REASSERTING THE DISNEY BRAND IN THE STREAMING ERA

A CRITICAL EXAMINATION OF DISNEY+

Robert Alan Brookey, Jason Phillips and Timothy Pollard
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Reasserting the Disney Brand in the Streaming Era investigates the evolution of the Disney brand at a pivotal moment – the move from content creation to acquisition and streaming – and how the company reasserted its brand in a changing marketplace.

Exploring how Disney’s acquisition of Pixar, Marvel, Lucasfilm, and Fox positioned the company to launch the Disney+ streaming service, the chapters look at the history of those acquisitions, and the deployment of the content, brands, and intellectual property from those acquisitions, through an analysis of the original content that appeared on Disney+. Offering a focused investigation of how the content offered from these various media brands was adapted for Disney+ so that it reflects the Disney brand, the authors illustrate through close textual analysis how this content reflects elements of the “Classic Disney Style.” The analysis positions these texts in relation to their industrial contexts, while also identifying important touchstone texts (both television and film) in Disney’s catalog.

This comprehensive and thoughtful analysis will interest upper-level students and scholars of media studies, political economy, Disney studies, media industries, and new technology.

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Disneyland has only shut down three times since it opened in 1955. The first shutdown occurred following the assignation of John F. Kennedy, and the second shutdown followed the terrorist attacks on 9/11 (Knowles, 2020). The park was again shut down in March 2020 due to the COVID pandemic. This final closure was significantly longer, as the park remained closed until California eased health restrictions and allowed Disneyland to reopen in April 2021. In important ways, these closures index these crises and locate the pandemic in relation to other historical events in the US. COVID, however, was not a crisis specific to the US, but was a global pandemic and over several months, shutdowns and lockdowns were an international experience. Many industries were affected, and many layoffs and business closures followed, as the pandemic proved to be both a health crisis and an economic one.

The impact of the pandemic on the media industries was radical. Worldwide lockdowns forced people indoors for inordinate amounts of time. Closures of movie theaters, concert venues, and sporting arenas forced many (if not most) people to find entertainment options in their own homes (Fortmueller, 2021). Fortunately, streaming services provided these people with more options, offering subscribers new original programming and the chance to binge-watch old favorites. Throughout the pandemic, the viewing habits of people changed as more streaming options became available. Subsequently, subscriptions to these services increased 26% according to a report from the Motion Picture Association, estimating that total streaming subscribers topped 1 billion (Faughnder, 2021). Several services were already in place, with others in various stages of development. For many media companies, these services would be their primary mode of connecting with audiences. Disney is a case in point. In addition to the closure of Disneyland, their other theme parks around the globe were closed at one time or another, their cruise ships were docked, and their live theater performances were shut down along with the cinemas. Given that the parks also functioned as important retail outlets for Disney’s ancillary products, the company had few revenue streams remaining, and one of those was very new and yet untested: Disney+.
Disney+ was the company’s entry into what has been called the “streaming wars,” a rather hackneyed metaphor used to reference the competition these services faced in attracting viewers and subscribers. Admittedly, there were several streaming, or Over-The-Top (OTT), services already in place before the pandemic, including Netflix, Hulu, Amazon Prime Video, and CBS All Access (rebranded as Paramount+). Prior to the lockdowns, two new services were launched, including Disney+ and Apple TV+ which both premiered in November 2019. During the early months of the pandemic, other high-profile services would be launched including Peacock from NBCUniversal (Comcast) and HBO Max from WarnerMedia (later Warner Bros./Discovery). These services were high-profile because they were tied to legacy media brands, but were designed to transition these brands for the streaming market. Like Disney, these companies would use these services to introduce new content, repurpose their back catalogs of films and television programing, and augment or replace the theatrical release of their films. Yet, at the risk of stating the obvious, none of those services carried the Disney brand. As Mart Ots has noted, “Media brands offer value propositions about what their customers can expect in terms of types of content, interactivity, and user experience” (2008, p. 3). Indeed, Disney is a brand that has signaled family-friendly content to media consumers for several decades. To that end, it has also been very successful: according to Interbrand, a marketing consultancy that ranks global brands across all market segments, Disney is 10th on their list of the Best Global Brands of 2021 (InterBrand, 2022).

Sylvia Chan-Olmsted (2011) has observed that the multi-channel media market, and the rise of social media, presents both challenges and opportunities to scholars studying media branding. She argues for an “OPEN” media brand studies that focus on four basic topics: “on-demand, personal, engaging and networked” (2011, p. 8). Although she is not referencing streaming services specifically, all four of these topics apply to streaming services generally. Chan-Olmsted offers a brief example of the challenges of streaming services when she observes that a CBS show streaming on Hulu could become disassociated from its network brand. Where Disney+ is concerned, however, the challenge was not brand disassociation, but rather the close association of the various brands the company owned.

While the launch of Disney+ was important to the company as a means of connecting with consumers and maintaining a source of revenue during the pandemic, we should also note the service was not designed with a health crisis in mind. Instead, the service was designed to compete with other streaming services, and clearly Disney was using its own brand, and the brands of the companies it has acquired over the years, to meet this competition. For proof, one need not look further than the service itself. The Disney+ interface features sections clearly identified by the labels Pixar, Marvel, Star Wars, and National Geographic. While other services (like Netflix) may organize content by genre, Disney+ orders its content by brand.
Under those labels, subscribers found legacy content mixed in with new Disney+ original content produced specifically for the service. These brands have been acquired over the years as Disney bought out Pixar, Marvel, Lucasfilm, and 21th Century Fox, and arguably Disney+ is literally a product (if not the culmination) of these acquisitions. Although Pixar, Marvel, and Star Wars films may have featured the Disney logo in the opening credits, seldom have all of these brands been so closely and visibly associated within the same media consumer product, and seldom has Disney’s supremacy as the parent company consumer brand been so obvious.

While the Disney+ interface is designed to associate these brands, these brands signify a vast amount of content, much of which reflect narratives and characters that are in several respects different from the worlds imagined by Disney. There was little Disney could do to alter this legacy content, particularly for those brands that have established audiences, without alienating some of the fans that make up those audiences. The original content created for the Disney+ service, however, was another matter entirely. That content could be created to reflect the Disney brand, while still appealing to the audiences that are attracted by Pixar, Marvel, Star Wars, and National Geographic content.

Disney+ presents an important opportunity to examine the company and its various brands at a rare moment in the media environment. Granted, Disney, as a company, has received extensive scrutiny, particularly from academics, but many of these studies engaged a very different and much smaller company than the one that exists today. For example, the anthology From Mouse to Mermaid, a collection of critical essays, was published before Disney had even acquired ABC (American Broadcasting Company)/CapCities (Bell, Haas & Sells, 1995). In The Disneyization of Society, Alan Bryman (2004) describes how the practices within Disney’s theme parks are incorporated into various businesses. While Disney provides the template for Bryman’s analysis, he engages Disney before the acquisitions of the brands that would make up Disney+, and his critical attention is devoted to companies other than Disney. In their book The Mouse that Roared, Henry A. Giroux and Grace Pollock (2010) raise significant concerns regarding the continued media consolidation that had allowed Disney to grow into a conglomerate with holdings across a variety of mediums and a global reach. While they acknowledge both the acquisition of Pixar and Marvel, they devote little time to the significance of those acquisitions, and their book predates the acquisition of Lucasfilm and Fox.

In the recently updated edition of Understanding Disney, Janet Wasko (2020) refreshes her comprehensive discussion of Disney and discusses the various mergers and acquisitions made by Disney. She casts many of these acquisitions as the outcome of various boardroom machinations and essential personalities in the Disney story as it evolved from the 1990s on. She also notes an emphasis on corporate synergy and branding and the expansion of the Disney brand in relation to its acquisitions. While she discusses
the history of those acquisitions, she does not engage the content that has
derged after the acquisitions occurred, or the way those acquired brands
have been strategically exploited through Disney+. It should be noted that
this edition was made available (at least on Amazon) on January 20, 2020,
only two months after the launch of Disney+. Therefore, it is unlikely that
Wasko had access to Disney+ while preparing the manuscript. Our purpose
is to pick up where Wasko left off and provide a focused engagement of
Disney+, its brands, and its content.

This book is intended to do just that. We do not offer it in contrast to
the work just mentioned, but as an extension, to reconsider Disney now
that it has become a much larger company and one that has faced some of
the most significant challenges to the entertainment industry. We intend to
analyze Disney’s acquisition of Pixar, Marvel, Lucasfilm, and Fox, but we
will do so through a critical lens focused on the Disney+ service. Specifi-
cally, in the chapters that follow, we will look at how Disney has used these
acquisitions to launch the service and then critique the original content that
they have produced for the service. In this chapter, we lay the groundwork
for those analyses. First, we trace the emergence of streaming services and
discuss the various services that make up Disney’s competition in this mar-
ket. We then provide a critical history of Disney in which we trace the prac-
tices that former CEO Bob Iger identified as preparing the company for the
streaming wars, back through the leadership regimes of Walt Disney and
Michael Eisner. Finally, we will discuss the theoretical and methodological
rationale for our study and provide a preview of the chapters that follow.

From VCR to Streaming

Although streaming services represent a relatively new technology, we
should note that these services need to be understood in relationship to
some older technologies. For example, the VCR or video cassette recorder.
Although video tape had been around for several years, and the older reel-
to-reel video tape players were used by the industry (and in some educa-
tional contexts), they never had a viable consumer market. The VCR, and
video cassettes, were considered much more user-friendly, and ushered in
a new form of media consumption: the home video market. The first VCR
was the Sony Betamax, introduced in 1975, but it soon met competition
with the JVC VHS format which was released in 1976. For various reasons
(Cusumano, Mylonadis & Rosenbloom, 1992), the VHS format took hold
in the consumer market. This market was a revolutionary change for the
media industries, as it created a secondary market primarily for film, but
also for some popular television shows. It also ushered in new consumer
practices, such as video rentals, and provided consumers with expanded
home entertainment options.

The VCR formats, however, were analog recordings which were limited
in both their quality and functionality. The cassettes contained magnetic
tape that would be dragged across the tape heads of the players, creating a consumer experience that was decidedly linear and occasionally interrupted by audio and video problems due to the physical erosion of the tapes. The introduction of the DVD in 1997 was another technological revolution. DVDs contained digital files read on discs using lasers, and they offered a better consumer experience in both video and audio quality, one that was more dynamic and interactive than video tape. In addition to the traditional functions of fast-forward and rewind, consumers could skip to specific scenes using the interactive menus of the DVDs. They could also enjoy a variety of extra features not often offered on video tape, including audio commentaries, behind the scenes segments, deleted scenes, and interviews. All of these features were also immediately accessible through the DVD interface. Therefore, the DVD introduced even more options for consumers than the old VHS format; it also changed the home video market from a rental market to a sell-through one, meaning that instead of renting consumers were buying DVDs (Rothman, 2004). Although rental giants like Blockbuster and Hollywood video transitioned to offering DVD rentals, consumer decisions to buy instead of rent significantly eroded the market. Yet the real threat the DVD format posed to the rental market was its place in the emergence of subscription services, or more specifically, Netflix.

Netflix is a classic Silicon Valley story from the late 1990s, involving two entrepreneurs, Marc Randolph and Reed Hastings. Randolph and Hastings came up with the idea for a DVD-by-mail sales and rental system, based on the assumption that DVDs (unlike VHS tapes which had several breakable plastic parts) could be easily shipped through the mail with minimal damage. The first DVD they shipped was sent to Hastings’ house, and it arrived unscathed. From this successful experiment, they started to build the company. On April 14, 1998, Netflix launched the first online DVD rental store with 30 employees and 925 titles, encompassing almost the entire stock of DVDs in print at the time (Netflix Inc., n.d.). As consumers began embracing DVD technology, and as the players and discs became cheaper, Netflix’s subscription base started to increase as well (McCord, 2014). Starting in late 1999, the start-up disrupted the rental market significantly since it eliminated the late fees charged by brick-and-mortar rental stores (Silva, 2020). Instead, consumers would pay a monthly fee, for which they could view as many DVDs as they like, but they could only have three titles at any given time. Still consumers enjoyed the relative convenience of Netflix, which allowed them to return titles in a postage-paid envelope through the mail, all for a set subscription fee. Although the DVD technology facilitated the emergence of Netflix, the company was well aware that another technological advancement was on the horizon.

By the mid-2000s, high-speed internet service delivered the bandwidth and data speed that made video streaming relatively seamless, without the buffering and glitches on slower services. Netflix began considering online delivery options, including a proposed “Netflix Box” that would download
movies overnight, so that they could be watched the next day. This idea was scrapped, but in January of 2007, the company introduced its streaming service (Rodriguez, 2017). Although Netflix was not the first to offer digital video online (Apple was offering downloads of television shows as early as 2005), it has become the dominant force in the video streaming market, and although it has started to lose subscribers, it still has 220 million subscribers worldwide (Goldsmith, 2022). Netflix, however, was not the first streaming service offered to consumers, because that honor is held by Amazon.

Amazon began offering online video downloads in 2006 under the “Amazon Unbox” label (Statz, 2006). Since then, Amazon’s video services would go through several different iterations including “Amazon Video on Demand,” “Amazon Instant Video” before becoming “Prime Video” (Boas, 2018; Downey, 2018). Unlike Netflix, for which subscriptions are its primary revenue stream, Amazon Prime Video is offered as just one of many amenities enjoyed by Amazon Prime customers. That is not to say that Amazon does not take video content seriously in its business model. Indeed, they have entered the original content game and have enjoyed some critical success. In 2014 Amazon had its first legitimate hit, Transparent, which garnered critical acclaim over its four-season run, and has received numerous awards (Bahr, 2019). From then on, Amazon has had its fair share of hits (and misses) like any streaming platform. Most recently, however, The Marvelous Mrs. Maisel (2017) has emerged as one of the service’s signature series garnering numerous Primetime Emmys and Screen Actors Guild awards.

In a move that also is indicative of Amazon’s commitment to content for its streaming service, the company acquired MGM in May 2021. Granted, the iconic film studio had certainly declined over the years and had changed ownership several times. Yet, as Dade Hayes (2021) has observed, Amazon is looking to integrate MGM’s historic film catalog into its Prime Video service. Although that integration will be delayed by the various streaming deals that MGM has already established with other services, the $8.5 billion deal (the second largest acquisition in the company’s history) signifies a strong commitment to Amazon’s Prime Video service.

Shortly after Netflix and Amazon began offering streaming content, Hulu was officially launched on March 12, 2008. It was created by a variety of investors and partners including, NBCUniversal (owned by Comcast), News Corporation (parent of the Fox Broadcasting Company and 21st Century Fox), Yahoo!, AOL, and Facebook (Lamare, 2018). The Disney Company purchased an equity stake in Hulu on April 30, 2009, and it would start to provide some of its library of television shows and movies through the service, significantly expanding Hulu’s offerings (Moore, 2019). When Disney acquired Fox, the deal included Fox’s percentage stake in Hulu. As a result, Disney became the majority owner of Hulu (Gold & Riley, 2017). Another equity partner, AT&T (owner of WarnerMedia), sold