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An Analysis of Total Experience in Streaming Services

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List of Acronyms

- TX** Total Experience
- UX** User Experience
- CX** Customer Experience
- EX** Employee Experience
- MX** Multi-Experience
- OTT** Over-the-Top
- APV** Amazon Prime Video
- EWOM** Electronic Word-of-Mouth

Abstract

Each year, Gartner, a US-based consulting firm, publishes a number of emerging strategic technology trends to help firms make informed decisions about technology investments. There seems to be little academic literature that attempts to apply these ideas to real-world firms and analyse their effects. This project is a research-based examination of Total Experience (TX), a trend identified by Gartner in 2022. The TX trend emphasizes the importance of providing a seamless, holistic experience for customers across all touchpoints, including digital, physical, and emotional. The objective of this research is to understand how a streaming service can apply TX to real-world applications, and identifying the opportunities associated with its implementation.

The project adopts a case-study approach, assessing how successful three video streaming service companies, namely Netflix, Amazon Prime Video APV and Disney+, have been at implementing TX and whether the strategy is worth pursuing. Overall, the case study approach provides insights into the practical application of TX within this industry, contributing to a broader understanding of the overall experience that both consumers and employees have with a company in the era of digitisation.

Declaration of Originality

In signing this declaration, you are conforming, in writing, that the submitted work is entirely your own original work, except where clearly attributed otherwise, and that it has not been submitted partly or wholly for any other educational award. I hereby declare that:

- this is all my own work unless clearly indicated otherwise, with full and proper accreditation;
- with respect to my own work: none of it has been submitted at any educational institution in any way to an educational award;
- with respect to another's work: all text, diagrams, code, or ideas, whether verbatim, paraphrased or otherwise modified and adapted, have been duly attributed to the source in a scholarly manner, whether from books, papers, lecture notes or any other student's work, whether published or unpublished, electronically or in print.

Signed: Abbie Delaney

Date: 24/04/2023

1 Introduction

Gartner introduced the concept of Total Experience (TX), a comprehensive business strategy that takes a holistic approach that goes beyond just focusing on user experience (UX) and also incorporates customer experience (CX), employee experience (EX) and multi-experience (MX). TX considers all the touchpoints of a stakeholder's journey, and aims to provide a seamless and consistent experience across all interactions.

The objective of this paper is to evaluate whether pursuing TX is a worthwhile investment for businesses. Specifically, this study aims to examine the impact of UX, CX, EX, and MX on overall stakeholder satisfaction and loyalty and whether these contribute towards a firm's competitive advantage. The research seeks to unveil the significance each experience has in improving the overall perception of a business.

The study will use a qualitative case-study approach. Video streaming services have become an integral part of modern entertainment, providing users with access to an extensive range of content on-demand. The industry has grown significantly over the past decade, with multiple players now competing for market share. Because of this, three video streaming companies were chosen for the analysis; Netflix, Amazon Prime Video (APV) and Disney+. This paper explores the role of UX in enhancing user engagement and satisfaction, CX in building customer loyalty and retention, EX in promoting employee motivation and productivity, and MX in providing a seamless and flexible experience across all channels.

The findings of this study will provide insights into the effectiveness of pursuing a TX approach. By examining the impact of each experience on a business's overall brand perception, this research seeks to identify best practices that can be applied to other industries.

2 Background

In recent years, the media and entertainment industries have undergone significant changes, driven by the rise of digital technologies and changing consumer behaviors (Li et al., 2013). Consumers are shifting towards the era of "post-network" television (Spilker & Colbjørnsen, 2020), which Lotz describes as being a time where viewers now have the opportunity to choose from a wide variety of options and decide what, when, and where they want to watch their desired content (Lotz, 2014). Traditional TV viewing, a model of advertised supported, weekly distributed content (Tefertiller & Sheehan, 2019), has been disrupted by the emergence of "Internet Television", also known as Over-the-Top (OTT) platforms, which offer the user a flexible and more personable experience (Burroughs, 2019).

Video streaming services provide users access to TV shows, films, and documentaries of all genres in multiple different languages (Lotz, 2021). These platforms extend beyond traditional TV offerings, satisfying users who demand a more diverse entertainment experience.

In 2017, Raine reported that in the US more than 60% of content consumed by 18-29 year olds is via an online video streaming platform (Raine, 2017). Due to Covid-19, these figures were even more significantly impacted as people were confined to their homes and actively sought out alternative entertainment options (Martínez-Sánchez et al., 2021). In 2020, a survey of individuals aged between 18-55 years old revealed that 71.4% of those involved had increased their OTT content consumption (Lemenager et al., 2021). This adjustment towards internet based content viewing is expected to evolve over the coming years, as users continue to seek convenience above all (Lotz, 2019).

Recognising the exponential growth rates of the video streaming service industry, it is important to understand the evolving consumer behaviors and preferences, as well as the technological advancements and market trends that are driving this growth. For this reason, a practical application of TX is conducted to analyse its implementation in three prominent streaming service companies, namely Netflix, Amazon Prime Video (APV), and Disney+.

3 Research Approach

To investigate TX within the video streaming industry, a case study approach was pursued. Table 1 and Table 2 present a framework for analysing the four components of (X: user experience (UX), employee experience (EX), customer experience (CX), and multi-experience (MX) This framework was developed based on a systematic review of academic literature, including empirical research, related to these experiences in a business context. The framework incorporates three key categories - what, why and how? - that are relevant to understanding and improving TX in a business context.

By applying this framework to the analysis of TX, businesses can gain an understanding of the various factors that contribute to positive experiences for all of their stakeholders. This can inform the development of innovative products and services, as well as broader business strategies aimed at improving overall satisfaction and engagement.

The framework has been applied to a case study analysis of a three prominent video streaming service companies. This is in an effort to demonstrate its practical application and value in a real-world setting. The case study involved a detailed analysis of the business's existing UX, CX, EX, and TX practices, using the framework as a guide.

Table 1: The What, Why and How of UX and CX

	UX	CX
What?	Holistic approach that encapsulates usability functionality and emotional perception of a product from a user's perspective (Allam & Dahlan, 2013), (Sward & Macarthur, 2007)	Service received, experience and the outcome, indirect or direct contact with a company. Gap between customer expectations and experiences closed. (Batra, 2017), (Johnston & Kong, 2011), (Meyer & Schwager, 2007)
Why?	Continuous commercial success. Improve customer loyalty. Long-term customer relationship and retention leads to competitive advantage. (Nøis, 2021), (Kujala et al., 2011), (Sward & Macarthur, 2007)	Increased customer satisfaction leads to customer loyalty. Win allegiance of customer if the market is crowded which enhances financial performance. (Batra, 2017), (Meyer & Schwager, 2007)
How?	Look beyond a consumer as a 'user'. Assign UX product owner. Measuring and evaluating UX. (May, 2012), (Budwig et al., 2009), (Jordan, 2000)	Experienced-based design process. Establish Customer Experience Management. Use smart cognitive technologies e.g KPI. (Mele & Russo-Spena, 2022), (Klink et al., 2020), (Bate & Robert, 2007), (Johnston & Kong, 2011)

Table 2: The What, Why and How of EX and MX

	EX	MX
What?	<p>Employee perspective: Holistic perception of relationship with their employer and associated experiences.</p> <p>Firm: HR practices strategically focused on engagement.</p> <p>(Gheidar & ShamiZanjani, 2020), (Albrecht et al., 2015)</p>	<p>User's interaction across a variety of different devices and/or cross-device computing using a combination of interaction modalities e.g. speech, gesture, writing.</p> <p>(Gnewuch et al., 2022), (Jaimes & Sebe, 2007), (Liu et al., 2019)</p>
Why?	<p>Engaged employees leads higher productivity.</p> <p>Higher productivity leads competitive advantage and higher financial returns.</p> <p>(Sage People, 2018), (Albrecht et al., 2015)</p>	<p>Platform to better meet user's needs and preferences.</p> <p>Increase task efficiency.</p> <p>Enhanced error avoidance.</p> <p>Positive attitude towards the system.</p> <p>(Gnewuch et al., 2022), (Jaimes & Sebe, 2007), (Rzepka et al., 2020)</p>
How?	<p>People Data Analytics.</p> <p>Social Collaboration Tools.</p> <p>(Vom Brocke et al., 2018), (Morgan, 2017), (Albrecht et al., 2015)</p>	<p>Use of multiple modalities or channels: (i.e, user ability and device capability).</p> <p>Machines capable of sensing humans emotional state.</p> <p>Open Agent Architecture/ Adaptive Agent Architecture.</p> <p>Voice Assistants (VA's). Providing tools for gesture based input.</p> <p>Facial Expression Recognition.</p> <p>(Gnewuch et al., 2022), (Liu et al., 2019), (Jaimes & Sebe, 2007)</p>

3.1 Total Experience (TX)

Total Experience (TX) is a business strategy that encompasses four disciplines, i.e., experiences (X), where an experience is considered to be

"an individual's stream of perceptions, interpretations of those perceptions, and resulting emotions during an encounter with a system" (Roto et al., 2011)

Using technological integration, TX facilitates an improved interaction with both the product and/or service for all stakeholders involved with a business, affecting consumers to employees. When implemented effectively, each element that TX comprises of can yield competitive advantage for the firm.

Each X is a core principle that affects some stage in the lifecycle of a good/service, spanning from inception through to customer interaction. X's are not interchangeable but can interact with each other which, when implemented efficiently, can cause a positive chain of events.

3.2 User Experience (UX)

Popularised in the 1990's, User Experience (UX) is found to be an ambiguous topic with varying definitions. There is a clear division in its meaning. A portion of research papers consider UX to refer strictly to the product's design and architecture, including aesthetics and its usability and all other qualities considered essential in product development e.g., (Nielsen, 1993), (Brumitt et al., 2000) and (May, 2012). However, its definition has evolved over the years with many academics arriving to a consensus that UX is a holistic approach to product development, spanning from human-computer interaction to the incorporation of psychological practices such as hedonic responses e.g., (Mahlke, 2007), (Bevan, 2009) and (Allam & Dahlan, 2013)

Acknowledging UX's multidimensional and dynamic nature, due to the changing emotional state of humans and the premise that past experiences influence future ones, this report adopts a definition suggested by (Kujala et al., 2011), which extends the earliest definitions beyond basic usability to also encompass *"enjoyability"*, a factor that can influence a consumer's opinions and behaviours towards the product. UX is not simply the way in which an individual interacts with a product, it incorporates the emotional side of the interaction, an idea echoed by Jordan, 2000, who created a framework dividing UX into functionality, usability and pleasure. This definition does not dilute the importance of a product's development and design. Instead, it attempts to emphasise the significance of human behaviours and judgement of the design and how these may influence a user's overall attitude towards the product.

Successful execution of a well-founded UX strategy contributes to a business' success through multiple channels. A user's relationship towards a product is indisputably the most important factor in a business. It is what yields profit. All business

strategies are aimed towards constantly questioning and improving this relationship. Innovative and efficient UX is vital for the company to pursue to exploit long-term positive relationships with customers which leads to customer loyalty and in turn continuous commercial success (Kujala et al., 2011). UX is also considered to be a pillar in obtaining competitive advantage, which is a crucial element to succeeding in an oversaturated market with scarce resources (Sward & Macarthur, 2007). As illustrated by Nintendo's uprising vs. Sega in the early 1980's to the late 1990's, their adoption of modern technologies such as the enhanced chip, the Super FX, a specially made RISC processor designed specifically for certain Nintendo video game cartridges, can be attributed to improving the UX, satisfying the consumer's technical needs, creating loyalty and advancing Nintendo in what is known as the first console war (Nøis, 2021).

Feedback from the consumers themselves is essential in facilitating effective UX integration, due to ever-changing and unpredictable human emotions. There have been a number of studies to address the question of how UX is measured and how to observe emotional patterns of humans throughout the different stages of product interaction. Metrics used to examine UX patterns include the Usability Scale (SUS), Customer Satisfaction Score (CSAT) and Net Promoter Score (NPS) (Feng & Wei, 2019). Using a self-formulated UX Curve which evaluates long-term UX experience, Kujala et al., 2011 undertook a study of analysing UX over an average period of 9 months when interacting with mobile phones. It was completed over a period of time to analyse pattern differences between the initial interaction to the user's overall experience. They concluded that experience improved over time in relation to ease of use, degree of use and utility. However, and concerningly, they revealed a pattern of dissatisfaction in general UX and attractiveness of the mobile phones as time passed. This survey is imperative in recognising human behavioural patterns and assists in identifying where companies need to invest in improvements to UX.

There are a number of methods a company can pursue to ensure an effective UX strategy:

1. UX encourages developers to look beyond consumers as mere 'users' who are a necessary cog in the company's system (Jordan, 2000). Humanising a user can contribute to product development that is people-centric, that encapsulates all aspects of UX including functionality, usability and enjoyability, satisfying all needs of the consumer, contributing to a company's success.
2. Assigning a UX product owner eases the process of cross-team communication and improves coordination of deliverables (Budwig et al., 2009). This is a managerial decision which allows for greater company organisation and understanding of relationships across channels, ensuring all stages of design and development are tackled e.g. wireframing and prototyping (May, 2012).

3. Once the product is on the market, measuring and evaluating existing UX 'levels' of current products and performing an organisation assessment to gauge the company's capabilities to market performance (Sward & Macarthur, 2007), (Roto et al., 2011).

3.3 Customer Experience (CX)

Coined in 1998, Customer Experience (CX) refers to a consumer's interactions with every aspect of a business. When the term was initially coined, it was only associated with customer satisfaction and loyalty and its definition was a topic of contention, often disputed whether CX is a topic to be restricted to specific industries, for example the entertainment industry, as opposed to encompassing all goods/services (Johnston & Kong, 2011). There was no isolation of CX as its own strategy, often being coupled with the measurement of the quality of a service. However, more recently a consensus seems to have formed and CX has been established as an individual concept. Klink et al., 2020, define it as a 'customer's sensorial, emotional, cognitive, behavioural and social responses to a firm's offerings during the customer's entire purchase journey', differentiated from UX due to its larger scope.

CX is not restricted solely to the product. Unlike UX, it includes consumers' relations with a company, either indirect (e.g., through word of mouth by other consumers) or direct (e.g. purchasing of a product from a salesperson), pre-sale or post-sale (Meyer & Schwager, 2007), (Batra, 2017). It attempts to bridge the gap between consumer expectations and their experiences. Historically discarded due to its insignificance as a feature of a business strategy, which can potentially be attributed to lack of clarity in its definitions (Meyer & Schwager, 2007), CX has been catapulted from a 'mere consultants hype' (Palmer, 2010) to establishing itself as central aspect within firms' strategies (Verhoef et al., 2009), (Klink et al., 2020). CX encourages greater adoption of people-centric firms, adapting to the behaviours of customers rather than the other way around.

There are several reasons for this rise in popularity, the most notable being that it is the era of digital disruption (Batra, 2017). Not only is this advantageous to the company, allowing them greater access to tools and analytics that create opportunities to enhance its CX but also, and arguably, more so, for the consumer. Mele Russo-Spena, 2022, believe that it is smart technologies (e.g. Internet of things, machine learning and artificial intelligence) that have resulted from the technology evolution that can enhance a company's ability to implement an effective CX. Consumers have increased and easier access to information, making them more knowledgeable and therefore influencing their expectations of a firm and its abilities. To develop a boastful CX strategy, and keep up with increasingly complex consumer demands, organisations must be willing to exploit

these technologies.

The goal of CX is to conjure up long-term customer loyalty and retention (Lemon & Verhoef, 2016), (Batra, 2017). At its core CX is a relationship strategy, it is people-centric. In a crowded and ever-evolving market, innovation is what distinguishes one firm from another. Developing a distinctive strategy and experience that creates value for a consumer, focused around their needs and behaviours, is imperative to a company's success. A positive CX influences customer's physical expectations and psychological perceptions of the organisation and their products (Bouwer, 2022). Loyal customers tend to purchase more, leading to sustainable growth (Magee, 2016). Choosing to ignore CX, or investing little into it, may cause a company to experience a rapid decline in economic value because they will lose the allegiance of consumers.

Assessing the consumers' opinions and attitudes are essential to improving a firm's CX. A number of marketing-based metrics exist that reveal a company's CX performance such as, Net Promoter Score, a survey software, Customer Sentiment Index, measures the degree of a consumer's attitude towards the firm and Customer Effort Score which measures how much effort is required by a consumer to complete a transaction (Bouwer, 2022). However, to best evaluate CX, the consumer's journey must be viewed as three separate occurrences, pre-purchase, purchase and postpurchase (Lemon & Verhoef, 2016), (Meyer & Schwager, 2007), (Palmer, 2010), (Wedel et al., 2020). By doing so, the data obtained will be its most accurate. CX does not spawn from the moment a product has been bought, it is a continuous process, beginning from the first interaction with a firm and every interaction thereafter. CX may be experienced by an individual who has not made a purchase from a firm, but has interacted with a support team, seen an advertisement, or read a post on social media. To ensure all aspects are enhanced, an organisation must not overlook any event of the CX timeline.

Outlined below are suggestions on how to integrate a successful CX strategy into a company:

1. Pursue an interactive experience-based design process (Bate & Robert, 2007). This unusual method involves consumers at every stage of the design process, from inception to implementation. Although this method can be viewed as a product-focused approach, from a CX point of view it improves trustworthiness between consumers and the firm. If implemented correctly, a positive relationship can form, leading to greater customer loyalty.
2. Establish a Customer Experience Management (CXM) team. This team provides organisation and structure to CX, which is reliant on different functional groups. Its responsibilities include 'designing, prioritising, monitoring and proactively adapting customer experiences' (Homburg et al., 2017). CXM has been found to improve financial performance (Klink et al., 2020).

3. Utilise smart cognitive technologies and exploit analytics to gain a greater insight into consumer behaviours (Mele & Russo-Spena, 2022). Through the collection of data via these types of technologies e.g, conversational agents, apps and machine learning, firms can gather insightful statistics about consumer interactions which can be utilised in predicting patterns to identify potential future opportunities and facilitate informed decision making e.g. using a Key Performance Indicator (KPI).

3.4 Employee Experience (EX)

Employee experience (EX) can be divided into two separate definitions, one from the perspective of the employee the other from the organisation. Borrowing aspects of CX, an employee's definition of EX may be:

"a comprehensive and holistic perception from his/her understanding of direct and indirect interactions with the organisation's touchpoints, which begins before the employee enters the organisation and lasts for life" (Gheidar & ShamiZanjani, 2020).

EX can be measured from the moment a prospective employee views a job posting until the contract's termination. For an employee, working in a company can be divided into 3 sections; an employee's meaning of work, interactions within the workplace and responses to practices (Syahchari et al., 2021). The organisation views EX as the practices and facilities designed and created for the employees, Morgan, 2017, summarising it as *"what the organisation believes the employee reality should be like"*.

It is now regarded as being an indispensable feature to be integrated into Human Resource Management (HRM) systems which seem to be shifting away from tangible benefits e.g. free lunches or ping pong tables, a method that makes the organisation look better from an outside perspective but has not been proven to engage employees or maintain/increase retention (Plaskoff, 2017).

It has been identified that there exists a disconnect between employer and employee (Sage People, 2018), whereby a shift in organisational priorities towards focusing on people, as a result of the War for Talent, combats this, encouraging consistent employee engagement across three environments technological, physical and cultural (Morgan, 2017). An empowered and engaged workforce in a collaborative environment is proven to be more productive (Plaskoff, 2017). Individuals are more willing to voice ideas, suggestions, and concerns, which yields competitive advantage (Albrecht et al., 2015).

Using statistics from a survey completed by Sage People, EX will be examined using the above mentioned environments (technology, physical and cultural). The survey revealed worrying insights about employee's perception of the workplace across several companies of all sizes. 50% of those surveyed believe that HR needs to increase

the value it provides to employees through improved communication and obtaining feedback, with 34% agreeing the method to do this is by obtaining data to inform decisions, utilising technology as a means of measuring these experiences. Applying surveying techniques and obtaining data from all three stages in EX, pre-employment, employment and post-employment (Plaskoff, 2017), may reveal all necessary information to a firm to form people-centric strategies that increase attractiveness of the firm externally and productivity internally.

Below are suggestions on how best to implement an effective EX strategy:

1. Establish a "People Data Analytics" team separate from HR. Considered a foundation of EX responsibilities would include organising and standardising data related to the firm's employees and identifying touchpoints of EX (Morgan, 2017). It gives firms the insight to make people-centric decisions and encourages experimentation, which if applied correctly results in more motivated staff.
2. Adopting Consumer Grade technologies and Social Collaboration (SC) tools such as instant messengers, e.g. Telegram, and group collaboration tools e.g. Microsoft Sharepoint. These tools have multiple benefits including greater accessibility to knowledge, encouraging teamwork and collaboration and facilitating faster decision making, all of which positively impact EX (Morgan, 2017), (Vom Brocke et al., 2018).

3.5 Multi-Experience (MX)

A new term which addresses a user's entire journey with an application across multiple devices and/or cross-device computing, e.g., smartphones, smart speakers, and the various modalities that can be used, e.g. gesture, speech (Gnewuch et al., 2022), Multi-Experience (MX) has been identified as a key digital strategy to be implemented by businesses looking to advance themselves within the tech industry and increase consumer engagement (Gartner, 2019).

Historically, human computer interaction (HCI) had been restricted to uni modal interactions, e.g., a single mouse-based interaction (Turk, 2014), but as the IT sector experiences exponential growth rates, Deloitte forecasts a growth in the digital health market alone of \$1.289 trillion over the next ten years (Silverglate, 2022), advancements in HCI continue to evolve. Two such advancements are the enablement of multimodal delivery, through developments made in language processing, eye tracking, gaze detection and brain-computer interaction virtual reality e.g., (Rzepka et al., 2020), (Liu et al., 2019) and (Leeb et al., 2013), and multi/cross-device delivery.

Multimodal interaction refers to a system that uses a combination of different modalities, e.g., a smartphone-only application that is restricted to supporting keyboard-/type input and visual output would not be considered MX (Gnewuch et al., 2022)

because this example does not involve any cross device and/or modality use. It has been suggested that consumers form opinions and base purchasing decisions considering all of their senses, not just sight (Jaimes & Sebe, 2007), (Krishna, 2012 as cited in Liu et al., 2019). Therefore, for a firm to expect to access new consumer channels, satisfy their growing demands, and strengthen these relationships, they must be willing to exploit these other senses, primarily touch, and integrate multimodal interaction into appropriate aspects of their business.

Multi device interaction is a form of continuity across an unconstrained number of systems which can be simultaneous or sequential. An activity begins on one device and has the ability to continue seamlessly onto another regardless of differences in the systems' size or processing power (Raptis et al., 2016). For example, Sky Go, a streaming television service, contains a feature which allows a user to stop watching a programme on one device and continue watching the same programme from the same timestamp as was left at, on a different device. However, this can oftentimes be restricted to within a manufacturer's environment, e.g. between Apple devices (Gnewuch et al., 2022).

MX combines both of these concepts, attempting to change the way in which a consumer interacts with a system and simplify their experience, e.g., Enterprise Resource Planning systems which combine PC usage and mobile applications with speech interaction and mouse and keyboard input (Gnewuch et al., 2022). Although technically challenging to design, due to the complex nature of developing systems which are efficient in both multi modularity and cross-device interaction, MX has been found to have multiple benefits for both the consumer and the firm such as; the enhancement of error avoidance and resolution, high level of adaptability in dynamic technological environments (Turk, 2014), increasing task efficiency (Gnewuch et al., 2022) and the formation of a positive attitude, from a consumer's perspective, towards a system (Rzepka et al., 2020).

How a company can begin MX integration:

1. Develop systems that are capable of recognising and responding to human emotions. This can be achieved through voice assistants that portray an emotive tone of speech, rather than the traditional monotone version, for example. Emotions may reveal insight about consumer purchasing behaviour. Systems that have this ability will be perceived by consumers as more trustworthy, strengthening the company-consumer relationship (Picard, 1997 as cited by James Sebe, 2007).
2. Adopting Open-Agent and Adaptive Agent architecture. These softwares provide a framework to facilitate the implementation of multimodal system processing (Jaimes & Sebe, 2007).

4 Case Study 1: Netflix

Beginning as a DVD-by-mail service in the US in the late 1990's Netflix identified the convenience, and lack of, online video streaming services, also known as "Internet Television" (Gomez-Uribe & Hunt, 2015). It disrupted the marketplace, elbowing at its well-established competitors, namely Blockbuster, which was during this period the market leader of the industry. By the mid 2000's, it had emerged as the leading Over-the-Top (OTT), a platform that provides media to users over the internet, subscriber based video streaming service by the mid 2000's. Unfortunately for Netflix, although it had managed to outperform Blockbuster, many new video streaming service competitors began to surface, such as Amazon Unbox (which was later renamed Prime) and Paramount Plus, attributed to a global increase in a desire for at-home entertainment. In response to this, Netflix needed to isolate itself from the growing number of market intruders, creating a distinctive brand that had the ability to maintain its large pool of existing consumers while simultaneously generating new revenue streams.

As of Q3 in 2022, Netflix boasts a subscriber count of 223 million (Ruby, 2022). Netflix's success in warding off its competitors and maintaining its boastful market leader position is gradually being undermined. Covid-19 caused a rapid increase in popularity of these streaming services. In 2020, the BBC found that 12 million people subscribed to a service they hadn't previously and that viewing figures increased by 71% on these platforms compared to the previous year (BBC.com, 2020).

This exponential rise in demand and growing number of competitors poses a threat. Nonetheless, Netflix has demonstrated its capacity to adapt and modify strategies that prioritise the satisfaction of both its customers and employees, which has contributed to its success over the last two decades.

4.1 User Experience (UX)

Netflix have implemented a number of features into its application with the intention of strengthening its consumer's overall UX. The most significant feature of Netflix's design, of which the majority of its success can be attributed to, is its recommender system for user preferences. In the case of Netflix, a recommendation algorithm, defined as being a tool *"that internet platforms use to identify and recommend content, products, and services that may be of interest to their users"* (Singh, 2020 as cited in Khoo, 2022), is implemented to quash the intimidation posed by having the availability of thousands of films and tv shows at a user's fingertips.

Employing big data and machine learning, Netflix have constructed an algorithm that differs from a more traditional recommender algorithm, veering away from relying solely on star ratings given by users (Gomez-Uribe & Hunt, 2015). Instead, it combines

two types of filtering, collaborative and content based, providing a more accurate result than some of its competitors (Hong & Kim, 2016). Collaborative filtering utilises data from other users with similar preferences Singh 2020, as cited in (Khoo, 2022), (Maddodi & Krishna Prasad, 2019). It is a favourable method to pursue because it requires a minimal amount of information on the current user to provide recommendations, it is formulated around the idea that ‘people who have agreed in the past will agree in the future’ (Agner et al., 2020). Content-based refers to a user’s own history including knowledge of what they watch, when they watch and how they watch (e.g., the device used) (Pajkovic, 2022).

Using an enhanced recommendation algorithm (the combination of collaborative and content based) means that both the firm and the user benefit. Netflix have the ability to gather meaningful data about its consumers. This can reveal information that can lend itself towards Netflix’s growth strategies such as which genres Netflix should focus its media production towards based on user popularity. Most importantly, it affects a user’s experience. It offers users the opportunity to discover new content and helps with lessening the impact of choice overload. The coherency in the display of these recommendations eases the process of choice for a user, which reflects positively on the UX, considering that it has been found that 80% of hours streamed on Netflix is directly correlated with the recommendation system, the remaining 20% comes from search (Lad et al., 2020), (Hong & Kim, 2016), (Gomez-Uribe & Hunt, 2015).

Extending beyond the recommender system, when compared to its direct competitors, Netflix ranks highly with regards to UX. Lad et al., 2020 conducted a study across several different categories including subscriber count, user preference and revenue, contrasting Netflix and Amazon Prime. Although Amazon Prime Video (APV) surpassed Netflix in greater availability of Hindu movies and subscription cost, Netflix dominated UX, with 77% of those surveyed preferring the platform’s UX over Amazon Prime’s (Lad et al., 2020). Netflix provides a multitude of features with the specific intention of strengthening its UX, some of which are yet to have been implemented and/or imitated by its competitors, for example trailer snippets which has not been prioritised by APV and Disney+. This feature has been acknowledged by users as having a significant impact on the overall experience (Lad et al., 2020).

UX is the foundation of any online video streaming service. In a saturated marketplace, if a firm cannot capture and maintain the attention of its intended audience it will quickly find itself being swallowed by innovative and responsive firms that surround them. As a result of Netflix adopting modern and powerful technologies, it has created and implemented a number of different features, most significantly its recommendation algorithm that is personalised for each user, which influences the enjoyability of the platform. Specific to the algorithm, the greater and more tailored the recommendations are, the more likely a user will be to interact with Netflix.

4.2 Customer Experience (CX)

In a saturated market like that of video streaming services, the focus of a business is to outperform its competitors through gaining and retaining customers (Mier & Kohli, 2021). Netflix's ex-Vice VP, Gibson Biddle, has admitted to a "customer obsession" approach, where CX strategies revolve around the prediction of unanticipated consumer behaviour and their wants and needs through research techniques (Kapooria & Karnik, 2019). Every Netflix employee, regardless of their job title, is tasked with not only completing their pre-defined duties but also investing a portion of their time into the customer experience, through the generation of ideas (Mier & Kohli, 2021). This emphasises the importance the company places on CX.

Consumers that are satisfied with a product and "feel cared for" by a brand are more inclined to repurchase from that brand (Tarmidi & Irgandi, 2022). In Q1 of April 2021, Netflix's market share had dropped by 14.6% (Shaw, 2021). This can be attributed to an increase in competitors. It is therefore imperative that Netflix secures a loyal consumer base to assert itself as market leader. Throughout Netflix's presence as a video streaming service it has received both positive and negative reactions to strategies implemented, all of which have an effect on its CX, and therefore consumer loyalty. Two such examples are its brand image over time and its usage of consumer intelligence.

It has been found that, in relation to Netflix, brand image has a significant effect on customer satisfaction and that a correlation exists between positive brand experience and high loyalty (Kurniati et al., 2021), (Amoroso et al., 2021). As an example of a blunder made by Netflix, Fornell et al., 2016 conducted an analysis of the relationship between stock price and customer satisfaction. Utilising the American Customer Satisfaction Index (ACSI), a method which employs a latent variable structural equation model to reveal a brand's true consumer satisfaction rate, it was revealed that Netflix's decision to increase subscription costs in 2011 shattered its ACSI score which in turn led to a collapse in its stock price. This is a reflection of the influence that consumer satisfaction holds over a company's reputation. Although pricing strategies are controllable variables by Netflix, a concept that has been coined electronic-word of mouth (EWOM) is slowly asserting itself as an uncontrollable marketing aspect of a business that has a significant impact on Netflix's brand trust and image (Stefanny et al., 2022).

In this digital consumer era, online social media platforms have become a major influence over both purchasing intentions and decisions. EWOM can either be a detriment or strategic tool used by companies. In Netflix's case, it has an active presence across four social media platforms that offer potential and existing customers the opportunity to view and express opinions about a product. This technique is used

by Netflix to be able to gather first-hand information about consumer behaviour that can quickly be implemented into the business (Sabrina et al., 2022). Although there are benefits to using tools like EWOM to gather consumer feedback, any negative information is also recorded, which can increase unwanted traffic to Netflix's page (Tobon & García-Madariaga, 2021). For example, in 2019, Netflix's Facebook page was saturated with negative comments (Hendrikx & Castro, 2022) which may contribute to damaging the brand's reputation in the short run.

Netflix pioneered the customer obsession and direct relationship strategy (Smith, 2017). Integrated throughout their business ethos is the importance of CX, demonstrated by its requirement of every staff member devoting some of their time to exploring how to improve the experience. Also, through the collection and analysis of consumer and social data, the company has afforded itself the ability to engage in adapting unpopular business decisions and predicting future behaviours of their consumer base. Netflix has cemented itself as a company that prioritises its consumers wants and needs, a vital approach to succeed in this competitive market.

4.3 Employee Experience (EX)

To remain competitive within the marketplace, Netflix must constantly be innovating the way in which individuals think about and watch media content. The root of the solution to consistent innovation is through Netflix's employees. The ex-CEO of the company, Reed Hastings, realised that company culture is the only aspect of Netflix's competitive advantage that he has complete control over (Putter, 2018). Without motivated and talented employees who have a willingness to contribute towards growing Netflix's success, the company would struggle to preserve its dominance in the market caused by a stagnancy in their service. In response to this, Netflix have pursued unconventional people management strategies that have positively impacted its EX, advancing itself within the saturated market.

Netflix has been acknowledged globally for implementing esteemed HR policies, termed the 'Netflix Way', that contribute towards an environment that stimulates ideas and creativity and diminishes stress. Managers adopt a laissez-faire, or a 'no rules', approach that rewards individuals who seek responsibility and embrace challenges (Stein et al., 2021). Supervisors are encouraged to make few decisions, placing an emphasis on delegation. Employees are supported in undertaking impactful tasks with the goal of contributing towards Netflix's legacy (Mier & Kohli, 2021). Highlighting the idea of working to solve problems instils motivation in employees, they have a purpose to work (Xu, 2021). This empowerment of employees, entrusting them with sole responsibility in the decision making process regardless of position in the chain of command, is appreciated by employees. A group of whom were interviewed by *The*

Wall Street Journal rated Netflix's company culture above their previous employers (Ramachandran & Flint, 2018).

Hand-in-hand with the laissez-faire attitude is a culture of openness and honesty. Throughout every interaction in Netflix's workplace the culture is evident. Formal annual employee appraisals have been abandoned, being viewed as too infrequent. Instead, consistent conversation and feedback is encouraged between managers and their staff. In this way employees are aware of the expectations of them all year round and improvements in their performance can gradually occur rather than peak post appraisal interview, securing impressive production results (McCord, 2014).

Controversially, the transparency surrounding the topic of firing Netflix employees is also encapsulated within the openness of conversation between parties, McCord, 2014, viewing it as *"be honest, and treat people like adults"*. Using a method called a "keeper test" if managers consider themselves unwilling to fight for an employee, due to a decrease in quality of output, then the resolution is to fire them, ensuring only the top tier candidates persist. Ramachandran and Flint, 2018, found that employees view this test as a *"guise for ordinary workplace politics"*. There is an anxiety that surrounds their work, threatened by being fired at any point (Putter, 2018). Netflix justifies its choices because of its company ethos that embraces "talent density", decreasing staffing numbers, and hiring few but very skilled employees (Mier & Kohli, 2021). This practice can be viewed as a chink in Netflix's EX armour. Although it secures impressive performance results, which is beneficial for the company, staff live in fear of being fired on the spot.

Employees at Netflix are the beneficiaries of a boastful skillset. The conditions in the workplace which embrace calculated risks, incentivises brainstorming and rewards the brave results in highly motivated, confident and engaged staff. Although there are improvements that should be considered by the company which may be more conventional, such as rejecting its keepers test and adopting a step by step approach to the firing of staff, overall Netflix is successful in the handling of its employees, identifying what energises them and putting in place policies to align with their goals.

4.4 Multi-Experience (MX)

Netflix is available on several devices including laptops, smartphones, smart TV's and gaming consoles, offering users the ability to watch from whichever device is most convenient to them at that time. Netflix has been faced with a challenge that did exist when it first began, that of delivering a seamless experience to a user regardless of their device which has become a key differentiator for consumer purchasing decisions when choosing a product (Velloo, 2020).

Rigby et al., 2018, conducted interviews with Netflix users to uncover cross-

device and location viewing habits. They found that the bigger the screen, such as a laptop or a TV, the more popular of a choice it was and that viewing on mobile devices was not only unusual but disliked by the majority, with only 31% of individuals having ever used a handheld device. The survey also revealed that users rarely watched Netflix outside the house, but importantly the cohort of consumers that did view it on, for example, public transport, praised the portability and convenience of smartphone viewing. This study demonstrates the array of consumer demands that have to be addressed by Netflix.

To tackle these growing consumer expectations, Netflix has invested in both cross-platform development and have integrated multi-surface operations into its application. The more platforms Netflix is compatible with, the greater number of consumers can be accessed. The company has evolved from a browser-only service to developing native apps for specific devices such as the Playstation 4 (Shah, 2023). This expansion by Netflix has increased its exposure to potential consumers, such as gamers, while simultaneously enhancing a user's MX as it facilitates switching between devices.

Multi-surface operations refer to Netflix's "Continue Watching" feature or cross-device continuous video display, which uses cloud servers to store the same app content from multiple individual applications (Oh et al., 2019). It enables a user to switch between devices and start watching from the same timestamp that they had left off at. This feature satisfies those individuals surveyed by (Rigby et al., 2018) who seek flexibility and convenience from Netflix as they travel and use different devices.

Although Netflix have successfully invested a wealth of time and resources into progressing its MX, it has yet to commit itself to developing multi-modality features. There exists opportunities for Netflix to delve into this, for example, through the incorporation of a voice assistant into the search feature, like that implemented by Apple TV.

5 Case Study 2: Amazon Prime Video

Amazon Prime Video (APV) is a subscription-based video streaming service launched by the e-commerce giant Amazon in 2006. On establishment, APV already had a vast consumer base and a well-established brand that has allowed it to leverage its resources to contribute to APV's success. Unlike other streaming services, it has been identified that APV's purpose aims to not only provide quality entertainment to its users but also to drive Prime membership accounts, which is Amazon's loyalty program (Sabharwal, 2018, Wayne, 2018).

In recent times, APV's presence in the streaming service industry has been perceived to possess a comparable level of influence as the dominant Netflix (Rahe et al., 2021). APV has emerged as another major competitor within this marketplace, with over 150 million subscribers worldwide as of January 2023 (Subburayan, 2023).

The success of APV can be attributed to various factors, which all encapsulate features of each experience of TX. APV has managed to differentiate itself from its competitors in a saturated market by focusing on the overall experience of its users, also aided by its financial resources and distribution network. The examination of the factors that contribute to the holistic experience of these consumers, which align with the concept of TX, is key to understanding the success of APV.

5.1 User Experience (UX)

Amazon states on their website that the role of their User Experience team is to "*reduce complexity and design fun, easy-to-use apps, where customers love to watch (their) content*" (Amazon.jobs). Similarly to Netflix, APV has implemented a recommender algorithm. Because APV accounts are linked to regular Amazon accounts, the company has pursued an item-based collaborative filtering algorithm, combining data from a user's shopping cart, profile and search history (Hong & Kim, 2016). This data reveals a user's purchasing intention and history which is used to assemble a list of appropriate movies and tv shows that will satisfy the consumer. Unfortunately for Amazon, this recommender system has come under criticism for its inaccuracy.

The algorithm suggests movies that are "safe bets", such as all-time classics or ones that have been rated highly by a large number of people, which may have no correlation with a specific user's interest (Song, 2021). This can lead users to distrust APV's recommendation reliability, which could tempt them to switch to a competitor that offers more accurate results. In a survey conducted by Kodatala and Perla, 2022, when questioned which application gives the best recommendation only 17.2% of respondents voted for APV, overshadowed by Netflix's boastful figure of 48.3%. This is a poor reflection of APV's recommendation algorithm, which is a pillar of UX for

Netflix.

To combat its weak algorithm, APV must invest in other aspects of its application to remain competitive, this has been succeeded through what are known as value-added services (Kour & Chhabria, 2022). One such example of this is its "Watch Party" feature. This is a co-experience viewing tool, allowing subscribers to watch the same content as their friends at the same time as if they are in a room together. Although Netflix offer a similar feature, it requires users to install an extension to their browser. APV's Watch Party is integrated within its application which simplifies its use and requires less effort from users. This feature enhances UX for the user and consumer stickiness for the company (Kour & Chhabria, 2022).

APV also offers Live TV which is an element of video streaming that Netflix is yet to exploit. It has partnered with pay TV companies, such as British Telecom's (BT) and Sky, which were originally threatened by the existence of these online video streaming services out of fear of replacement. APV has instead struck deals with these companies that expand the programs that it can offer to users. Its partnership with Sky has given APV the opportunity to stream live Premier League matches since 2020, removing the necessity of switching between devices to watch a desired match (Song, 2021).

APV should look towards improving its recommender algorithm. As demonstrated by Netflix, an accurate recommendation system is favourable to user's, they demand personalised suggestions to ease the choosing process. Fortunately, the value-added services pursued by APV not only distinguish the company from its closely related rivals, but also enhance the UX for its consumers. Implementing, seemingly unorthodox, methods for advancement of its UX, such as collaborating with pay TV companies, is beneficial to APV and should be continued.

5.2 Customer Experience (CX)

APV is a subsidiary of Amazon, which is known for the "Amazon Effect", offering users everything that they desire in one convenient marketplace (Chakrawarty, 2017), establishing itself as one of the most agile companies that *"connects everyone and everything everywhere all the time"* (Song, 2021). Consumers seek convenience and reliability. Services that provide these tend to attract more loyal customers (Saiprasad & Meenakshi, 2022). Jeff Bezos, Amazon's CEO, summarises their strategy as

"We see our customers as invited guests to a party, and we are the hosts. It's our job every day to make every important aspect of the customer experience a little bit better" Bloomberg.com, 2004.

To ensure that all services offered by Amazon uphold this notion, the company has placed an emphasis on its Customer Relationship Management (CRM) and its

expert customer service, adopting a similar customer obsession strategy as Netflix that prioritises passion for the consumers (Baboolal-Frank, 2021). If a company responds promptly to a customer's complaint or query, customer satisfaction is proven to increase (Masyhuri, 2022). APV has a dedicated line that is active 24/7 which is readily available to solve any inquiries about products. APV is an engagement oriented environment that encourages employees to always be thinking about the consumer and their future wants and needs (Venkatesan, 2017). This strategy results in favourable CX because the consumer feels cared for.

Secondly, as demonstrated by Netflix's failed subscription cost increase, price changes can cause consumer fluctuation. In an attempt to evade this occurrence, APV offers two subscription options available to customers. Bundling is used as a strategy to entice users into its e-commerce platform, selling items together as a package. A user can choose to purchase the higher priced £8.99 a month which includes free Amazon prime delivery, which also qualifies them for "Amazon Prime Day" discounts, or the lower end £5.99 a month subscription which is independent of the delivery service. Pursuing a multi-price strategy has proven a popular decision, with 93% of those interviewed in a survey conducted by Lad et al., 2020, agreeing that Amazon is more cost effective than Netflix, attributed to its value added subscription plan.

Although APV has been successful in attempting to integrate pricing strategies to enhance its CX, there is a separation that it has struggled to define. Some consumers believe that APV is just an addition to Amazon.com and that the linkage of movies and tv shows into the Amazon.com website coaxes customers from watching content to purchasing items (Song, 2021). This type of self-marketing is found to be unfavourable to consumers, where it has been suggested that APV is just a gateway to the e-commerce platform, and vice-versa, and is not solely dedicated to satisfying the consumers entertainment needs (Rahe et al., 2021).

It is difficult as a subsidiary to isolate APV from the parent company, Amazon. Highlighted by some consumers, there seems to be an overemphasis on the e-commerce platform that deters potential consumers. However, in general the pricing strategies implemented by APV are the most significant aspect of their CX that differentiates it from its competitors. This, alongside its commitment to customer service, has reflected positively on its CX.

5.3 Employee Experience (EX)

Due to a lack of academic literature on APV's specific EX, Amazon in its entirety will be examined for the purpose of this report.

A company that is praised for its innovation and customer-centric policies, Amazon's treatment of employees has been described as the "dark side" of its business

model (Boewe & Schulten, 2017). Similar to Netflix, Amazon seek only the most talented and dedicated employees. As a result of this approach, Amazon has been recognised globally as inventors of several revolutionary products and services such as the Kindle, drone delivery and Amazon Prime (Harney, 2023). However, this strategy has also received backlash.

Rather than encouraging an environment of openness and creativity which is received positively by Netflix's employees, Amazon is notorious for overworking and pushing its workers beyond their limits in order to sustain this impressive level of innovation (Maylett & Wride, 2017). *The New York Times* has quoted an Amazon employee who was told "*if you hit a wall, the only solution is to climb the wall*" (Kantor & Streitfeld, 2015), although these references are prone to bias. Described as "purposeful Darwinism" (Maylett & Wride, 2017), it is an industrialisation of survival of the fittest. There have been reports of employees losing their jobs or being punished for taking sick leave that they are legally entitled to (Yu et al., 2022), (Kantor & Streitfeld, 2015)). Weaker employees are not tolerated.

Another issue that plagues Amazon's HRM is the strategy to motivate employees through the discouragement of their coworkers, a policy known as "anytime feedback" (Yu et al., 2022). This yields similarities to Netflix's keeper test, which in itself has received negative feedback, as it attempts to replace the annual employee review (bbc.com, 2015). Instead of it being a managerial review, the critiques come from the employees' peers. "Amazonians", a term for Amazon employees, are pressured into embracing debate and conflict and urged to sabotage each other in order to outperform their coworkers (Maylett & Wride, 2017).

In an attempt to attract top-performing, enthusiastic individuals, Amazon has created "Career Choice", a scholarship program that funds 95% of the cost of certain educational courses, for example in computer-aided design, outside of the US and more recently full tuition fees for US employees (Lang et al., 2012). This scheme supports individuals upskilling, resulting in a greater number of knowledgeable, capable employees.

Although there is a vast amount of criticism surrounding these HR policies and a high staff turnover (Boewe & Schulten, 2017), Amazon will probably never struggle to find willing candidates. This is because of the brand image that the company has built for itself. Its trailblazing attitude will always attract top-quality individuals that seek an innovative working environment. Tien, 2022, found that 70% of candidates would settle for a lower salary in Amazon simply because of its reputation.

Amazon's EX is a poor reflection of its company. There exists a distrust and lack of loyalty between management and employees which is instilled through its lack of compassion for its workers (Maylett & Wride, 2017). This culture is an indication of Amazon's main objective and ambition, profit (Harney, 2023), as it disregard the

significance of maintaining positive relationships with its workers. Because of Amazon's esteemed reputation with regards to its innovation, there is no urgency for an EX restructure for the sole reason of retaining workers.

5.4 Multi-Experience (MX)

One of the key features of APV is its cross-device ability. Similar to Netflix, APV is available across its mobile app, multiple browsers and devices such as mobile phones, gaming consoles and desktops. As consumers increasingly demand MX and convenience, APV's cross-device functionality allows the platform to remain competitive in the market and gain market share. To implement seamless integration across most devices, video streaming services have two options; device-side interaction or a cloud-based approach. In line with the nature of the services offered by Amazon, APV has opted for the cloud-based approach, powered by Amazon Web Services (AWS) (aws.amazon.com, n.d.).

The cloud based approach is a method that facilitates the uniform transmission of interaction data between devices, with all necessary content sent to the cloud for computing and analysis (Huang et al., 2021). It manages requests from multiple devices, transmitting the results to every device involved, enabling the "Continue Watching" feature. Cloud-based integration minimises waiting times between interactions and has improved APV's scalability and operational efficiency (aws.amazon.com, 2018), providing users with a platform that is the "best-in-class linear TV service" (Song, 2021).

To extend its offerings towards multi-modularity, Amazon developed the Fire TV Stick, a remote control device that has voice search functionalities, where users gain access to APV through the HDMI port on a TV. From the time it launched in India in 2016 to the end of 2018, APV members increased by 75% (Sabharwal, 2018). By expanding its offerings to physical assets like the Fire Stick and Fire Cubes, APV not only improves its MX capabilities, which has been proven to be popular with users, it also leverages these devices as a "data point exchange", a place of contact where a user's data is shared, to gather user information and behaviours that inform its business decisions (Klatt, 2022).

APV has managed to adapt to the evolving demands of consumers by integrating both cross-device and multi-modularity into its platform, the pillars of MX. Through the use of its well-established AWS service, Amazon's cross-device functionality provides users with a flexible, reliable system. The diversification into the development of physical products such as the smart TV accessories have allowed for a seamless experience across devices, enabling users to access their favourite content on multiple platforms with ease. Additionally, the incorporation of multi-modularity within the

platform through its 'Fire' range has enabled users to engage with voice search, an aspect which is yet to be exploited by Netflix. Overall, APV's focus on MX has made it a strong competitor in the streaming industry, with a flexible and innovative platform that continues to evolve with the changing needs of its users through its cloud-based approach and expanding range of devices.

6 Case Study 3: Disney+

Disney Group is a multinational entertainment company that offers multiple services and products to its consumers ranging from film and TV show production to theme parks. At the core of the company is storytelling, combining artistry, business and family values. As consumer demands within the entertainment industry shift towards digitalisation, Disney has responded through its streaming service, Disney+ (Korenkova, 2019). Disney+ was launched in late 2019. It garnered 10 million subscribers on its first day (Oler, 2020).

Less than a year after its launch, Disney+ managed to exceed its initial goals, reaching 60 million subscribers within 8 months, a target which had originally been set for 2024 (Vlassis, 2021). This popularity may be attributed to its launch coinciding with the Covid-19 pandemic, a period of time that restricted people to indoor, at-home activities (Martínez-Sánchez et al., 2021), or because of Disney's well-established reputation within the entertainment industry, shaping people's understanding of childhood, community and pleasure (Sandlin & Garlen, 2017).

Disney+ has achieved impressive growth and is worth analysing to gain insight into how a brand can experience such rapid success in a crowded marketplace. As of Q3 2022, Disney+ managed to secure an impressive 174 million subscribers (Subburayan, 2023), surpassing Amazon's subscriber base and becoming the second most popular global streaming service, all of which has been achieved in less than three years. By analysing the TX of Disney+, valuable insights into what makes the platform successful can be gained and why and how other companies can emulate its approach.

6.1 User Experience (UX)

As the newest of the dominant streaming services, Disney+ is under pressure to provide users with comparably impressive recommendations, similar to those offered by Netflix. As discussed, the recommendation algorithm implemented by Netflix is a key feature of the streaming service, and helps enhance UX. Therefore, if Disney+ is to establish itself as a threat to Netflix, designing an accurate and reliable recommender algorithm must be its highest priority.

There is a lack of academic literature that references Disney+'s recommender algorithm. What has been identified is that Disney+ uses several different data points to gather information about users preferences and provide suitable suggestions such as what users have clicked on, the time of day of viewing and interlinking different users viewing histories (Arman & Ahmed, 2022). Similarly to Netflix, Disney+ bases recommendations on the assumption that *"people who have agreed in the past will agree in the future"* (Agner et al., 2020), suggesting a collaborative filtering algorithm.

Speaking to Forbes, the Vice President of data science and analytics at Disney, Laura Evans, revealed that it is not a "one algorithm fits all" type method (Forbes, 2022). Instead, algorithms are adapted depending on the length of time an individual actively uses the app. The more time an individual spends watching content on Disney+, the more behavioural and preference data can be gathered which improves the quality of recommendations, dividing its recommendations into two sections for users; "recommended for you" and "because you watched".

Its traditional integration of collaborative filtering and disregard for content-based, which closely mimics the algorithm implemented by APV, may result in inaccurate recommendations. However, due to the gap in literature about this topic, it is difficult to conclude whether the Disney+ recommendation algorithm has been successful and if it has the potential to undermine Netflix's success.

Disney+'s popularity is largely due to the content it offers subscribers, aided by its brand recognition (Sturgill, 2019). Its global reach has eased its introduction into the marketplace. As of Q1 in 2022, Disney+ had 1,514 titles (Arman & Ahmed, 2022). This content is primarily aimed at children and families, described as an "electronic museum" of much-loved Disney content (Pitre, 2022), although its acquisition of National Geographic expanded it beyond its family friendly brand, tapping into more mature content to satisfy all subscribers (Rato, 2022). Disney's global image has created a positive expectation among users when they see "Disney Original" due to the company's established reputation. In contrast, with other streaming platforms like Netflix, people may not have a clear idea of what to expect from a "Netflix Original" (Soares et al., 2022). The homepage of the app separates each of its key brands into individual icons, such as Pixar and Marvel, demonstrating that although diverse content is important to Disney+ its recognisable brands are at the root of success to the company (Meckel, 2021, Pitre, 2022). According to Khimuray and Panjaitan, 2023, users are inclined to switch from other OTT platforms to Disney+ due to its array of content.

Disney+ benefits from being a subsidiary of Disney Group because there is a pre-existing portfolio of content that has no requirement of extensive licensing (Guo, 2022). This copyright was not only beneficial to Disney during its establishment because it facilitated a smooth entry into a competitive market (Zhou, 2021), it also prevents its competitors from gaining access to popular content. For example, Grey's Anatomy is a TV show that was produced by Disney. Before Disney+ was founded the show was ranked in the top four most watched shows on Netflix. These Disney-owned shows are now exclusively aired on Disney+, which has denied Netflix, and all other streaming services, to potential customer acquisition (Rato, 2022).

As a 'newcomer' to the OTT industry, Disney+ faced a challenge of overcoming existing competitors by offering content that was desired by users. Disney+ benefits from its extensive content library and recognisable brands, which have allowed it to

establish a strong presence in the marketplace amongst both children and adults alike. Additionally, Disney's ownership of popular content has given it a competitive advantage by limiting the access of its competitors to this content, which enhances UX by granting users' access to exclusive Disney titles. While Disney+ uses a collaborative filtering algorithm, similar to APV, to gather information about user preferences and behaviour, there is limited academic literature on its effectiveness and/or ineffectiveness. As Disney+ continues to evolve, it must place an emphasis on its recommender algorithm if it intends on becoming as dominant a platform as Netflix.

6.2 Consumer Experience (CX)

Consumers have confidence in Disney+ due to the company's established reputation for consistently delivering high-quality content (Soares et al., 2022). However, nowadays they have greater choice of streaming services and it is therefore much easier for them to cancel subscriptions and switch platforms (Guo, 2022). Because of this, it is imperative to Disney that it constructs pricing strategies that can maintain consumer stickiness.

Similar to APV, Disney+ offers a bundle option as a pricing strategy to attract more consumers, combining several streaming platforms into one package. Disney Group owns multiple streaming services; Disney+, Hulu and ESPN+ to name a few. These three platforms are each designed to cater to specific audiences. Disney+ is a platform primarily associated with family-friendly content, Hulu is much more adult-oriented content and ESPN+ is tailored towards the sporting market. By bundling these three services together for \$14 a month (X. Chen et al., 2022), Disney+ benefits in two ways, it can engage a wider range of consumers from each target demographic while simultaneously minimising its loss of existing customers (Guo, 2022). Customers benefit because they gain access to a greater variety of content that is tailored to their interests for a discounted price, enhancing CX.

Another pricing strategy used by Disney, which is unique to its platform, is the idea of dismantling traditional theatre viewing by releasing new content exclusively on the platform for a 'premium access' price (Oler, 2020). For example, in 2020 the remake of *Mulan* was announced to be released onto Disney+ at an added cost of \$29.99 on top of a regular subscription (Meckel, 2021). This premium access pricing strategy for the latest and most in demand content creates a sense of exclusivity among consumers. This may lead to greater loyalty and satisfaction from customers as they receive benefits that are unavailable to standard users.

A brand's presence on social media, including the regular updates of its pages, is said to increase consumer loyalty, building relationship equity (Erdoğan et al., 2012). As a result, Disney+, like Netflix and APV, uses social media as a marketing platform, consumer engagement strategy and a form of customer support. Rahe et

al., 2021, compared both Disney+ and APV's approach to social media posts in early 2021. At this time, it was revealed that Disney+'s engagement on these platforms was much higher than APV's, on average receiving 6% more likes from consumers and more comments in general. This was succeeded through focusing on marketing original content through polls, behind-the-scenes clips and teasers of content. This type of engagement is a reflection of the successful relationship that Disney+ is attempting to build with its customers. Alongside this impressive consumer engagement, Disney+ has also leveraged the ability to conduct user sentiment analysis and gather data about general opinions of its content to inform business decisions (Arora, 2022).

Social media has proven itself a key component of many streaming services' marketing and CX strategies. It has helped Disney+ engage with their consumers and facilitated the gathering of consumer feedback. This contributes towards relationship equity for the brand, and the interactiveness creates a personalised experience for the consumer, increasing their satisfaction.

6.3 Employee Experience (EX)

Employees at Disney have described their experience as "working for the mouse" (Dreier, 2020). It encapsulates all that the Disney brand projects to its consumers, that Disney is a place of magic committed to creativity and innovation (thewaltdisney-company.com). Managers of the company put an emphasis on learning the company's missions and values in an attempt to empower employees, motivating them to not simply work but also to be passionate about their roles in the firm (Abou Elnaga & Imran, 2014).

Disney has been celebrated for its educational programs offered to some of its employees, allowing them to upskill (Ryan, 2020). Most notable is its CODE:Rosie program, launched in 2016. This is an opportunity for Disney's female employees to transition from non-technical positions to roles within the technology field through intensive programming courses (Dubois, 2022). The program has been praised for its impact on gender inclusivity and promotion of diversity in the workplace.

A month into the launch of Disney+, it released a TV series entitled "One Day at Disney". The show's intent is to give insight to consumers about the behind-the-scenes work at Disney, each 5-7 minute long episode focusing on a different department, ranging from costume designers to animal managers to research and development managers. Pitre views this production as an extension to Disney's brand strategy. Specifically, the production is seen as a way to instil into its consumers the perception of Disney as an employer, portraying the company as the "happiest place on earth to work". This outlook is consistent with Disney's overall branding, which focuses heavily on the company's image as a purveyor of happiness, dreams and bringing families together

(Evangelista & Wasser, 2021).

Although it is an important topic that may reveal areas of improvement for Disney Group, there is a lack of academic literature about white-collar workers of Disney. For this reason, researching Disney's EX has been challenging, despite extensive efforts. Disney's core value of creativity is at the forefront of working at Disney. Through the use of educational programs, and a strategic TV show, Disney portrays itself to prospective employees as a company that fosters and encourages innovation, traits seen in Netflix's policies which have been praised by its employees.

6.4 Multi-Experience (MX)

Disney+ can be used across multiple devices, a prominent feature also available on Netflix and APV. As listed on the Disney+ website, the streaming service can be viewed on gaming consoles, tablets, mobile phones and smart TV's (help.disneyplus.com). Disney's commitment to making its content accessible to all audiences is a reflection of its MX policy, the more devices/platforms that are compatible with Disney+, the more convenient it is for the consumer.

According to Dittmann, 2022, accessibility is a key aspect of Disney+'s diversification strategy. Disney+ is the first subsidiary of Disney Group to introduce a cross-device feature, enabling its consumers to access content at any time from any location (Dittmann, 2022). It facilitates seamless transitions from a device when a user wants to continue watching on a different one without interruption. As discussed, users are now demanding convenience from streaming services, which has been identified as OTT's best superiority over regular TV services (Y.-N. K. Chen, 2019). This demand has been answered by Disney through its MX capabilities.

To further its cross-device service, Disney+ includes an innovative feature called "Group-Watch", similar to APV's "Watch Party". It is integrated into the platform and allows groups of up to 6 individuals (all of who must be subscribed to the streaming platform) to watch the same content in different locations, on different devices at the exact same run-time (Soares et al., 2022). Again, this is a reflection of Disney's commitment to user engagement and building a sense of community among its consumers, which aligns with the company's ethos.

Disney+, like Netflix, is yet to combine multi-modality into its streaming platform. Although it has partnered with Amazon to be a feature on its Fire TV, therefore benefitting from the Fire Stick voice recognition, it does not offer any Disney-owned multi-modal features. This may be a missed opportunity for Disney+, considering the praise APV has received for its MX features.

Despite valuable insights that may be gained from analysing Disney+'s MX, there is again a lack of academic literature which addresses Disney+'s integration and/or

lack of cross-device and multi-modal features on the platform. For this reason, it is difficult to conclude a definitive evaluation of Disney+'s MX capabilities. Further research is necessary to fully assess the effectiveness of these efforts. Based on the information that is available, it is evident that Disney+ has implemented strategies to enhance the accessibility and convenience of the service, attempting to satisfy the growing demands of users. From its extensive device compatibility to the introduction of innovative features such as Group-Watch, Disney+ has prioritised the platform's flexibility.

Table 3: Summary of UX and CX by company

	UX	CX
Netflix	<p>Collaborative and content based filtering for recommender algorithm. Based on the assumption of "People who have agreed in the past will agree in the future".</p> <p>Trailer snippets.</p> <p>77% prefer Netflix's UX over APV's (Lad et al., 2020).</p>	<p>Customer obsession approach.</p> <p>Active presence on social media.</p> <p>EWOM used to gather consumer behaviour data.</p>
APV	<p>Item-based collaborative filtering for recommender algorithm. Recommends "safe bets".</p> <p>Integrated "Watch Party" feature.</p> <p>Live TV, partnerships with pay TV companies.</p>	<p>24/7 customer support line.</p> <p>Customer obsession approach.</p> <p>Two subscription options, use of bundling with Amazon Prime Delivery.</p> <p>Self-marketing of Amazon.com is unfavourable.</p>
Disney+	<p>Recommender algorithm of "people who have agreed in the past will agree in the future".</p> <p>Algorithms adapted per user.</p> <p>Mostly recognisable family friendly content but it has diversified into more mature brands.</p> <p>Lack of licensing required and denies its competitors rights to its owned content.</p>	<p>Bundle pricing option alongside its other owned streaming services.</p> <p>Exclusive content through premium access pricing.</p> <p>Huge consumer engagement on social media.</p>

Table 4: Summary of EX and MX by company

	EX	MX
Netflix	<p>Laissez-faire environment coined the "Netflix Way".</p> <p>Emphasis on delegation and employee empowerment throughout the decision making process.</p> <p>Replaces annual employee appraisals with the controversial keeper's test.</p>	<p>Available across multiple browsers and devices.</p> <p>Developed Native apps, veering away from a browser-only service.</p> <p>"Continue Watching" feature enables users to switch devices and maintain timestamp.</p> <p>Is yet to introduce multi-modal aspects.</p>
APV	<p>Described as purposeful Darwinism where workers are overworked and pushed beyond limits.</p> <p>Anytime feedback encourages the discouragement of colleagues through criticism and debate.</p> <p>Career Choice funds educational courses for upskilling.</p> <p>Amazon's brand reputation lends itself to attracting top-performing candidates.</p>	<p>Available across multiple browsers and devices.</p> <p>Uses cloud-based approach to facilitate seamless cross-device viewing.</p> <p>Fire TV Stick has voice search functionalities which saw a increase 75% increase in Indian APV members. (Sabharwal, 2018)</p> <p>Fire Cubes allows for data exchange points that contribute to APV's consumer analysis.</p>
Disney+	<p>Based around the ideals of Disney Group.</p> <p>Produces content that is viewable to market Disney as a workplace.</p> <p>Educational programs, e.g., CODE:Rosie, to encourage upskilling and inclusivity in the workplace.</p>	<p>Available across multiple browsers and devices.</p> <p>Integrated Group Watch feature.</p> <p>Is yet to introduce multi-modal aspects.</p>

7 Discussion

The case-study approach used to analyse the TX of three prominent video streaming service companies revealed the significance of each experience in enhancing the perception of a business among all stakeholders involved. All four experiences that comprise TX are equally important, as each contribute toward a firm's competitive advantage. In a saturated market such as this industry, it is imperative for firms to develop strategies that diversify them from their competitors. Netflix, APV and Disney+ have succeeded in doing this, each company employing a unique approach to attract and retain stakeholders.

The findings in the UX category suggest that a double filtered recommendation system can have a significant impact on user engagement and satisfaction. Netflix's use of this system has been a major factor in its success in the industry (Lad et al., 2020). This result aligns with previous studies that emphasise the importance of personalised recommendations in enhancing UX and consumer retention (Hong & Kim, 2016). Furthermore, the study also highlights the importance of content in shaping user perception of a brand. Disney+ has managed to leverage its existing brand recognition to attract a large customer base in a short amount of time. Similarly, despite lower ratings overall in the UX category, according to Lad et al., APV's pursuit of live TV has contributed to its success by offering a unique value proposition compared to competitors. This finding stresses the role of brand image in shaping user preferences and behaviour, and its impact on a company's success.

The study's results emphasise the importance of customer-centric approaches to CX. The approach taken by Netflix and APV, in prioritising people-centric strategies, has proved to be successful, and in theory should result in consumers feeling a strong connection and sense of care from their preferred brand (Saiprasad & Meenakshi, 2022). This heightens the necessity of companies developing an understanding of their consumers' needs and preferences to tailor their offerings accordingly. The use of bundling pricing by Disney+, and APV is an effective strategy for engaging a wider range of consumers from each target demographic while minimising the loss of existing customers (Guo, 2022). This aligns with the importance of customer-centric approaches to CX, which prioritise understanding consumers' needs and preferences to tailor services accordingly. All three companies have also focused on EWOM as a form of data retention, enabling them to gather valuable insights into consumer behaviour. The study highlights the importance of data-driven decision-making for CX. The use of data analytics has allowed these companies to better understand their customers' needs and preferences, leading to the development of more effective strategies to meet their expectations (Sabrina et al., 2022).

In relation to EX, Netflix's laissez-faire environment encourages idea generation

and delegation, providing employees with a sense of responsibility and ownership over their work. This approach fosters a sense of trust in employees, which has contributed to Netflix's reputation as a company that values creativity and innovation (Ramachandran & Flint, 2018). However, the study also uncovered some criticisms of this strategy. An open and honest environment can lead to excessive pressure on employees to perform and meet high expectations (Maylett & Wride, 2017). In particular, Netflix's infamous "keeper test" and Amazon's "anytime feedback" policies have come under scrutiny for their potential to demoralise employees. These findings highlight the importance to businesses of balancing openness and transparency with employee morale. Disney+ and APV are demonstrating that investing in employee upskilling and educational programs promotes a sense of inclusion within a company (Dubois, 2022). By prioritising employee growth and development, companies can create a more engaged and motivated workforce.

In the context of MX, the findings suggest that multi-modal features could be an essential aspect of enhancing a platform's experience. APV has made advancements in this area by integrating voice command functionality into their Fire Stick, while neither Netflix nor Disney+ have yet to capitalise on this. APV's decision to incorporate this feature has resulted in a noticeable increase in subscribers, indicating the potential benefits of incorporating multi-modal features into streaming platforms (Sabharwal, 2018). Furthermore, all three platforms are available across a range of devices and browsers, providing a high level of convenience and flexibility for users in line with the growing demands of modern consumers (Velloo, 2020). This highlights the importance of continually evaluating and implementing new technologies to ensure that MX remains a key focus for streaming platforms in meeting the evolving needs of users. As such, companies should consider the potential benefits of incorporating multi-modal features into their platforms to provide users with a more seamless experience.

As demonstrated by these findings, each X of TX plays an integral role in enhancing the overall perception of a brand among stakeholders. As the industry continues to evolve, companies must continually innovate and invest in these experiences to meet the ever-changing needs and expectations of modern consumers and employees.

8 Conclusion

This research was aimed at determining the practicality of pursuing TX as a business strategy, based on Gartner's suggested trend. Through the analysis of three leading video streaming companies, it is evident that each component of TX has a significant impact on the firm's competitive advantage and stakeholder perceptions.

The findings of this study suggest that pursuing a TX approach could be a valuable strategy for businesses looking to remain competitive and be capable of meeting the evolving needs of their stakeholders.

The case-study approach used in this research has demonstrated the importance of each experience in enhancing the overall perception of a brand among stakeholders. The findings suggest that all four experiences - UX, CX, EX, and MX - are equally significant and contribute towards the competitive advantage of companies operating in the highly competitive video streaming industry.

The results highlight the importance of people-centric approaches in UX, CX and MX, where the demands of users and consumers must be considered in every decision. Furthermore, the study emphasises the importance of balancing openness and transparency with employee morale, promoting a sense of inclusion and investing in employee growth and development to create a more engaged and motivated workforce. As the industry continues to evolve, companies must continually innovate and invest in these experiences to meet the ever-changing needs and expectations of modern consumers and employees. By prioritising people-centric strategies, leveraging existing brand recognition, and diversifying from competitors, companies can remain competitive, meet the evolving needs of their customers, and enhance their overall brand perception among all stakeholders involved.

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