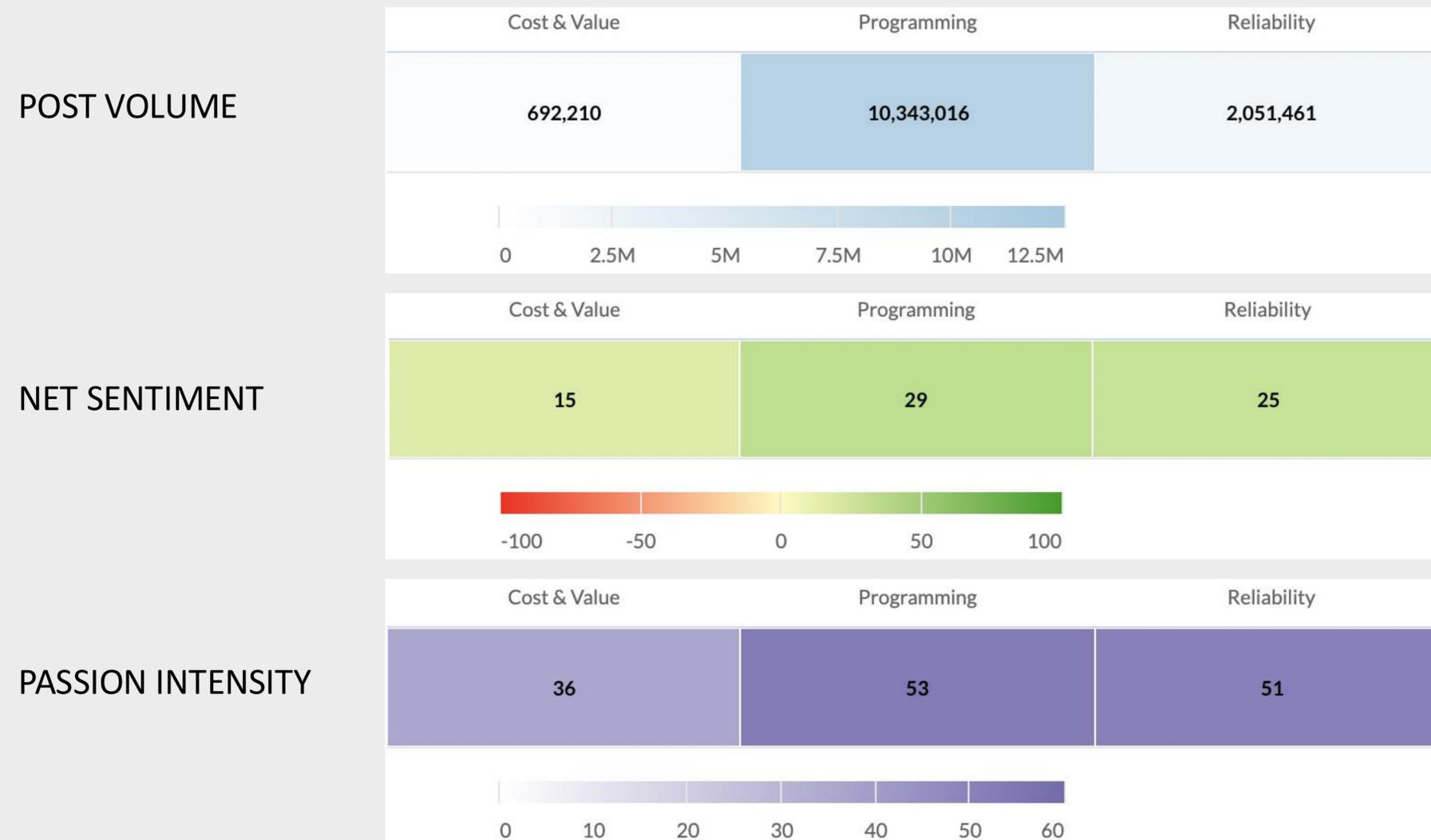
Iconic Dance Scene



Adam’s Family Throwbacks

Consumers most frequently, positively and passionately talked about programing, though there were strong negative reactions when their favorite content was cancelled or removed.

Streaming Services Ratings Across Post Volume, Net Sentiment, and Passion Intensity



**COST & VALUE**

Customers are upset about rising prices – especially for Netflix, though they still see streaming services as a cheaper option compared to cable.

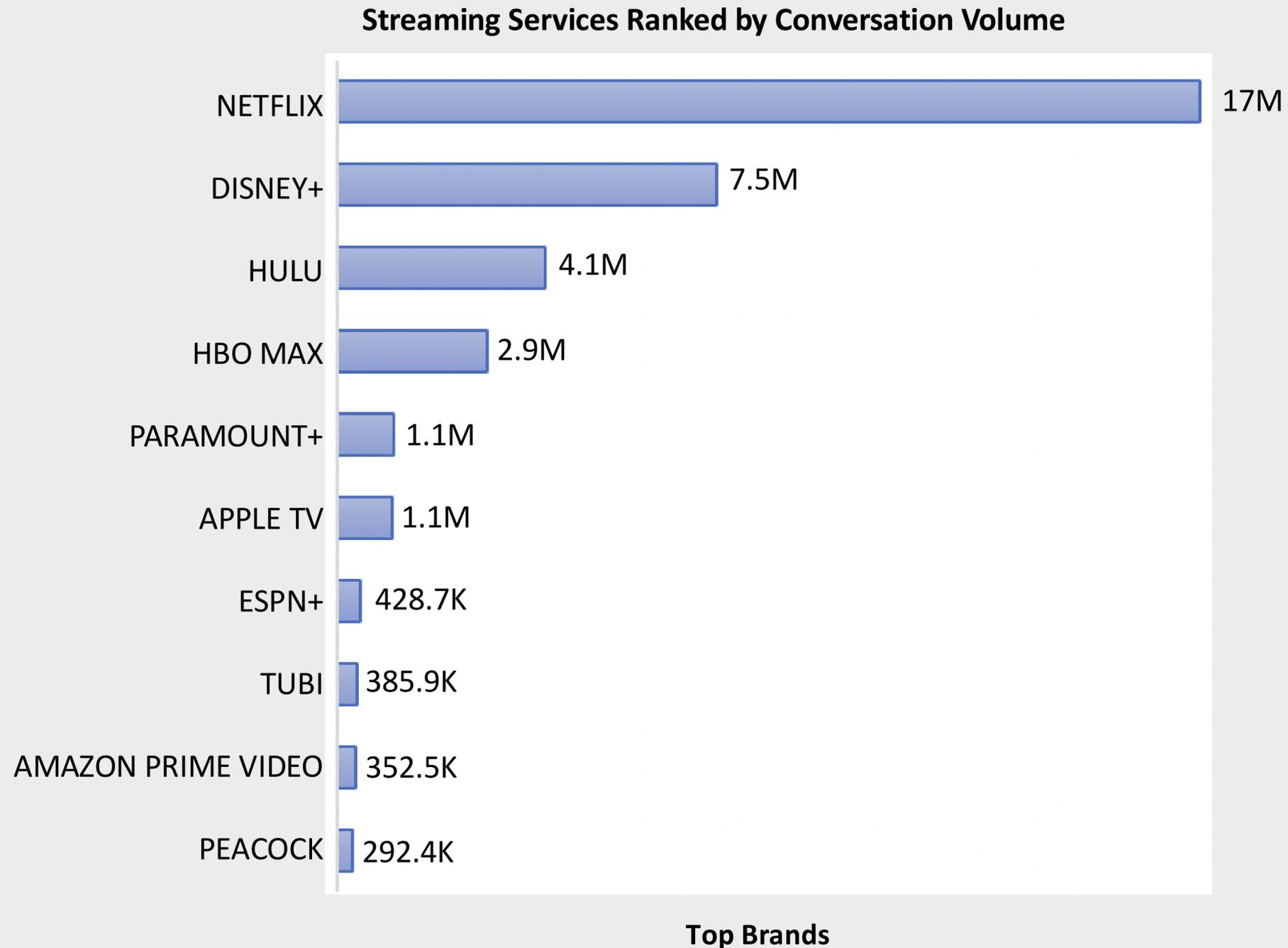
**PROGRAMMING**

Subscribers are passionate about their favorite TV shows and share strong negative reactions such as cancelling their subscription when their favorite content is cancelled or removed from their service.

**RELIABILITY**

Customers expect their service to be uninterrupted and share extreme frustration including unsubscribing from services when there are interruptions.

The top 4 streaming services made up 90% of conversation volume across the competitive set. Netflix had the most significant conversation volume; more than double that of the second highest volume service, Disney+. Netflix was mentioned as a within slang phrases unlike other brands, with expressions such as “Netflix and chill” prevalent in conversation.



Netflix was the clear front runner in terms of conversation volume and engagement though the brand garnered the lowest sentiment. Disney+ was the most positively and passionately perceived service.

2022 KPIs	Competitive Benchmark	Netflix	Disney+	Hulu	HBO
POST VOLUME	7.8M	16.7M <small>+114% TO BENCHMARK -5% YoY</small>	7.4M <small>-5% TO BENCHMARK -18% YoY</small>	4.1M <small>-48% TO BENCHMARK +16% YoY</small>	3M <small>-61% TO BENCHMARK -15% YoY</small>
ENGAGEMENT	121.6M	253M <small>+108% TO BENCHMARK -32% YoY</small>	96.2M <small>-21% TO BENCHMARK -29% YoY</small>	99M <small>-19% TO BENCHMARK +22% YoY</small>	38.2M <small>-69% TO BENCHMARK -12% YoY</small>
SENTIMENT	35%	24% <small>-31 pts TO BENCHMARK -15 pts YoY</small>	46% <small>+32 pts TO BENCHMARK -16 pts YoY</small>	37% <small>+6 pts TO BENCHMARK -4 pts YoY</small>	32% <small>-8 pts TO BENCHMARK -7 pts YoY</small>
PASSION	55%	46% <small>-16 pts TO BENCHMARK -1 ppt YoY</small>	64% <small>+16 pts TO BENCHMARK -3 pts YoY</small>	48% <small>-13 pts TO BENCHMARK -9 pts YoY</small>	62% <small>+13 pts TO BENCHMARK -2 pts YoY</small>

Top Brands KPIs

Classic blockbusters such as Star Wars and Marvel series drove the most conversation for Disney+; discussions on Hulu’s partner bundles and discounts contributed to higher conversation volume for cost & value.

**COST & VALUE**

HULU is most frequently discussed as [the best value streaming service](#); some customers referenced additional savings using cellular service offers, [like Verizon](#), to receive the service free or at a lower cost for the ad-free version ; [bundle offers](#) (HULU and Disney+) also enticed consumers to choose HULU as their primary service.

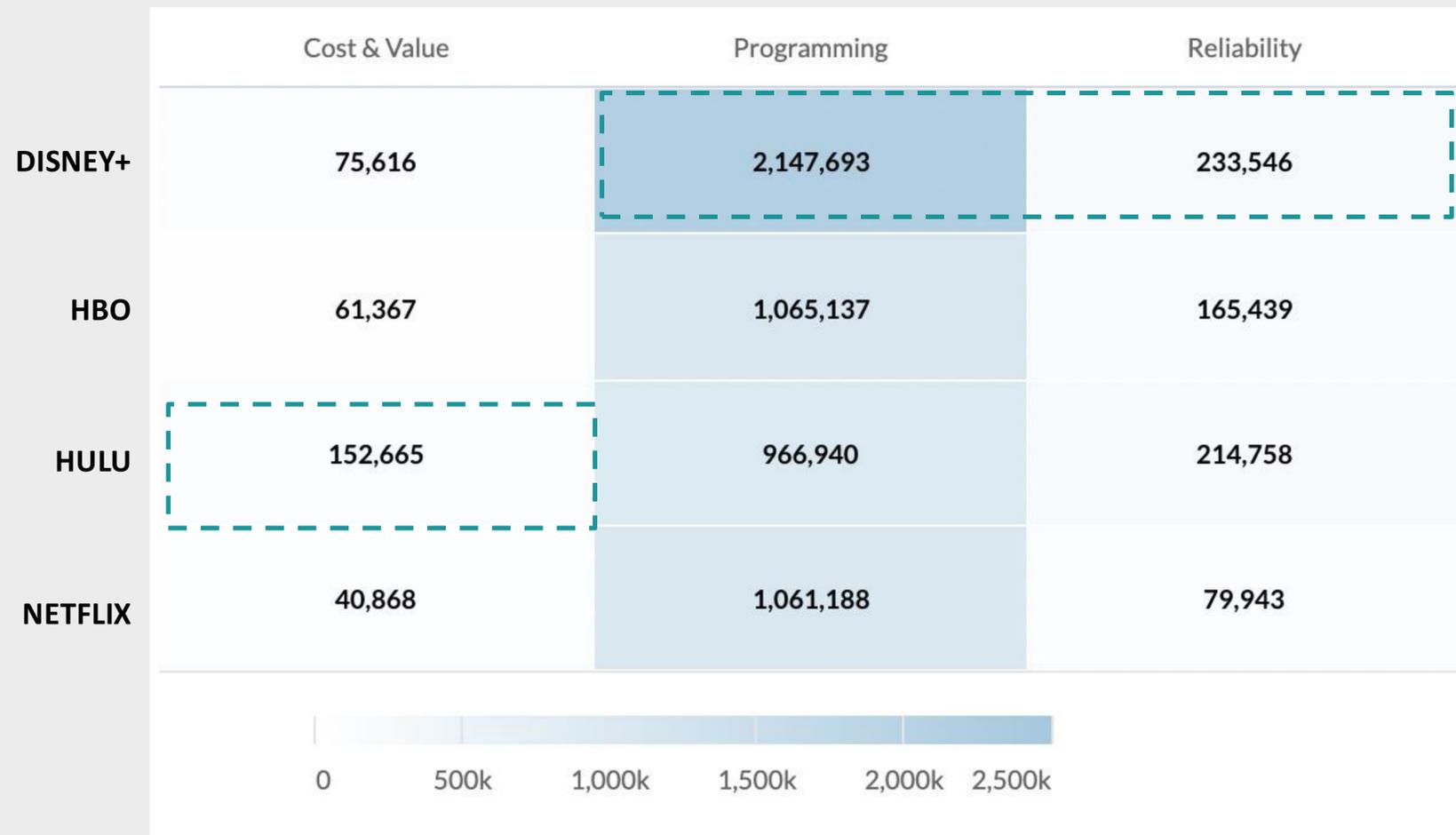
**PROGRAMMING**

Programming drives the highest conversation volume across all competitors with customers mostly discussing top TV shows and limited series. Disney+ programming is the most discussed across all competitors; with Star Wars and Marvel content as most loved content within the service’s offering.

**RELIABILITY**

Streaming devices impacted Reliability rankings across competitors as consumers struggled having reliable service if using an [Amazon Fire Stick](#), or [Roku](#), compared to streaming directly on a [Smart TV](#). Disney+ is seen as the most reliable service with limited interruption due to app updates.

**Competitor Post Volume Ratings\***

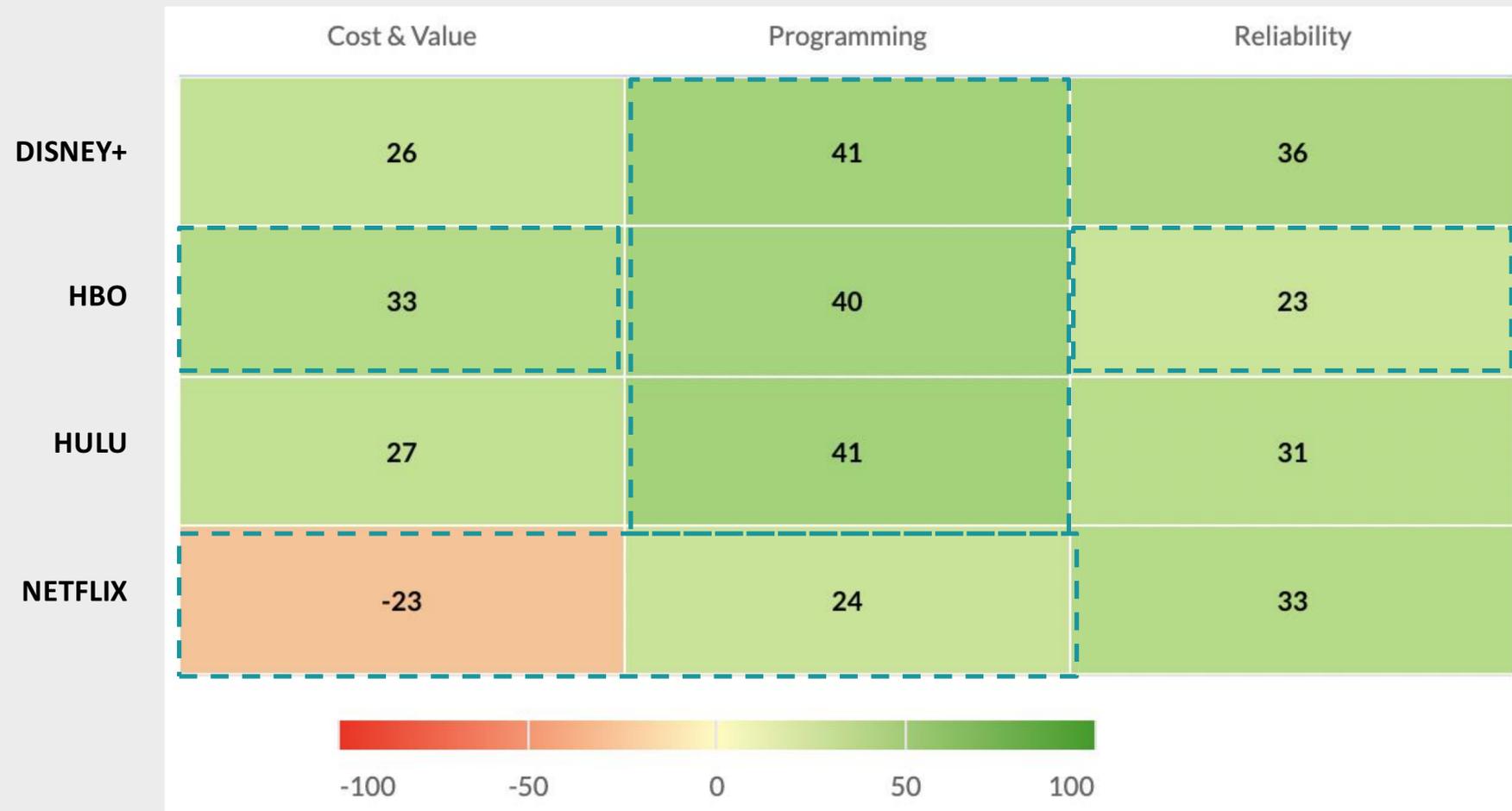


Netflix price increases have had the greatest negative impact on cost & value across all competitors combined with a decline in programming ratings due to show cancellations, most notably “Warrior Nun”.

**COST & VALUE**

Though HBO was previously seen as an expensive service, competitors such as Netflix have raised prices making HBO an affordable alternative with perceived premium content. Netflix is the clear underdog in consumer perception surrounding cost due to price increases. Customers are asking Netflix to launch a cheaper subscription plan option with commercial additions or limited content offering.

**Competitor Sentiment Ratings\***



**PROGRAMMING**

Customers enjoyed most offerings across streaming services. Content driving the highest sentiment: Resident Evil (Netflix), The Witcher (Netflix), Game of Thrones (HBO), Mrs. Marvel (Disney+), The Umbrella Academy (Netflix), and Sandman (Netflix). Though Netflix has the lowest sentiment, their show offerings are most loved when excluding show removals and cancellations. Customers were especially upset that Netflix did not renew the third season of Warrior Nun.

**RELIABILITY**

HBO is seen as the least reliable service with customers frequently sharing that the app crashes during their viewing time. HBO is also perceived to have the worst user interface, with customers sharing the app will randomly show other languages and cut off text.

The lack of streaming interruptions on Netflix greatly bolstered the brand’s reliability rating, on contrast HBO’s frequent crashes and poor user interface drove passionate negativity.

**COST & VALUE**

Netflix customers are the most passionately negative about price compared to the competitive set. On the contrast, devoted fans to Star Wars and Marvel are sharing high praise to be able to access this content at a perceived low price with Disney+.

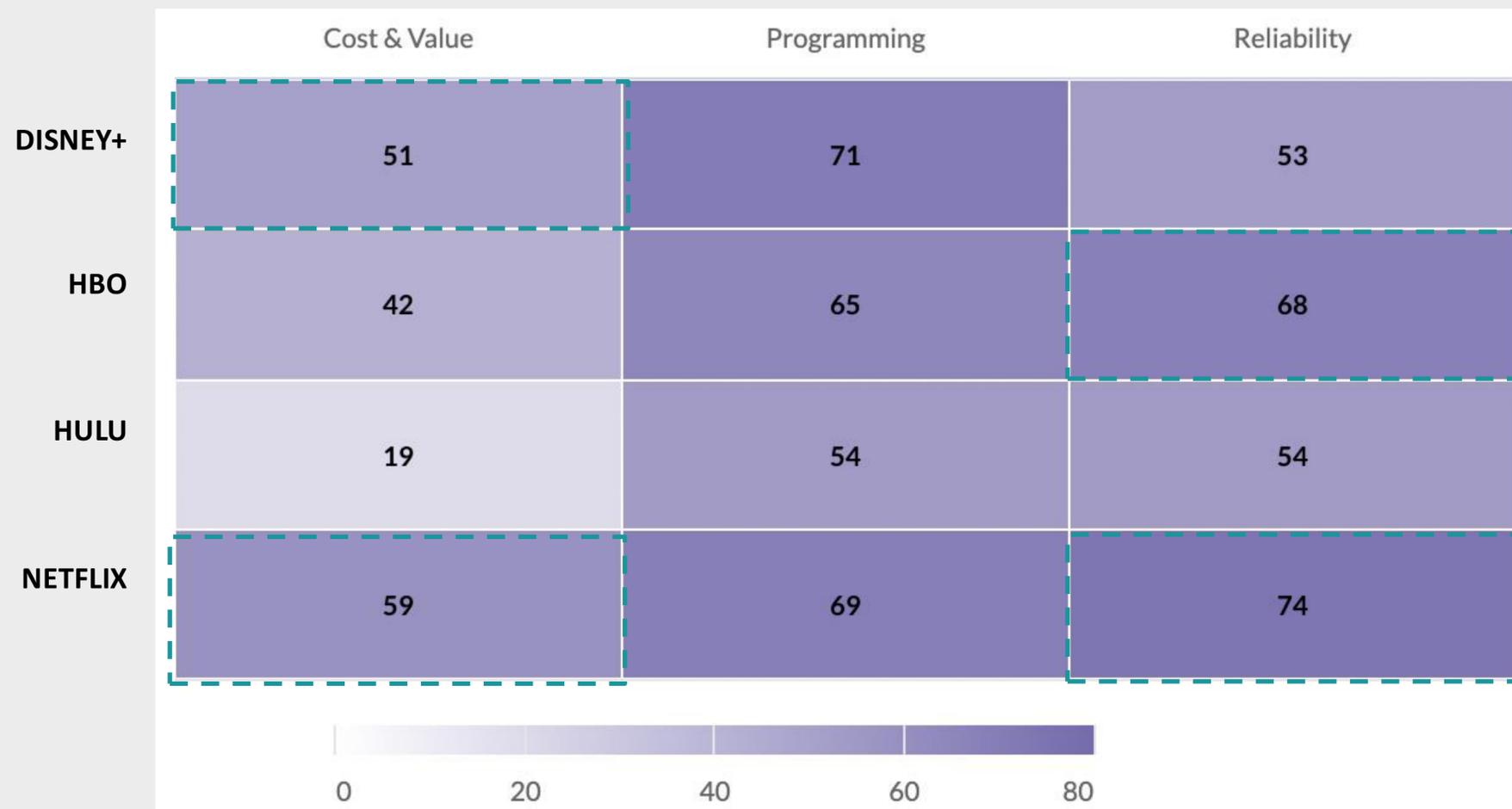
**PROGRAMMING**

Customers spoke most passionately about programming on Disney+ and Netflix, using language including great, best, favorite, terrible, and hate to describe movies/series; cancellation conversations of favorite shows on Netflix contributed to more instances of negative sentiment being expressed about the service.

**RELIABILITY**

Complaints about a poor User Interface drove up negative passion intensity mentions for HBO; while Netflix customers were generally happy with the quality of the service, with limited interruptions to streaming.

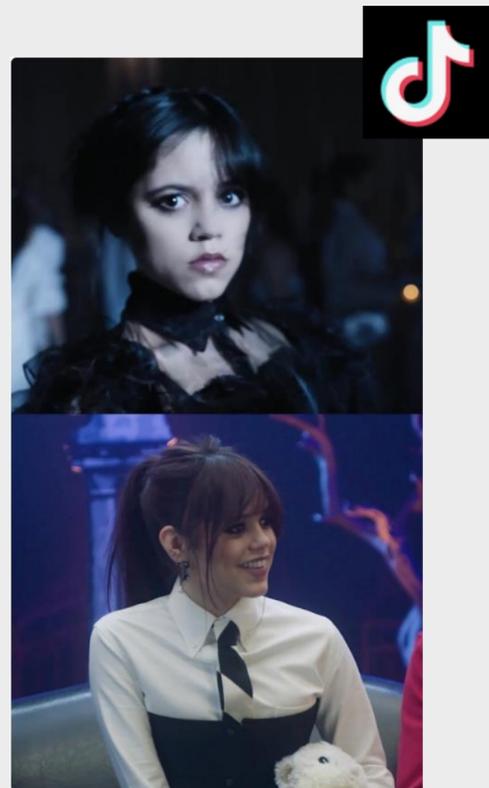
**Competitor Passion Ratings\***



# Jenna Ortega's reaction to her dance scene on Netflix's "Wednesday" drove significantly higher engagement than the balance of competitor's top posts.

## NETFLIX

### Celebrity Show Reactions

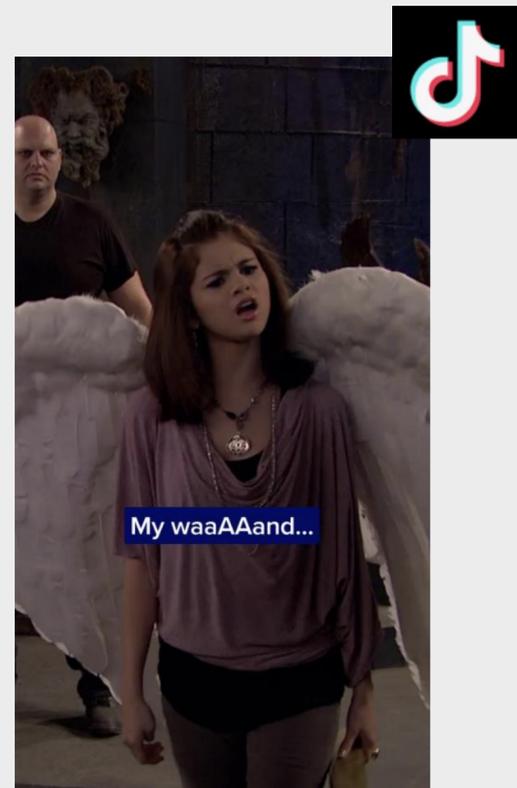


Jenna Ortega and the cast of Wednesday react to the iconic Wednesday dance scene ft. the Goo Goo Muck song. #WednesdayNetflix

9.6M engagements

## DISNEY+

### Nostalgic TV Show Teaser

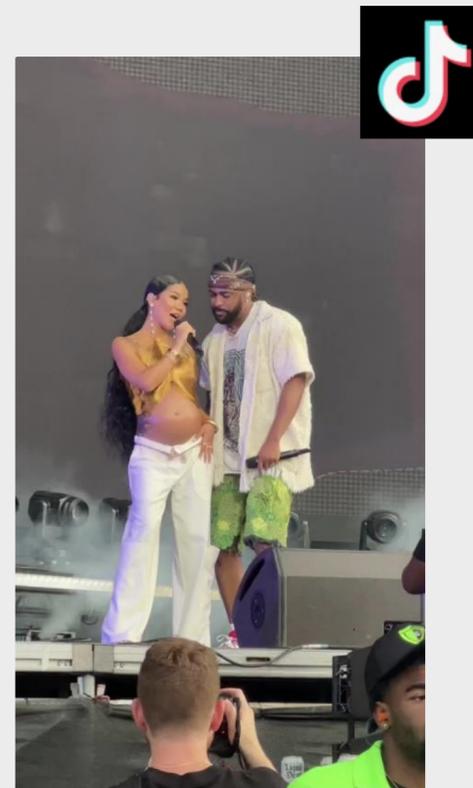


15 years later and Alex Russo is still a mood. 🍷 #WizardsOfWaverlyPlace is streaming on #DisneyPlus!

3.2M engagements

## HULU

### Festival Highlights

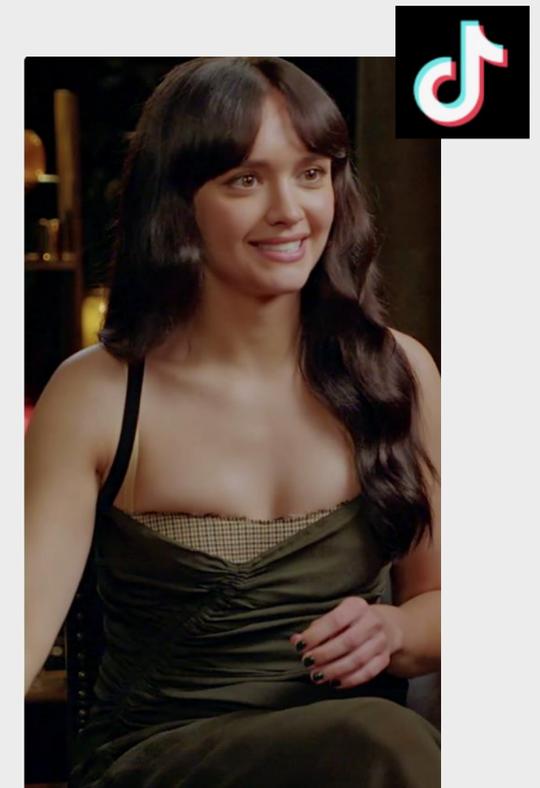


POV: Next thing I knew, I was pregnant. #Lolla #festival #hulupalooza

1.1M engagements

## HBO

### Celebrity Interviews



I'll take one of each. #houseofthedragon

2.5M engagements

# Celebrities teasing their upcoming TV shows drove high engagement across the board.

## NETFLIX

Movie Premier

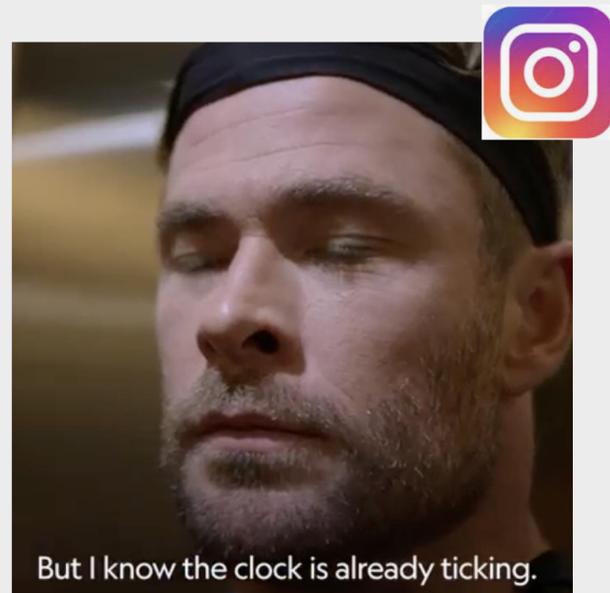


Amazing night at the premiere of my beautiful and talented wife's new film Interceptor! Be sure to check it out and see her kicking ass June 3rd on @netflix @matthewreillyofficial #interceptor @elsapatakyconfidential @boss

3.2M engagements

## DISNEY+

TV Show Teaser



The best way to live a longer and healthier life is apparently to risk it many times for the purpose of entertainment. Join me as I explore the boundaries of human potential and take on some of the most physically and mentally challenging tests of my life. Tune in on November 16

1.1M engagements

## HULU

TV Show Teaser



KARDASHIANS press day ❤️ our new show airs April 14th on HULU @kardashianshulu

7.1M engagements

## HBO

TV Show Teaser



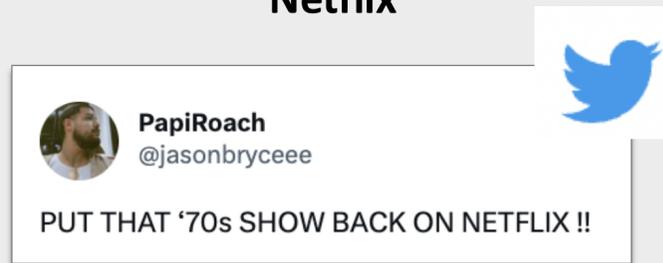
HBO's THE IDOL ❤️ coming soon

3.2M engagements

# Top engaged consumer posts tend to be negative with customers requesting for shows to be added back, more episodes within series seasons, and lower service prices.

## NETFLIX

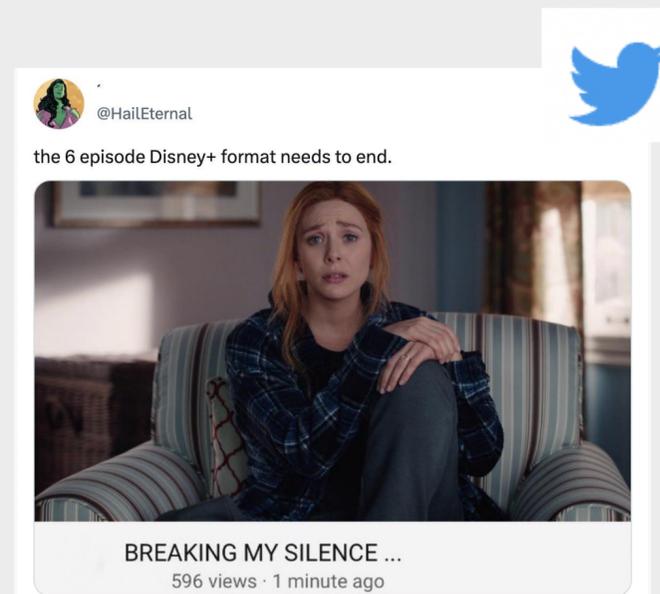
Requests for Shows to be Added Back to Netflix



71.8K engagements

## DISNEY+

Requests for More Episodes



2.9K engagements

## HULU

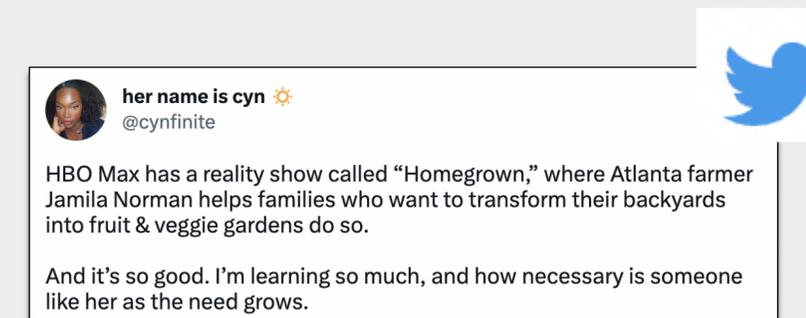
Price Increases



12.7K engagements

## HBO

Programming Excitement



20.1K engagements

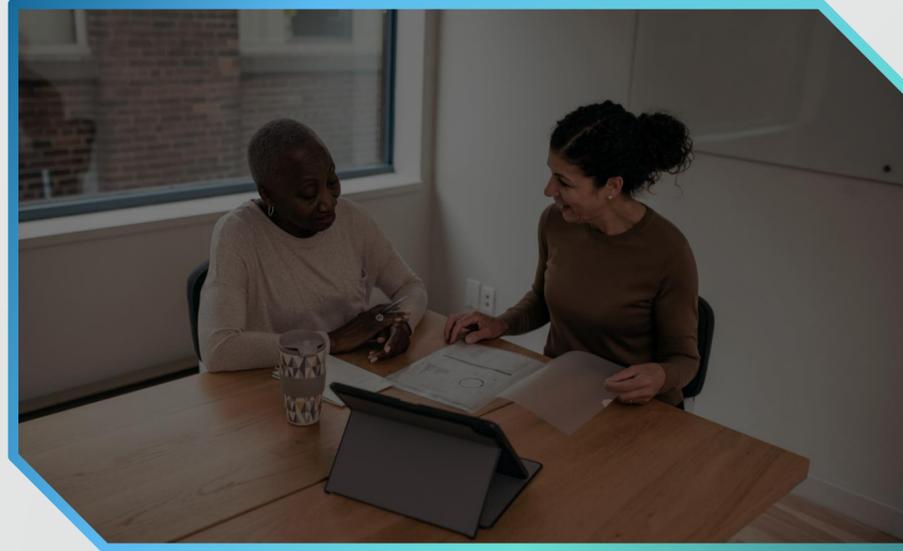
# Recommended Actions

To stay ahead of shifting viewer sentiment and rising subscription fatigue, streaming platforms should:



## Track sentiment around pricing changes to preempt backlash.

The spike in media coverage around subscription hikes (e.g., Netflix password sharing crackdown) often precedes spikes in customer churn. Use Quid to monitor tone and topic momentum before PR issues escalate.



## Analyze viewer conversations to stay ahead of loyalty risks.

Media narratives have shifted from binge-watch excitement to platform fatigue. As value perception drops, customers are more likely to cancel or switch. Use Quid to surface early signs of dissatisfaction and adapt messaging to emphasize content value and differentiation.



## Ensure platform experiences and deals support perceived value.

Just like app users expect seamless, redeemable offers, streaming subscribers expect easy access, bundled options, and transparent pricing. Use Quid to benchmark against competitor positioning and identify where user expectations are being missed.

QUID

## Outcomes

What did the customer achieve by implementing Quid's recommended actions to invest in product optimization and user experience research?



23%

Decrease in Customer Complaints

QUID

## Outcomes (cont.)

What did the customer achieve by implementing Quid's recommended actions to invest in product optimization and user experience research?



16%

Decrease in Customer Churn

**QUID**

**WHAT OUTCOMES  
CAN WE DELIVER FOR YOU?**

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