



Disney+

Situation Analysis

Summer Bryant, Sydney
Burzynski, Kristina Bynum,
Mackenzie Konz, & Abby Madan

Final Situation Analysis - MAKSS



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Industry Overview



Introduction

Disney Plus is a streaming service created and owned by The Walt Disney Company. Disney Plus features a variety of content including National Geographic, Marvel, Star Wars, Pixar, and Disney classics. Disney Plus has also launched successful originals. The top five originals include: Loki, Star Wars: The Mandalorian, the Falcon and the Winter Soldier, Wanda Vision, and Imagineering Story.¹ Since its start in 2020, Disney Plus has become a major competitor within the streaming industry, competing with household names such as Netflix and HBO Max. The brand wishes to expand their audience, by reaching 18 - 24-year-old college students who might not seek Disney Plus out on their own. Disney desires to further develop their streaming platforms, including Disney Plus and Hulu, by creating young-adult specific content. This report on Disney Plus aims to provide an industry overview analysis, a client/competitor analysis, a consumer analysis, and a SWOT analysis, in order to expand their audience reach and viability within the 18 - 24-year-old market demographic.



Industry Highlights

Streaming as a whole in the U.S. is growing immensely.

Since the pandemic more and more people are purchasing streaming services and cutting down on cable and live TV packages; This is due to people spending more time at home.

The consumer response and attitude towards streaming is growing positively. As the streaming industry gains more consumers, the competition grows with it with all companies are trying to bring in higher valued content.²



History: YouTube

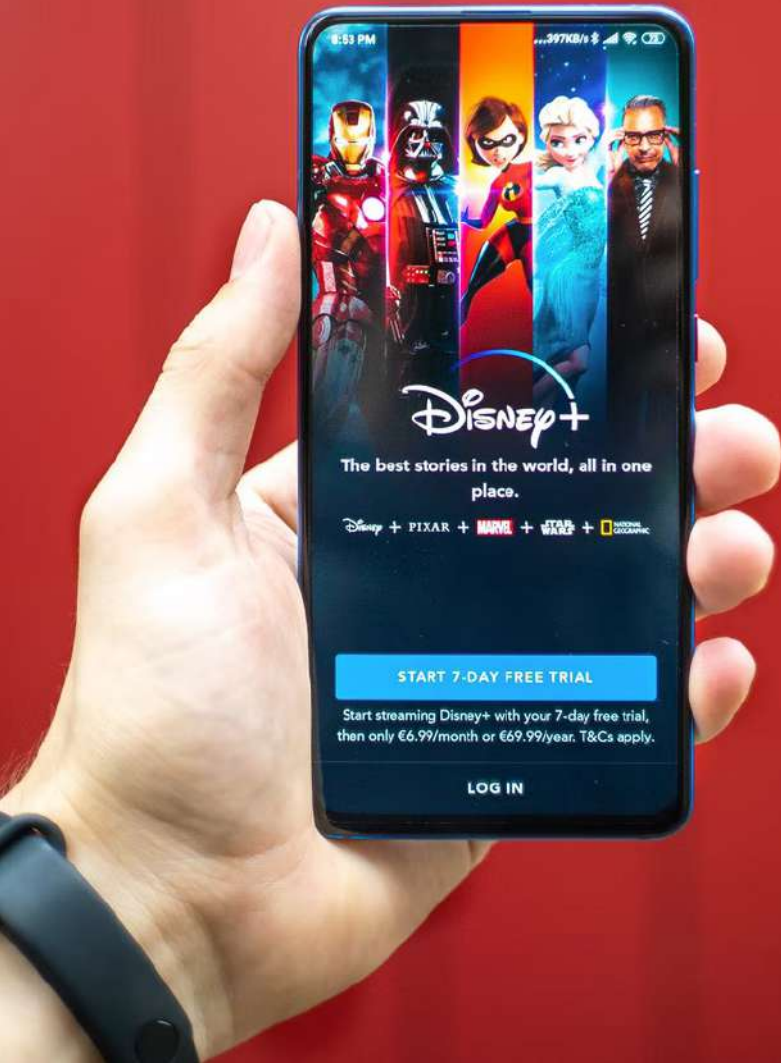
YouTube commenced development on February 14th, 2005, after the three co-founders had an idea for a shared “home video” site.³ In December 2005, the site was officially launched and gained national notoriety by the public. Despite the success of YouTube within the public eye, the site proved to be more trouble than it was worth due to expensive broadband connection issues and copyright violations. YouTube was sold in November 2006 to Google for \$1.65 billion, and Google worked out the political copyright infringements by negotiating deals with several entertainment companies. Today, YouTube continues to be a popular and free video-streaming website, with an estimated 1.3 billion visitors per month at 5 billion videos per day.³

History: Netflix

In 2007, Netflix launched its first streaming via internet service which started as an unlimited plan where subscribers could stream movies through their internet and continue to rent DVDs.⁴ Although customers were hesitant, the creation of original content available only through the streaming model led to massive success for Netflix. In 2013, Netflix began producing Netflix original content that was only available on their streaming service.⁴ It was estimated that by the final quarter of 2021, Netflix had produced over 2,400 original series and films. In 2021, Netflix reported having over 200 million subscribers.⁴

History: Disney Plus

Disney has always been known for being a company that can accomplish pretty much anything. They have gone from television and movies to amusement parks. Disney bought both Lucasfilm Ltd., the creator of the Star Wars and Indiana Jones series, in 2012.⁵ In 2017, they sought out both 20th and 21st Century Fox and bought them out as well. This led to their 2019 decision to create their own streaming service, Disney Plus, where they would allow viewers to stream Disney classics as well as other Blockbuster and television favorites. Following the successful model of exclusive original content, Disney Plus started producing their own original content including shows like Star Wars: The Mandalorian and Wanda Vision.² In 2021, Disney Plus reached 116 million subscribers which topped past projections for the company.⁶



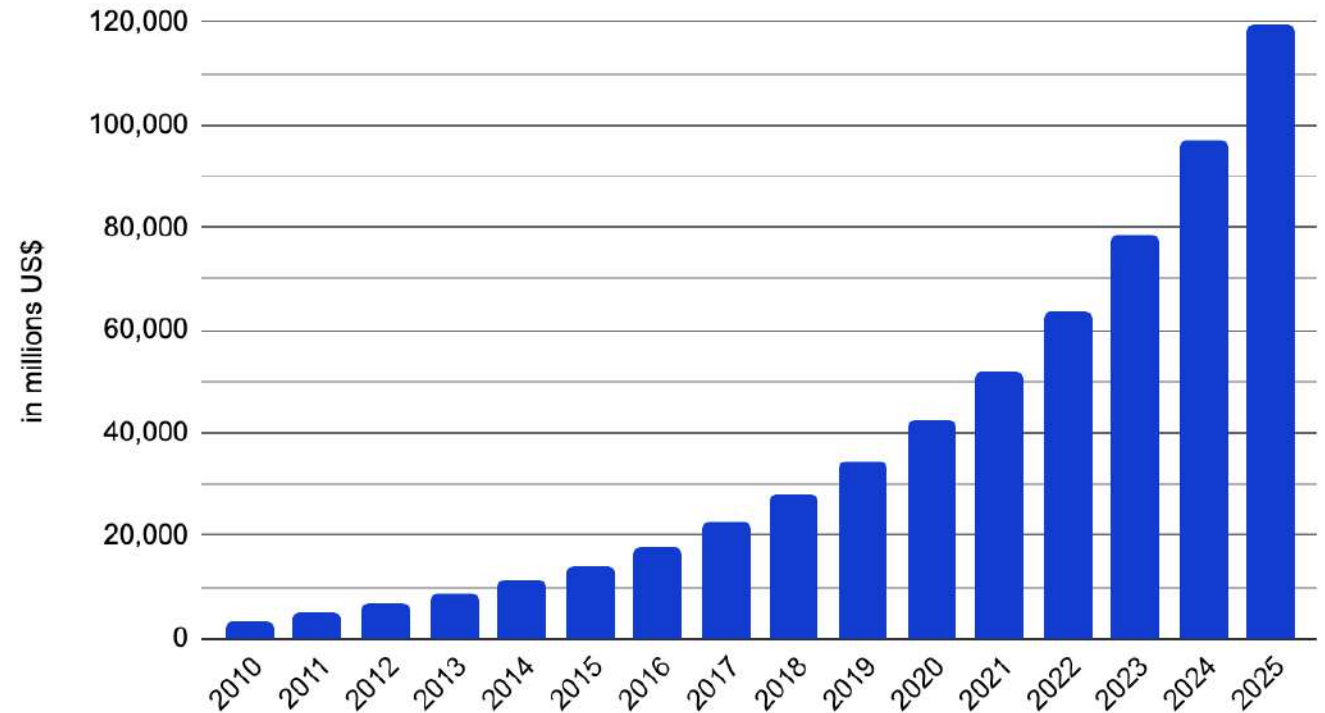


History: Overall

Overall, all of the video streaming services like YouTube, Netflix, Disney Plus are continuing to develop. In 2005 the video streaming industry made a revenue of 69.8 million dollars whereas in 2020 the revenue grew to 41.8 million dollars.⁷ Advancements in technology have allowed this industry as a whole to grow and become as complex as they are today, with companies now turning their attention to creating original content for their own prospective platforms.

Product Life Cycle

Revenue for Video Streaming Services in US (10)



Product Life Cycle

Within the product life cycle, the video streaming industry has now reached the maturity stage. Having been around since the start of YouTube in 2005, the video streaming industry is no longer forced to focus on introducing consumers to the new concept of on-demand video streaming while convincing them it is worth the price tag that comes with it. Instead, consumers have now had time to form their opinions, with a majority of consumers having both positive attitudes towards video streaming and agreeing it is worth the price tag.² A handful of top video streaming services like Netflix, Amazon Prime Video, HBO Max, Hulu and Disney Plus have now emerged as the top competitors within the industry.² The chart above demonstrates how rapidly revenue within the streaming industry has risen in the past and is forecasted to rise in the coming years.² With competition becoming stiff among these top competitors, companies have been forced to start introducing unique selling points as inclusive benefits consumers' may only gain access to through their prospective platforms as well as decide how to best differentiate themselves from their competitors.



Product Life Cycle

The streaming service Disney Plus is currently in the growth stage of the product life cycle having just launched in November of 2019.⁸ While Disney Plus has emerged as a top competitor among streaming services, it is still relatively new compared to its rivals. Because of its young age, Disney Plus has yet to reach the same level of success as one of the pioneers of streaming and current leading streaming service—Netflix.² Being only three years old, Disney Plus is still working to build its content library which has come at a cost. In 2021, these expenses added up to losses of approximately \$300 million in total.⁵ This is actually quite an improvement though when compared to their losses just a year prior which amounted to double this number.⁹ This could be an indicator the company is on the path to maturity as it grows older.

The word "Disney" is written in its iconic white script font, centered over a dark blue background featuring a silhouette of Cinderella Castle.

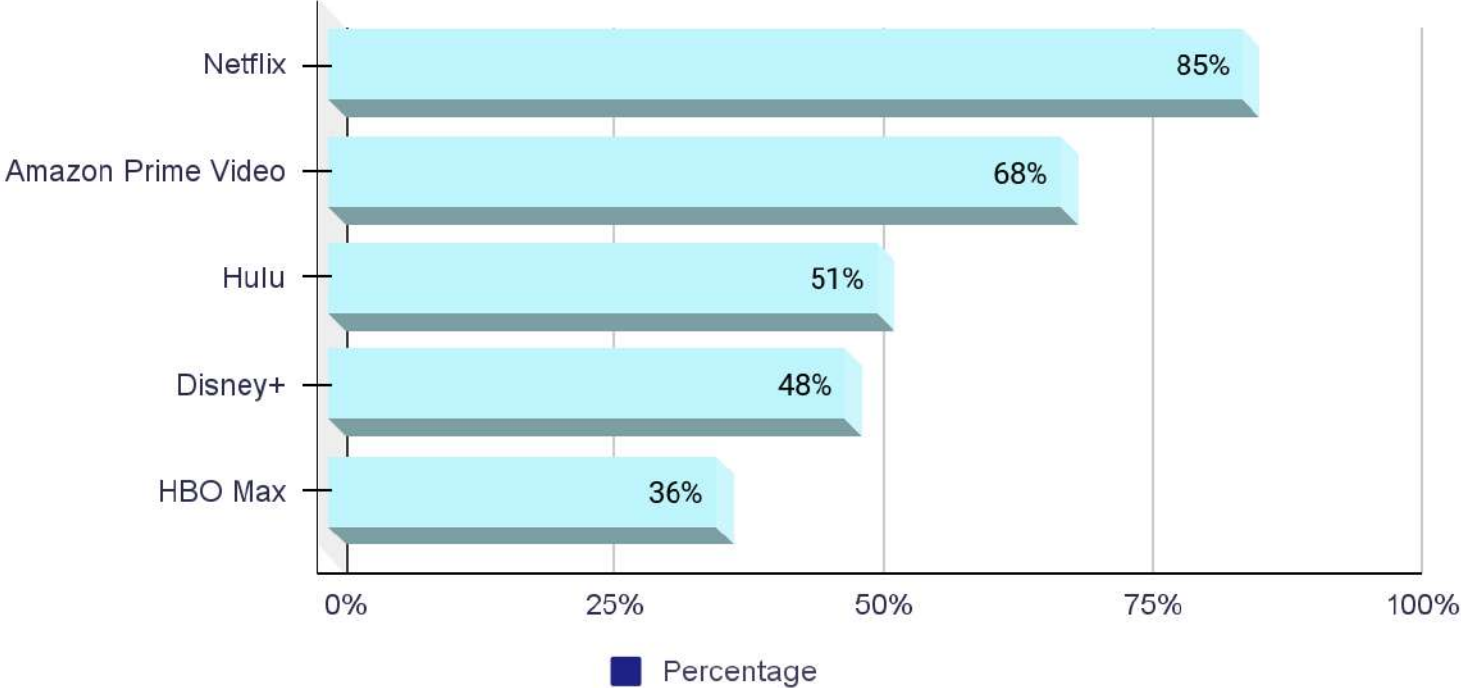
Product Life Cycle

The video streaming service industry is on track to continue to grow at a rapid rate with revenue projected to reach approximately 80,000 million dollars in 2023 – an almost 30,000 million dollar jump compared to revenue in 2021.⁵ Disney Plus is also on the path of rapid growth with projections predicting the company will even pass Netflix in subscriber count by 2026 with a whopping 284.2 million subscribers as they continue to expand to new countries. The industry will continue to grow especially as household subscriptions of traditional TV services continue to fall rapidly², and new streaming service offers continue to be introduced giving consumers' even more streaming options.⁵ With Disney Plus being in the vital growth stage of the product life cycle, they must promote the exclusive content consumers' may only gain access to through their own platform. By differentiating themselves, they can win consumers over when being compared to their more mature competitors who have had a head start in the video streaming industry.



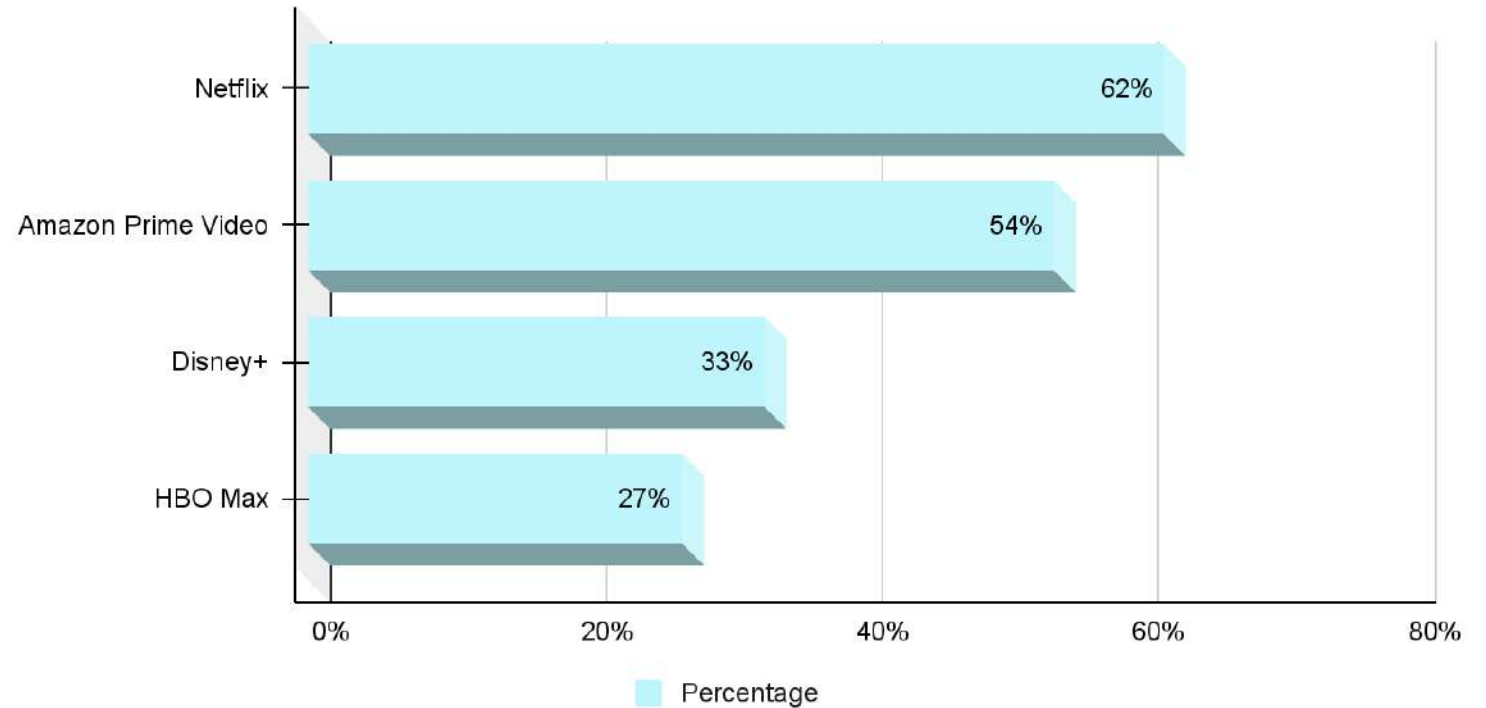
Key Players

Which of the following on-demand streaming services do U.S. consumers currently use? (11)



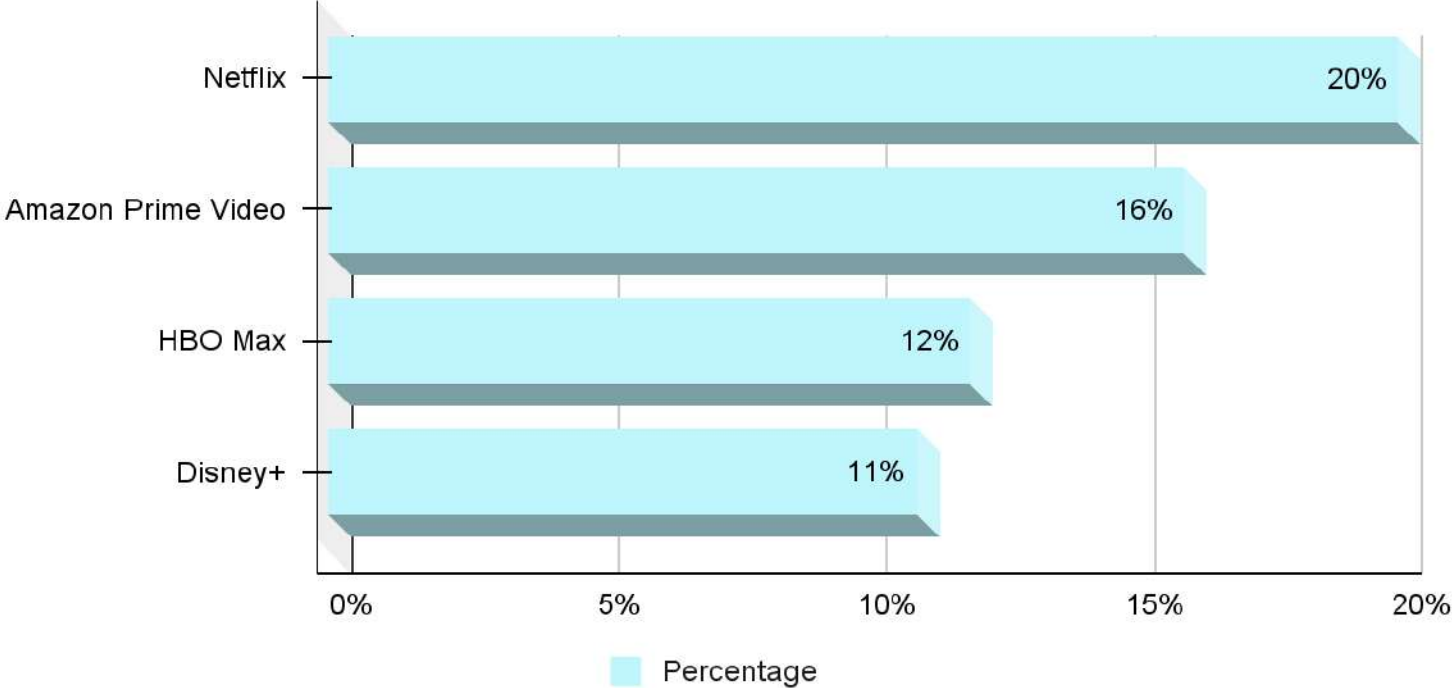
Key Players

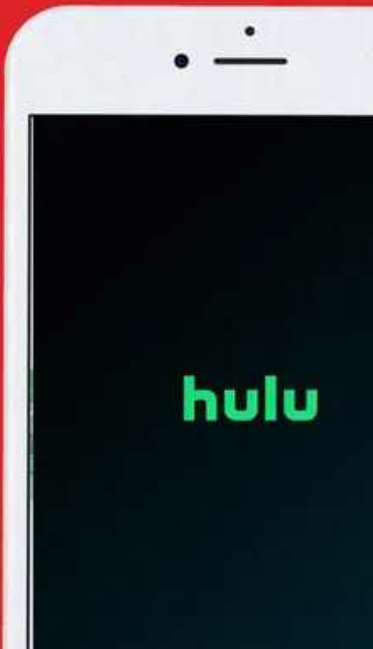
Share of households using or subscribing to selected video streaming platforms in the United States as of May 2021, by service (12)





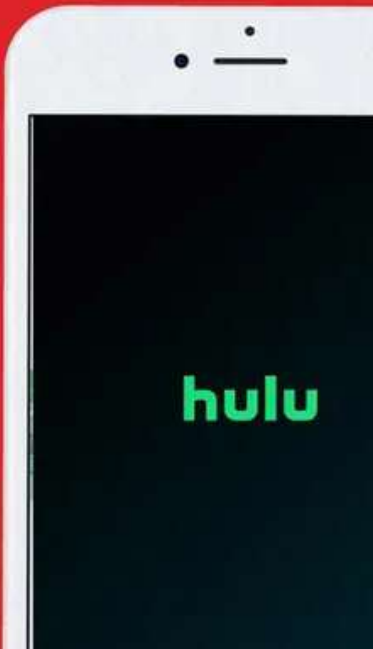
Market shares of selected streaming services in the United States in 2020 (13)





Key Players

Outside of Disney Plus: Netflix, Amazon Prime Video, and HBO Max are the key players in the video streaming industry. From the graphics above, it is clear that Netflix is the top streaming company and exerts the most influence over how streaming is conducted within the industry today (with a market share of 20%). The most widely used and owned streaming service is Netflix with 85% of those sampled reported using Netflix on a day-to-day basis. In addition, an estimated 62% of households have Netflix across the United States. Compared to Disney Plus, they own less of the video streaming market (11%) and have lesser influence within the public sphere since less households subscribe to its platform (an estimated 33%) and 48% of subscribers use the service on a day-to-day basis. Due to its recent development, Disney Plus falls short to its competitors in terms of the number of tv shows and films available through the platform.¹³ In comparison to the three other streaming services (main competitors), Disney has the lowest number of shows (at an estimated 727 shows) and movies (at an estimated 983 films). This number is miniscule compared to more established platforms such as Netflix and Amazon Prime Video that have at least 2,000 tv shows and 3,500 films for each. Although Disney Plus is not the top streaming service within the United States at the moment, it is estimated that by 2026, Disney Plus will have the highest number of subscribers worldwide, out of all the current streaming platforms.¹⁴



Key Players

Each of the streaming platforms competitors to Disney Plus - Netflix, Amazon Prime Video, and HBO Max - serve as direct competitors due to their similarities between the service offered. Similarities include content, pricing, accessibility, and no advertisements. These services offer the option of streaming a variety of content, ranging from tv shows to films. Within the content libraries, classics, new releases, and original content are all found for each streaming service. Another similarity that exists between the platforms is the pricing. All of the direct competitors to Disney Plus range from about \$8 to \$14 dollars a month for a subscription.¹⁵ The popularity of these services is due to the option to watch from anywhere in the world. Through the mobile app, the website, or through the internet (on one's television), these streaming services can be accessed with ease. Finally, the last similarity that exists is that all the services offer an ad-free viewing experience. Despite the numerous similarities, these streaming platforms distinguish themselves from the competition on what type of content they offer. Offering shows with a cult-following or new originals help to persuade viewers to subscribe to the service.¹⁶ In addition to what type of content is offered, the refresh and upload of new content is also a viable feature.¹⁷ Finally, the behind-the-scenes features, such as how easy the platform is to use and navigate is also an important distinguishing factor.¹⁸



Year-Round Sales

There is not consistent seasonality in video streaming. There is a steady growth of subscribers every quarter. This is seen across all the video streaming platforms. For example, Hulu had 30.4 million subscribers in Q1 of 2020, 32.1 million in Q2, 35.5 million in Q3, and 36.6 million in Q4.¹⁹ This is proving they are growing at a steady rate with not one quarter significantly higher/lower. This is seen in Disney plus as well. In 2021 Disney plus had 94.9 million subscribers in Q1, 103.6 million in Q2, 116 million in Q3, and 118.1 million in Q4.²⁰ These statistics are proving that there is not a seasonal factor that is influencing more people to subscribe in one quarter vs the other. There is no seasonality in video streaming because people are watching for and subscribing to entertainment year-round.



SEPTE Analysis → Social/Cultural Considerations

There are many social considerations that motivate young adults in their choices of entertainment, especially video streaming. There are external drivers that will influence a young adult to choose a video streaming service. One is to distract themselves from a hard day or to relax in their down time.²⁰ They want to buy a streaming service so that when their day is winding down, they can log in on their tv or computer and watch a show to take their mind off things. Another factor is their friends. When everyone is talking about a show that is trending or just got released all someone wants to do is be able to relate and talk about it. This causes them to purchase a streaming service just so they are not left out of the loop.²¹ Social media helps someone see what others are watching and where they are watching it.²² This is another factor that motivates a young adult to choose a video streaming service. The genres available on a specific subscription push a young adult to buy a subscription. They are in the mood to watch comedy one day and horror the next, so having an abundance of genres on these streaming platforms is important because it is valuable to the consumer. There are multiple external drivers that push a young adult to watch something in the video streaming industry.

SEPTE Analysis → Economic Considerations

A possible tariff that could affect the streaming service industry is a tariff on U.S. film exports to other countries, such as China who spent 8.6 billion dollars in 2017 to see movies.²⁷ If a tariff is placed on movies created in America, this could have unforeseen consequences on the streaming industry. For instance, this could cause streaming services to be unable to expand to countries outside of the U.S. at a fast rate because popular movies are a part of a tariff. With the unemployment rate slightly increasing, as well as a drop in the Consumer Confidence Index (CCI), there may be a decline of disposable income to spend on streaming services. However, bundling streaming services may help consumers to feel as if they are getting more for their dollar, which can increase sales.

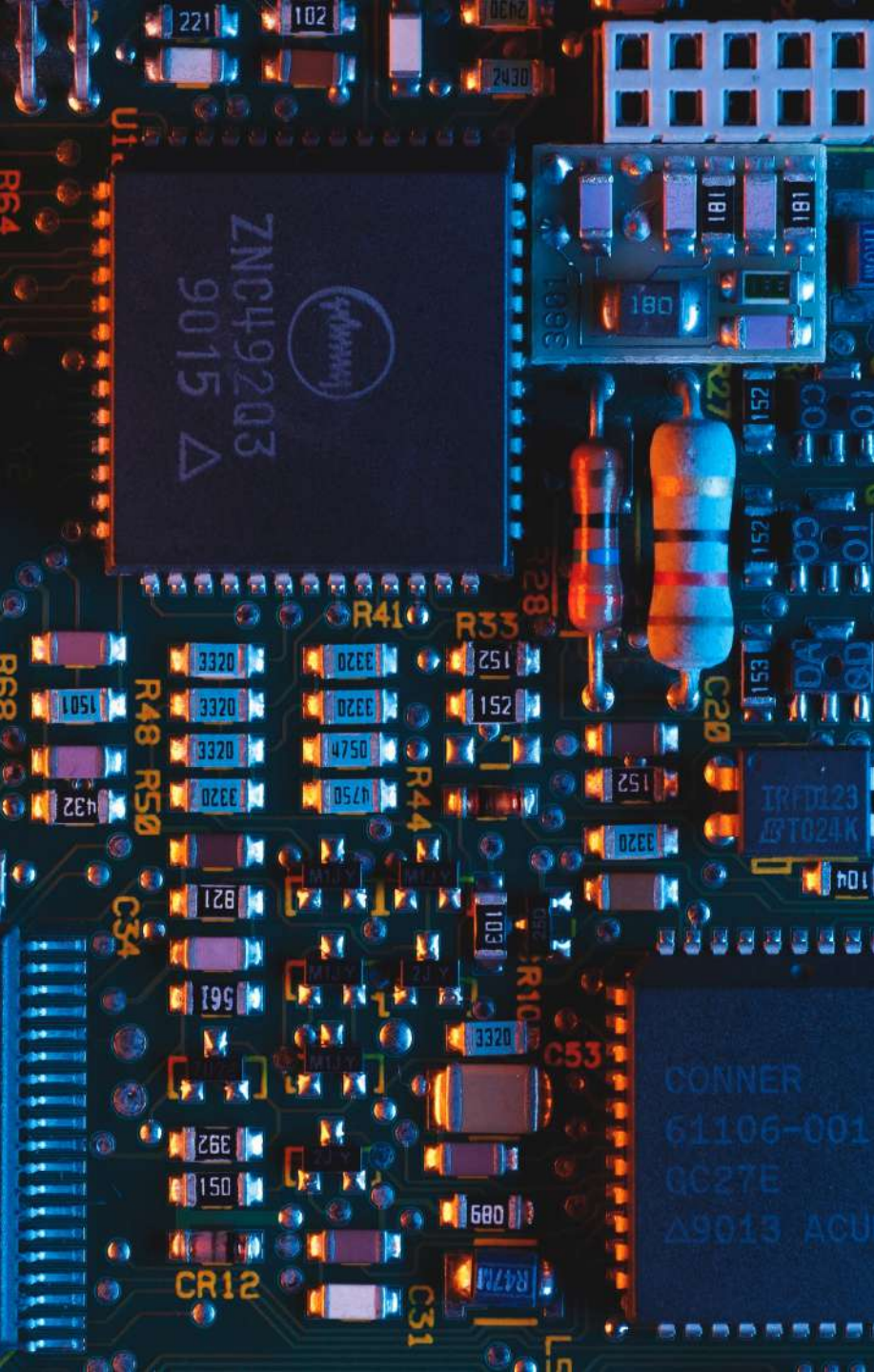
Gross Domestic Product (GDP) In Q4 of 2021 the Real Gross Domestic Product increased by 6.9%. This is compared to Q3 where the GDP increased by 2.3%. ²³	Consumer Confidence Index (CCI) The Consumer Confidence Index stands at 113.8 as of January 2022 as based on a 1985 baseline of 100. This is 1.4 lower than December 2021's CCI, which stood at 115.2. ²⁴
Consumer Price Index (CPI) The Consumer Price Index increased 0.6% in December compared to the previous month. ²⁵	Unemployment Rate The Unemployment Rate in January 2022 stands at 4.0%. This is an increase of 0.1% compared to the previous month. ²⁶



SEPTE Analysis → Political/Legal Considerations

In 1948, the Supreme Court found that seven major film companies “had engaged in a wide-spread conspiracy to illegally fix motion picture prices and monopolize both the film distribution and movie theatre markets.” The case is widely known as the Paramount Decrees, and has become a topic of conversation recently as the Department of Justice has opened up a review to decide whether the law is still valid. The Paramount Decrees “mandated a separation between film distribution and exhibition.” It also “prohibited those defendants from both distributing movies and owning theatres without prior court approval.”²⁸

Perhaps most important to the discussion on how the Paramount Decrees relates to the streaming service industry today is the issue of “block bundling”²⁸, which is described in the text as “bundling multiple films into one theatre license”.²⁹ Some parties are concerned with the main streaming services monopolizing the film industry just as the film companies did in the 1940s. Although the model has changed from in person movie theaters to at home venues, the system could still be played similarly. Therefore, it is important for streaming services to create strong legal teams with this in mind in order to continue creating and distributing films for the long-term future. Regarding Video Streaming Services, the FTC has a couple of rules set in place specifically to protect children. One of these rules is called COPPA which stands for: the Children’s Online Privacy Protection Act. COPPA is an act that does not allow providers to collect information on children under the age of 13 if a parent does not allow it. Another rule that is set in place for Video Streaming Services includes parental controls that only gives children access to things that their parents agree to first. For example, parents can block all access to Movies or TV shows rated over PG for their children. This keeps children from viewing anything that their parents find inappropriate without a password to bypass it.



SEPTE Analysis → Technological Considerations

Technological advancements have played a huge role in the video streaming industry. Without all the advancements the industry would not be as big or complex as it is today. One step that has been taken is the use of super resolution. It creates a clearer picture and can now be used at a much faster pace.³⁰ Another huge advancement is the use of Ultra High Definition instead of SD or HD content. This is an upgrade that will have to take some adjusting so the resolution can stream the content on a UHD screen²⁹. The growth of the technology industry is allowing the video streaming industry to go with it. These advancements can be used to the advantage of video streaming industry players because they can make their content more visually pleasing and even load content in a faster way. Internet speed and mobile access advancements have also played a huge role in the video streaming industry. Streaming services, like Netflix, have systems that automatically adjust the video quality based on someone's speed of internet.³⁰ The slower the internet speed the lower the quality, but as the years go by the internet is getting faster, which is upping the quality of streaming services.³¹ As for mobile access, it is growing along with internet speed; In 2021, more than 90% of the world population utilizes a mobile device to access the internet.³² Looking at the United States, internet access has expanded exponentially across all areas of the United States (including rural and urban areas).³³ Internet access is provided from a personal computer or other internet-accessing device through dial-up, ADSL, cable broadband access.

These advancements influence competition because every company that has a video streaming service wants to be the first to use the newest technology. This way people are more inclined to buy their subscription. People always want the newest and fastest products because they are so appealing. The services in the industry are going to have to fight for who uses it first and therefore bringing in more consumers.



SEPTE Analysis → Environmental Considerations

There are more environmental considerations that the video streaming industry faces than one might think. This includes aspects such as energy costs and sustainability. Video streaming uses a lot of energy and affects the environment negatively. For example, watching as little as 30 minutes of Netflix causes CO₂ emissions to be the same as if someone drove around for 100 meters.³⁴ When someone is watching a tv show or movie they are not thinking about all the energy being used; It is not the first thing a young adult thinks of. Another environmental consideration the Video Streaming industry faces is traffic on the internet. Video streaming is responsible for 40% of the internet traffic on mobile networks in the U.S.³⁵ If more environmentally friendly systems were used this number could be reduced and a huge amount of energy could be saved globally.

Key players in this industry are addressing environmental considerations in different ways. For example, in 2018 Hulu started the shift to a fully renewable energy space.³⁶ They did this in order to reduce a large amount of carbon emissions. While Hulu is doing this, Netflix has a plan called Net Zero + Nature being put into action.³⁷ Their goal is to have zero greenhouse gas emissions by the end of 2022 and continue with zero from there on out. They have a three-step plan that includes reducing, retaining, and removing emissions and carbon storage³⁸. Disney plus is aiming for the same goal as Netflix; however, they are hoping to achieve this by 2030.³⁸ The key players in the Video Streaming industry are all working to consider their environmental impact and take certain costs into consideration.

Market Factors

There are many factors that lead to how the streaming industry can both grow and shrink. One of them being movie theaters reopening after Covid. When Covid-19 started; movie theaters, restaurants, and stores all shut down to limit exposure. With this being said, streaming services were rapidly growing since there were no in person movies to be seen. With the pandemic continuing on however, movies are becoming more popular again with 64% of people saying that they were comfortable going to the movies.³⁹ Even though more people will still be attending movies, it should not have too much of an impact on how many people stream.

Unlimited data plans that are being offered are making streaming a lot easier to use outside of the home. Before unlimited data plans, most people were only using streaming services inside of their homes which limited the audience for streaming subscriptions. With the availability of unlimited data plans from every telephone service, it is becoming much more popular for people to be paying for that and a streaming service that they can use everywhere, instead of paying for television services that can only be watched at home.

While the economy is continuing to reopen, there is a lot in store for the streaming industry. Since the pandemic, spending on activities outside of the home came to an abrupt halt for a while but with concerts, events, and activities reopening Mintel believes that people will start to reconsider spending their extra money on streaming services instead of in person events. Mintel says that they believe that spending on streaming services will continue to increase but the growth of the industry during the two years of Covid will really slow.



Market Factors

Another factor that will affect video streaming is cost over things such as cable. Cable prices are continuing to rise by 50%.⁴⁰ In one year, Disney Plus alone went from 50 million subscribers to 94.9 million subscribers.⁴¹ The average cost of a Disney Plus account is \$8 while the cost for the average AT&T cable TV package is \$69.99 a month so this makes buying a streaming service subscription a lot more intriguing than buying a cable package.

One other market factor that would lead to the purchase of more streaming services would be the ease of use for that service. With technology continuing to progress, these services are getting easier to use and more appealing to users. PWC did a consumer survey and found that 31% of users agreed that easy to use and personalized recommendations would be a major factor as to why they would keep a streaming service.⁴² It also says that if companies were to make streaming services even more personalized it would make 29% of people from their study get subscriptions to streaming services causing the market to grow.



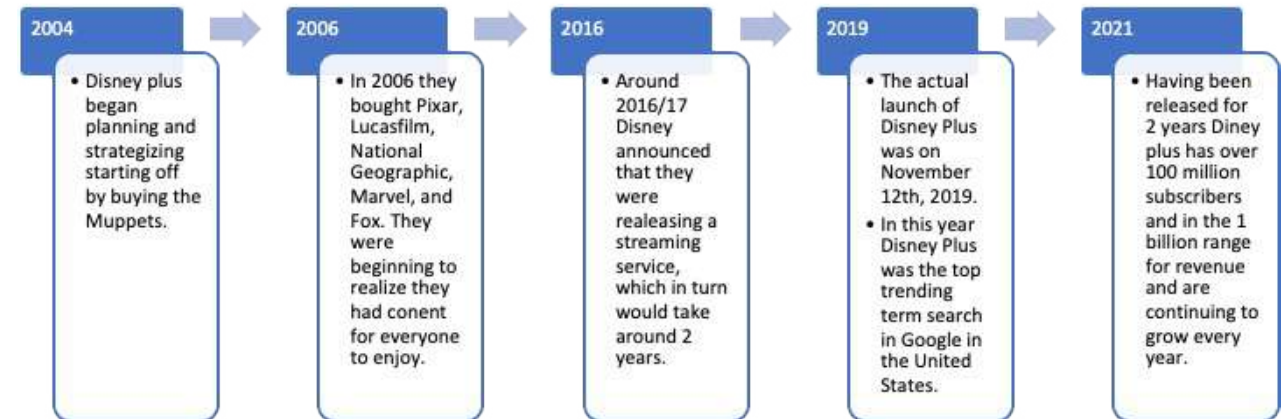
Disney Plus' Potential

Disney Plus has a lot of very strong potential in the streaming industry. As a result, Disney Plus is predicted to increase sales over the next few years and dominate the SVoD market. Although they are relatively new within the industry, they have expanded and reached a wide audience of approximately 118 million subscribers worldwide (as accounted for in 2021).⁴² As of March 2022, Disney Plus now has a total of 129.8 million subscribers worldwide.⁴³ This is a 10% increase in subscribers in the span of three months.⁴³ Their subscribership surpassed their previous prediction of reaching an audience of 60 to 90 million subscribers by the end of 2024.⁴³ Statista predicts that Disney Plus will surpass Netflix in 2026 (regarding their market share). Currently, Netflix is the leading streaming service provider worldwide with the greatest number of subscribers and the higher market share percentage.⁴³

Competitor Analysis

Disney Plus Timeline¹⁹

- Disney Media and Entertainment Distribution owns Disney Plus.¹⁶
- It was founded in November of 2019.¹⁶
- Disney Plus is a newer streaming platform, but it has become popular very fast. As of Q4 in 2021 Disney plus has around 118.1 million subscribers.¹⁷ They are continuing to grow every year and add more and more content to their website.
- The company headquarters are located in New York, NY.¹⁸



NETFLIX

Netflix's Timeline (1)

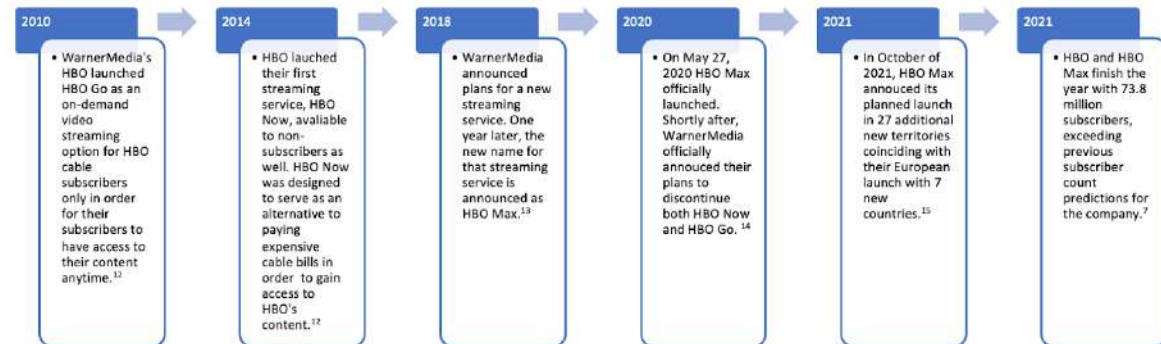


Netflix Timeline¹

- Netflix held a prize contest with a grand prize of \$1 million in 2006. The contest was for redeveloping their recommendation system. Netflix awarded a group (called BellKor's Pragmatic Chaos) in 2009 for creating the algorithm that Netflix uses today.
- This algorithm determines which other TV shows and movies are recommended for you based off your previous watch list. This algorithm also determines which thumbnails you see and a generalized customized experience on the platform. This algorithm individualized Netflix from the other beginning streaming services at the time.
- Another notable piece of information regards Netflix's ill-fated attempt at segmenting the company into two different companies in 2011. They planned on splitting the streaming service into one company and the mail-based subscription service into another company (which they planned to call Qwikster). Just a month after their announcement, they quickly dropped that idea and decided to keep both aspects of the company together. Later, the mail-based subscription service would be dropped after it was phased out with the popularization of the internet and internet streaming services.
- The company headquarters are located in Los Gatos, California.¹

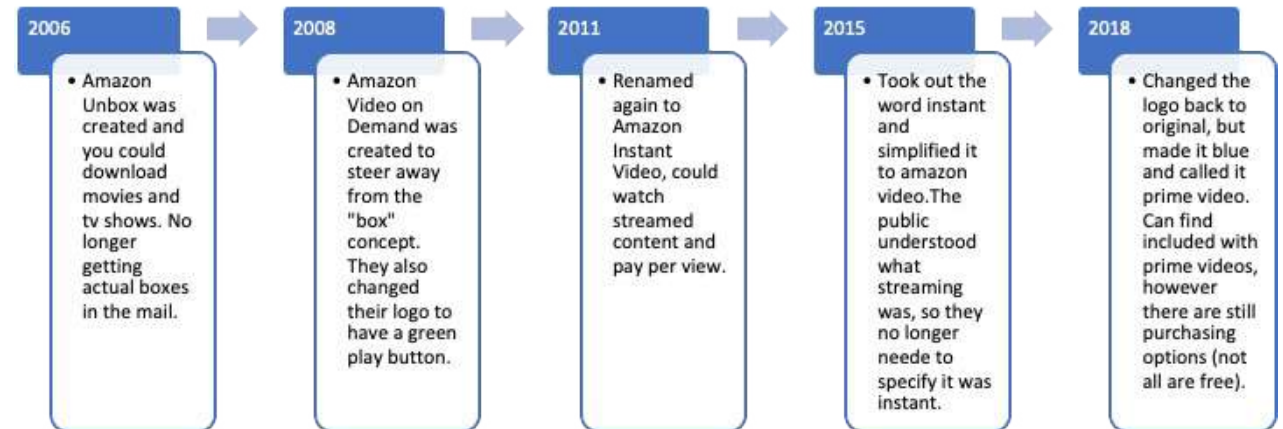
HBO Max Timeline

- AT&T's WarnerMedia currently owns HBO Max.⁷
- HBO Max launched in May of 2020.⁸
- HBO Max replaces the company's former streaming services, HBO Go and HBO Now. Formerly, HBO Now offered consumers the option to gain access to HBO content without paying the cost of cable, but HBO Go was only offered to HBO cable subscribers.⁸ Since HBO Max is WarnerMedia's streaming platform, they offer not only HBO original content but are also home to the rest of WarnerMedia's content as well. This includes new Warner Bros. movies and content from CNN, DC, TBS, AdultSwim, TruTV, and more.⁸ HBO Max monthly subscriptions currently start at \$9.99/month.⁹ HBO and HBO Max had a combined total of 46.8 million subscribers as of the Q4 in 2021.¹⁰
- The company headquarters are located in Burbank, California.¹¹



Amazon Prime Video Timeline⁶

- Jeff Bezos owns Amazon prime video.²
- Amazon prime video was created in 2006.³
- It was first called Amazon Unbox.³ When it finally became Amazon Prime Video, the subscriber watched for an average of a little over 5 hours and they obtained 100 million subscribers.⁴
- The company headquarters are located in Seattle, Washington.⁵



Company Revenue

It is important for the client to know that although Netflix and Amazon Prime have been in the streaming service realm longer, Disney Plus is doing exceptionally well in terms of revenue. Amazon Prime is the main competitor for Disney Plus with 1.91 billion dollars in revenue in 2021 Q1 compared to Netflix's 1.04 billion and Disney Plus's 759.2 million at the same time. Disney Plus has grown 716 million dollars from the company's first recorded revenue in Q1 2020. This increase happened in the span of one year.

This is comparable to HBO Max whose revenue has only increased 106 million since its first recorded in 2019 Q3. Although Disney Plus has not caught up to Netflix and Amazon Prime in terms of revenue, their growth rate is promising.

Netflix and Amazon Prime, the top competitors for Disney Plus, are in the maturity stage of the product life cycle. Netflix and Amazon Prime entered the streaming service industry before HBO Max and Disney Plus, so it is not surprising their revenue is higher. These companies had the chance to gain customer loyalty early on and overall changed how consumers viewed the entertainment industry. However, Netflix could soon begin to decline as their revenue stayed at 1.04 billion from Q1 to Q3. With more competitors like HBO Max and Disney Plus, Netflix and Amazon Prime will have to do more to keep their market share. HBO Max is in the growth stage of the product life cycle because it is steadily growing and has not been in the game if its competitors. Disney Plus was founded in 2019 and its revenue has skyrocketed compared to HBO Max. This could be attributed to Disney's large name recognition and its combination deal for consumers with Hulu. Disney Plus has a strong competitive advantage because of its ability to keep Disney movies, TV shows, and other brands such as Marvel and National Geographic off other streaming platforms.

STREAMING SERVICE REVENUE

The revenue for each company was found by multiplying the number of subscribers by the cost of the subscription at the given time. N/A means that the company was not created or there was no data for that given time frame.

STATISTA DOCUMENTS USED: NUMBER OF SVOD SUBSCRIBERS WORLDWIDE FROM 2020 TO 2022, BY SERVICE

	<i>Netflix</i>	<i>Amazon Prime</i>	<i>HBO Max</i>	<i>Disney+</i>
2016 Q1	\$456.64 MILLION	\$637.4 MILLION	N/A	N/A
2016 Q3	\$464.34 MILLION	\$692.4 MILLION	N/A	N/A
2017 Q1	\$542.7 MILLION	\$879.2 MILLION	N/A	N/A
2017 Q3	\$564.3 MILLION	\$1.011 BILLION	N/A	N/A
2018 Q1	\$605.44 MILLION	\$1.23 BILLION	N/A	N/A
2018 Q3	\$625.99 MILLION	\$1.26 BILLION	N/A	N/A
2019 Q1	\$782.4 MILLION	\$1.34 BILLION	N/A	N/A
2019 Q3	\$787.5 MILLION	\$1.46 BILLION	\$346 MILLION	N/A
2020 Q1	\$908.9 MILLION	\$1.53 BILLION	\$363 MILLION	\$212 MILLION
2020 Q3	\$949.3 MILLION	\$1.64 BILLION	\$381 MILLION	\$436 MILLION
2021 Q1	\$1.04 BILLION	\$1.91 BILLION	\$442 MILLION	\$759.2 MILLION
2021 Q3	\$1.04 BILLION	DATA NOT PROVIDED	\$452 MILLION	\$928 MILLION

Competitor Analysis Matrix

	Disney Plus	Netflix	HBO Max	Prime Video
Product	Streaming Service	Streaming Service	Streaming Service	Streaming Service
Price	\$7.99-\$14 /month	\$9.99-\$15.49 /month	\$10-\$14.99 /month	\$8.99/month
Place	Website, computer, mobile app, television app	Website, computer, mobile app, television app	Website, computer, mobile app, television app	Website, computer, mobile app, television app
Promotion	<p>The streaming service to access all the Disney classic movies.</p> <p>Additionally, there are shows and movies here that you can't watch anywhere else - they release original content.</p>	<p>There are shows and movies here that you can't watch anywhere else - they release original content: Love is Blind, YOU, Bridgerton, Spaceforce, Ozarks.</p>	<p>There are shows and movies here that you can't watch anywhere else - they release original content.</p> <p>HBO Max only series and movies: Euphoria, The Kingsmen, Nightmare Alley.</p>	<p>There are shows and movies here that you can't watch anywhere else - they release original content: Jack Ryan, Man In The High Castle, The Marvelous Mrs. Maisel.</p>

Competitor Analysis Matrix

	Disney Plus	Netflix	HBO Max	Amazon Prime
Discounts and Coupons	Save 15% on a yearlong subscription (\$79.99) instead of a monthly subscription (\$7.99).	They do not have set discounts, but they have promo codes which vary over time.	Save 16% on a yearlong subscription (\$99.99/yr.) instead of a monthly subscription (\$9.99). There is also a discount that if you watch ads it takes \$2 off your monthly bill.	Government Assistance/EBT is \$5.99 a month ²⁰
Cross Promotions	Awkwafina ²¹ → American actress, rapper, and comedian. Another very large cross promotion offered by Disney Plus is for only \$6 more a month, you can also get Hulu and ESPN Plus on top of your Disney Plus Subscription.	OTR ²² & Ukiyo ²³ → American musicians who created electronic based songs.	After the launch of HBO Max (in July 2020), they released advertisements - specifically on the channels TNT and TBS - about who they are and what type of content they have. ²⁴	If you watched 5 hours of Prime Video, you got \$5 of free Cheez-Its. ²⁵

Competitor Analysis Matrix

	Disney Plus	Netflix	HBO Max	Amazon Prime
Ad: Target Audience	Millennials for two reasons. First being the mention of classic Disney titles, which were popular during their childhood. The mention of these titles plays into the nostalgia factor. Secondly, the usage of Awkwafina is geared towards millennials as she starred in more mature content.	Movie buffs are targeted in this advertisement due to the message of the ad. The promotion of releasing new films every week for the entire year is of interest for those who watch movies regularly. This commercial shows a variety of films, ranging in genre and style. Thus, Netflix is targeting movie buffs in general.	Avid tv and film watchers are targeted in this advertisement due to the message of the ad. This ad portrays the original content that will be released this year on the platform. Within this commercial, they show a variety of films and tv shows that range in genre and style.	This commercial targets sci-fi and fantasy fans for TV shows and films due to what type of shows they highlight which are available on the streaming service. ²⁶ Titles range from “Wheel of Time”, “The Expanse”, and many others.
Ad: Creative	Awkwafina walks around and talks about the range of content available on Disney Plus. ²⁷ She mentions the most famous films and TV shows that are available (such as The Lion King).	This commercial touts about how Netflix is releasing a new movie every week for the duration of 2022. ²⁸ This commercial touches on titles of movies that will be released, alongside a short snippet of the film.	This commercial is made up of snippets of shows and films that will be released throughout the year. ²⁹ Although, this commercial is original-content specific meaning that they are only highlighting content that is produced by HBO Max.	This commercial is a modge-podge of shows and films that fit within the genre of fantasy and sci-fi. ³⁰ Ranging from tv shows and films of original and non-original content. The ad transitions through each show/film, showing a brief snippet of the trailer.
Ad: Tagline	“Discover new worlds”. ³¹	“See what’s next”. ³²	“Where HBO meets so much more”. ³³	“See where it takes you”. ³⁴

Competitor Analysis Matrix

	Disney Plus	Netflix	HBO Max	Amazon Prime
Social Media Followers and Likes	Does not have a Pinterest.	Has the most followers/likes across all platforms.	Does not have a Snapchat.	Has all social media options.
Facebook	4,553,894 likes	80,675,114 likes	103.8K Members (private group)	16,092,495 likes
Twitter	3.2 million followers	16.1 million followers	768.1 K followers	2.2 million followers
Instagram	4.7 million followers	29.2 million followers	2.1 million followers	2.3 million followers
Pinterest	N/A	251,000 followers	11,000 followers	9,000 followers
Snapchat	N/A, only Disney has a snapchat not Disney Plus.	Can subscribe to watch stories and use Netflix tv shows "lenses".	N/A	Can subscribe to watch stories and use Prime Video tv show "lenses".

The Four P's

Product

Price

Place

Promotion

Product



Disney Plus, Netflix, HBO Max, and Prime Video are streaming services that offer a variety of television shows and movies for the consumer to enjoy. Disney Plus offers titles from the Disney collection, National Geographic, Star Wars, Marvel, and Pixar. Netflix has gained popularity through their original titles, such as “Stranger Things”, and cult favorites, such as “New Girl.” HBO Max offers popular shows and movies, such as the Harry Potter series and originals, such as “Euphoria.” Prime Video is a part of the Amazon Prime subscription and is unique because some titles are free through the service, while others must be purchased individually on top of the subscription price. Prime Video offers popular titles such as “The Marvelous Mrs. Maisel”. Each service offers unique entertainment options that are not available to watch through the other platforms. In addition to this, there are intangible differences through each service. For example, Disney Plus has tv shows/movies that people associate with their childhood, which brings back emotions and memories. Each streaming service can take a consumer back to a memory when they felt something when watching a particular tv show or movie. The streaming services all differ in this way because while one person associates Netflix with a happy family bonding experience another person might associate HBO Max with a sad time in their lives. This creates a decision for the consumer on which streaming service fits their needs and wants best.

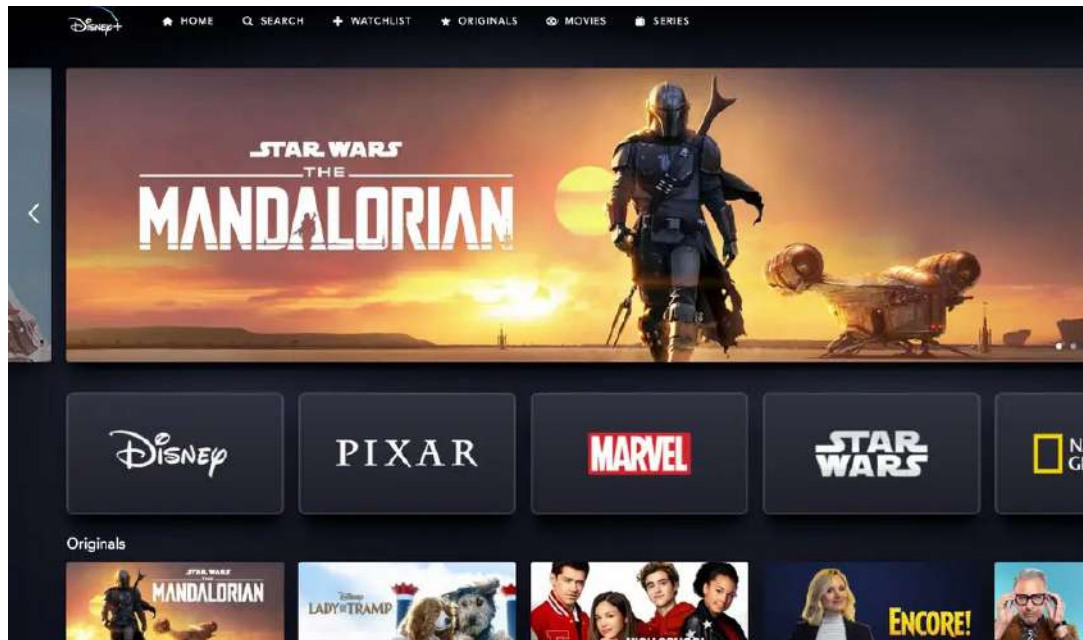
Price

Disney Plus, Netflix, HBO Max, and Prime video all have varying price ranges for each subscription. The simple subscription option for Disney Plus is \$7.99 a month. The next cheapest option is Prime Video that is \$8.99 a month. HBO max and Netflix both start at \$9.99 a month, but Netflix subscriptions can go up to \$15.49 and HBO Max can go up to \$14.99. All of these streaming services have basic plans which are at the lowest price compared to other subscription options. For example, HBO Max has an ad free subscription option, however it is priced higher at \$14.99 a month. All the basic plans are similar in pricing.

The screenshot shows the Disney+ website interface. At the top, the Disney+ logo is displayed. Below it, the tagline reads "The best stories in the world, all in one place." Two subscription options are presented side-by-side. The first option is the basic plan, priced at \$6.99/month, with a "START FREE TRIAL" button. The second option is a bundle including Disney+, Hulu, and ESPN+, priced at \$12.99/month, with a "BUY NOW" button. The background of the page is dark with a subtle image of a child's face.

Subscription Option	Price	Action
Disney+ Basic Plan	\$6.99/mo.	START FREE TRIAL
Disney+ + Hulu + ESPN+ Bundle	\$12.99/mo.	BUY NOW

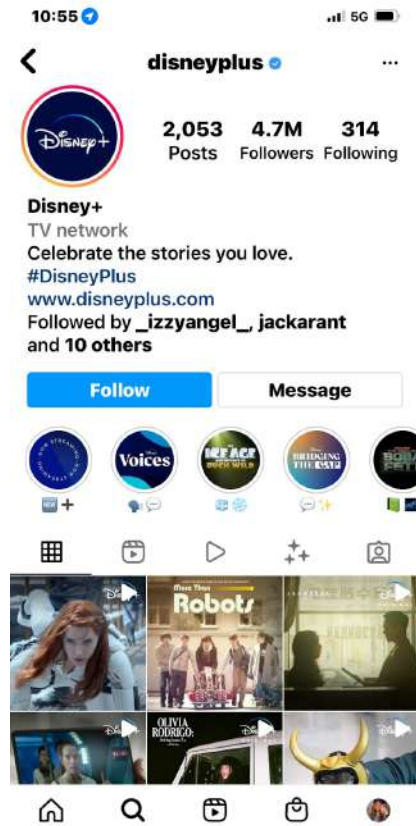
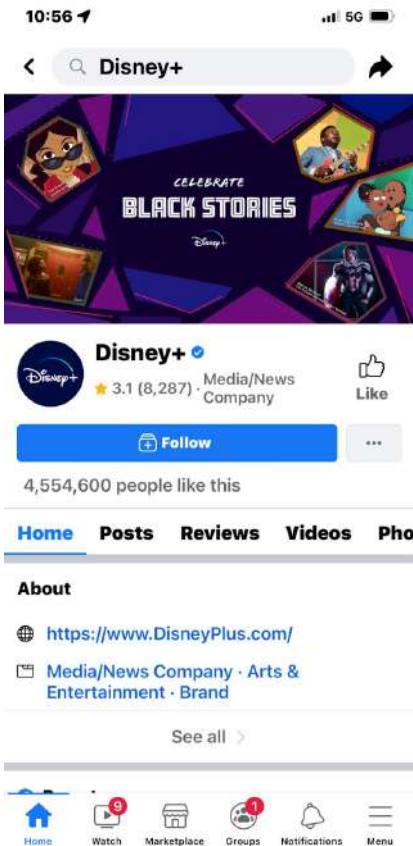
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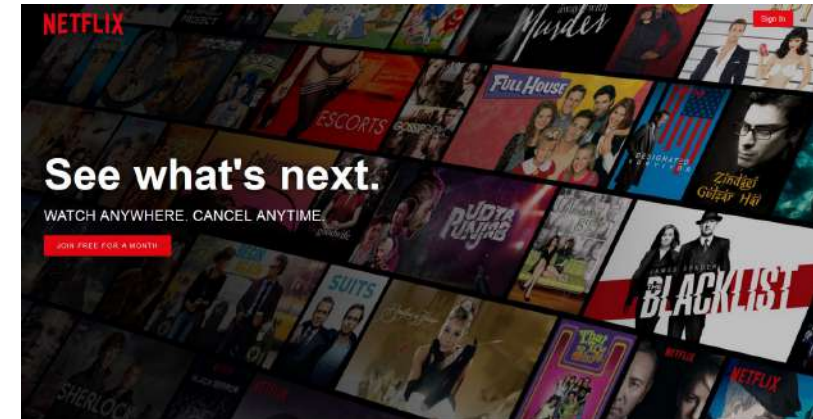
All of these streaming services have both a website and an app. Starting with Disney Plus their app is easy to use with categories laid out. There is a recommended for you, originals, and many other categories. In addition, the consumer can watch on up to four screens. Their website is similar in that you can search by character or just the name of the show/movie itself. Netflix is laid out very similarly. Their app has a home page, new & hot, fast laughs, search, and downloads. When clicking on the search in the app it takes you to top searches. On their website you are also able to search by character and if they don't have what you are looking for, they will show you a similar option.

The HBO Max app has a 2.8 out of 5 stars on the app store and many bad reviews saying it lags. It is one of the simpler apps because it has a home page, a search, and a profile. You can search by featured or A-Z. Their website is laid out in which you can search and browse by category. They also have a watch free option even if you don't have a subscription. Lastly, Prime Video's app and website. There are search options including home, originals, TV, movies, and kids. Prime Video also has a free to me section on their website. You can then search by top categories and genre.

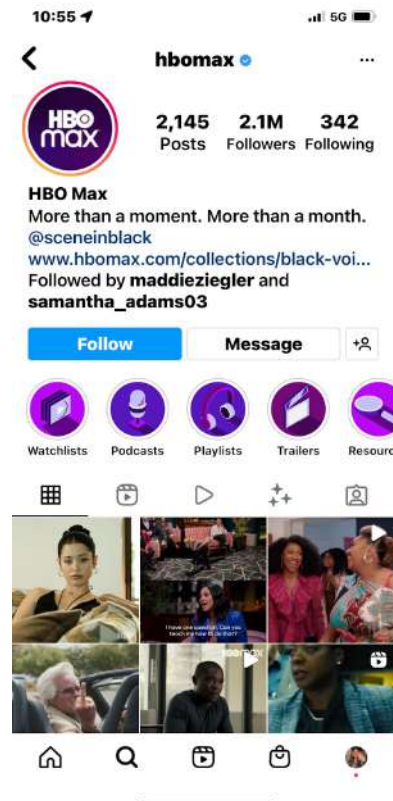
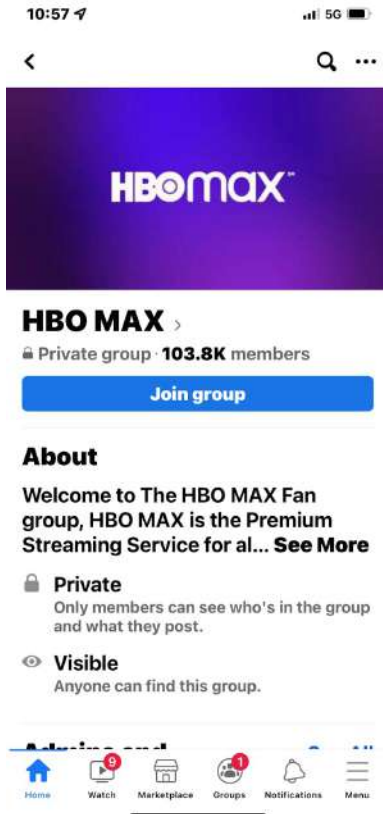
Promotion: Disney Plus Facebook, Instagram, Twitter, and creative



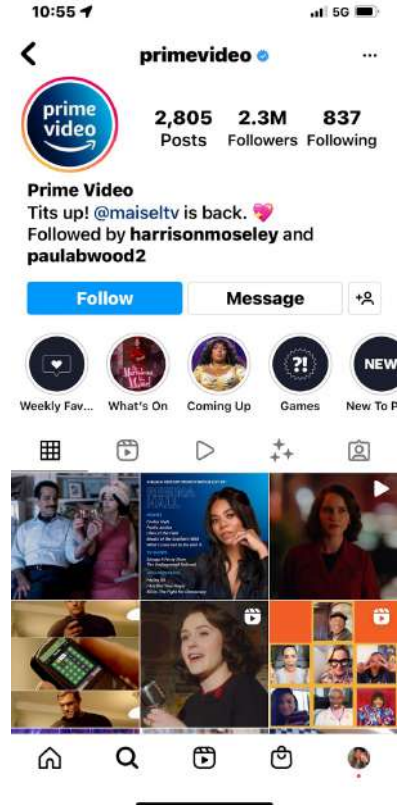
Promotion: Netflix Facebook, Instagram, Twitter, and creative



Promotion: HBO Max Facebook, Instagram, Twitter, and creative



Promotion: Prime Video Facebook, Instagram, Twitter, and creative



Extra Value

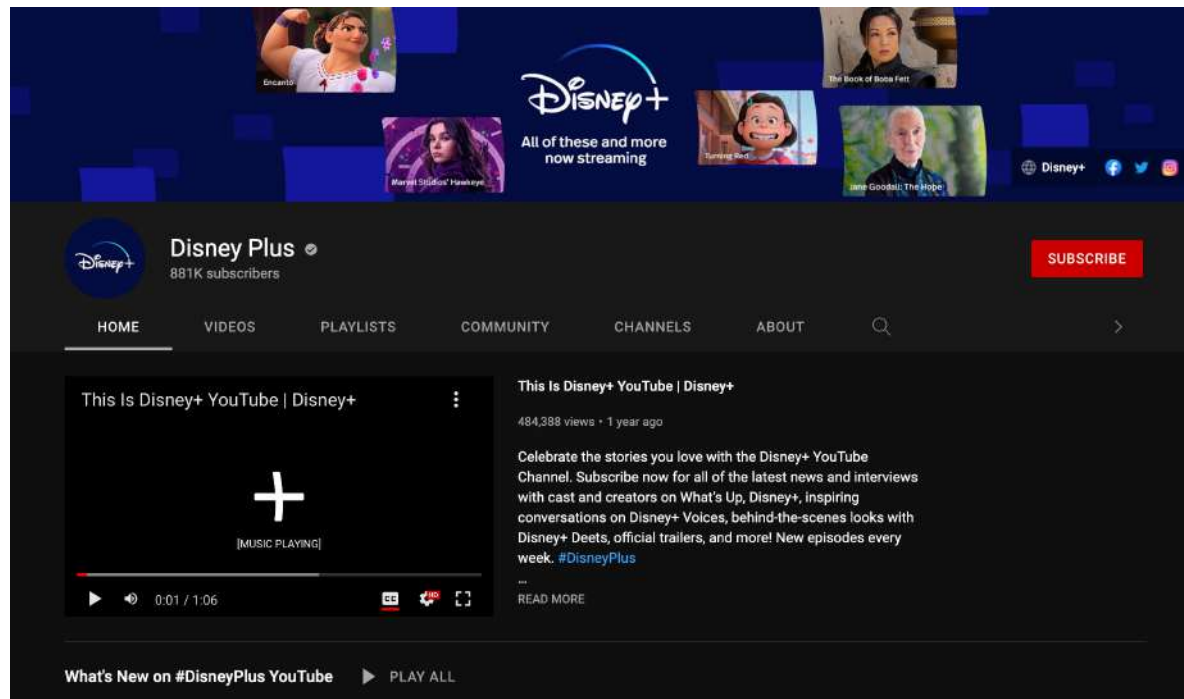
Starting with Disney Plus, they have frequently asked questions at the bottom of their website that include important information like the cost, where to watch, and what is included. This feature is helpful because many new subscribers might have questions and they are answered right there for them. Netflix on the other hand has a help center both at the bottom of their website and under the profiles section. This is helpful if someone is having trouble or has a question. In addition to this Netflix's website has an audio and subtitles link that leads you to shows that include subtitles which is a cool feature. HBO Max has a section with frequently asked questions as well. This includes information about different plans and devices that might be hard to find outside of their website. Lastly, there is Prime Video. They have a get to know us, make money with us, and let us help you sections. The let us help you has many helpful subsections that can lead you to more information or help.



Streaming Services Social Media Analysis

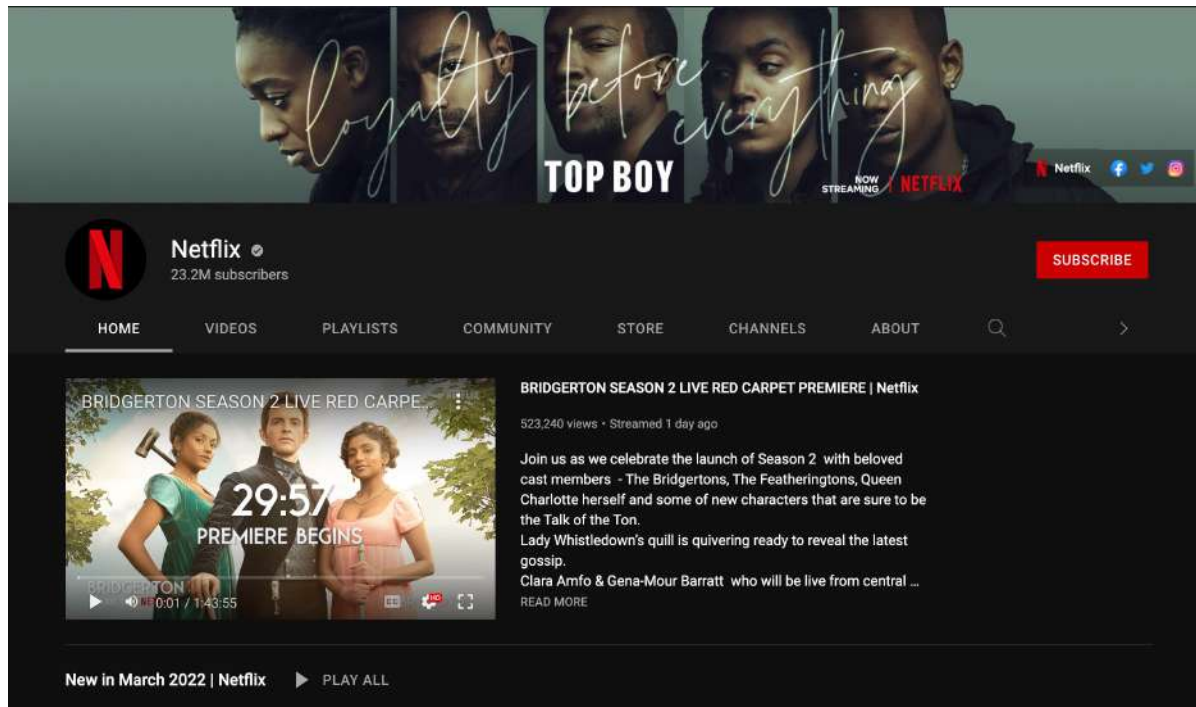
	Disney Plus	Netflix	HBO Max	Prime Video
Followers for each platform	Facebook: 4,553,894 likes Twitter: 3.2 million followers Instagram: 4.7 million followers	Facebook: 80,675,114 likes Twitter: 16.1 million followers Instagram: 29.2 million followers	Facebook: 103.8K members (private group) Twitter: 768.1 K followers Instagram: 2.1 million followers	Facebook: 16,092,495 likes Twitter: 2.2 million followers Instagram: 2.3 million followers
Hashtags used	Facebook: #DisneyPlus, #BlackisKing, #LouderandProuder, #PixarSoul, #FalconandWinterSoldier, #DisneyPlusGoats Twitter: #DisneyPlus, #Eternals, #Snowdrop, #DisneyPlusGOATs Instagram: #DisneyPlus, #Snowdrop, #drivinghome2u, #DisneyPlusGOATs, #TheDisneyBundle, #SeasonsStreamings	Facebook: #NetflixBookClub Twitter: N/A Instagram: N/A	Facebook: #Euphoria, #TheRighteousGemstones #Selena #PaintingWithJohn Twitter: #Euphoria, #PaintingwithJohn, #PeacemakerParty, #TheStaircaseHBOMax, #RaisedbyWolvesMax Instagram: #TheSuicideSquad #Peacemaker #WinningTime #TheSurvivor	Facebook: #LOTRonPrime #LOTR #LOTROP #LucyandDesiMovie #FootballisOpen #TNFonPrime Twitter: #LOTRonPrime, #LOTR, #LOTROP, #MaiselWatchParty, MrsMaisel, #PhatTuesdays, Instagram: #LOTRonPrime #LOTR #LOTROP
Influencers used	Grace VanderWaal, Lexi Underwood, Karan Brar	Francesca Farago, Harry Jowsey, Thomas Petrou, Alex Warren, Vinnie Hacker, Jack and James Wright, Chloe Veitch	Whyllie Heiner, Sarah Frier, Justine Bateman, Liz Eswein, Christopher Bailey, Shannon Dee ³⁵	Luciana Faulhaber, Mike Heslin, Samantha Gracie ³⁶

Advertising Strategy → Disney Plus



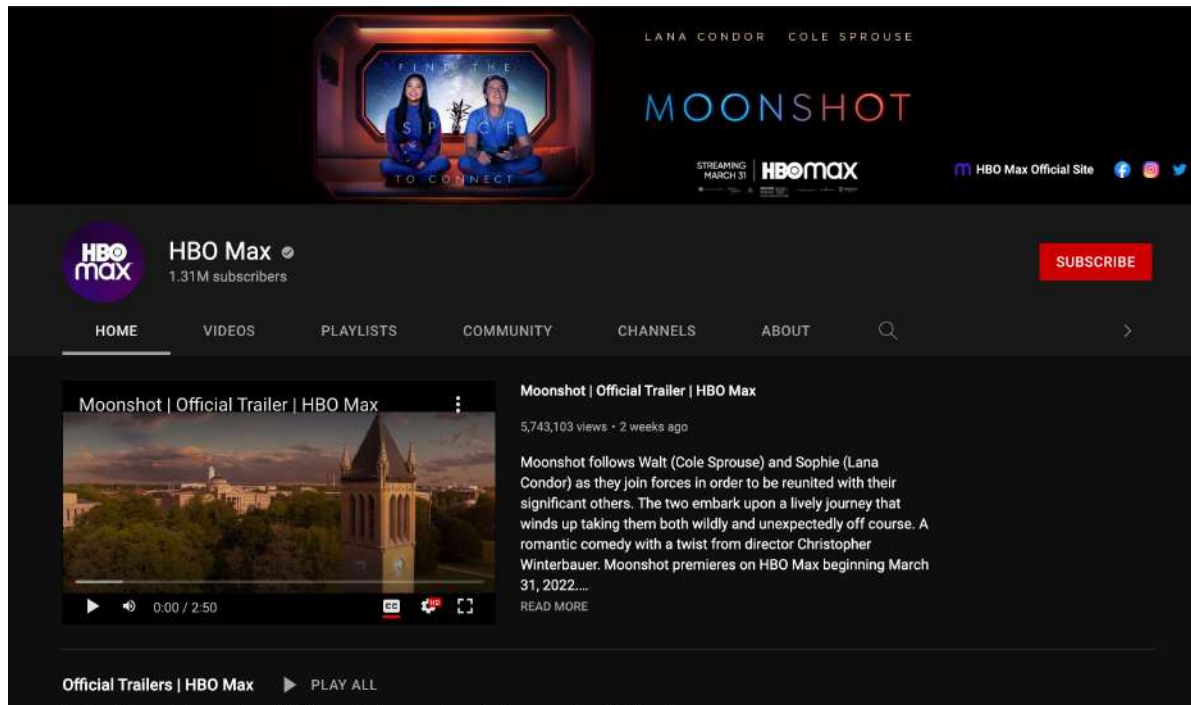
Disney Plus launched an advertisement in 2021 on December 16th that focused on the variety of titles that can be watched with a subscription. The ad showed popular showings from Star Wars, National Geographic, Pixar, Marvel, and Disney movies and originals. The advertisement has over two million views on YouTube and was published on the Disney Plus channel. The comment section is filled with praise towards Disney Plus and works as an advertisement and review page for potential subscribers to see.³⁷

Advertising Strategy → Netflix



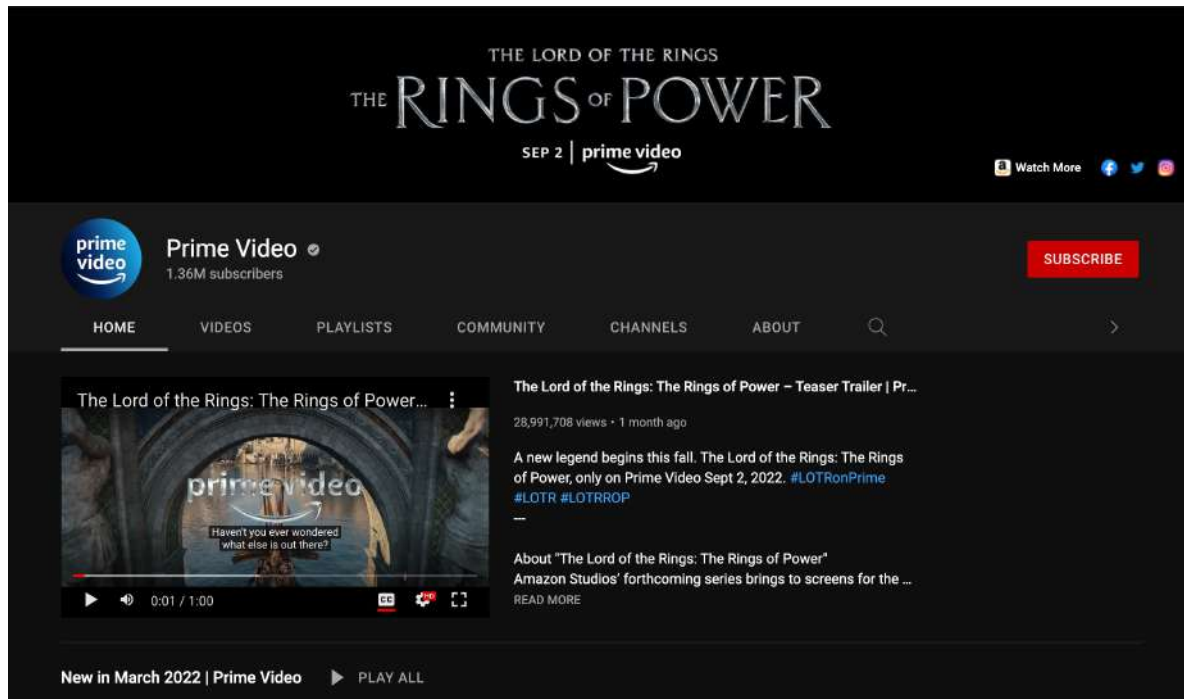
Netflix created a movie preview trailer on February 3rd, 2022. The advertisement showed the movie titles launched in 2022 in order to gain excitement for the brand. With over 14 million views on YouTube, the advertisement seems to be successful. Netflix created the advertisement with actors from the newly released movies, and focused on telling a story of adventure.³⁸

Advertising Strategy → HBO Max



HBO Max created a similar advertisement to Netflix's movie preview trailer on December 17th, 2020 entitled "HBO Max's Epic Lineup Through 2022."³⁹ The advertisement has 750,000 views on YouTube currently, which compared to the Disney Plus and Netflix advertisement views falls flat. The advertisement focuses on popular titles, such as "Game of Thrones" and "Friends" with the focus of drawing users in through these shows.

Advertising Strategy → Amazon Prime Video



Prime Video had a similar strategy and showed off a variety of genres from comedy to drama in their advertisement “Welcome to Prime Video 2021.”⁴⁰ The advertisement also showed behind the scenes footage, which the other advertisements did not include.⁴⁰

Promotions Strategy → All Streaming Platforms



Disney Plus, Hulu, and ESPN created a bundle for consumers where all three services can be purchased for \$14.99. The bundle gives consumers more options for a competitive price. In 2021, Netflix launched the “FansGiving” campaign. The campaign offered a variety of prizes from a trip for two to Paris to a lifetime subscription to Netflix.⁴¹ HBO Max teamed up with AT&T to provide AT&T Unlimited Elite members with a free subscription to HBO Max.⁴² Prime Video does not have any current promotions.

Public Relations → Disney Plus



Disney Plus is owned by the Walt Disney Company, who donated 333.1 million dollars to charitable causes in 2020. A few of their charity programs include giving cloth masks decorated with Disney, Marvel, and Pixar characters to families in need, sending characters to the children's hospital to create an unforgettable experience for children with serious illnesses, and the Disney Conservation Fund which focuses on protecting the planet and saving wildlife.⁴³

Public Relations → Netflix



Netflix hopes to achieve net zero greenhouse gas emissions by the end of 2022 by reducing internal emissions by 45% and investing in external projects to remove indirect emissions from their supply chain.⁴⁴ Netflix is also dedicated to diversity and inclusion in their brand stating “Netflix’s greatest impact is creating empathy and understanding through the stories we tell.” This is accomplished through telling diverse stories, diverse employees, and accessibility efforts including the creation of audio descriptions for the visually impaired.

Public Relations → HBO Max



HBO Inspires is the company's campaign name for supporting social issues. "HBO's Corporate Social Responsibility team unites employees, talent and non-profit partners to elevate social issues connected to our community and our programming." HBO works with many different charities including a partnership with the National Alliance of Mental Illness and a mentor program for female creators.⁴⁶

Public Relations → Prime Video



Amazon Prime Video itself does not have charity efforts, but Amazon as an entire 46 brand has donated to a plethora of different causes. Amazon Smile is a program that allows Amazon customers to donate to a charity of their choice when shopping through Amazon. Over 237 million dollars has been donated since November of 2020.⁴⁷ Amazon also helps with disaster relief. Amazon recently sent supplies and volunteers to help Filipino communities after Typhoon Rai/Odette.⁴⁸

Target Audience



The four streaming services target 18 to 35 year olds based on their social media presence, advertisements, and content. For instance, “Euphoria,” “Too Hot to Handle,” “The Marvelous Mrs. Maisel,” and “Wanda Vision” are all top performing original shows for each platform. While the shows are different in most ways, all four have created buzz on social media and in turn created a reason for 18 to 35 year olds to become a customer for each streaming service. The shows contain drama and adult themes that would appeal to this target audience.

Disney Plus also targets this audience through nostalgia by creating shows like “High School Musical: the Musical: the Series.” Disney Plus also targets parents through advertising popular children’s cartoons and films. The streaming platforms target a younger audience because the older generation may be less likely to switch from cable television to streaming platforms. The technological innovation is more suited towards a younger audience.



Comparative Analysis

Regarding Disney Plus, their strengths include containing the Marvel and Star Wars series within their content library. Since Disney owns the rights to these brands, they are the only streaming platform allowed to have this content on their platform.

At first glance, Disney Plus' accounts (across all platforms) are very generic and have a corporation feel. Meaning their posts (with their copy) sound robotic and appear impersonalized. In addition, they fail to properly interact with their followers. Finally, all of their posts, across all platforms, are the exact same. There is no platform specific content, despite the differing types of audiences on each platform of social media.



Comparative Analysis

Regarding Netflix, their strengths lie in the wide variety of content they offer on their platform. Their library offers content for all ages and preferences with a diverse range of genres. Netflix was also one of the first streaming platforms to enter the video streaming industry, and has continued to remain in the lead every year for global subscribers.⁴⁹ Thus, their name is synonymous with streaming platforms/services and is known by most.

On the other hand, they also possess a major weakness in the amount of popular shows that have been removed due to limitations of ownership rights. Friends, The Office, and Grown Ups are all examples of popular shows Netflix was once known for having within their library. Netflix used to have all of the “classic” shows, but now they have lost a majority of those options and are attempting to make up for it with their Netflix originals. The originals (TV shows and films) range in their success and popularity.



Comparative Analysis

Regarding HBO Max, they have majorly succeeded in bringing their original content into the limelight. With shows like “Euphoria” that are in the news almost daily and all over social media, it shows just how creative and strong they can compete as a platform. HBO Max is by no means the largest streaming platform but it is just as successful.⁵⁰

One thing that HBO Max lacks though is their range of content. They have three shows that are household names now but they do not have much more than that. Without Game of Thrones, Gossip Girl and Euphoria HBO Max would not be near as successful as they are now. It would be in their best interest to try and create more shows like these and spend the money advertising like they have for Euphoria.



Comparative Analysis

Regarding Amazon Prime Video, their strengths lie in the features available (such as the accessibility features and search tools) when watching a show. For example, a viewer can pause what they are watching and see who the actor is in the frame, as well as other similar features which improves the viewing experience. Another strength is how Prime Video is included with an Amazon Prime membership. This is an ingenious way to encourage trial of the streaming platform and attract new viewers. Finally, their last strength is the sheer amount of titles available in each category. For example, they have a lot more documentaries available - especially in comparison to other platforms.

In contrast, they do have major weaknesses within their content library though. The appearance of the library is dated and organized in a haphazard manner. Also, in popular culture, there is not one show or movie from the Amazon Prime content library that is talked about widely across one or any social media platform. In addition, a majority of their content library requires the viewer to pay an additional fee on top of the subscription fee to access the title. Whether you are renting for a limited period or buying the title, these fees are steep in comparison - to buying/renting the titles elsewhere.

Consumer Analysis



Consumer Analysis – The Case

There are a few things that we have found most important to the case. It is important to note that the target audience is a big audience, and it also includes the most racially diverse generation.⁹ This stands out greatly because a diverse generation can lead to an expansion for Disney Plus. While this target audience is huge, Disney Plus can obtain more subscribers from them. They have not nearly reached the capacity that they can. One other aspect we find important is that Instagram is the most popular social media platform for Generation Z, which includes 18–24-year-olds. This is important because it is a space where advertising can be created and seen by the most people in the target audience. Advertising in the right place can grow the number of subscribers immensely.

The Target Audience

The target audience for this case is 18–24-year-olds. It is important for Disney Plus to note multiple things about the target audience in order to reach them successfully. This target audience is very technologically inclined; however, they have many more options that are not streaming services. Although the target is tech savvy, they spend an ample amount of time on social media, so it is important to show them that Disney Plus has young adult specific content that they can enjoy. Over half of the target audience is subscribed to at least one streaming service, but they need to be proven that Disney Plus is the one that they should have and the most worth their money. The last thing that Disney Plus needs to note is that the largest amount of young people are in the South. This can change the way they advertise and reach the most specific and largest area of their target audience. All these aspects are important things that Disney Plus should remember about the target audience.

Streaming Video on Demand (SVoD) Subscribers

SVoD & American Subscribers

61% of Americans are subscribed to a Streaming Video on Demand service (SVoD). This percentage is comparable to the 45% of Americans who pay for Cable TV and the 22% of Americans who pay for Satellite TV. ³



SVoD & Target Audience Subscribers

57% of 18–24-year-olds (our target audience) are subscribed to a Streaming Video on Demand service (SVoD). The most subscribed age group is 25–34-year-olds with 72%. The least subscribed age is 65+, which is at 50%.³

SVoD & Target Audience Subscribers

The reason for this discrepancy is that 25–34-year-olds may have a higher amount of disposable income, especially when compared to 18–24-year-olds.¹ But a caveat could exist for 18–24-year-olds who live at home with their family. Due to not having additional expenses (such as rent), they have a greater amount of money to spend on wants such as streaming service subscriptions. However, 18–24-year-olds are more tech savvy than older generations (due to the popularization and expansion of technology during their youth), which could be a reason they are more subscribed to SVoD services than people 65+.³

SVoD Subscribers & Streaming Platforms

SVoD & Disney Plus Subscribers

48% of SVoD subscribers were subscribed to Disney Plus in August 2021.³ This percentage is comparable to the 42% of SVoD subscribers that were subscribed to Disney Plus in May 2020.³ This is a 6% increase from May 2020 to August 2021.³



SVoD & Netflix Subscribers

According to the Mintel Streaming Video Report, Netflix has the highest number of users out of all of the other SVoD where 85% of people subscribe to it or know of someone who does (August 2021) which is 4% lower than it was in May 2020 when it was at 89%.³



SVoD & Amazon Prime Video Subscribers

68% of users subscribe to Amazon Prime Video (August 2021) which is a 4% increase from May 2020.³



SVoD & Hulu Subscribers

51% of people subscribe to or know someone who subscribes to Hulu (August 2021) which is 1% higher than in May 2020.³



SVoD & Quantity of Subscribership

In April 2019, 63% of SVoD subscribers were subscribed to 1-2 services, 29% were subscribed to 3-4 services, and 8% were subscribed to 5+ services. In May 2020, 41% of SVoD subscribers were subscribed to 1-2 services, 40% were subscribed to 3-4 services, and 19% were subscribed to 5+ services. In August 2021, 32% of SVoD subscribers were subscribed to 1-2 services, 34% were subscribed to 3-4 services, and 34% were subscribed to 5+ services. The percentage of SVoD subscribers who are subscribed to 5+ services has increased by 26%. This increase in percentage shows a higher adoption rate of streaming services as a whole. As a result, one can conclude that streaming services have progressed through the product life cycle as streaming services go from growth to full maturity. Additionally, this also means that people are willing to spend more money to have multiple different streaming services over other things. ³

From this change in percentages over the years, one can conclude that subscribers use a range of SVoD services each month. ³



SVoD & Quantity of Subscribership by Target Audience

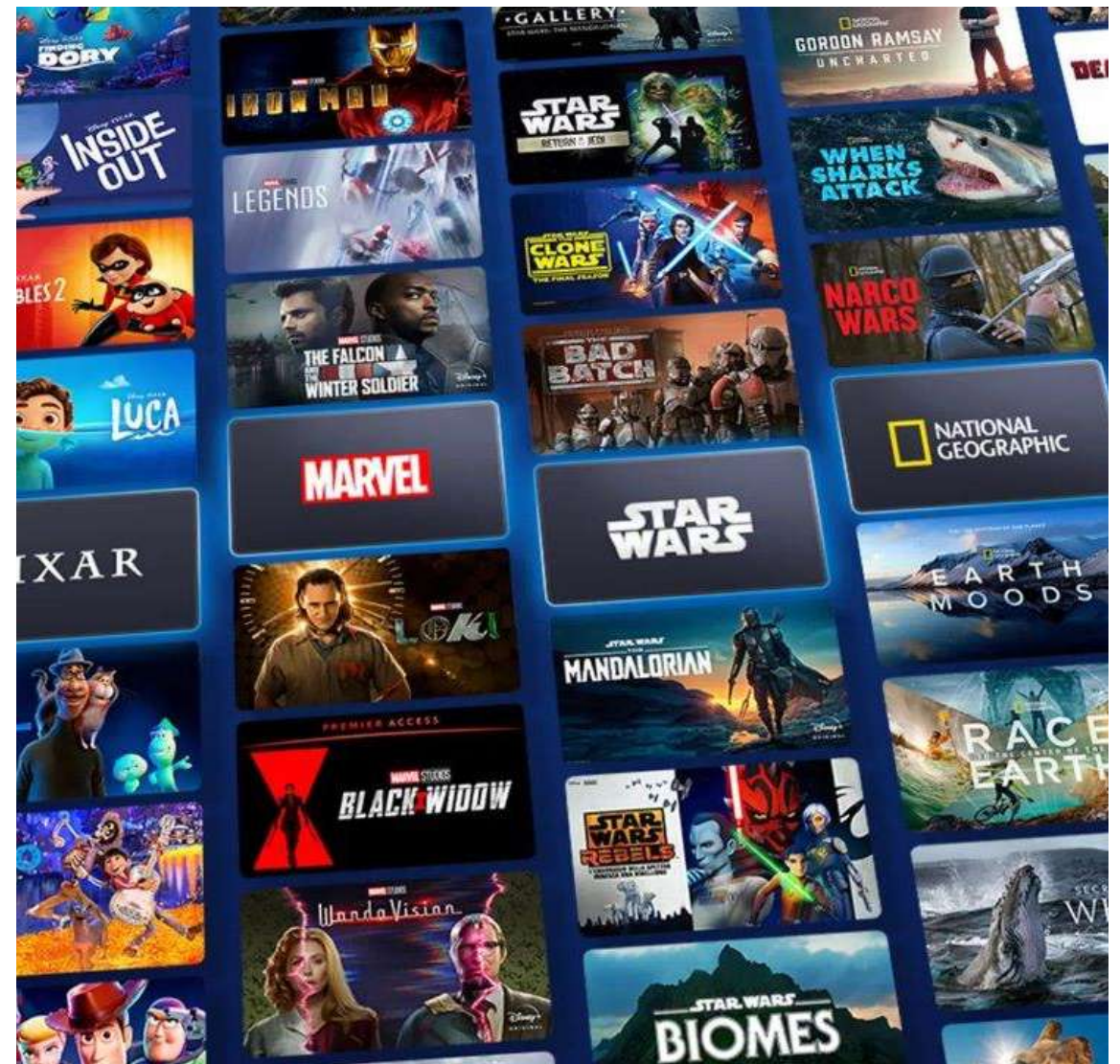
44% of SVoD subscribers ages 18-24 (our target audience) are subscribed to 5 or more SVoD services. Regarding all other age groups, 34% of people are subscribed to five or more SvoD's. This means that people aged 18-24 are 10% more likely to subscribe to five or more streaming services at one time.³

SVoD & Types of Subscribers (By Streaming Service)

Types of Subscribers for Disney Plus

66% of Disney Plus subscribers are a parent of a child under 18. ³

While 36% of Disney Plus subscribers are not a parent of a child under 18. ³



Types of Subscribers for Netflix

88% of Netflix subscribers are a parent of a child under 18. ³

While 83% of Netflix subscribers are not a parent of a child under 18. ³



Types of Subscribers for Amazon Prime Video

68% of Amazon Prime Video subscribers are a parent of a child under 18.³

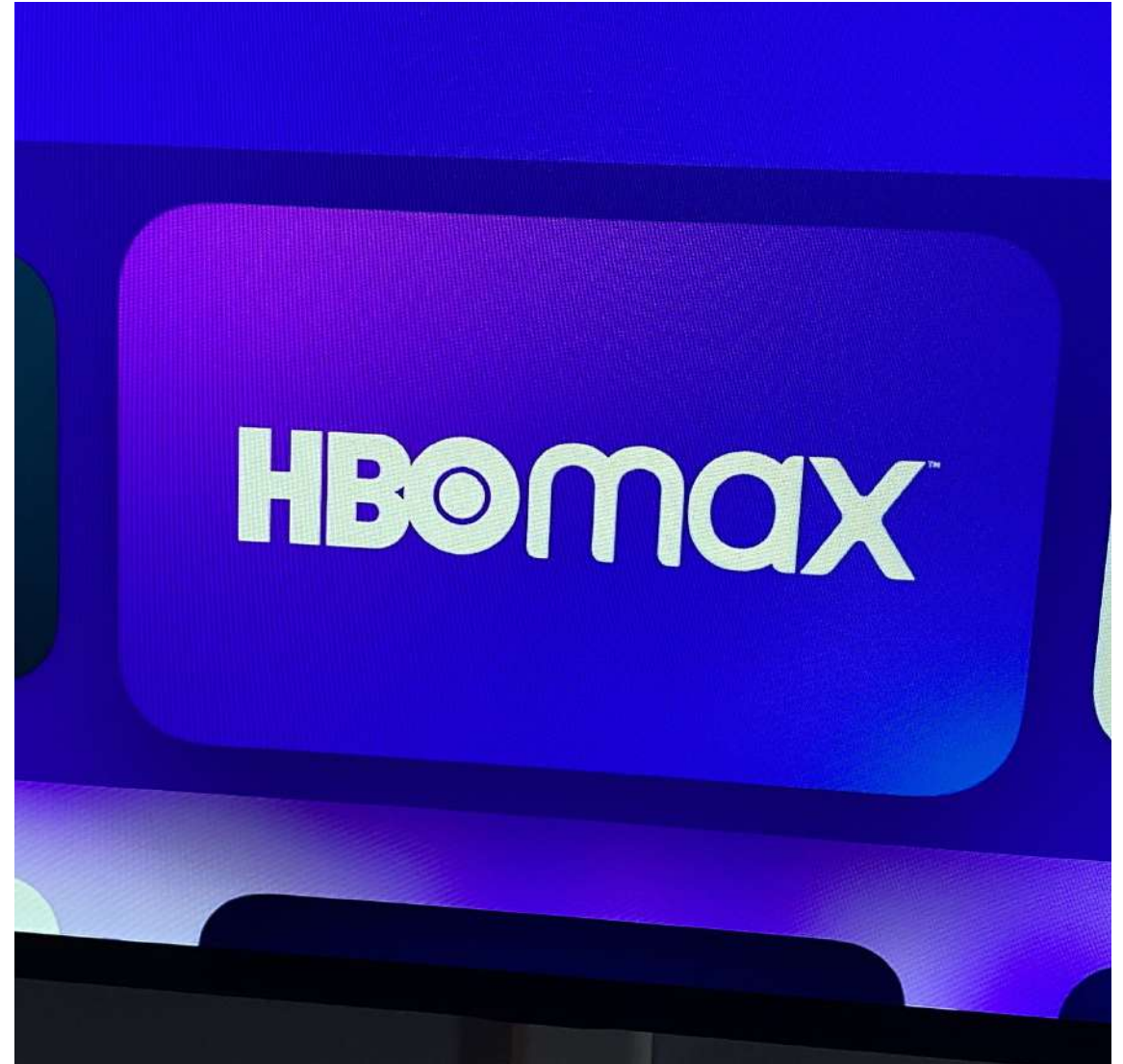
While 69% of Amazon Prime Video subscribers are not a parent of a child under 18.³



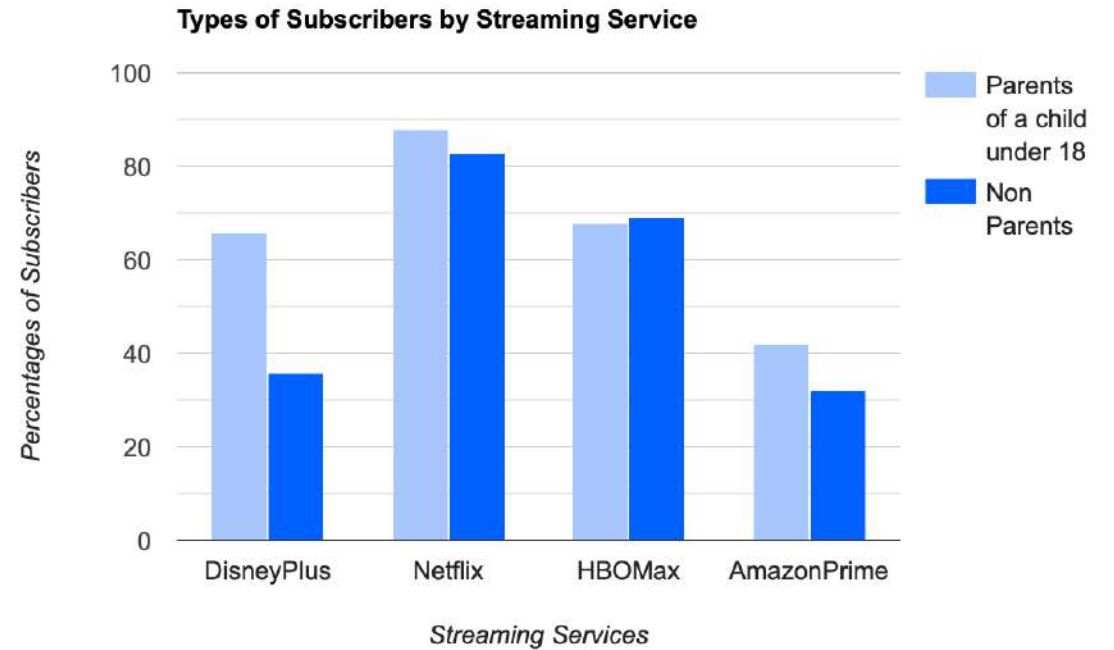
Types of Subscribers for HBO Max

42% of HBO Max subscribers are a parent of a child under 18. ³

While 32% of HBO Max subscribers are not a parent of a child under 18. ³



Types of Subscribers Chart ³



Types of Subscribers Conclusion

From this information, it can be inferred that people are more likely to subscribe to Disney Plus if they are a parent of a child under 18, while the other services have similar subscriber rates whether they have a child under 18 or not.³

Market Viability

The percentage of people 18-24 years old who have at least one child in the household total is 11,070,000. In total, the number of 18-24 years olds in the United States totals to 27,772,000. Based on the total values, this market share is viable to Disney Plus because about 40% of 18-24-year-olds have at least one child in their household. Thus, the market size is relatively large and has a possibility to shift to an even greater number.³ Additionally, due to the lower price of Disney Plus, especially when compared to their competitors (in the streaming service industry), members of this market will be inclined to purchase this service over others. The price factor is important considering 18-24-year-olds typically have less disposable income and as a result less expendable money. If members of this group have a child, this would result in an even tighter budget and desire for a lower-priced streaming service. Finally, regarding competition, Disney Plus has the widest range of child-friendly content available, especially in comparison to the other streaming services. Children viewers are also more inclined to watch Disney content over other kid-friendly content produced by their competitors since Disney is a large part of American culture and childhood.³



The Role of Race in Streaming Service Subscribership

After looking at reports regarding the components of race and origin (specifically Hispanic origin) in relation to streaming services, the aspect that stood out to us the most was that the percentages were much higher or much lower than the others. Meaning that there appears to be discrepancy that is affected by race and origin outcome. For example, 56% of Hispanics use Disney Plus whereas white (non-Hispanic), black (non-Hispanic), and Asian/other (non-Hispanic) were all in the 40% range.³ The same thing goes for Hulu; 60% of black (non-Hispanic) are subscribed to Hulu whereas all of the other races and Hispanic origins are in the low 50 percent.³ On the other hand, there were low percentages compared to other races/origins. For Netflix, 78% of black (non-Hispanic) people are subscribed, but all of the other races/origins are in the 80 percentages. 62% of Hispanic (of any race) are amazon prime video users where all of the other origins/races are in the high 60% or 70%.³ It was interesting to see the highest percentages and lowest percentages in relation to a specific streaming service. The differences arise from variation in types of shows and general content.³

Quantity of Subscribership & Platforms

According to the Mintel Streaming Services Report the more streaming platforms that someone is subscribed to, the greater the chance that they are subscribed to a smaller streaming platform.³ With this being said, if someone only subscribes to 1-2 streaming services, there is a very small chance that they are subscribed to a smaller service like Showtime or STARZ. In regard to Disney Plus, the more SVoD's that a person is subscribed to, the higher possibility that they are also subscribed to Disney Plus.³

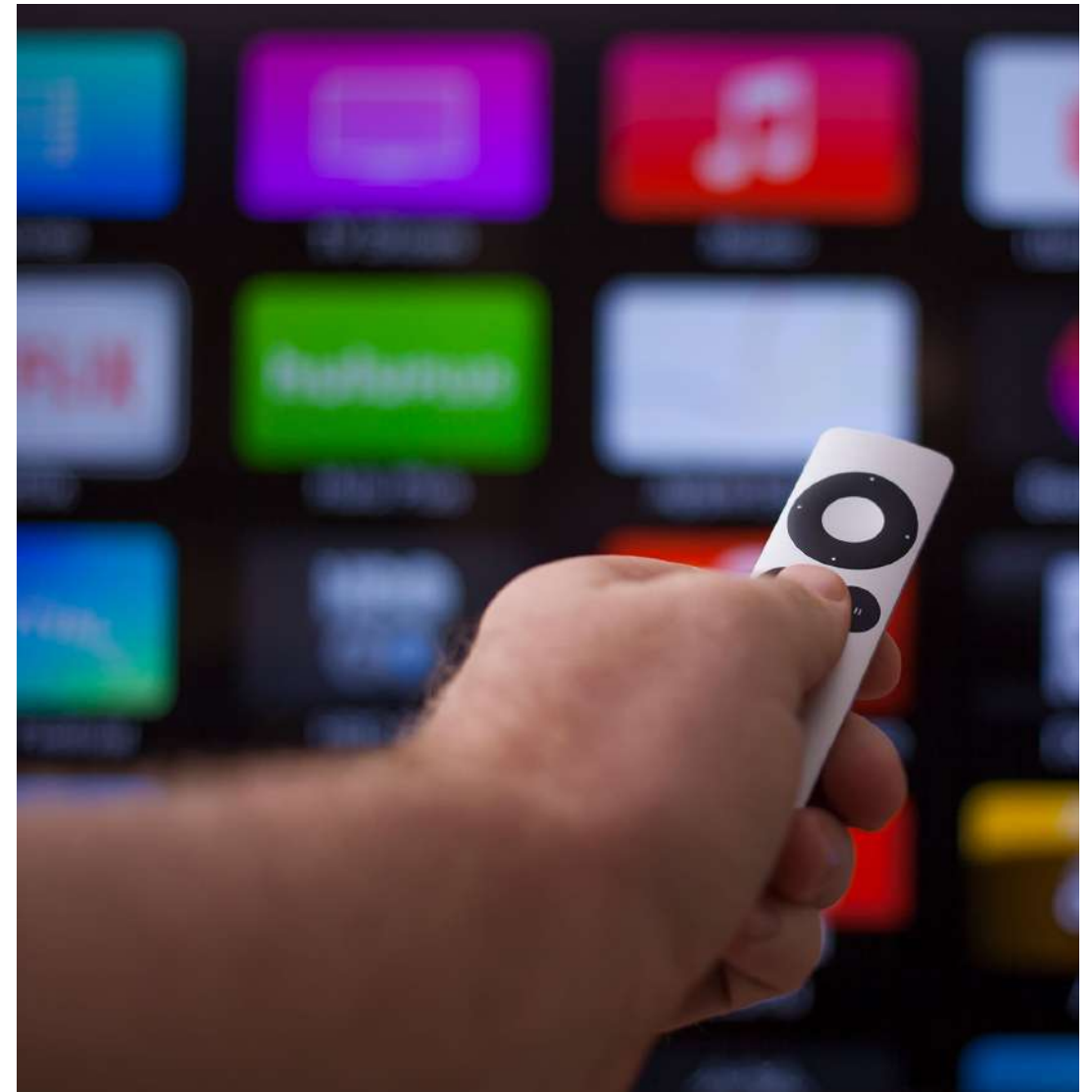
Account Sharing

The streaming service report by Mintel deems Disney Plus to be the most shared SVoD service.³ Account sharing is a concern to Disney because the graph is showing that most people are only subscribed to Disney Plus if they are also subscribing to multiple other streaming services.³ On the graph, 51% of people who use Disney Plus either share their password or have gotten a password from someone else.³ This will result in Disney miscalculating their revenue/users and missing out on obtaining a higher number of subscribers.³



Streaming Behaviors

Gen Z shows the highest percentage of all streaming behaviors (including binge watching, specific show pursuit, and background noise) according to the Mintel US Streaming Video Report.³ 49% of Gen Z who use streaming services say that they like to put on shows/ movies as background noise compared to millennials who were the next highest category at 39%.³ Gen Z also has the highest percentage of binge-watching habits at 62%.³ While all of these percentages are high, Gen Z is 3% higher than Millennials.³ Lastly, 44% of Gen Z subscribed to a streaming service just to watch one specific show compared to 40% of Millennials.³



Intent to Cancel

According to the Mintel US Streaming Video Report, parents of children 18 and older are 5% more likely than other people to cancel video streaming services.³ This is not a positive statistic for Disney Plus because most of their clientèle are parents with children under the age of 18. Netflix, on the other hand, has a lot of older viewers which would make people less likely to cancel their memberships.³

Comparison of Watching Media at Home Versus in the Theater

The Mintel US Streaming Video Report shows how people view watching movies at home compared to going to the movie theater to watch a movie.³ Over half (65%) of the people asked said that they would prefer ordering takeout and watching a movie in the comfort of their own home, rather than going out to a movie theater and a restaurant. Thus, one can conclude that people like the actual act of watching a film and eating a meal, rather than going to an actual location (such as the movie theater and restaurant). Since the option of watching a movie at home has grown more popular, many (44% of survey participants) have replicated a “mini-theater” in the comfort of their homes. Components of speakers, a large flatscreen, and comfortable chairs could simulate a movie theater experience without leaving home. Additionally, this chart expands upon the movie theater going experience. If one does decide to go to the movie theater, a majority of people (54%) surveyed enjoy the social aspect of watching a film together. The experience of sharing emotions in tandem with those surrounding you is an important aspect of watching a movie in theaters. As a result, most people (46%) prefer watching movies that they have never seen before (such as new releases) in theaters for a sense of community.³



Preference for Content Drops

45% of people like the weekly episode releases while 24% do not like the weekly releases and would like things to all be released at once.³ Disney usually releases whole shows all at once since most are from the Disney Channel which have already aired. Netflix has started to do a lot more of the weekly releases for shows.⁴

Content Drop & Disney Plus

Disney Plus should look at what their competitors are doing and their specific competitor advantage for their individual streaming service. Netflix is one of the leading streaming services. As a result, Disney ought to take Netflix's approach to weekly releases. Disney should create a re-release of those shows from Disney Channel when adding them to the catalog on the streaming service. For example, an old show could have episodes that are released once a week, despite already airing in a previous year.



Key Points

1. There are four main types of viewers for SVoD: Binge Watchers 22%, Pop Culture Consumers 24%, Home Viewers 24%, and Theater Goers 30%.³
2. Pop Culture Consumers are mostly urban males who are 25-34 with children under 18 years of age.³
3. Theater goers are usually rural females aged 55+ with no children under the age of 18.³
4. At home viewers are usually 55+ who are rural females with no children under the age of 18.³
5. Lastly, Binge watchers are usually females with no children under the age of 18 who live in suburban areas.³

Simmons Report Analysis^{A1}

After running the Simmons report, one of the elements that stood out to our group the most was how this age group did not consider television to be their main source of entertainment. This finding was not surprising since members of this population tend to be technologically-inclined and avid users of it. People ages 18-24 (also known as Generation Z) grew up with the popularization and expansion of technology. Thus, there are a lot more options out there for entertainment in a digital sense - ranging from smartphones to tablets. Another prominent feature that stood out within the data was the correlation that was found between the index numbers of those who are consumers of Netflix (an index of 131) and the index numbers of those who are regular movie theater goers (an index of 139). Those numbers were very similar across all rows.

Looking at the data, one can see that young people are overperforming in actively watching and utilizing the streaming services of Disney Plus and Hulu (including the subscriptions of advertisements and no advertisements). For Disney Plus and Hulu, young people (ages 18-24) are 63% more likely to use these services when compared to the average U.S. consumer. On the other hand, Amazon Prime Video is the least watched amongst young people. Regardless, they are 4% more likely to use this service compared to the average American consumer. From this data, one can conclude that young people are more likely overall to use these streaming services rather than watch television in a traditional manner (through cable).

Simmons Report Analysis^{A1}

Regarding consumption of various streaming services between the two sexes, the biggest difference pertains to Hulu (with advertisements). For females, they are 107% more likely to watch Hulu (with advertisements) than the average American consumer. For males, they are 21% more likely to watch Hulu (with advertisements). Comparing those two percentages, there is an 86% difference that exists between males and females. Disney Plus also experiences a large difference between men and women consumers. Women are 90% more likely to watch Disney Plus than the average American consumer, compared to men who are 37% more likely to watch Disney Plus than the average consumer. Regarding the media attitude attributes, there is no statistically significant difference that exists between males and females for the belief that television is my main source of entertainment. But for the statement of “when I am watching television, I am usually involved in other activities”, males are 6% less likely to engage in other activities when compared to the average American consumer. For females, they are 8% more likely to multitask while watching television, when compared to the average U.S. consumer. There is also no significant statistical difference between males and females regarding the statement “I am a regular movie theater goer”. There was only a small difference found with males being 31% more likely to be a regular movie theater goer than the average American consumer, and females being 47% more likely to be a regular movie theater goer than the average American consumer.

Simmons Report Analysis^{A1}

Looking at the various geographic regions (including the Northeast, Midwest, South, and West), it is notable that there is a higher proportion of young people that inhabit the South region, especially when compared to the other regions. With this population size, the data from the sample reflects this difference, as Simmons recorded a higher number of young people's responses from the South. This was done in order to gain an accurate representation of young people's beliefs, attitudes, and habits regarding their media consumption habits. The largest difference found between the different geographic regions is regarding Amazon Prime Instant Video. Consumers from the South region are 12% less likely to stream using Amazon Prime Instant Video compared to the average American consumer, while consumers from the South are 26% more likely to stream using Amazon Prime Instant Video compared to the average American consumer. Looking at the media attitudes, for all three questions regarding their habits, there is a small range that exists between the geographic regions. The mean for the range of percentages across all three statements is 11.33%. For the first statement of, "television is my main source of entertainment", the range is 13%. For the second statement of, "when I am watching television, I am usually involved in other activities", the range is 7%. For the third statement of, "I am a regular movie theater goer", the range is 14%.

Simmons Report Analysis^{A1}

When there was one or more children in the household, 18–24-year-olds were 73% more likely to stream using Disney Plus compared to the average American consumer, meanwhile there was a lower percentage found in all 18–24-year-olds with 63% of all 18–24-year-olds more likely to stream using Disney Plus compared to the average American consumer. For the media attitudes, the first statement of, “television is my main source of entertainment”, the percentage is the exact same for those young people with kids and without kids. Both groups are 38% less likely to agree with this statement, when compared to the average U.S. consumer. For the second statement of “When I am watching television, I am usually involved in other activities”, the range of difference between the two different groups of 18–24-year-olds is 9%. Young people aged 18–24 with children are 8% less likely to watch television while involved with other activities compared to average American consumers, while all young people aged 18–24 are 1% more likely to watch television while being involved in other activities compared to all American consumers. Finally, regarding the last statement of, “I am a regular movie theater goer”, there exists a range of 19% between the two groups, of young people with kids and young people without kids. For those without kids, they are 39% more likely to regularly watch movies in the theater when compared to the average American consumer. While those with children are 58% more likely to watch movies in the theater. This difference between the groups stems from the fact that movies are a good source of entertainment for children and can keep them occupied for several hours at a time.

Simmons Report Analysis^{A1}

Finally, the last distinguishing factor that exists is the differences in media habits between young people who are full-time college students and those young people who are considered full-time workers. Looking at the streaming service usage between the two groups, the biggest difference exists when looking at Hulu (with advertisements). The range between these two groups is 31%. For full-time college students, they are 104% more likely to consume television and films on Hulu (with advertisements) than the average U.S. consumer. For the other group, full-time workers are 73% more likely to regularly consume media on Hulu (with advertisements), than the average American consumer. For the other streaming service platforms, there is no statistically significant difference that exists between the two groups. Regarding media habits, for the first statement of “television is my main source of entertainment”, the range of difference between these two groups is 7%. Both groups, 18–24-year-olds considered full-time college students and 18–24-year-olds considered full-time workers, were less likely than all average American consumers to consider television their main source of entertainment. 18–24-year-olds considered full-time college students were 27% less likely to consider television their main source of entertainment compared to all American consumers, while 18–24-year-olds considered full-time workers were 34% less likely to consider television their main source of entertainment compared to all American consumers. Looking at the second statement, there exists a range of 13% between the two groups. Full-time college students are 13% more likely to multitask when watching television, when compared to the average American consumer. For full-time workers, their habit of watching television is the exact same as the average American consumer - they are not more nor less likely to multitask. Finally, looking at the third statement, there is a 13% range difference between the two employment groups. Full-time college students are 69% more likely to consider themselves to be a regular movie theater goer than the average American consumer. Looking towards full-time workers, they are 56% more likely to consider themselves to be a regular movie theater goer than the average U.S. consumer.

Simmons Report Analysis^{A1}

All in all, we can conclude that demographic features such as age, sex, type of employment, number of children, and geographic location can influence the media habits of streaming service platforms and general attitudes of media.



Generation Z



Generation Z & Covid

57% of Gen Zs say they feel like they have lost a year due to COVID-19. Gen Zs are 26% more likely than the average US adult to say they agree with the statement “With many people getting vaccinated, I do not need to be as cautious about COVID-19 prevention.”⁹

Generation Z & Social Media

Instagram is the most popular social media platform associated with a good place to learn about brands for Gen Zs. Disney Plus can advertise on Instagram, create an informative and interesting feed, and allow potential customers to buy a subscription using Instagram's shop feature. Creating content that is curated for the Instagram discover page will help Disney Plus gain more exposure.⁹



The Important Figures of Generation Z

The figures who can motivate Gen Z will need to be a positively-viewed public figure who accurately represents the diverse nature of this generation. Gen Z is known as one of the most diverse (in terms of demographic and psychographic features) generations (especially as they begin to enter the workforce). As a result, representatives should reflect the various groups of people in this generation. Also, it has been noted that Gen Z will call out and bring attention to societal issues (such as discrimination, disparity, and inequality). Thus, those representatives should not have any prior mistakes regarding these attributes. Finally, representatives should be involved online and have a sizable social media presence as members of this generation are inherently connected to the web and are avid-users of it. For brands, in order to best target this generation, it is necessary that they convey how the product or service could result in an experience (or an improved experience) for those who use it. For members of Gen Z, the experience of something has a higher importance than simply owning a product. Another possible brand strategy is to emphasize how this could shape their identity. Gen Z is an individualized generation who is not afraid to bring light to their differences. Thus, allowing them to further examine and showcase their identity will cause them to be interested in the product or service.⁹



The Income & Purchasing Power of Gen Z

Brands need to support causes that Gen Z cares about in an authentic way. Gen Z will use their income and purchasing power to support brands who care about causes important to them. Overall, Gen Z's income is low compared to other age groups, however, Gen Z vastly affects consumer trends. Although Gen Z is more likely to choose the lowest price when making a purchase, their purchasing power will grow in the future. When their purchasing power grows, Gen Z will look beyond price and at the quality of a product, the brand name, and the shopping experience. Gen Z prefers a shopping experience that is online and easy.⁹

Marketing to Gen Z



Key Points → Marketing to Gen Z (9)

(1) 57% of Gen Zs say they feel like they have lost a year due to COVID-19.

(2) Gen Zs are 26% more likely than the average US adult to say they agree with the statement “With many people getting vaccinated, I do not need to be as cautious about COVID-19 prevention.”

(3) Instagram is the most popular social media platform associated with a good place to learn about brands for Gen Zs. Disney Plus can advertise on Instagram, create an informative and interesting feed, and allow potential customers to buy a subscription using Instagram’s shop feature. Creating content that is curated for the Instagram discover page will help Disney Plus gain more exposure.

(4) The figures who can motivate Gen Z will need to be a positively-viewed public figure who accurately represents the diverse nature of this generation. With Gen Z being known as one of the most diverse (in terms of demographic and psychographic features) generations (especially as they begin to enter the workforce), representatives should reflect the various groups of people in this generation. Gen Z will call out and bring attention to societal issues (such as discrimination, disparity, and inequality). Thus, those representatives should not have any prior mistakes regarding these attributes. For brands, in order to best target this generation, it is necessary that they convey how the product or service could result in an experience (or an improved experience) for those who use it. For members of Gen Z, the experience of something has a higher importance than simply owning a product. Another possible brand strategy is to emphasize how this could shape their identity. Gen Z is an individualized generation who is not afraid to bring light to their differences. Thus, allowing them to further examine and showcase their identity will cause them to be interested in the product or service.

(5) Brands need to support causes that Gen Z cares about in an authentic way because Gen Z will use their income and purchasing power to support brands who care about causes important to them. Overall, Gen Z's income is low compared to other age groups, however, Gen Z vastly affects consumer trends. Although Gen Z is more likely to choose the lowest price when making a purchase, their purchasing power will grow in the future. When their purchasing power grows, Gen Z will look beyond price and at the quality of a product, the brand name, and the shopping experience. Gen Z prefers a shopping experience that is online and easy.

Gen Z & Disney Plus



Gen Z By The Numbers

Gen Z is the most racially diverse generation to enter adulthood. At least one in four people in Gen Z identify as either Black, Hispanic, Asian, or another race or ethnicity.⁹ This would open up new markets for Disney Plus. Specifically, Disney Plus should create TV shows and movies that show diverse stories, which would result in bringing in a more racially diverse customer base and increase subscriptions for Disney Plus.⁹

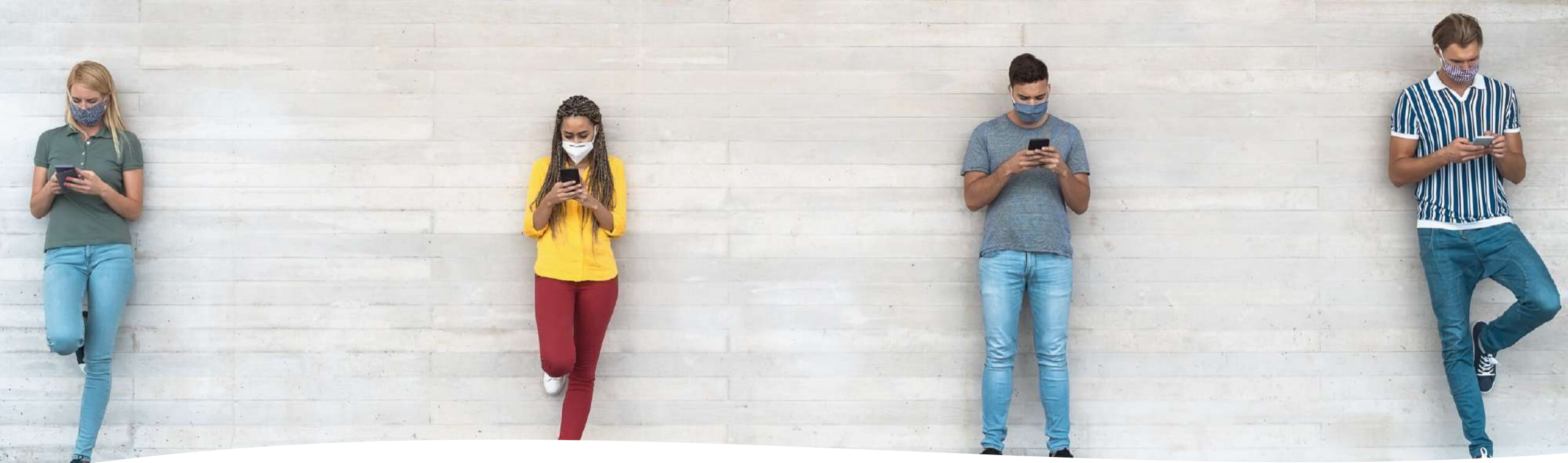
Gen Z By The Numbers

Most of Gen Z is delaying marriage till at least the age of 25 with 90.4% being unmarried from ages 20-24.⁹ However, 53.4% of people are married between the ages of 30-34.⁹ This presents a unique opportunity for Disney Plus to create brand affinity with Gen Z before they are married, which will make Disney Plus a must have in their household as they age.⁹ This also allows Disney Plus to create brand affinity with the future children of Gen Z as they will grow up using the service in their childhood homes.⁹

Gen Z Segments

Only 44% of Gen Z believes getting a college degree is worth the money, yet 66% still plan to go to college.⁹ Disney Plus should create a scholarship fund for future directors, designers, and other creatives. This would get Gen Z more involved with Disney Plus and would help Disney Plus create a positive brand image in the minds of Gen Z.⁹

35% of Gen Z is more aware of their family's financial situation since COVID-19. Disney Plus has the opportunity to provide resources for Gen Z to learn about finances. Disney Plus ought to create a series where Gen Z can learn about finances with their favorite Disney characters. Disney Plus should also partner up with a financial education app to make the app free with a Disney Plus subscription.⁹



Impact of Covid-19 on Gen Z

COVID-19 had a severe impact on disadvantaged Gen Z teens as they transitioned to remote learning for middle school and high school classes. A lack of technology, parental help, and social distancing created a feeling of isolation.⁹ Disney Plus has the opportunity to create communities for disadvantaged Gen Z teens by supplying them with a laptop and access to Disney Plus.⁴ After supplying them with resources, Disney Plus could create a space for teens to talk about their favorite shows, school, and more.⁹



Impact of Covid-19 on Gen Z

Due to COVID-19 Gen Z is 37% more likely than the average US adult to spend money on leisure and entertainment.⁴ New content should be marketed on social media platforms to create buzz. Gen Z is more likely to spend money on leisure and entertainment, so the creation of content exclusive to Disney Plus could pull in new users with the right social media campaign.⁹ For instance, HBO Max's original show *Euphoria* is found all over Tik Tok and Instagram. The buzz created online has users subscribing to HBO Max to watch *Euphoria* and become a part of an online community.⁹

Competitive Strategies

The Nintendo game Animal Crossing is used as an example of a way for Gen Z to escape reality.⁹ The simple tasks and immersive world creates the perfect environment for Gen Z to relax. Disney Plus should create a game like Animal Crossing featuring characters specific to Disney Plus. Disney Plus choosing to go another route like partnering with Animal Crossing would result in the creation of a limited-edition Disney Plus version of the game. This release would be a huge hit with Disney Plus characters in the art style of Animal Crossing. Videos of the game would have the potential to go viral on platforms like Tik Tok.⁹





Relationships with Technology & Social Media

Gen Z is 127% more likely than the average US adult to say they agree with the statement “I have moved most of my social media interactions to a new platform this year.”⁹ This is significant because Tik Tok is becoming a major influence over Gen Z. Tik Tok is seen as a platform for entertainment and education, so Disney Plus should create Tik Tok content that appeals to these facets. For instance, Disney Plus could create content that focuses on interesting facts about where Disney characters stories take place.⁹



Relationships with Technology & Social Media

Gen Z is 15% more likely than the average US adult to say they agree with the statement “Social media is a good tool to voice concerns to brands.”⁹ This is important to Disney Plus because Gen Z wants to feel connected to a brand and receive superior customer service. If a person takes to social media and their concern is not addressed well, the person could share their negative experience, which would be a bad look for the brand overall.⁴ Disney Plus must continue to invest in a good customer service team that has experience with solving issues over social media.

Increasing Brand Value

Gen Z is more likely to pay a slightly higher price for a product if it is high quality, they trust the company, they can buy the product online easily, and if they get a recommendation from a friend.⁹ These are aspects for Disney Plus must keep in mind because as Gen Z's buying power increases, these aspects will become even more important. Disney Plus must continue to stay up to date with technology trends and ways to make Disney Plus more accessible for Gen Z. Disney Plus will claim more of the market share with improvements to their user experience.⁹

Increasing Brand Value

Gen Z is more likely to pay a slightly higher price for a product if the brand supports a cause they are passionate about.⁹ Disney has strong philanthropic efforts, which they should market on their social media platforms consistently so that Gen Z is aware of their vast efforts to do good in the world.⁹

The Preferred Brands of Gen Z

As generation Z continues to age, their impact and opinions will have more prevalence within the marketplace. Based on data provided from Statista, Generation Z has several brands, products, and services that they prefer over others. Their top two brands are Nike (with a total of 21 percent) and Apple (with a total of 15 percent).⁵ These brands completely surpass the rest of their top brands by several percentage points. Another notable brand on their list includes Disney (although it is important to note that they are last on the list with a total of 2 percent).⁵

The Preferred Brands of Gen Z

It is important for brands to gain the respect and prevalence in the lives of generation Z members because they make up about 20% of the United States population.^{5,9}

This affects Disney Plus as the Disney brand knows that for a proportion of the population (specifically the generation Z population) already thinks favorably about the brand and the company.^{5,9} Meaning that Disney does not have to reinvent itself in order to attract the attention of the younger generation. Rather, it should take note of their most favorite brands (which includes Nike and Apple) and adapt their marketing strategy to resemble those companies.^{5,9} Disney should pay special attention to how those companies utilize social media and interact with members of generation Z on those platforms.

What Gen Z Looks For In A Product

Gen Z is looking for products or services that can facilitate their daily lives, however they do not always become an owner of the product/service.⁹ They try to find companies that allow rentals or month by month plans. This way they do not have to buy it and have it forever, they can change their minds. They value access over ownership.⁶

- This affects Disney Plus because if they pay for one month but want to cancel the next, they can. But if Disney Plus did not have a monthly payment plan Gen Z might not even bother to purchase it at all.

What Gen Z Looks For In A Product

Gen Z also looks for products/services that are personalized or tailored to them.⁶ They would pay more for something that is geared towards the things they like or picks up on the aspects they value.⁶

- This affects Disney Plus because if they do not have a well run recommended for you section, a subscriber from Gen Z may unsubscribe because it is not inline with what they like.

The Most Influential Advertising Channels for Female Members of Gen Z

The data presented in the graph from Statista illustrates that female members of Generation Z (with a total of 59%) are more likely to abide by and use (the recommendations from friends and family as an advertising channel for buying new products and services.⁷ Close behind is seeing a family member or friend actually use the product (with a total of 54%).⁷

- From these top two advertising channels, one can deduce that the source of the knowledge about the product is important for female Generation Z members.



The Most Influential Advertising Channels for Female Members of Gen Z

Another notable source of advertising channels is social media - particularly advertisements on TikTok. A total of 39% of respondents said that this advertising channel is prevalent in their purchasing behavior.⁷ This social media platform is highly used amongst members of Generation Z (among other platforms).⁷

- Generation Z is the generation with the most skill and comfort regarding the internet. Being a tech-savvy generation, they are the most susceptible to paying attention and being targeted by advertisements online (due to the ease in which they navigate the internet and the amount of time they spend on it daily).⁷ As a result, their generation is more likely to use online shopping methods over in-person shopping methods. With online shopping comes product recommendations and consumer reviews - which results in more experience with the product and knowledge regarding it prior to purchase.





Disney Plus & Gen Z

This knowledge is important to Disney because they can take this information and apply it to their marketing and advertising strategy for reaching members of the target audience (18–24-year-olds). While it will be difficult for Disney to ensure that those surrounding (friends and family members) Generation Z members talk positively about and use the Disney Plus streaming service in their presence. But Disney can counteract this difficulty by ensuring that their brand continues to possess a positive reputation and have an approachable connotation (especially regarding the 18–24-year-old point of view). Another takeaway Disney ought to take from this data is the importance of social media advertising — especially on platforms (such as TikTok and Instagram) that are widely used across the entire generation.



Gen Z Consumer Spending

Gen Z has multiple consumer spending trends some of which relate to entertainment and cell phones. It has been proven that consumers under the age 25 spend a yearly total of \$10.4 billion on entertainment with 39% of this amount solely spent on tv, radio, and sound systems.⁸ This is a huge amount of money being spent on entertainment services and devices. Along with this almost every single person in Gen Z has a cellphone/smartphone, no matter their race or origin.⁶

- This can affect Disney Plus because they have the opportunity to reach every consumer in Gen Z. If they are spending money on entertainment and all of them have smartphones Disney Plus can be a company that they are interested in.



Gen Z Consumer Spending

Similarly, members of this generation are more likely to download their entertainment (in the form of tv shows and movies from streaming service platforms) in comparison to other generations.⁶ It is estimated that about one-third of members from this generation have downloaded or streamed some sort of media entertainment within the past 30 days. This is a large number of consumers. This manner of consuming media is also the preferred manner (rather than buying a DVD to watch a movie).⁶

- This can affect Disney as they need to develop a platform that can handle all the potential traffic from consumers at all hours of the day. Their service should be speedy and work no matter how many people are logged onto the server. Disney ought to also direct their attention to ensuring high quality entertainment on their streaming platform, rather than reproducing their work for DVDs and other ways to consume it.



Gen Z Consumer Spending

Additionally, Generation Z as a whole are less brand loyal in comparison to other generations. ⁶ Meaning, they are willing to switch brands should a competitor offer a lower price, better quality, more value, or a combination of these. Although it has been proven that this generation is brand loyal to two industries in particular - beauty and media/entertainment.

- This can affect Disney because should they develop a streaming service platform that is perceived positively by consumers (particularly within the generation Z demographic) and continue to offer quality entertainment, they will be able to retain subscribers of this generation month after month.

Important Information

Social Media is a big part of what Gen Z cares about most. Disney +'s social media is not directed towards any platform in particular which makes the information not always relevant to the people who will see it.

Another aspect that is most important is the new content that is available on Disney+. This includes Marvel, Star Wars, and many others that are geared more towards adults and less towards little kids.

It is important for Disney+ to note that Gen Z is more likely to pay a higher price for a product if it is high quality, a trustworthy brand, and easily accessible to purchase.

Gen Z is the most racially diverse generation which is important for Disney+ to note because it can open up a new market and lead to generating new ideas.

Key Points⁸



Media Use Overview

Adults today spread their free time amongst a majority of media sources and do not usually spend all of their time on one source, like video entertainment.⁴ Even looking across all generations, video and audio forms of entertainment are popular, even though the younger generations look at social media more.⁴ When trying to reach a certain group of people the best way to advertise to them is through video and audio media, and not written media.⁴



Video Entertainment

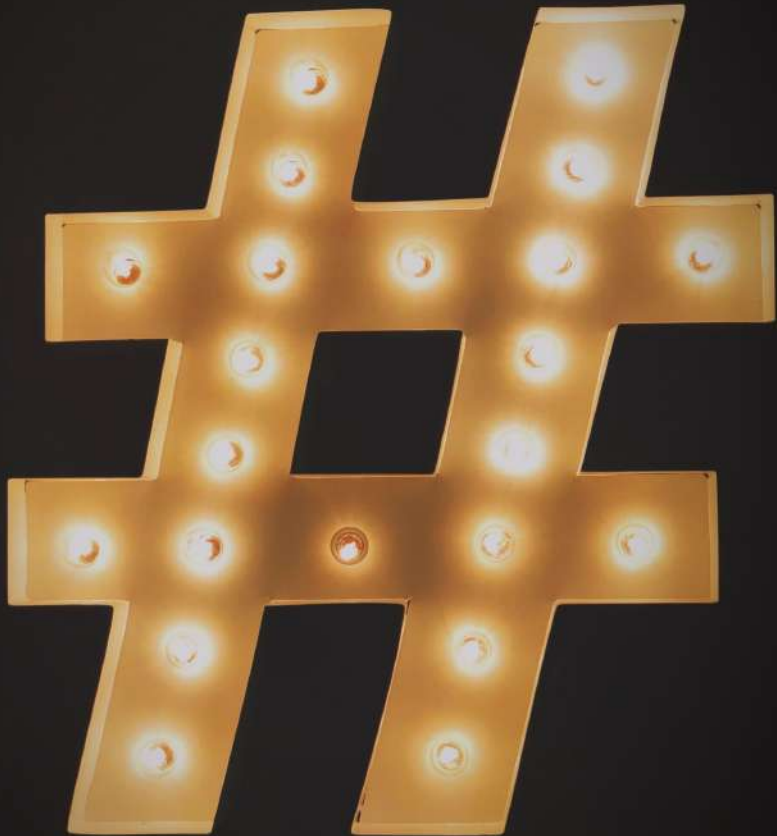
Ad free services are becoming more popular, so advertisers have to find ways to reach their audience that does not include just a simple commercial.⁴

They need to offer something in addition to the streaming service like a bundle or other service.⁴

Another thing that Disney Plus can be aware of is that live tweeting or spoilers after the episode can create a sense of urgency to watch specific shows.⁴

Influences in Content Selection

The biggest influence on what people, men and women, watch or what media they look at is people's friends and family.⁴ It is higher than any other influence including posts on social media, commercials, talk shows, and podcasts.⁴ Younger generations tend to look at social media more than older adults however, conversations with friends and family still has the most influence.⁴ This is important for Disney Plus to be aware of because they need to create shows or movies that would be talked about or real people in.^{3,4}





Shifting Media Habits

People are expecting to consume more media than they ever have before.⁴ They expect to consume more of everything including podcasts, digital video, books, magazines, traditional TV, newspapers and music services.⁴ It is important for Disney Plus to be aware of this because these consumers will get overwhelmed and will eventually have to prioritize something and Disney Plus needs to make it their mission to be the one service they prioritize.⁴ It is also important to note that when a consumer likes something they will come back for more.^{3,4}

Consumer Overview

There are a few things that we have found most important to the case. It is important to note that the target audience is a big audience, and it also includes the most racially diverse generation. This stands out greatly because a diverse generation can lead to an expansion for Disney Plus. While this target audience is huge, Disney Plus can obtain more subscribers from them. They have not nearly reached the capacity that they can. One other aspect we find important is that Instagram is the most popular social media platform for Generation Z, which includes 18–24-year-olds. This is important because it is a space where advertising can be created and seen by the most people in the target audience. Advertising in the right place can grow the number of subscribers immensely.

The target audience for this case is 18–24-year-olds. It is important for Disney Plus to note multiple things about the target audience in order to reach them successfully. This target audience is very technologically inclined; however, they have many more options that are not streaming services. Although the target is tech savvy, they spend an ample amount of time on social media, so it is important to show them that Disney Plus has young adult specific content that they can enjoy. Over half of the target audience is subscribed to at least one streaming service, but they need to be proven that Disney Plus is the one that they should have and the most worth their money. The last thing that Disney Plus needs to note is that the largest amount of young people are in the South.⁷ This can change the way they advertise and reach the most specific and largest area of their target audience. All these aspects are important things that Disney Plus should remember about the target audience.



Segments of
the 18-24
Year-Old
Audience

Segment 1

One major segment of the 18–24-year-old audience that Disney Plus should pay close attention to is a group we call Nostalgic Nikki. This group is important because they are on a college student budget, watches a ton of movies in their free time (usually in a row), and loves Disney classics because it reminds her of her childhood during her stressful school schedule.

Segment 2

Another major segment of the 18–24-year-old audience that Disney Plus should pay close attention to is a group we call Superhero Seth. This group is important because they have a love for comics/superheroes which Disney Plus can expand on. Their workload is demanding and takes up most of their time, so they have a hard time staying inspired and creating their own films and videos. Disney Plus can be an inspiration for their work while still entertaining them with the comics they love.

Segment 3

Another major segment of the 18–24-year-old audience that Disney Plus should pay close attention to is a group we call Babysitting Bailey. This group is important because they have a lot on their hands but consider family (that has a wide range of ages) the most important. Their time is taken up greatly by tv entertainment during dinner or keeping their younger siblings entertained while their parents are at work. This group is also important because they can no longer afford cable and have to watch a limited supply of DVDs.



Notes About the Target Audience

With Disney Plus and all of its success it does have opportunities and threats to address. As for opportunities there are external drivers such as the 18–24-year-old target audience wanting more tv shows and movies that are from their childhood. Disney Plus can take this opportunity to add more content that aired when the 18–24-year-olds were younger. This way they will look back on their childhood and connect to the streaming service all because of nostalgia. Disney Plus also has the opportunity to make original content that other streaming platforms are not providing which can reach more subscribers.



Consumer Personas



Consumer Persona 1: Nostalgic Nikki

Nikki is 22 years old and currently a senior at Savannah College of Art and Design in Savannah, GA. She is from the town of Valdosta, GA which is located close to the Georgia–Florida state line. Her family habitually goes to Walt Disney World due to the proximity (about 3 hours, 30 minutes) and has held season passes ever since she was born.

Nikki is about to enter the Architectural job field after graduating and currently during applying for jobs. She chose the architectural field, as she loves learning about this history behind buildings and how they were created. Despite her upper-middle class upbringing, she is transitioning to becoming financially independent with graduation approaching. As a result, her budget is typical of a full-time college student.



Consumer Persona 1: Nostalgic Nikki

School occupies most of her time as the curriculum for architecture is demanding - due to the sheer number of labs throughout the week. When she does have a moment to spare, she enjoys unwinding and treating herself to movie nights. Since her nights to relax are few and far between, she watches several films in a row, complete with delicious snacks like a hot fudge brownie sundae. She is a serial re-watcher of films and will happily choose to watch a film she has seen numerous times rather than a new one that she potentially dislikes. She is one for comfort and consistency in her routine.

Each week, she tries to carve out a bit of time every Sunday, so she can relax and rejuvenate herself before the start of another week. She does not feel completely and properly relaxed until she has had some me-time, which typically consists of at least two movies.



Consumer Persona 1: Nostalgic Nikki

On traditional cable television, it can be difficult to find movies that fit within her tight schedule. Additionally, she does not want to pay for the rising costs of cable and finds it hard to find the older Disney classics playing on live TV. She wants to subscribe to a streaming service platform that has a wide range of classic films and television shows from her childhood. Growing up, Disney was a staple in her household and reminds her of the comforts of home. With college graduation and the commencement of working life soon approaching, she often finds herself overwhelmed with the future. Between periods of homesickness and anxiety about what is to come, she finds comfort in re-watching old Disney channel shows and classic Disney films.

Despite attempting frugality, she splurges on subscription to Disney Plus due to the nostalgic factor. Disney Plus is the perfect answer to her problem. For the low price of just \$7.99/month, Nikki has access to all the Disney classics she grew up watching with her family. By subscribing to Disney Plus, she does not have to worry about fitting her schedule around when movies on traditional TV are programmed to air. She can now watch her favorite classics, like Cinderella, whenever she has free time or is missing home.



Consumer Persona 2: Babysitting Bailey

Bailey is 18 years old and currently a senior at Brighton High School in Rochester, New York. With high school ending in just one short year, she has applied to St. John Fisher College, a local college in Rochester. Not only does this college have her major of choice, education, but the location is ideal. She hopes to gain admittance, since she wants to stay close to family and be able to visit her siblings on the weekends. She knows her parents struggle to juggle between caring for her siblings and working long hours. So she wants to be close enough to continue to help out in her household as the eldest sibling. Since she is still a high school student, she lives with her parents and little siblings in a single-family home in the south wedge of the city. She is the oldest of five children, their ages ranging from 18 to 5 years old.



Consumer Persona 2: Babysitting Bailey

As the eldest sibling, she is the one in charge in the household when her parents are at work. On the weekends, she can be often found toting her younger brothers and sisters to the park down the street, where they organize games of hide and seek with the other neighborhood kids. She would consider herself very family-oriented and puts her family at the heart of everything she does. Her family members are the most important people in her life and she would do anything for them.



Consumer Persona 2: Babysitting Bailey

When her parents are not working their shifts at the manufacturing plant and hospital, the kids (Bailey included) try to spend as much time as possible with them. They know that their parents are tired from working hard to provide a life where they are not in need of anything. As a result, one of their family bonding activities consists of having dinner together in front of television, where they discuss their days while the younger kids stay occupied with cartoons. For Bailey, no matter what type of day she's had, she knows that she will experience a familiar dinner of her siblings laughing at the television, while she converses with her parents about the latest stories from their days at work and school.



Consumer Persona 2: Babysitting Bailey

After school though, she is often exhausted from grueling coursework and finds it difficult to find enough energy to transport all her siblings over to the park and keep a watchful eye on them at all times. As individuals, her siblings can keep even the most experienced babysitter on their toes - put them all together and you are in for a wild ride. As a result, Bailey tends to turn on the afternoon cartoons for them to watch while she takes some time for herself to complete her daily homework. Upon completion, she joins them on the couch until dinner. Due to their wide age range, it can be difficult to find one television program that suits everyone's tastes and desires. One factor everyone does agree on is that the film or the television show has to be animated. Her family loves animated films, but Bailey is often subjected to watching movies like Finding Nemo (her siblings' favorite) over and over again. She has watched it so many times that she can quote every other line, if not all lines, at this point. Her family also cut the cord on traditional cable a few months prior as they could not afford the rising costs. Thus, they have to rely on DVDs of movies and shows that they have and their selection leaves much to be desired.



Consumer Persona 2: Babysitting Bailey

Hearing of her dilemma, Disney Plus provides the best solution for Bailey and her family. The streaming service has a wide selection of animated films and television shows that would suit someone as young as 5 years old or even an 18 year old. Disney Plus also has most of their famous animated films, such as *Finding Nemo*, in their catalog available. With new offerings, Bailey will not have to listen to “just keep swimming” anymore and her siblings will be content to sit quietly until Bailey’s homework is completed. Disney Plus’s price is also perfect for their family as it only costs \$7.99 a month, which is a fraction of the cost of traditional cable.



Consumer Persona 3: Superhero Seth

Seth is 20 years old and currently a sophomore film student at The University of Southern California, in Los Angeles, California. He is from a small town outside LA where he spent his free time reading and collecting comic books growing up. His love for comics continued to grow and turned into a passion for superheroes as well. As he got older, his favorite superhero comics were turned into films which is where his love for film first came from.

Seth's workload this semester is extremely demanding. He is juggling 18 hours of coursework as well as trying to find time and inspiration to start building his own portfolio of videos and films. With so much going on in his life, he finds himself losing the passion for film he once had as a teenager.



Consumer Persona 3: Superhero Seth

In order to find the same inspiration he once had, Seth has turned to his impressive collection of superhero comics, but would love to be able to watch the movies to go along with them. He would love to have the convenience of being able to watch all of his favorite superhero movies in one place, and wishes there was even more content available starring his favorite superheroes.



Consumer Persona 3: Superhero Seth

Disney Plus is the perfect option for Seth. Not only do they have all of his favorite superhero films like Iron Man, Captain America, and Thor, but unbeknown to him, they also continue to release new exclusive content based on even more of his favorite superheroes. Through new series' like WandaVision, Hawkeye, Agents of S.H.I.E.L.D, etc. Seth has access to even more superhero content in addition to his older favorites at a low price of \$7.99/month. Now Seth can once again find the passion for film he once had growing up through all his favorites and more.

SWOT Analysis

DISNEY PLUS

S

- Disney Plus has exclusive access to Disney, Marvel, National Geographic, Star Wars, and Pixar content that the other streaming services do not.
- Disney Plus excels at giving consumers access to bundling deals at a low price. The Hulu, Disney+, ESPN+ bundle is cheaper than the highest price point of Netflix subscription options.
- Disney+ has strong branding and loyal customers.

W

- Disney Plus content is focused more towards kids and is not as versatile as Netflix, HBOMax, and Amazon Prime.
- Disney Plus does not currently create individualized content to be put out on its social media platforms.
- The layout of Disney Plus is not as easy to follow as Netflix's layout and the search function could use improvement as a particular title has to be searched instead of a topic unlike other streaming services.

O

- Disney has created a culture of nostalgia over time, which brings in users from all generations and ages. Disney Plus has access to classic Disney content and the ability to create spinoff series from Disney content.
- People spend more time inside due to covid rather than going out, which benefits Disney+ as boredom rises.
- Many entertainment companies did not recover from the recession and Disney could buy these companies and expand their content library

T

- New CDC guidelines recommend people to spend more time outside, which could impact people's usage of Disney Plus negatively.
- The monopolization of entertainment means that there is less content for Disney to buy and put onto Disney+, which creates a lack of versatile content.
- Copyright laws present issues for Disney+ as Disney characters could be used by other platforms in the future.

Appendix

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	Total					CABLE/TELEVISION/RADIO VIDEO STREAMING/ DOWNLOADING SERVICES DISNEY+ (CONSUMER)					CABLE/TELEVISION/RADIO VIDEO STREAMING/ DOWNLOADING SERVICES AMAZON PRIME INSTANT					CABLE/TELEVISION/RADIO VIDEO STREAMING/ DOWNLOADING SERVICES I	
	Sample	Weighted(000)	Vertical %	Horizontal %	Index	Sample	Weighted(000)	Vertical %	Horizontal %	Index	Sample	Weighted(000)	Vertical %	Horizontal %	Index	Sample	Weighted(000)
Total	25,910	247,612	100%	100%	100	3,950	47,201	100%	19.1%	100	6,031	63,176	100%	25.5%	100	10,745	116,270
AGE_18 - 24	2,013	27,772	11.2%	100%	100	654	8,626	18.3%	31.1%	163	491	7,350	11.6%	26.5%	104	1,254	17,023
(AGE_18 - 24) AND (GENDER_MALE)	961	14,137	5.7%	100%	100	246	3,697	7.8%	26.2%	137	200	3,253	5.1%	23%	90	525	8,139
(AGE_18 - 24) AND (GENDER_FEMALE)	1,052	13,635	5.5%	100%	100	408	4,929	10.4%	36.1%	190	291	4,097	6.5%	30%	118	729	8,885
(AGE_18 - 24) AND (FULL/PART TIME COLLEGE)	717	8,377	3.4%	100%	100	248	2,641	5.6%	31.5%	165	217	2,835	4.5%	33.8%	133	498	5,849
(AGE_18 - 24) AND (EMPLOYMENT STATUS_EMPLOYED)	600	9,998	4%	100%	100	210	3,474	7.4%	34.7%	182	151	3,030	4.8%	30.3%	119	382	6,597
(AGE_18 - 24) AND (NUMBER OF CHILDREN_0)	892	11,007	4.4%	100%	100	294	3,640	7.7%	33.1%	173	210	2,716	4.3%	24.7%	97	551	6,320
CENSUS REGIONS_ NORTHEAST	4,442	43,379	17.5%	100%	100	622	6,992	14.8%	16.1%	85	1,002	10,610	16.8%	24.5%	96	1,840	19,991
CENSUS REGIONS_ MIDWEST	5,325	51,450	20.8%	100%	100	842	11,031	23.4%	21.4%	112	1,190	12,803	20.3%	24.9%	98	2,139	24,083
CENSUS REGIONS_ SOUTH	10,322	94,806	38.3%	100%	100	1,492	16,259	34.4%	17.1%	90	2,230	21,166	33.5%	22.3%	88	4,135	41,845
CENSUS REGIONS_ WEST	5,821	57,977	23.4%	100%	100	994	12,919	27.4%	22.3%	117	1,609	18,598	29.4%	32.1%	126	2,631	30,350

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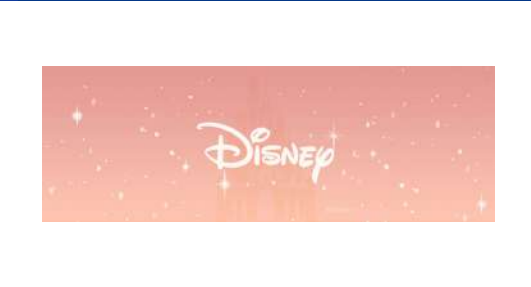
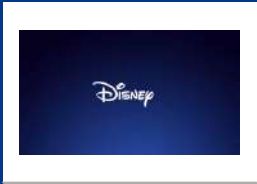
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CABLE/TELEVISION/RADIO VIDEO STREAMING/ DOWNLOADING SERVICES NETFLIX (CONSUMER)					CABLE/TELEVISION/RADIO VIDEO STREAMING/ DOWNLOADING SERVICES OTHER HULU					CABLE/TELEVISION/RADIO VIDEO STREAMING/ DOWNLOADING SERVICES HULU (NO ADS)					ATTITUDES (MEDIA) - ANY AGREE_ TELEVISION IS MY MAIN SOURCE OF ENTERTAINMENT					
Sample	Weighted(000)	Vertical %	Horizontal %	Index	Sample	Weighted(000)	Vertical %	Horizontal %	Index	Sample	Weighted(000)	Vertical %	Horizontal %	Index	Sample	Weighted(000)	Vertical %	Horizontal %	Index	Sample
10,745	116,270	100%	47%	100	2,061	27,844	100%	11.2%	100	1,841	24,397	100%	9.9%	100	11,545	100,677	100%	40.7%	100	13,
1,254	17,023	14.6%	61.3%	131	337	5,094	18.3%	18.3%	163	314	4,293	17.6%	15.5%	157	483	7,018	7%	25.3%	62	1,
525	8,139	7%	57.6%	123	114	1,919	6.9%	13.6%	121	125	2,151	8.8%	15.2%	154	207	3,418	3.4%	24.2%	59	,
729	8,885	7.6%	65.2%	139	223	3,175	11.4%	23.3%	207	189	2,142	8.8%	15.7%	159	276	3,600	3.6%	26.4%	65	!
498	5,849	5%	69.8%	149	145	1,920	6.9%	22.9%	204	107	1,357	5.6%	16.2%	164	166	2,475	2.5%	29.5%	73	:
382	6,597	5.7%	66%	141	106	1,945	7%	19.5%	173	98	1,584	6.5%	15.8%	161	145	2,675	2.7%	26.8%	66	:
551	6,320	5.4%	57.4%	122	140	1,947	7%	17.7%	157	127	1,441	5.9%	13.1%	133	222	2,783	2.8%	25.3%	62	.
1,840	19,991	17.2%	46.1%	98	326	4,802	17.2%	11.1%	98	277	3,668	15%	8.5%	86	2,000	17,831	17.7%	41.1%	101	2,
2,139	24,083	20.7%	46.8%	100	483	6,141	22.1%	11.9%	106	370	5,222	21.4%	10.1%	103	2,458	22,594	22.4%	43.9%	108	2,
4,135	41,845	36%	44.1%	94	811	10,650	38.2%	11.2%	100	757	9,274	38%	9.8%	99	4,632	37,903	37.6%	40%	98	5,
2,631	30,350	26.1%	52.3%	111	441	6,251	22.5%	10.8%	96	437	6,234	25.6%	10.8%	109	2,455	22,349	22.2%	38.5%	95	2,

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SOURCE OF			ATTITUDES (MEDIA) - ANY AGREE_ WHEN I AM WATCHING TELEVISION, I AM USUALLY INVOLVED IN OTHER					ATTITUDES (MEDIA) - ANY AGREE_ I AM A REGULAR MOVIE THEATER GOER				
Horizontal %	Index	Sample	Weighted(000	Vertical %	Horizontal %	Index	Sample	Weighted(000	Vertical %	Horizontal %	Index	
40.7%	➔ 100	13,199	128,826	100%	52%	➔ 100	4,068	42,329	100%	17.1%	➔ 100	
25.3%	⬇ 62	1,012	14,576	11.3%	52.5%	➔ 101	457	6,586	15.6%	23.7%	⬆ 139	
24.2%	⬇ 59	448	6,904	5.4%	48.8%	➔ 94	207	3,158	7.5%	22.3%	⬆ 131	
26.4%	⬇ 65	564	7,673	6%	56.3%	➔ 108	250	3,428	8.1%	25.1%	⬆ 147	
29.5%	⬇ 73	392	4,922	3.8%	58.8%	⬆ 113	175	2,427	5.7%	29%	⬆ 169	
26.8%	⬇ 66	297	5,208	4%	52.1%	➔ 100	155	2,673	6.3%	26.7%	⬆ 156	
25.3%	⬇ 62	430	5,259	4.1%	47.8%	➔ 92	212	2,975	7%	27%	⬆ 158	
41.1%	➔ 101	2,249	22,853	17.7%	52.7%	➔ 101	650	6,977	16.5%	16.1%	➔ 94	
43.9%	➔ 108	2,790	27,890	21.6%	54.2%	➔ 104	769	9,000	21.3%	17.5%	➔ 102	
40%	➔ 98	5,244	47,896	37.2%	50.5%	➔ 97	1,613	15,693	37.1%	16.6%	➔ 97	
38.5%	➔ 95	2,916	30,186	23.4%	52.1%	➔ 100	1,036	10,658	25.2%	18.4%	➔ 108	



The End!