



Disney+

Disney

PIXAR

MARVEL

STAR
WARS

NATIONAL
GEOGRAPHIC

hulu

ESPN

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HISTORY

Historical Perspective

The Walt Disney Company has long been synonymous with storytelling magic, capturing audiences worldwide with timeless classics and iconic characters. Founded in 1923 by Walt and Roy Disney, the company evolved from an animation studio into a global media empire encompassing theme parks, television networks, and a formidable intellectual property (IP) portfolio.

In 2005, Bob Iger became the CEO of The Walt Disney Company. In less than a decade, he reshaped Disney's empire, securing a legacy of blockbuster acquisitions—Pixar (2006), Marvel (2009), Lucasfilm (2012), and 21st Century Fox (2018). Existing assets like ESPN, ABC and nearly a century of original Disney content, it was hard to find any company with a stronger catalogue.

But, in the same timeframe, the media landscape was changing. Companies like Netflix and Amazon have disrupted traditional models with their streaming services and were starting to enter the turf of Hollywood. Fewer people were paying for cable television,

and Disney realized this after their August 2015 earnings call. The numbers for ESPN subscribers were trending in the wrong direction, and Disney's stock fell 9% the next day after the call.

Something bold had to happen. Iger realized that Disney needed a direct-to-consumer (DTC) platform that would allow the company to leverage its vast content portfolio without relying on third-party distributors. Such a platform would help Disney regain control over distribution but also create opportunities for data-driven personalization, cross-promotion, and direct engagement with its global audience.

Disney made a series of strategic moves. In 2016, the company took stake in BAMTech, a technology services company specializing in streaming infrastructure. Simultaneously, Disney began to restructure its content distribution strategy. In 2017, the company announced that it would be pulling its movies from Netflix, signaling its intent to control its own streaming destiny. Same year, Disney also



HISTORY

finalized a deal to acquire 21st Century Fox, further adding properties like The Simpsons, X-Men, and National Geographic. (Figure 1.1)

In August 2017, Disney announced that it would be launching its own DTC streaming service. In November 2018, the service was

named Disney+, and the first version of this landing page went live at disneyplus.com. After a year of teasing the public and press, Disney+ was finally launched on November 12, 2019. (Figure 1.2)



Figure 1.1

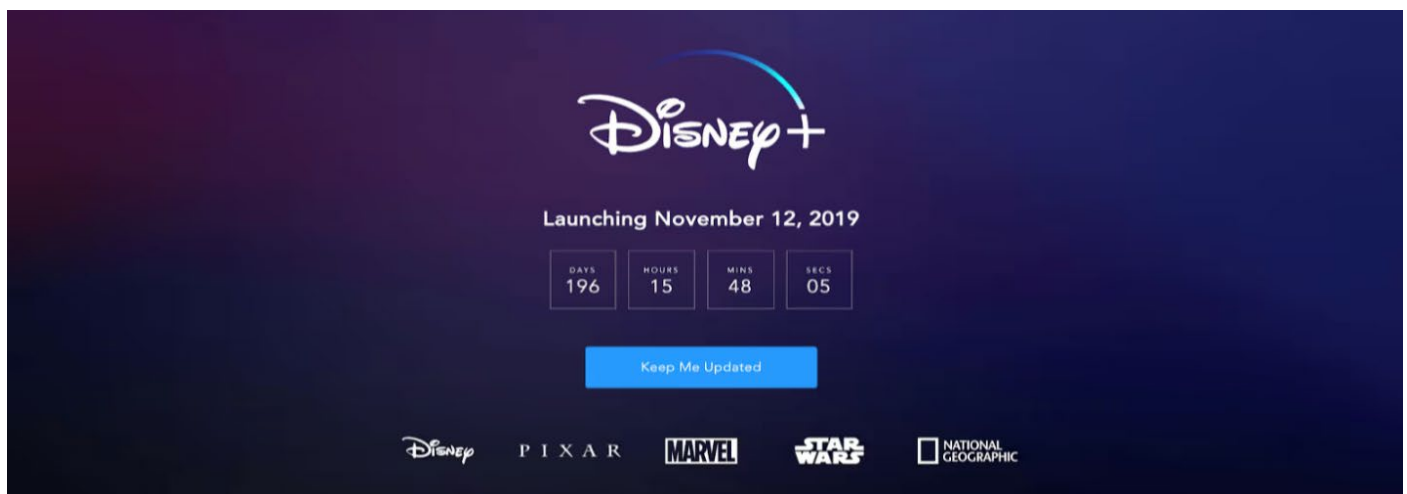
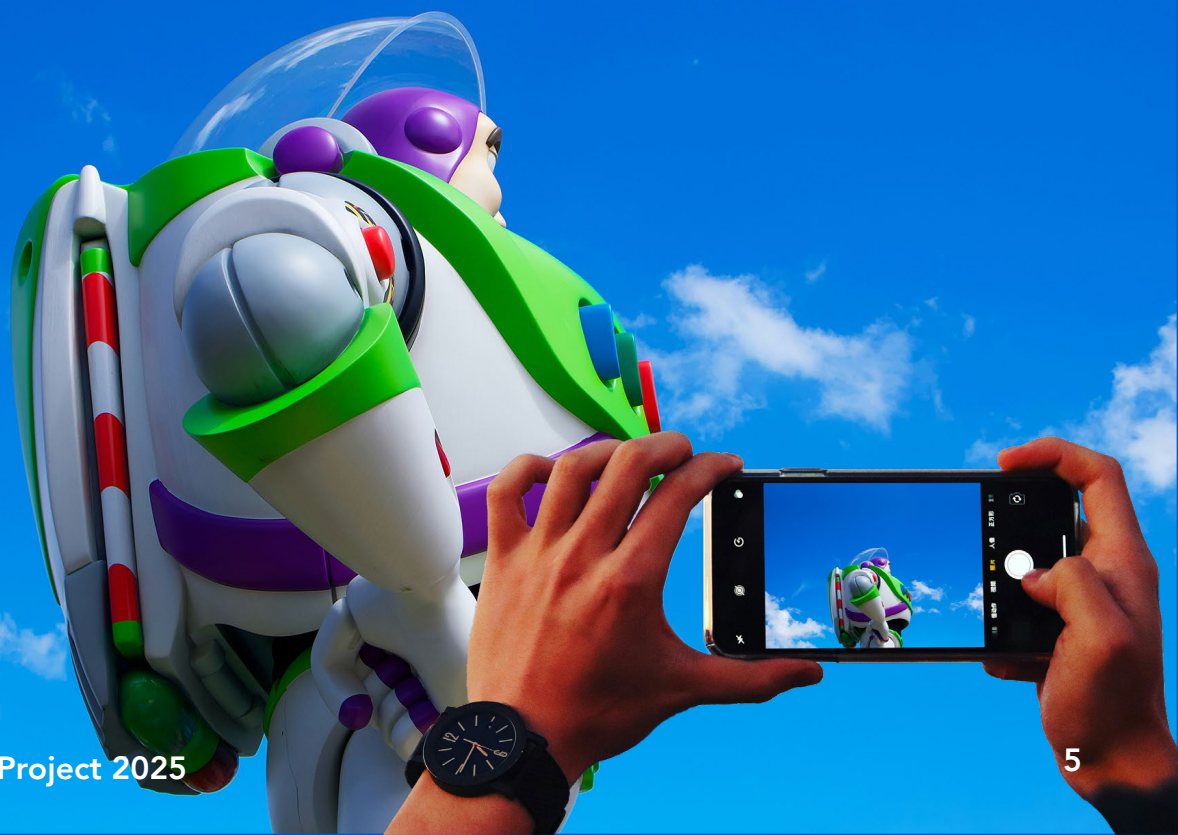


Figure 1.2

MARKET

PIXAR

Target Market
Brand Marketing
Current Market Situation



MARKET

Target Market

Disney+ primarily targets Family-Oriented Viewers and Franchise Enthusiasts, two core segments that drive subscriber engagement and retention. In addition, Young Adults & General Entertainment Seekers represent a growth market as Disney+ expands its content library.

Core Target Markets

Disney+ primarily targets Family-Oriented Viewers and Franchise Enthusiasts, two core segments that drive subscriber engagement and retention. In addition, Young Adults & General Entertainment Seekers represent a growth market as Disney+ expands its content library.

Family-Oriented Viewers

Disney+ is positioned as a premier family-friendly streaming service, offering safe, engaging, and educational content that parents trust.

- + **Demographics:** Parents aged 30-45 with children aged 3-12 years; middle to upper-income households.
- + **Geographics:** Primarily suburban and metropolitan areas across North America, Europe, and Australia.
- + **Psychographics:** Family-centric values; prioritizes child-safe entertainment; prefers convenience features like parental controls and offline downloads.
- + **Behavioral:** Watches animated movies, educational programs, and live-action remakes together as a family. Frequently engages with seasonal content (e.g., holiday movies) and uses multiple user profiles for different age groups.
- + **Benefits Sought:** Ad-free, family-friendly content; easy parental controls; a single subscription that serves both children and adults; exclusive access to Disney's animated classics and Pixar films.
- + **Marketing Mix Variations:** Emphasis on family bundles (Disney+, Hulu, ESPN+), kid-friendly UI, and promotions during school breaks or holidays.

Franchise Enthusiasts

This group consists of dedicated fans of Disney's powerhouse franchises, including Marvel, Star Wars, Pixar, and classic Disney properties. (Figure 2.1)

- + **Demographics:** Aged 18-45; slightly male-skewed for Marvel/Star Wars, balanced for Pixar and Disney animation; mix of singles, couples, and young families.
- + **Geographics:** Global audience, highly concentrated in urban areas across North America, Europe, and parts of Asia.
- + **Psychographics:** Passionate about fandom culture; follows movie/TV release schedules closely; enjoys discussing theories and engaging in online fan communities.
- + **Behavioral:** Watches new releases immediately, subscribes to multiple streaming services but considers Disney+ essential for exclusive franchise content, engages with official franchise social media accounts, attends fan events and conventions.

MARKET

- + **Benefits Sought:** Access to exclusive franchise content (Disney+ Originals like *Loki*, *Ahsoka*, *Inside Pixar*), high-quality streaming (4K, Dolby Atmos), behind-the-scenes footage, early access or exclusive content drops.
- + **Marketing Mix Variations:** Heavily promoted franchise releases (trailers, behind-the-scenes content, social media engagement); targeted digital marketing campaigns leading up to premieres; exclusive collectibles or tie-ins with merchandise.



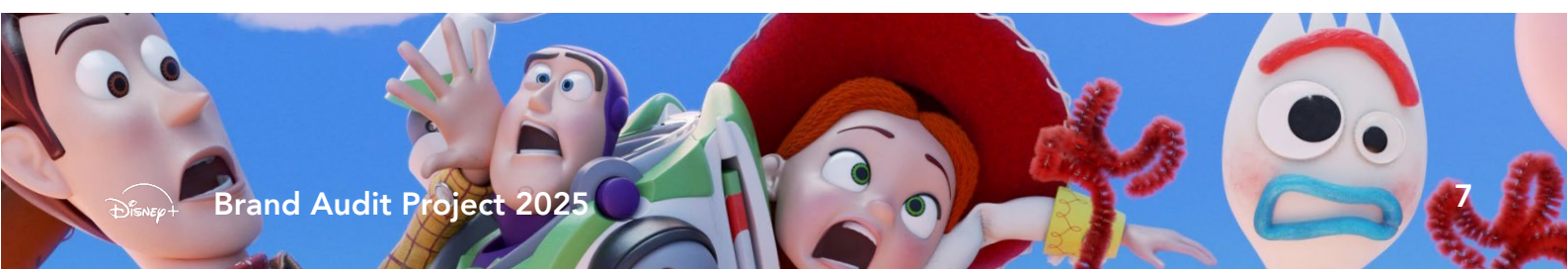
Figure 2.1

Growth Markets

Family-Oriented Viewers

With the expansion of general entertainment on Disney+ (including FX, Hulu Originals, and international content), young adults are an emerging segment.

- + **Demographics:** Aged 18-34, mix of students, young professionals, and cord-cutters who prefer digital streaming over cable.
- + **Geographics:** Urban and metropolitan areas, especially in markets where Disney+ has expanded content variety (e.g., Latin America, Southeast Asia).
- + **Psychographics:** Values diverse and mature storytelling; enjoys both mainstream and niche content; open to trying international series and reality TV.
- + **Behavioral:** Watches during late evenings or weekends, often binge-watching; engages with content via TikTok, YouTube, and Twitter; shares recommendations with friends.
- + **Benefits Sought:** Access to Hulu, FX, and general entertainment content, a wider variety of genres, exclusive streaming of popular adult-leaning series (*The Bear*, *Shōgun*).
- + **Marketing Mix Variations:** Promotions featuring Hulu + Disney+ bundle, social media campaigns targeting pop culture trends, and curated content lists for binge-watchers.





Brand Marketing

Disney+ primarily targets Family-Oriented Viewers and Franchise Enthusiasts, two core segments that drive subscriber engagement and retention. In addition, Young Adults & General Entertainment Seekers represent a growth market as Disney+ expands its content library.

Product

Disney+ boasts a broad product mix breadth, encompassing a diverse selection of movies, television series, and exclusive originals across multiple genres. Its product line depth is evident in its extensive catalog from renowned brands such as Disney, Pixar, Marvel, Star Wars, National Geographic, Hulu, and ESPN, offering deep content libraries within each franchise. Additionally, Disney+ expands its portfolio with general entertainment, including documentaries, reality shows, and international programming, catering to varied audience preferences.

In terms of product item design, Disney+ enhances the user experience with high-quality audio and visual features like Dolby Atmos, 4K Ultra HD, and HDR. Its platform is designed with user-centric functionality, including personalized profiles, parental controls, and offline downloads. Regular content updates, seasonal additions, and exclusive premieres ensure continuous engagement, reinforcing Disney+ as a dynamic and evolving streaming service.



MARKET

Price

Disney+ offers numerous customizations to their subscription packages to ensure that enthusiasts with diverse taste have access to all of their subsidiaries. Subscriptions begin as low as \$9.99 a month and through variable additions of family members, have no set max. Disney+ cracked down on household sharing in late 2024 to match competitors like Netflix who have seen double digit profit growth with strong restrictions.

Tiered Subscription Pricing: Ad Supported or Ad Free

Option	Price
Basic with Ads	\$9.99/month
Premium no Ads	\$15.99/month or \$159.99/year
Add an extra member	\$6.99/month basic \$9.99/month premium

Bundled: with ESPN+, Hulu, or MAX

Option	Price with Ads	Price without Ads
Duo: Disney+ and Hulu	\$10.99/month	\$19.99/month
Trio: Disney+, Hulu, and ESPN+	\$16.99/month	\$26.99/month
Max Bundle: Disney+, Hulu, and MAX	\$16.99/month basic	\$26.99/month



MARKET

Place

Distribution

Access: Users can access Disney+ on the Web, Mobile, and Connected TV.

Geography: Global – available in over 60 countries with some localized content by region

Compatibility: Disney+ works to be on the bleeding edge of technological compatibility. Besides being available on all major device types, in early 2024, Disney+ Launched on the Apple Vision Pro, using **Universal Scene Description (USD)** technology to make some of their 2D shows into 3D experiences. To do this, Apple and Pixar have partnered to for the group The Alliance for OpenUSD.



Marketing

Disney+ has a robust marketing strategy that shows up on paid, owned, social, and experiential channels. Disney+ paid strategy includes promotion of trailers for its upcoming show releases and movie premieres as well as static ads for the platform on Connected TV, YouTube, Meta, X, Google, TikTok and Snap. They also pay for advertisements on gaming platforms like Xbox and PlayStation, where the Disney+ app is available.

On owned channels, Disney+ mainly advertises its upcoming premieres and top shows. These channels include commercials on ESPN, ABC, and Hulu as well as light promotions at Disney Parks and on Cruises. Disney+ also has popular social channels posting content and releases that often gain traction without paying for ads. Disney+ follower count: 15M TikTok, 6M X, 2M Instagram.

Disney runs major experiential events each year with the D23 expo and sponsoring large events at Comic-Con for Marvel and Star Wars. (Figure 2.2) They use this as an opportunity to tease premieres and drive subscriptions around their upcoming slate of shows. Disney+ also show up in non-traditional ways – like as toys in happy meals and in radio and podcast promotions.



MARKET

Promotion

Disney+ promotes its streaming service through a mix of television, digital, and social media marketing, along with cross-promotions across Disney-owned platforms like ESPN, ABC, and Disney Parks. A core pillar of its strategy is event-driven marketing, leveraging exclusive premieres and franchise releases to drive engagement. This is complemented by seasonal promotions, including bundling discounts with Hulu, ESPN+, and Max.

Social media plays a crucial role, with campaigns on Instagram, TikTok, YouTube, and X featuring teaser trailers, behind-the-scenes content, and influencer collaborations. Additionally, paid search, display advertising, and strategic sponsorships extend reach and sustain strong subscriber growth. (Figure 2.3)



Figure 2.2

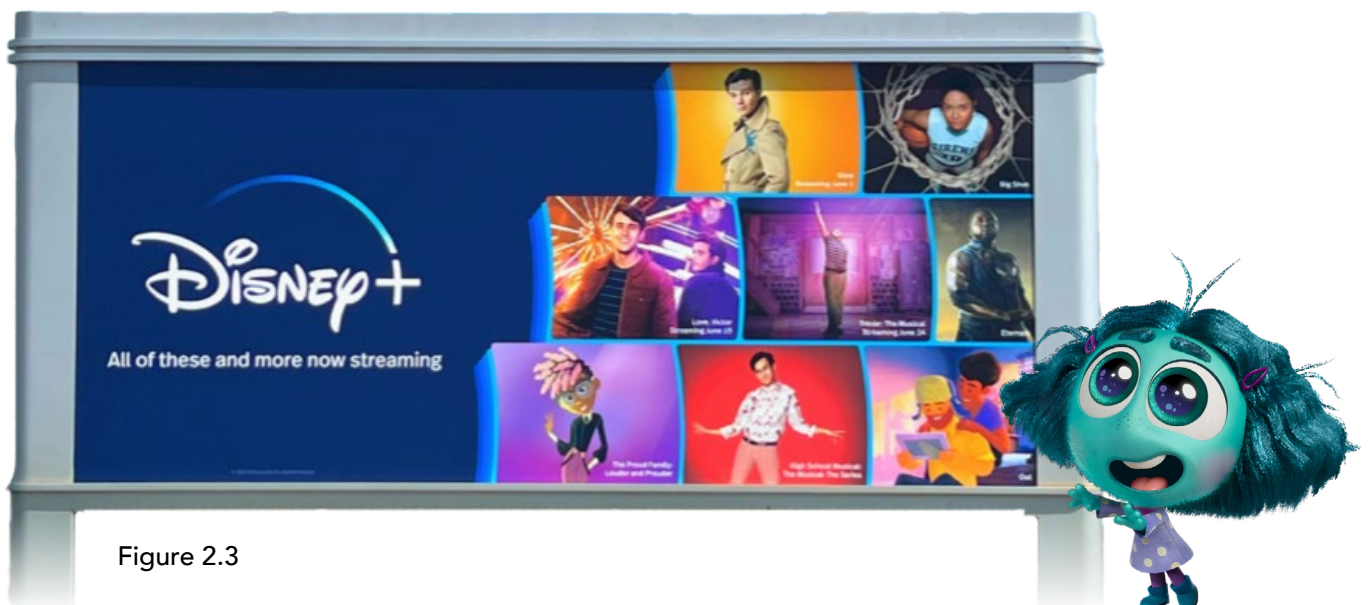


Figure 2.3

MARKET

Past and Current Advertising Campaigns

Past Campaigns

Launch Campaign (2019)

Introduce Disney+ as a premier streaming service, showcasing its exclusive content from Disney, Pixar, Marvel, Star Wars, and National Geographic.

- + **Key Messaging:** All the Disney magic, all in one place—only on Disney+.
- + **Channels Utilized:** Television commercials, digital ads, social media promotions, and strategic partnerships.
- + **Outcome:** Successfully established a substantial subscriber base shortly after launch, positioning Disney+ as a formidable competitor in the streaming industry.
- + **Advertising Spend:** 135+ million

Digital Advertising Efforts (2021)

Maintain and grow the subscriber base through targeted digital advertising.

- + **Key Messaging:** Promotions centered around exclusive releases such as “Raya and the Last Dragon,” “Soul,” and “Luca.”
- + **Channels Utilized:** Predominantly desktop video ads, comprising approximately 89% of the marketing spend for these releases.
- + **Outcome:** Continued engagement with existing subscribers and attraction of new users through exclusive content offerings.
- + **Advertising Spend:** In the first seven months of 2021, Disney allocated over \$238 million to digital advertising for Disney+, representing a 39% decrease compared to the same period in 2020.

Disney+ Day (2021-2022) (Figure 2.4)

An annual celebration of the streaming service, offering exclusive premieres, promotions, and subscriber perks to drive engagement and brand loyalty.

- + **Key Messaging:** A global celebration of Disney+ subscribers, with exclusive premieres and surprises.
- + **Channels Utilized:** Disney promoted the event through theme park activations, exclusive content drops, and influencer-led social media campaigns.
- + **Outcome:** Increased subscriber engagement and reduced churn rates.



MARKET

Current Campaigns

Disney+ Bundle Campaign (2023-2024)

Enhance value proposition by bundling Disney+ with Hulu and ESPN+, catering to a wide range of entertainment preferences.

- + **Key Messaging:** More of what you love, all in one place—with Disney+, Hulu, and ESPN+.
- + **Channels Utilized:** The campaign leveraged connected TV and YouTube ads, podcast sponsorships, and retail partnerships with Verizon and Roku offering free trials.
- + **Outcome:** Increased subscriptions across all three platforms, with consumers appreciating the comprehensive entertainment package.



Deadpool & Wolverine R-Rated Expansion (2024) (Figure 2.5)

This campaign marked a major shift for Disney+, promoting R-rated content through its Hulu integration. The goal was to attract a young adult male audience and compete with Netflix and Max's mature content offerings.

- + **Advertising Spend:** \$75 million
- + **Key Message:** The ultimate Marvel team-up—now on Disney+.
- + **Channels Utilized:** Marketing efforts included edgy social media campaigns with Ryan Reynolds & Hugh Jackman, sponsorships at major sports events like the NBA and UFC, and bold, humorous billboards in major urban centers.
- + **Outcome:** Helped Disney+ attract more young adult male subscribers, boosting engagement in a key demographic.

Figure

2.4



Figure 2.5

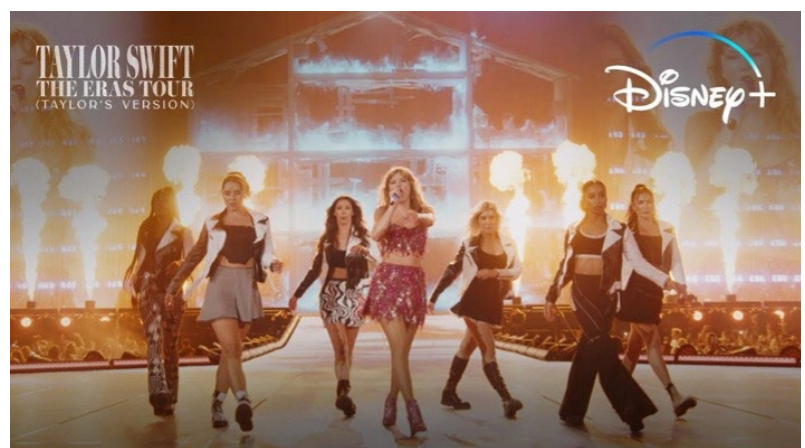


Figure 2.6

MARKET

Current Campaigns

Taylor Swift: The Eras Tour (2024) (Figure 2.6)

Following the record-breaking theatrical success of The Eras Tour, Disney+ secured exclusive streaming rights for the Taylor's Version cut, leveraging Swift's global fanbase to drive new subscriptions.

- + **Key Messaging:** The biggest concert event of the year—only on Disney+.
- + **Channels Utilized:** Disney+ utilized TikTok & Instagram influencer campaigns targeting Swifties, Spotify & Apple Music collaborations featuring special playlists, and a hashtag campaign (#ErasTourOnDisneyPlus) encouraging fan engagement.
- + **Outcome:** Attracted millions of new subscribers, reinforcing Disney+'s dominance in event-based streaming content.



MARKET

Current Market Situation

As more Americans and global households cut the cord on cable, the streaming industry will continue to grow and improve its position as the dominant medium for at-home entertainment.



Figure 2.7

As of 2024, the global streaming market is valued at almost \$130B and the US portion of that is \$35B, a 32% share of the global streaming market. Growth is projected to steadily increase due to increased demand and consumer willingness to pay as more households convert to streaming from cable.

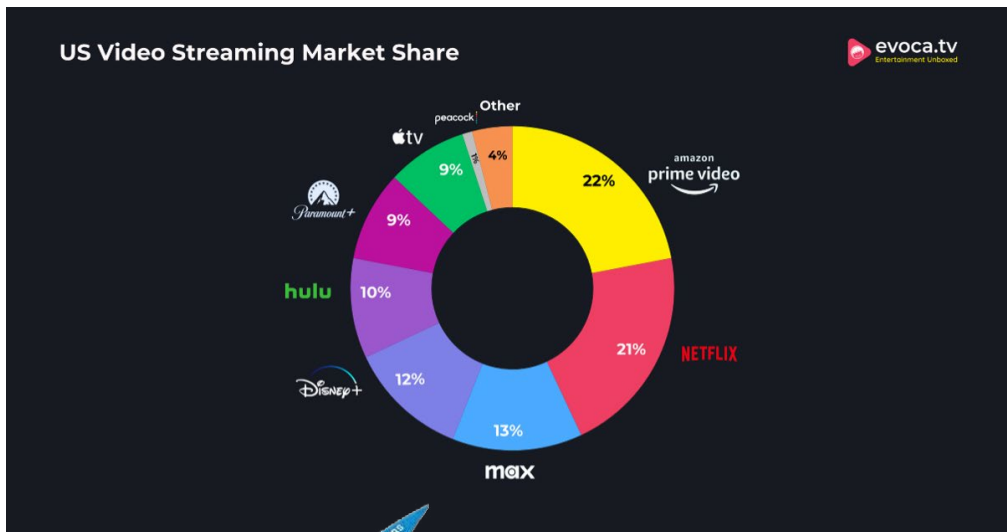
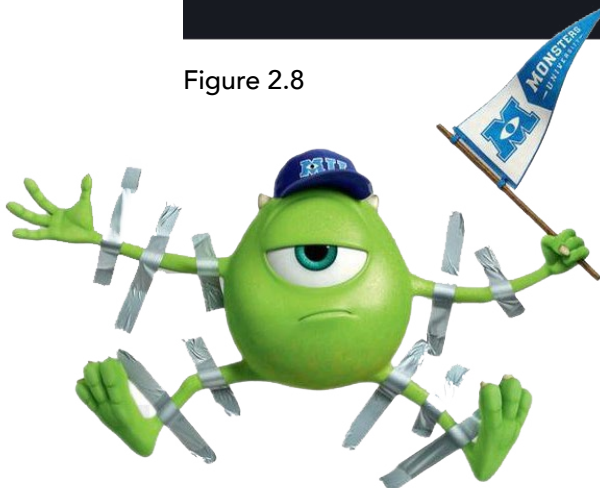


Figure 2.8



Disney+ is in the On-Demand streaming segment – lead by Prime Video, Netflix, Max, Disney+, Hulu, Paramount+, and Apple TV. This segment is separate from the live-streaming segment which is dominated by sports streaming channels like ESPN and content streaming platforms like YouTube and Twitch.

MARKET

Disney+ Financial Performance and Market Share

Disney+ controls approximately 12% of the video streaming market, but it has taken many years to become a profitable segment of Disney's business. Disney reports on financials for its entire streaming business which includes Disney+, Hulu, and ESPN+ which brought in \$321M in profit in Q4 2024, up from \$47M the previous quarter. In Disney's most recent earnings call, CEO Bob Iger mentioned a key reason for this that more subscribers are starting to opt for the ad-supported streaming plan, which is highly profitable for Disney.

Trends

Advertising: Disney has one of the most sophisticated audience graphs for advertisers and can charge high advertising premiums because of the broad appeal of their streaming and granular targeting capabilities.

Bundling: Bundling has become a significant trend in the streaming space with Disney offering a bundled price for its three streaming services. They also offer a bundle with Max to attract more consumers and compete for market share with leaders Amazon Prime and Netflix.

Threats

International Competition: Disney+ has struggled to succeed in some international markets, specifically India. Disney+ recently merged with JIO, taking a minority stake and removing its name from the platform. Iger mentioned low margins and high competition as the reason for the move. (Figure 2.9)

Economic Factors: Inflation and economic downturns can cause consumers to cut their entertainment and streaming budgets. Rising prices for Disney+ can lead to consumers cutting Disney+. This can be mitigated by offering affordable bundles.



Figure 2.9



Competitive Frame/Brands
Brand Positioning

MARVEL

COMPETITION



COMPETITION

Competitive Frame/Brands

Disney+ operates in a highly competitive streaming market, with key competitors including Netflix, Amazon Prime Video, and emerging services like Fox's Tubi.

Netflix

Target Market: Netflix primarily targets individualistic young adults, offering a personalized viewing experience that caters to diverse tastes and preferences.

Overall Positioning: As an established leader in the streaming industry, Netflix positions itself as a global provider of a vast and diverse content library, investing heavily in original productions to cater to a wide array of audiences.

Points of Difference:

- + Heavy investment in original productions (Stranger Things, Squid Game), making it less reliant on licensed content.
- + Advanced AI-driven content recommendations personalize viewing experiences.

Points of Parity:

- + Both Netflix and Disney+ offer ad-supported and premium subscription tiers.
- + Multi-device compatibility and strong global presence.

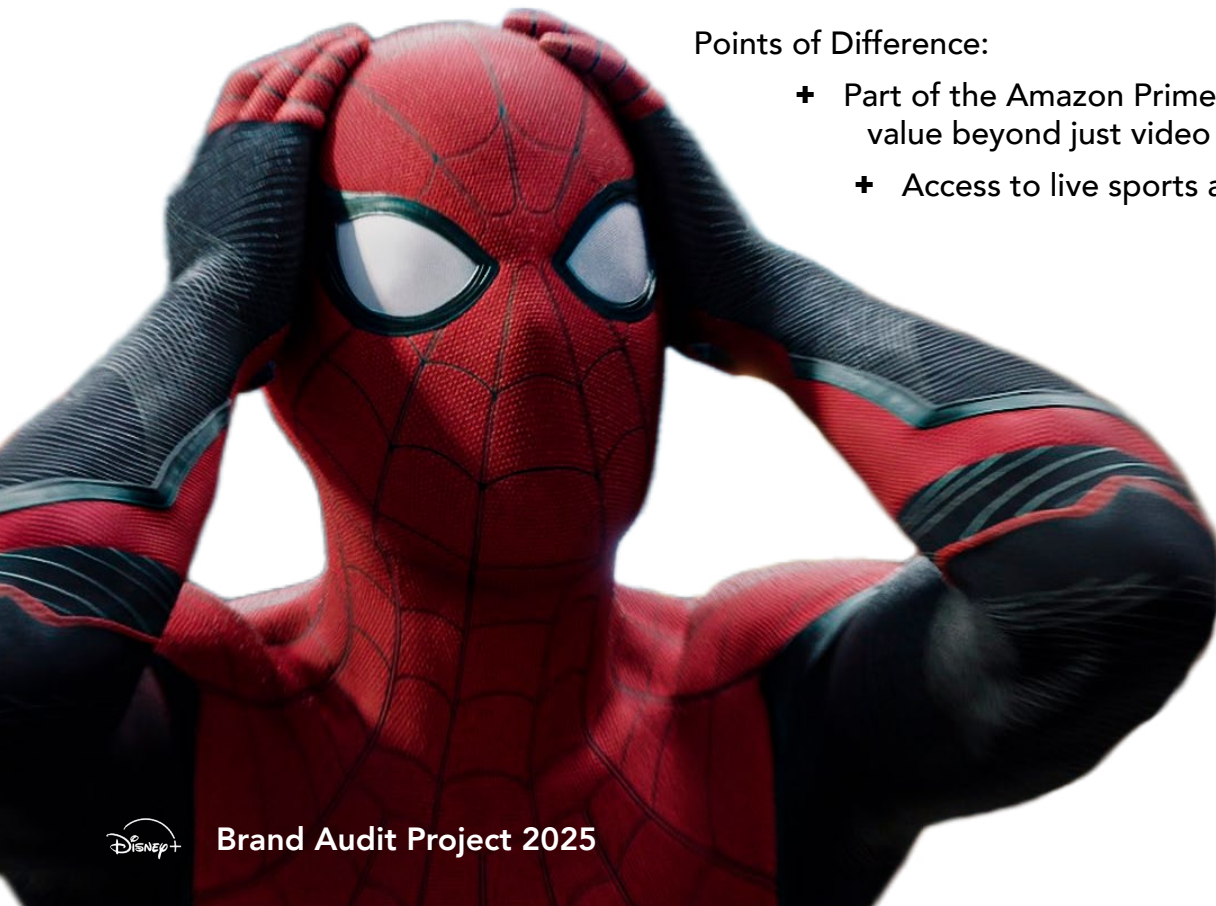
Amazon Prime Video

Target Market: Appeals to a broad audience, especially Amazon Prime members, integrating entertainment with shopping and bundled digital services.

Overall Positioning: Prime Video is positioned as a value-driven streaming service that enhances the overall Amazon Prime ecosystem, providing exclusive movies, series, and add-on subscriptions.

Points of Difference:

- + Part of the Amazon Prime bundle, adding value beyond just video content.
- + Access to live sports and rental.



COMPETITION



Amazon Prime Video (cont'd)

Points of Parity:

- + Both platforms offer a mix of original and licensed content.
- + Available globally with multi-device streaming options.

Paramount+

Target Market: Paramount+ appeals to families and nostalgia-driven adults by providing a rich selection of content from its extensive library, including popular Nickelodeon shows and movies.

Overall Positioning: Positioned as a comprehensive streaming service, Paramount+ offers a blend of live TV, news, sports, and on-demand content, leveraging its well-known brands to attract subscribers.

Points of Difference:

- + Exclusive access to a vast library of Nickelodeon content, catering to both children and adults nostalgic for classic shows.
- + Inclusion of live TV options, such as CBS broadcasts, providing real-time viewing experiences.

Points of Parity:

- + Subscription-based service with tiered plans, similar to Disney+
- + Availability on multiple devices and expanding global reach.



COMPETITION

Brand Positioning

Positioning Statement

For families and adults who cherish timeless stories and iconic characters, Disney+ is the place to stream your most beloved content, among entertainment platforms, because it is the exclusive home of Disney, Marvel, Star Wars, Pixar and more.

In Disney+ first press release announcing its launch it stated that "Disney+ is the dedicated streaming home for movies and shows from Disney, Pixar, Marvel, Star Wars, National Geographic, and more, together, for the first time." This is key to understanding that while Disney+ is Disney's flagship streaming platform, it is the home of strong brands and was created to target the loyal fan bases of those brands.

Target: [Families and Adults who cherish timeless stories and iconic characters]

Disney+'s most direct target audience are families with young children. Approximately half of US families with young children are subscribed to Disney+ (Source: The Observer). Most of the content on the platform is meant to be family friendly and Disney has been one of the major sources for family entertainment since the 50s. (Figure 3.1)

The next largest segment are young adults (Age 18-24) making up the largest segment of the user base (30%).

Frame of Reference:

[Disney+ is the place to stream your most beloved content]

Disney has invested in high-affinity brands with stories and characters that attract significant followings – Pixar, Marvel, Star Wars, and more. Per the Hollywood Reporter survey, 70% of Americans under 44 are superhero fans and 25% of all Americans are Star Wars fans.

Disney+ is also the exclusive streaming home for all Disney Channel, Disney classic movies, and content children and families love. (Figure 3.2)

Point of Difference and Reason to Believe: [because it is the exclusive home of Disney, Marvel, Star Wars, Pixar and more]

Our team struggles to differentiate these two points for Disney+ because the access it provides to its beloved brands is the main differentiation between itself and its competition as well as its main draw to viewers.

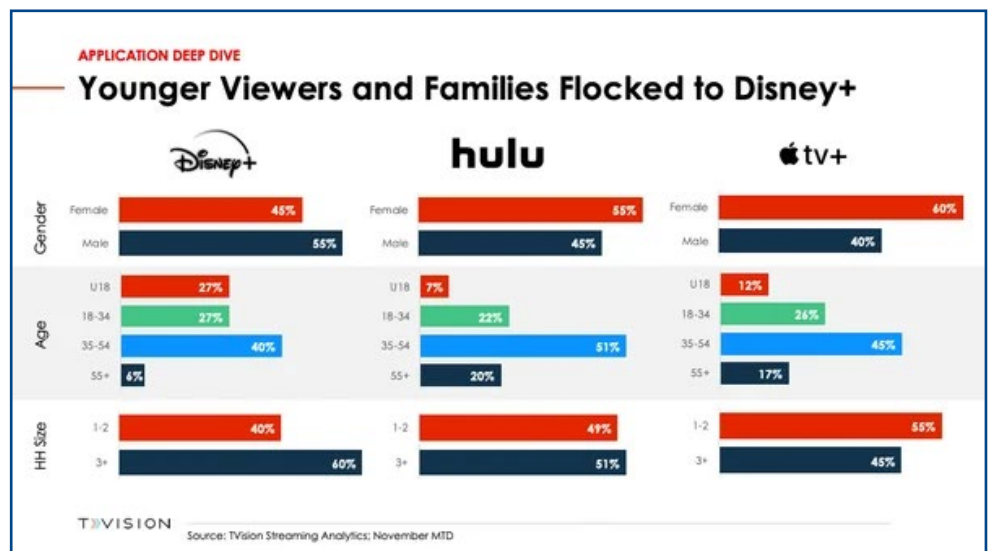
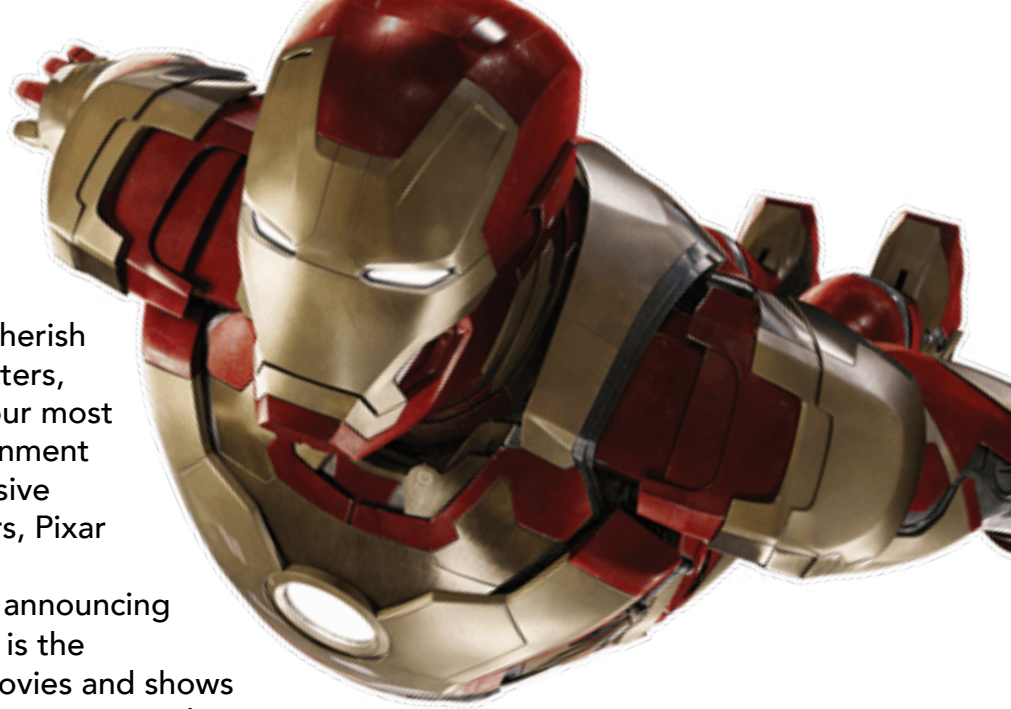


Figure 3.1

COMPETITION

Point of Difference and Reasons to Believe (cont'd)

The five major brands are emphasized immediately when you open the app and Disney+ does not extend its name to any of the content with a by Disney+ or exclusively on Disney+ tag. However, the extremely popular brands provide resonance with the audience for Disney+ and quickly made it ubiquitous among viewers as a leading streaming option.

Positioning Contradictions: Deadpool & Wolverine & Hulu on Disney+

Deadpool & Wolverine was the first R rated movie released by Disney. This does not mesh with the family friendly values looked for by its main demographic of families with young children. However, this release was highly successful and helped strengthen Marvel's standing with young adults, while also not alienating families from Disney+. This is a potential benefit of keeping the Disney+ brand separate from its titles on the app.

Disney+ now allows users to stream Hulu content which includes adult only content and many shows that do not fit the family or young adult target demographic. This seems to be a business decision and one that could dilute brand equity for Disney+, though it also could expand both Disney+ and Hulu's audiences.



Figure 3.2: The Incredibles



Figure 3.3



STAR
WARS

BRAND

Brand Portfolio & Architecture
Brand Identity



BRAND

Brand Portfolio & Architecture

The Walt Disney Family of Companies operates as a house of brands where each acquired brand maintains its own equity and enthusiasts within the larger Walt Disney brand. Disney+ exists as a stand-alone product underneath Disney's Media and Entertainment Distribution division. The Studio Content division is the fuel to the distribution tool and includes studios such as the Buena Vista Catalogue Co, Disney Family Movies, Search Light Pictures, Lucasfilm, and Marvel. Alongside Disney+ in the Media and Entertainment Distribution division are ESPN+ and Disney Consumer Products and Interactive Media, which houses all of Disney retail and licensed goods.

The *WALT DISNEY* Company

Media and Entertainment Distribution



Studios Content



and Disney Movie Insiders, El Capitan Theatre, Hollywood Records

ESPN and Sports Content



Disney+ subscribers can enjoy tightly aligned releases from theatres to streaming and seamless integration for Disney's largest franchises. Prior to the acquisition of Hulu, Disney+ was strictly home to Disney content and fans were only able to view a relatively limited library. Now, viewers can expect to see shows "available with hulu subscription." (Figure 4.1) Also featured are content lines showcasing "Live and Upcoming From ESPN+" or "Streams: Non-Stop Playlists." All tools used to accommodate a growing diverse viewership with higher expectations. Currently, Walt Disney limits the amount of entertainment from their General

BRAND

Entertainment Content division, which holds all of their news channels via the ABC network, FX Networks and additional live talk shows.



Figure 4.1

Brand Identity

Disney+ has established a strong brand identity centered around nostalgia, family entertainment, and exclusive content. The brand evokes trust, warmth, and familiarity, making it the go-to platform for families, Disney enthusiasts, and fans of franchises like Marvel, Star Wars, and Pixar.

Logo and Colors

The platform's interface, marketing, and content curation reinforce this identity with a clean, user-friendly experience that prioritizes accessibility across different age groups. Disney+ began in 2019 with a signature blue and white color palette, paired with the iconic Disney logo. However, in March 2024, Disney+ refreshed its branding - blending Hulu's signature green into the legacy Disney+ blue, refining the logo to all white, and making a new orchestral mnemonic created by Academy Award®-winning composer Ludwig Göransson. This refresh signaled a new era in Disney's streaming business, as Disney plus acquired Hulu. (Figure 4.2)



Figure 4.2

According to a Disney+ spokesperson, the biggest source of inspiration for this new teal color came from Aurora Borealis. The northern lights phenomenon is a representation of the night sky which featured prominently in many of Disney's shows. During the launch of this rebrand, Andy Baker, VP of Creative at Disney+, was quoted saying that "We think we've found a balance of new and nostalgic that helps strike a chord that Disney+ has all the things you love about Disney but is also evolving and adding new things to love, too."

Consumer-Based Brand Equity



 NATIONAL
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CONSUMER



CONSUMER

Consumer-Based Brand Equity

Based on the insights gathered from our interviews, we have evaluated each level of Disney+'s Customer-Based Brand Equity Pyramid. While Disney+ has established itself as a leading streaming platform with a loyal subscriber base, there are opportunities to strengthen customer brand equity across various aspects.



Salience

At the salience level, Disney+ is highly **recognized** within specific audience segments, particularly among families, Marvel fans, and nostalgia seekers. The platform is **top-of-mind** for users who prioritize family-friendly content or are fans of iconic franchises such as Marvel and Star Wars. However, its prominence is weaker among adult audiences who are looking for a wider variety of genres. As one interviewee noted, "I only use Disney+ for Marvel shows. For everything else, it's Netflix," suggesting that Disney+ is not universally considered the go-to streaming service for all types of content, limiting its salience to a more **niche** group.

CONSUMER

Performance

At the performance level, Disney+ receives praise for its **high-quality** content, such as original series and **exclusive franchises** like Marvel and Star Wars, and for offering a **user-friendly interface** and seamless streaming experience. However, it faces criticism for a **limited content variety**, especially outside of Disney-owned franchises. Users have expressed a desire for a broader selection of genres, particularly for adult audiences. As one respondent mentioned, "Disney+ needs more thrillers or comedies for adults," highlighting that while the platform performs well in its core offerings, it falls short when it comes to catering to a wider range of tastes.

Imagery

At the imagery level, Disney+ is strongly associated with **childhood nostalgia, magic, and family-friendly content**. The platform's imagery evokes warm, comforting feelings, making it a favorite among families and younger viewers. However, this image can limit its appeal to adults who may view Disney+ as "**too childish**" or primarily geared toward children's content. One interviewee remarked, "Disney+ feels like a kids' platform. I use it for my cousins, not myself," reflecting how the brand's imagery can be a barrier for broader adult engagement, especially for those looking for more mature content.

Judgments

At the judgments level, Disney+ is generally viewed as a **trustworthy** and **safe** platform, especially by parents who rely on it for family-friendly entertainment. It is known for its exclusive franchises like Marvel and Star Wars, which add to its **credibility**. However, the platform faces criticism for its pricing structure. Many users feel that the cost of a standalone subscription is too high considering that the content is largely limited to Disney properties. As one interviewee pointed out, "The standalone **price feels steep** for just Disney content." While the platform is trusted and reliable, the pricing concerns reveal an area where Disney+ could improve in terms of perceived value.

Feelings

At the feelings level, Disney+ successfully evokes emotions tied to **nostalgia, warmth, and happiness**. The platform is often viewed as a comforting and predictable source of entertainment, particularly for families and fans of classic Disney content. However, this emotional connection does not extend to excitement or novelty, which limits its appeal to users seeking fresh and dynamic experiences. One interviewee shared, "I know exactly what to expect when I open Disney+. It's comforting but **predictable**." While this predictability is a strength for its core audience, it could be a weakness for those seeking more exciting or innovative content.

Resonance

At the resonance level, Disney+ enjoys strong **loyalty** from families and franchise fans who are dedicated to the platform for its exclusive content. However, this loyalty is often tied to specific franchises, like Marvel or Star Wars, rather than to the platform. The platform lacks a deeper sense of community engagement, and users generally do not feel strongly attached to Disney+ as an entity. As one respondent expressed, "I wouldn't care if Disney+ shut down. My loyalty is to Marvel, not the platform," highlighting the **weak community connection** and limited attachment to the service itself. This suggests that while Disney+ has loyal customers, it has not yet fostered a broad or deep emotional connection across all its user segments.



FUTURE

Brand Challenges



Brand Positioning

Disney+ has become a major player in the streaming industry. However, despite its success, the platform faces significant challenges that could impact its long-term growth and profitability.

The Disney Corporate Umbrella

Disney+ operates within the larger Walt Disney Company, which means acquisitions and strategic decisions must align with broader corporate goals. This structure can slow decision-making and limit flexibility in pursuing partnerships. Unlike Netflix, Disney+ cannot act independently in content expansion, as moves must fit Disney's financial priorities, such as managing debt from past acquisitions like 21st Century Fox. Prioritizing franchise expansion over niche content may also limit innovation.

Expanding outside core family demographic

Disney+ primarily caters to families with young children, who are drawn to Disney's extensive library of animated classics, Pixar films, and kid-friendly series. This audience values safe, wholesome entertainment, making Disney+ a trusted choice for parents. However, expanding beyond this demographic presents challenges. To remain competitive, Disney+ must strike a balance between maintaining its core brand identity and appealing to a broader audience. This

might include investing in more general-audience programming via its Star brand internationally or integrating Hulu more effectively in the U.S. as a content hub for older viewers. However, these moves must be carefully managed to avoid diluting Disney's family-friendly image and alienating its loyal customer base.

Saturated Streaming Market

The streaming landscape has become fiercely competitive, with major players like Netflix, Amazon Prime Video, Apple TV+, and Max all fighting for consumer attention and subscription dollars. As the market matures, subscribers are becoming more selective about how many services they maintain, leading to increased churn rates across the industry.

Disney+ initially benefited from its strong brand recognition and the exclusive appeal of its content, but retaining and expanding its subscriber base in a crowded market is becoming increasingly difficult. Price hikes, content licensing challenges, and the need for consistent blockbuster releases make sustaining long-term engagement a challenge. Additionally, competitors are aggressively investing in original content, making it harder for Disney+ to stand out purely based on its existing franchises.

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