

Zoom COVID-19 & the Vaccine

GROUP 1

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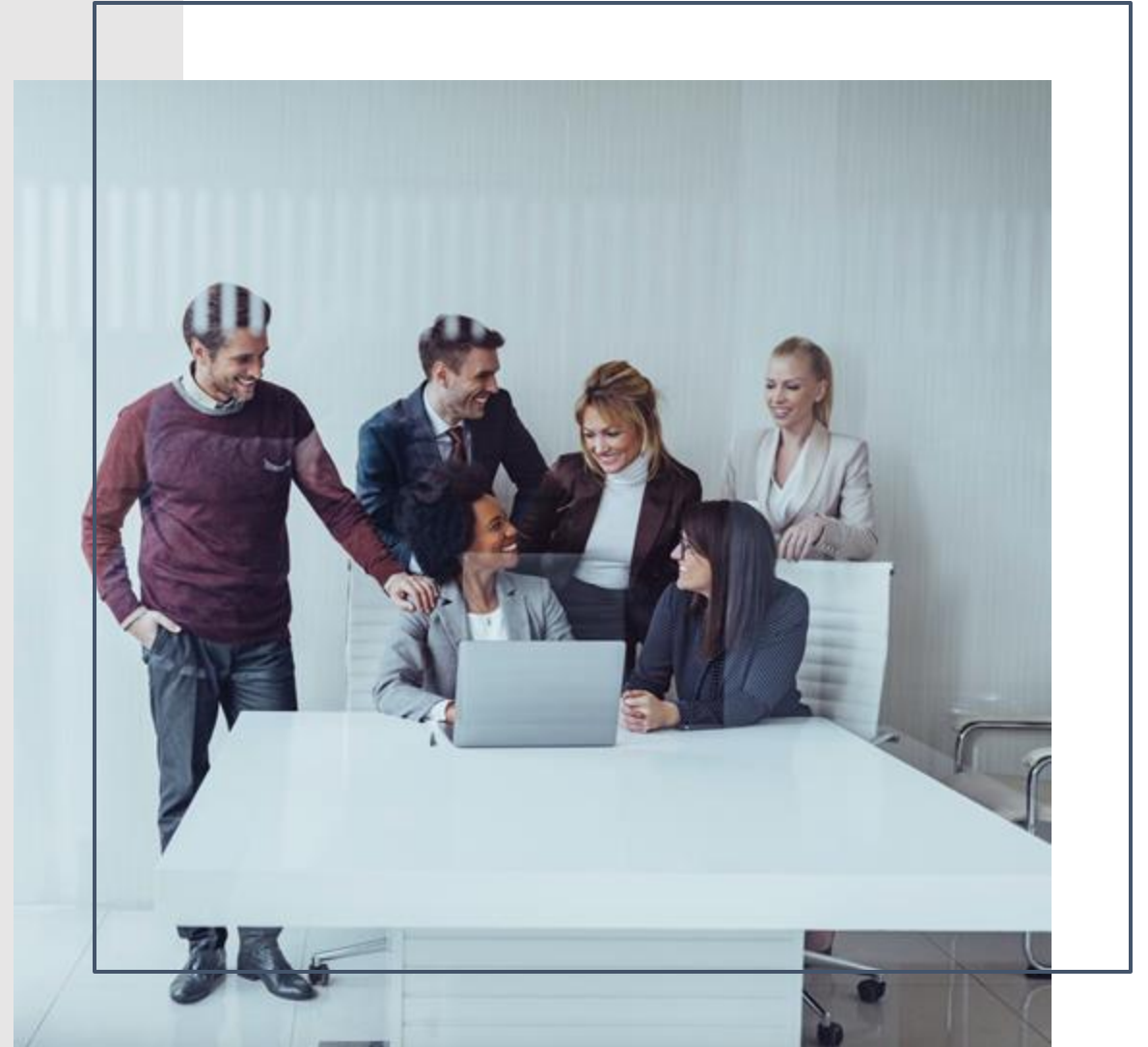


Table of Contents

- 01 Industry background**
- 02 Brand reputation based on tweets**
- 03 Event background**
- 04 How event influenced firms and Stock market**

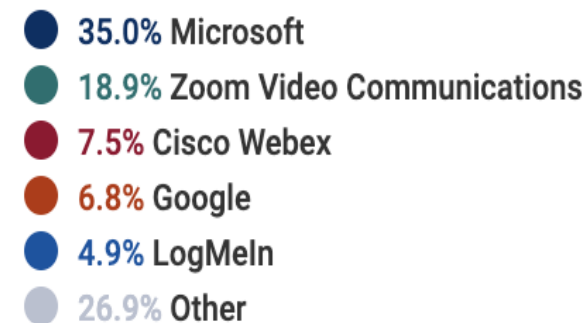
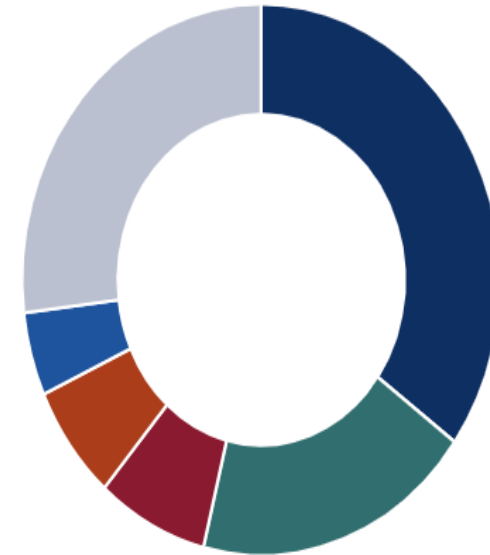
Industry Growth and Competition

Video Conferencing Industry

- Industry enables multiple people to communicate and share information across the globe over the internet
- Surge in sales after COVID-19's emergency orders to socially distance

Industry Growth

- \$13.1B Industry Revenue; annual growth of 31.2% between 2016 and 2021
- \$2.9B Industry Profits; annual growth of 36.8% between 2016 and 2021



Video Conferencing Software Developers

Source: IBISWorld

Add Information about
Customer Profile

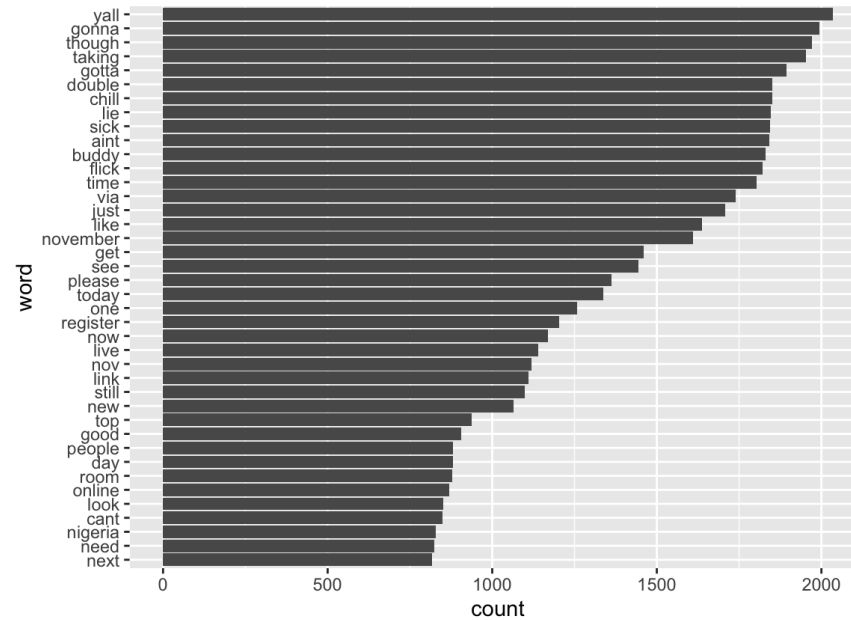
Pre-Event

Words frequency
– deleted
meeting, join, call

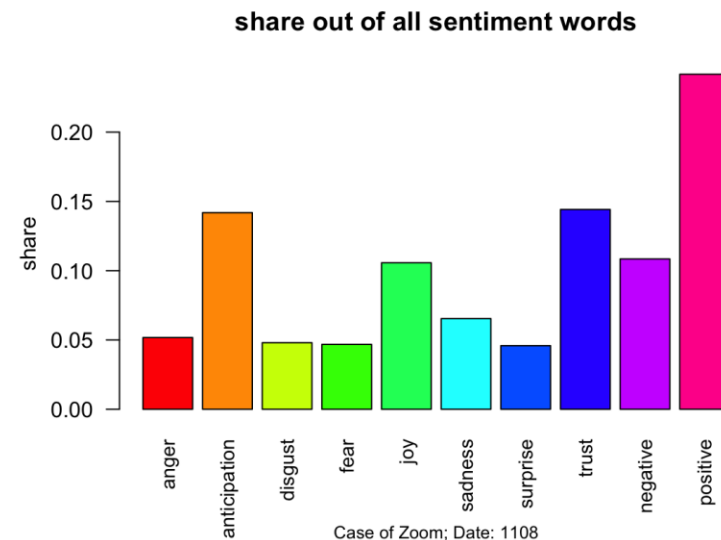
Overall positive
feelings towards
Zoom

Number of
Tweets: 30k

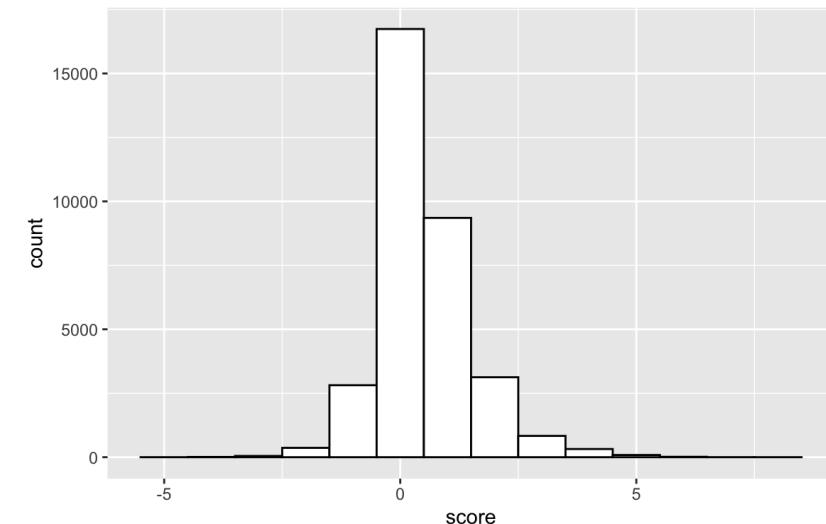
Date 11/08



Date 11/08 Average feeling: 0.5004285



Histogram of Feeling in the Post Mentioning Zoom
Date: Nov 08




Discuss the event window

Zoom, COVID-19 & the Vaccine

Event Date: Nov. 9, 2020

CNBC @CNBC · Nov 9, 2020
Zoom and other 'stay-at-home' stocks are getting crushed on the positive vaccine news



cnbc.com
Zoom and other 'stay-at-home' stocks got crushed on the positive vac...
Zoom Video stock fell as names benefitting from people staying at home due to the coronavirus pandemic came under pressure by the ...

19 103 169

FTC Requires Zoom to Enhance its Security Practices as Part of Settlement

Commission alleged that the company deceived users about the level of security for Zoom meeting platform and unfairly undermined a browser security feature

November 9, 2020

Tags: Consumer Protection | Bureau of Consumer Protection | deceptive/misleading conduct | Coronavirus (COVID-19) | Privacy and Security | Consumer Privacy | Data Security | Tech

Note: The FTC hosted a conference call for media. Participants included Director of the FTC's Bureau of Consumer Protection Andrew Smith and Maneesha Mithal, Associate Director of the FTC's Division of Privacy and Identity Protection.

The Federal Trade Commission today announced a [settlement](#) with Zoom Video Communications, Inc. that will require the company to implement a robust information security program to settle allegations that the video conferencing provider engaged in a series of deceptive and unfair practices that undermined the security of its users.

Zoom has agreed to a requirement to establish and implement a comprehensive security program, a

Related Cases

[Zoom Video Communications, Inc., In the Matter of](#)

Related actions

[Dissenting Statement of Commissioner Rebecca Kelly Slaughter In the Matter of Zoom Video Communications, Inc.](#)

[Dissenting Statement of Commissioner Rohit Chopra](#)

- Pfizer announced the success on the first COVID vaccine after phase three trial with overall, 90% protection
- Zoom and other "stay-at-home" stocks crashed since this news could indicate "back to normal" is close
- FTC announced settlement with Zoom, requiring more robust security

Sources:

<https://www.pfizer.com/news/press-release/press-release-detail/pfizer-and-biontech-announce-vaccine-candidate-against>

<https://www.united.com/en/us/fly/travel/credit.htm>



Caolán Mc Aree @Caolanmcaree · Nov 9, 2020

The owner of Zoom hearing about the vaccine



From [sharon mitchells stunning weave](#)

11

242

1,215



abhishek @abhishek_tri · Nov 9, 2020

market is so much fun! Zoom is 20% down and Boeing is 15% up as the market opened!
And this is just on Pfizer news 🤔

Once we get the vaccine, no one will use zoom according to my portfolio

6

10

67



Charlie Bilello @charliebilello · Nov 9, 2020

Covid vaccine trade today...

Winners

Carnival **\$CCL**: +39%

Valero **\$VLO**: +31%

Simon **\$SPG**: +28%

\$WYNN: +28%

\$LYFT: +26%

Expedia **\$EXPE**: +25%

JetBlue **\$JBLU**: +22%

Losers

Wayfair **\$W**: -22%

Peloton **\$PTON**: -20%

\$ETSY: -17%

Zoom **\$ZM**: -17%

\$POOL: -16%

Docusign **\$DOCU**: -15%

Clorox **\$CLX**: -11%

18

141

487



Dr. Allison Gill @allisongill · Nov 9, 2020

If you need a Four Seasons Total Landscaping zoom call background.



Mari Lewis @MariCLewis · Nov 9, 2020

Am happy to share my new Zoom background:

Four Seasons Total Landscaping.



10

4

244



FTC @FTC

#Breaking: FTC announces settlement with [@zoom_us](#) requiring the company to implement a robust information security program, settling allegations it engaged in deceptive and unfair practices that undermined the security of its users: [go.usa.gov/x7NaE](#) 1/6

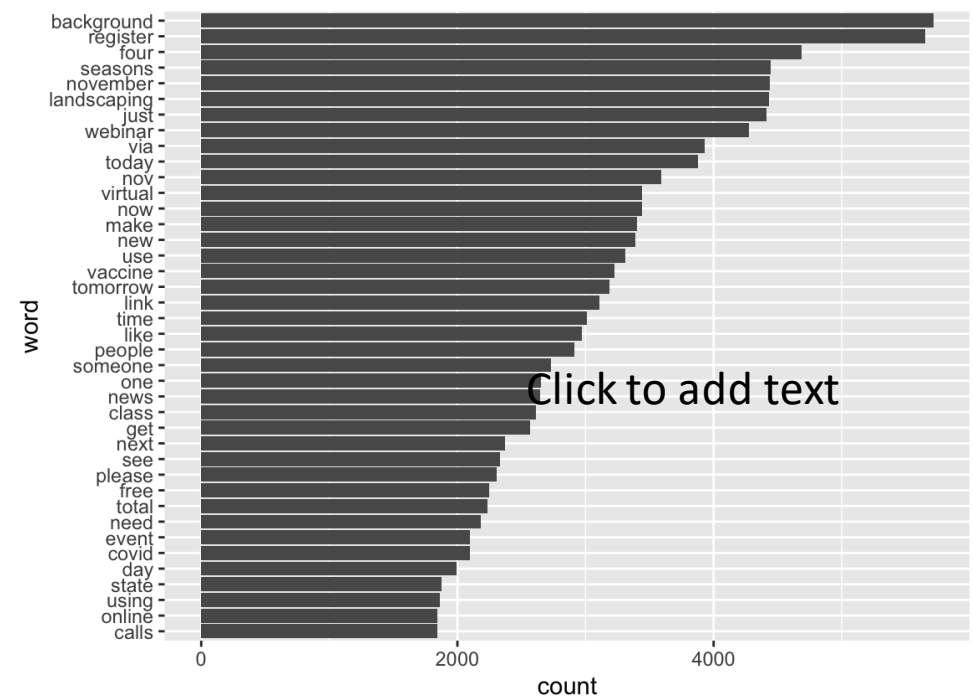


9:38 AM · Nov 9, 2020 · Twitter Web App

192 Retweets 83 Quote Tweets 312 Likes

Post Event

Date 11/09



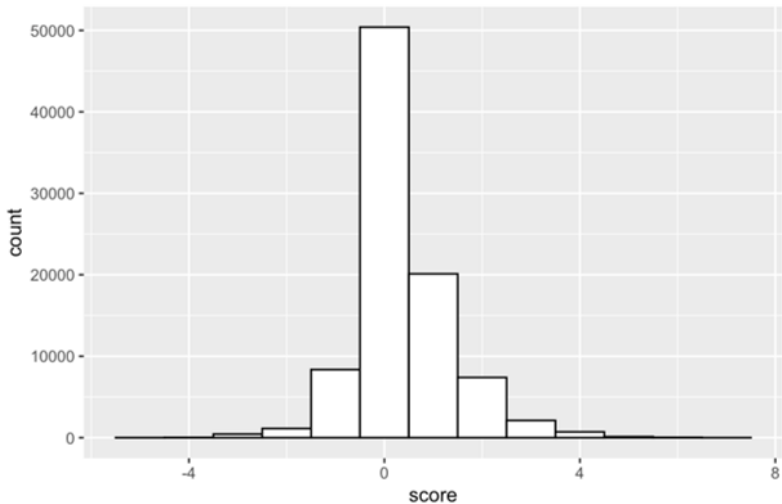
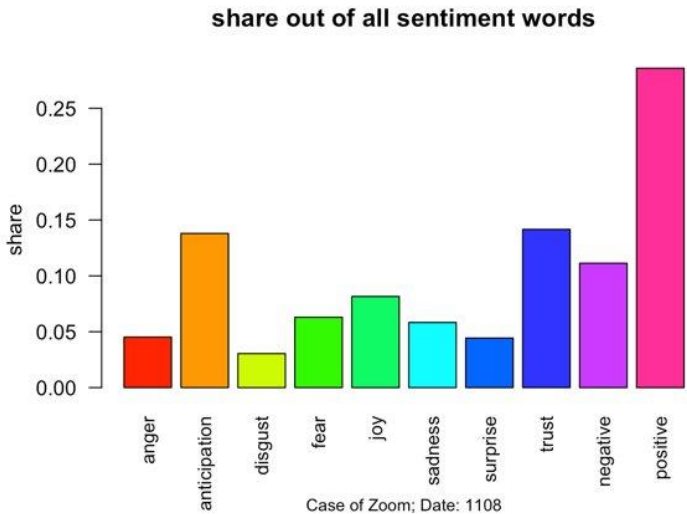
Post Event

Positive
feeling
dropped .10

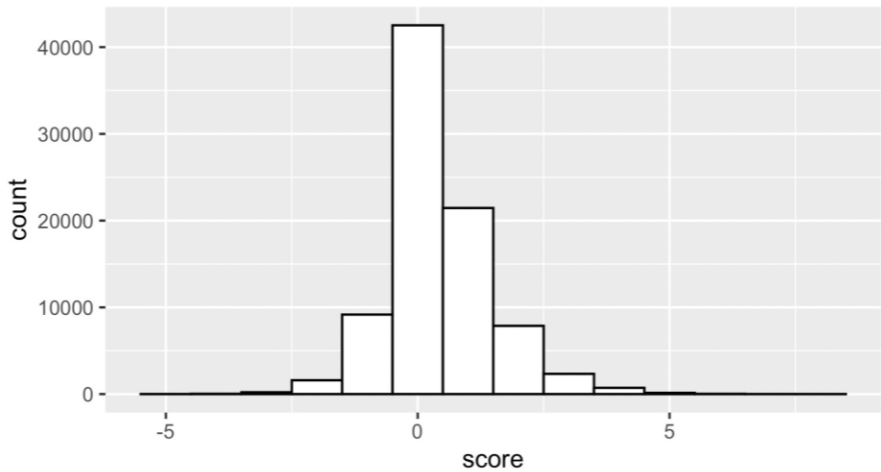
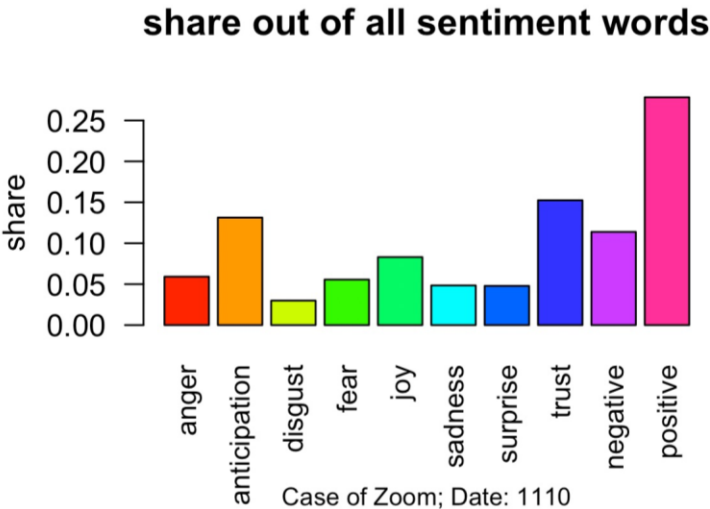
Sentiment:
Fear
increased, and
joy decreased

Number of
Tweets: 90k

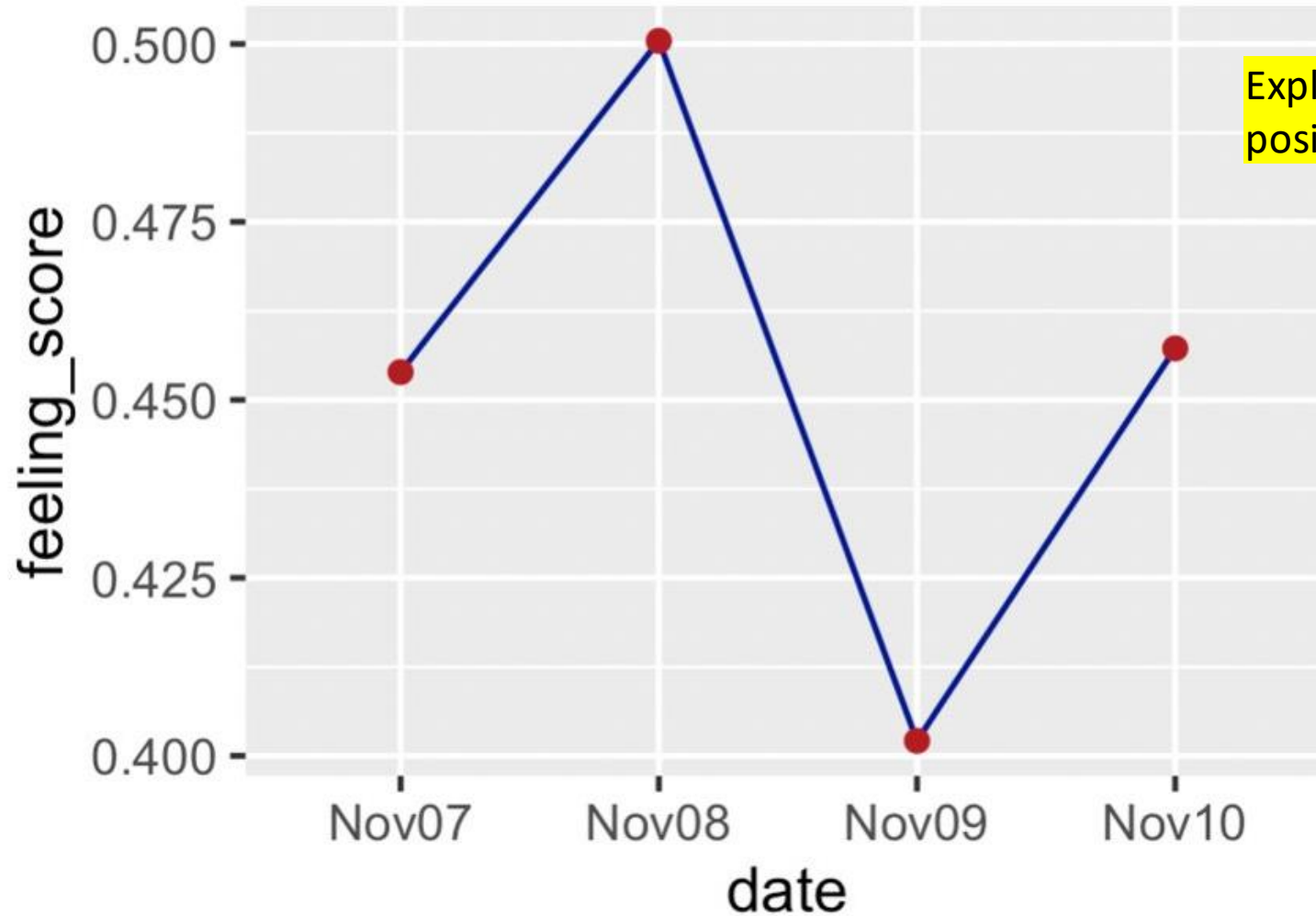
Date 11/09 Average feeling: 0.4021116



Date 11/10 Average feeling: 0.4572338



Feeling Score Change



Explain why they saw the positive feeling back up

Event Influence on the Market

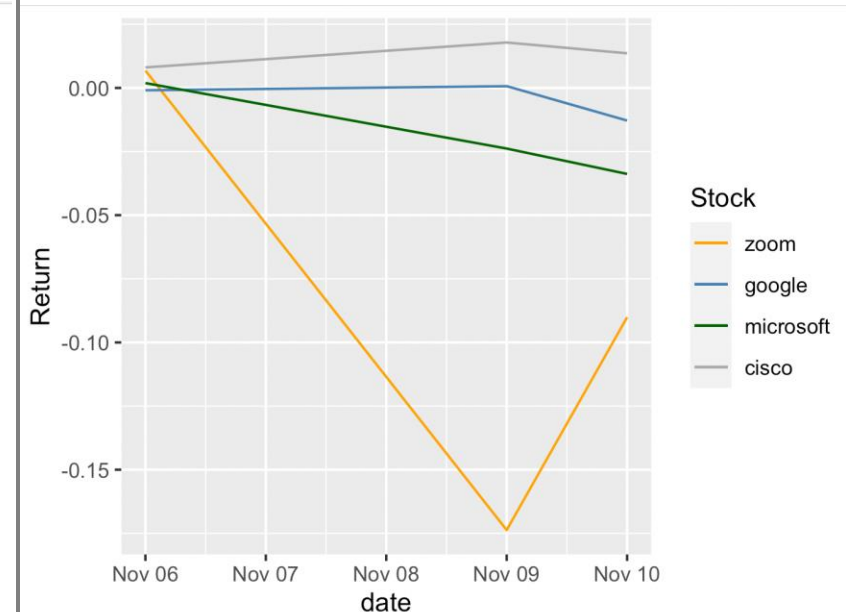
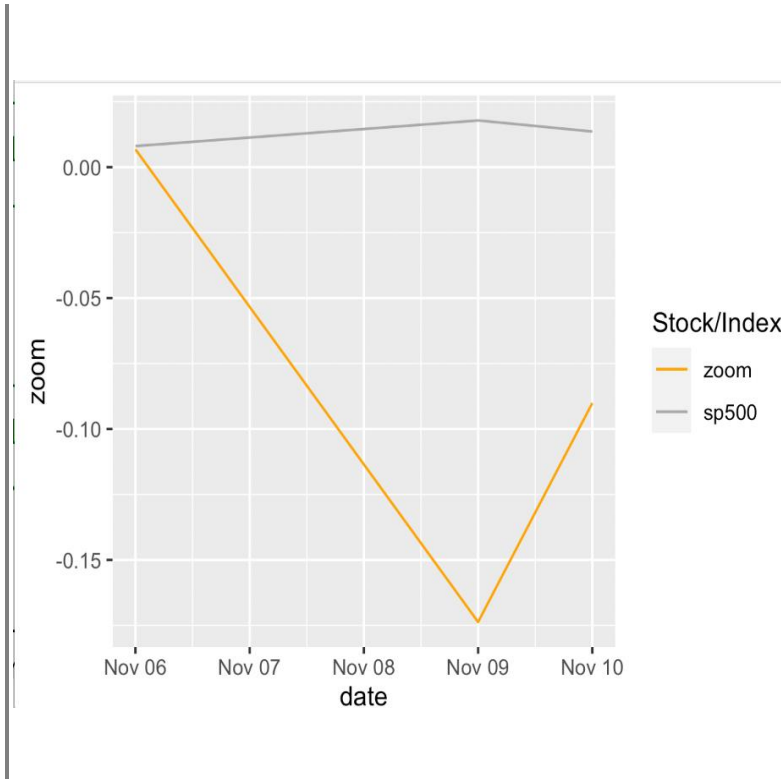
Nov. 6 – Nov. 10, 2020

Compared
to competition cumulative
abnormal return during event
window: -0.247

Zoom maintained the largest
market share, at that time, could
explain why Zoom's decline

News from FTC could also explain
decline

Also declined because google,
Microsoft and Cisco do more than
JUST video conferencing





Conclusion on Event

- News that affect the industry will show up on social media
- Stock market is sensitive to news
- Social media listening is a thing and companies should pay attention to this
- Stock market and twitter are complimentary (different segments) when doing social listening

Thank You

Questions?