

Disneyizing Home Entertainment Distribution

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This chapter will contextualize Disney's strategic practices for home entertainment, in relation to the company's broader strategies in the New Disney and contemporary period (from 1984). Coinciding with the growth of home entertainment, these align with shared strategies of media conglomerates with a Hollywood film (and television) studio at their heart: synergy, globalization, franchising, economies of scope and scale, and exploiting new technologies and revenue streams. I will outline how Disney grew through home entertainment, and came to dominate from VHS to Blu-ray, through distinctive practices that differentiated the Disney brand. These have served to Disneyize home entertainment, through appropriation, hybrid consumption, and branded experiences. I develop how home entertainment was consolidated, boomed, and has been disrupted by shifts in technology and consumer behaviour. Disney's Studio Entertainment division, like other Hollywood studios, is primarily involved in the distribution business (Balio 2013: 66). As content provider within a diversified conglomerate, they have adopted a range of practices to maximize profits from home

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entertainment, as new technologies and revenue streams have developed. Disney has consistently maintained and grown the value of its library and its media market share due to these factors. The company has adjusted to the changing conditions and fortunes of home entertainment, rental and retail, as well as television sales, trying to maximize its distributor share of revenues across different windows.

Disney, like Hollywood in general, exploits its filmed entertainment across the aggregated niches provided by the life-cycle of successive windows of release—those willing to pay most to see a film first, or repeatedly, and those willing to pay for a package that includes the same film later, or only willing to watch ad-supported free television. The value of a film is maximized by ‘balancing time, differential pricing options, exclusivity, and multiple platforms for repeat consumption’ such as video, pay and free television (Ulin 2010: 64). This is the New Hollywood equivalent of the Classical Hollywood run, zone, and clearance system, shifting price discrimination from first and subsequent run cinemas to the home. This is dependent on copyright being transferrable and divisible (Ulin 2010: 63–4), allowing Hollywood to license its films to television across different windows since 1955 (Balio 1990: 31). Through finessing home video rental, retail, and television licensing, Disney and Hollywood have also arguably reversed the effects of the post-war decline in theatrical attendance. Cinema competed with other forms of leisure and consumer spending, suffering the effects of the baby boom and suburbanization, compounded by the rise of television, before syndication and television production provided further revenue streams, consolidating the value of film libraries (Balio 1990: 3–4). More money is spent on film, more people watch film, and Hollywood has established and consolidated its position in the home (Allen 1999: 122)—both in America (successively via broadcast television, pay TV, home video, pay-per-view and now digital delivery), and increasingly globally.

This is exemplified by the growth of Disney, both the corporation and its Studio Entertainment division. The Walt Disney Company expanded significantly under the New Disney management from 1984. Gomery suggests New Disney utilized key strategies: sell its assets, for instance re-exploit the classic films on video; expand profitable activities including theme parks; whilst increasing corporate partnerships (Gomery 1994: 81). Wasko outlines further factors helping Disney’s revival and expansion through the 1980s and 1990s: reviving traditional Disney (repackaging products for video and television, and subsequently creating new

animated features to expand on this); and diversifying product lines, achieved by renaming Walt Disney Pictures to concentrate on family audience films, whilst developing subsidiary film studios Touchstone and Hollywood Pictures to diversify their theatrical and home entertainment slate (and hence library) (Wasko 2001, citing Knowlton: 34; Kunz 2006: 41). These enabled economies of scope and scale in both theatrical and home entertainment distribution.

New Disney also maintained previous strategies of the company, that fed directly into its approach to home video, or indirectly via its theatrical film production: utilizing corporate partnerships, particularly cross-promotions to reduce marketing costs, and limiting exposure with Silver Screen partnerships to part finance (and cross-collateralize) Touchstone and Hollywood Pictures films (Ulin 2010: 85) with Disney receiving distribution fees and owning 50% of theatrical rights with 75% of home video rights (Wasser 2009: 164). ‘Disney also exploited new technologies and delivery systems, creating synergies that were altogether unique among the studios, and that finally enabled the perpetual “mini-major” to ascend to major studio status’ (Schatz 2008: 23), and have contributed to Disney’s growth to global media conglomerate.

The lesson of video, albeit previously from television and pay cable, was the value of a film library (Wasser 2008: 126), and Disney, as an emerging major studio in the 1980s, with diversified interests in theme parks, exemplified their increasing economic significance. Hollywood as a ‘*rights* industry’ with economic power through access and control over global distribution networks, focused on ‘acquiring, licensing and regulating media rights’ (Drake 2008: 89). Distributor power was underpinned by their library, to provide a steady stream of (presold) new and (proven) legacy filmed entertainment across multiple territories and revenue streams (Ulin 2010: 4; Wasko 2003: 59–60; Balio 2013: 66–67), whilst offsetting the risk of new productions ‘against [this reliable] flow of revenues from their back catalogs’ (Drake 2008: 81). Film (and television) ‘content libraries have dramatically increased in value in the last two decades’ (Drake 2008: 81), and even before that, in discrete leaps coinciding with each new delivery platform and revenue stream. Disney further extended its distributor power, as it transformed into a horizontally and vertically integrated media conglomerate with its merger with ABC/Capital Cities from 1995 (McChesney 2000). It continues to maintain and exercise this as it seeks to move into new platforms, and to control the whole value chain for each significant revenue stream

for film; through video manufacture, the Disney Channel for premium cable, ABC for broadcast television, and continuing into digital delivery (such as the Disney Life multi-platform streaming and download service); or participate in partnerships that will otherwise maximize revenues such as with Apple's iTunes or cable operators.

Disney's market power, and library, grew significantly between 1984 and 2005. From the 'bottom of the studio heap in terms of output and market share' (Schatz 2008: 23) with a library of 158 films, by 1988 Disney achieved the 'industry's leading market share' of theatrical revenues (Schatz 2008: 23) with its increased slate of 12 films per year, including Touchstone hits, particularly *Who Framed Roger Rabbit* (dir. Robert Zemeckis, 1988) (Wasser 2009: 164). In 1990 Disney's library was reported as 194 live-action films, and 29 animated features (Wasko 1994: 263). This reflected Michael Eisner's goal in 1984 to 'carefully manag[e] Disney's largely untapped ... film and television library', as well as growing their slate of live-action releases (Eisner 1984). Discussing the company's success during the 'Disney Decade' of the 1990s, Michael Eisner noted they had 'enhanced our library with 17 animated films, 205 live-action films', whilst still seeking to 'build the greatest entertainment asset base in the world' (Eisner 1999: 2). The 1993 acquisition of Miramax, with its library of 200 films also contributed (Balio 2013: 135), albeit to compensate for recent failures with Touchstone (Wasser 2009: 182). By 2005, the library was 900 films, and the 'home entertainment division accounted for nearly one-third of the revenues of the entire industry' (Epstein 2005).

Disney epitomized the principle of synergy; historically through its licensed merchandise, and from the 1950s the tight diversification around its films, theme park, and television programming (Anderson 1994). Within New Disney, coordinated cross-promotion between subsidiaries and partners was further developed. For instance, the synergies around *Aladdin* (1992) products, ice shows and theme park parades noted by Eisner in the 1993 Annual report (Kunz 2006: 41). *Aladdin's* synergy demonstrated both cross-promotion and also 'content streaming', migration of content as a strategy underlying production, linked to economies of scope to 'amortize ever-higher production costs by establishing multiple revenue streams from major media franchises' (Murray 2003: 10).

Eisner's example illustrates how synergy also underpinned strategies of repurposing, through licensed merchandise, spin-off products and subsequently sequels, and links to Disney's control and exploitation not

only of their film rights, but also of Intellectual Property. Disney are in the business of renewing, exploiting, and extending their licensed assets and brands (Allen 1999: 121), and they achieve this through repurposing characters, stories and story worlds, as well as repackaging or reformatting their library properties. Disney repurposed its library to VHS, Laserdisc, DVD, and other formats and revenue streams (Sedman 1998: 50), particularly exploiting sell-through, including straight-to-video (and DVD) releases. Linked to this, Disney took advantage of alternative versions for VHS, Laserdisc, and DVD, Special Editions, to provide further tiered pricing. Justified by extra features and enhanced presentation (such as THX sound or widescreen), this promoted upgrading for repeat sales to maximize revenues, or even repeat purchase of reformatted DVD versions (Lyman 2002). Additionally Disney repurposed sequences, and songs, from its features in the ‘Sing Along Songs’ videos and DVDs. Disney previously utilized repurposing and reformatting, to re-exploit its library in the 1950s, particularly with the *Disneyland* television series. Telotte outlines how the anthology series encompassed condensed feature films (i.e. a ‘short version of *Alice in Wonderland* (November 2, 1954)’, or a reformatted ‘serialized’ feature, such as *Treasure Island* (January 5 and 12, 1955), or a compilation of animated shorts (imitating Disney’s earlier approach of package features) (Telotte 2004: 64). Disney preserved its prints, motivated both by its re-releasing strategy, and this repurposing for television (Grainge 2008: 113). This illustrates ‘content warehousing ... reformatting of pre-existing archival content for reuse in new mediums’ (Murray 2003: 9), which continued with the Disney Channel, and Disney home video.

Disney grew as a corporation as it exploited home entertainment innovations and market changes, and increasingly tried to drive these. As its status as a Hollywood major was consolidated, its market share of home video sales, and subsequently home video revenues as a whole increased. Disney pioneered different packaging of rental and retail VHS tapes, and exercised tight control over video sales (Wasser 2009: 111–112; Wasko 1994: 133). ‘Disney has dominated the sell-through market in video products ever since. This domination financed the expansion of Disney through the late 1980s and 1990s’ (Wasser 2008: 124). Alongside other growing ancillary revenues, this enabled Disney to raise finance for further theatrical production from Japanese banks and investors (Balio 2013: 38), for the revival of animated feature production, known as the Disney Renaissance from 1989.

Initially Disney, alongside MCA Universal championed Hollywood's opposition to the VCR, as plaintiffs in the copyright case against Sony (and its Betamax format), based on the fear of home recording (with its time shifting capability which the studios premised as a copyright violation that would impact revenue from Network TV sales) (Wasko 2003: 126). By providing audiences with free copies of films recorded from television this would inhibit the value of other release windows, and potentially affect Disney's strategy of theatrically re-releasing its animated feature films (Wasser 2008: 124). As Disney entered video, studio executives thought releasing their animated films on video would end profits from re-releasing, but Eisner argued 'sensitively managed' releasing could expand 'ancillary markets [video and television licensing] without competing directly with The Disney Channel or inhibiting theatrical re-issue of our classics' (Eisner 1984). He was proved right. By 2004, Disney achieved '\$6 billion from videos and DVDs sales' (Epstein 2005). In relation to theatrical re-releasing, Disney still exploited this during the growth years of home video, preceding the *Pinocchio* VHS in 1985, with cinema re-release in 1984, and likewise *Lady and the Tramp* 1987 (theatrical 1986), *Cinderella* 1988 (1987), *Bambi* 1989 (1988), *101 Dalmatians* 1992 (1991), and *Snow White and the Seven Dwarves*, re-released theatrically in 1987 and then 1993 before video debut in 1994 (and yet again *Pinocchio* 1993 (1992), and *Lady and the Tramp* 1994 (1993)). Hence, Disney began to coordinate 'the release and withdrawal of videos from the market around past and future theatrical campaigns' to maximize revenues and shared publicity (Wasser 2009: 11).

Film industry revenues significantly increased between 1980 and 1990, with domestic theatrical almost doubling, but contributing a smaller proportion overall (down from 29.6 to 15.9%) (Prince 2000: 92). Disney's share of this increased dramatically from 1986 up to 10%, against 3–4% the previous five years, reaching 20% in 1988 (Prince 2000: 75). Hollywood home video revenues rose from \$280 million in 1980 to 18 times bigger at \$5.1 billion by 1990, from 7 to 38.6% of Hollywood's overall income (Prince 2000: 92). US sales of videocassettes notably rose from 3.5 million units in 1981, to 45.9 million in 1985, then more than doubling by 1987 at 107.5 million, and nearly doubling again to 207.5 million in 1989 (Prince 2000: 95). Wasko notes this consolidated a period where Hollywood as a whole adopted a dual approach to home video, combining rental and sell-through (Wasko 1994: 136). Disney dominated sell-through as both distributor

and manufacturer of tapes, selling these directly to retailers, maximizing their proportion of revenues, and degree of control, and developing (these more lucrative) video sales, which were increasing at a faster rate than the rental market and would exceed rentals in 1990 (Wasko 1994: 136, 149; Gellene 1989). Disney grew sales of animated classics successfully through reduced pricing, *Pinocchio* (1985); increased marketing, 'Bring Disney Home for Good' for *Sleeping Beauty*, and broadening sales through mass retailers like Target, with *Cinderella* (1988) achieving nearly 6 million units and \$100 million revenue (Eisner and Schwarz 1998: 187–189). By 1988 Disney was top studio for home video (Wasser 2009: 164). Whilst Gomery suggests New Disney sold its assets, re-exploiting the classic films on video for short-term gain (Gomery 1994: 81), the company's adaptation of its theatrical re-releasing strategy to capitalize on their enduring appeal through home video underpinned the 'explosion in its film entertainment revenues' up to \$1588 million in 1989 (Prince 2000: 74), and the studio's expansion.

As Hollywood's ancillary revenues exceeded theatrical, domestic revenues from home video (rental and sales) surpassing theatrical around 1986 (Prince 2000: 97; Drake 2008: 76; Allen 1999: 122), they drove investment in pre-sold blockbusters, and cinema release became an 'advert' for video windows (Wasser 2009: 171). Sales of videos 'aimed specifically at kids ... represent[ed] 37% of all video sales' (Allen 1999: 116). Disney benefitted as the family audience, comprising the 'Echo-boomers' born between 1977 and 1995 and their parents from the tail end of the post-war baby boom, '[drove] the video industry and transform[ed] the film business in the early 1990 s' (Allen 1999: 110, 118). As sales of film on video increased on average 52% annually from 1983 to 1992, and continued with average increases of 20% a year in the 1990s (Allen 1999: 113), Disney was positioned to take full advantage. Treating 'the sell-through and rental businesses as two related but distinct businesses' to avoid cannibalization of revenues (Newcombe 1990), Disney 'perfected its manipulation of theatrical and video releasing' (Wasser 2009: 130). *Aladdin* was priced low for mass market and rental stores (Munk 1993) with 'repeat consumption ... maximizing value' (Ulin 2010: 183). Further capitalizing on the popularity of its animated characters, this was followed by two direct-to-video sequels.

Buena Vista Home Video provided 'three-quarters of Disney's 1992 operating profits of \$508 million' (Allen 1999: 113), with sales of \$1.1 billion worldwide (Wasko 1994: 143). Secured as market leader from

1992 to 1994, Disney averaged 27.9% market share of video sales revenues, more than double its nearest competitor (Waterman 2009: 340). In 1994 ‘Disney’s VHS business [comprised] more than 50% of filmed entertainment earnings’ (Goldstein 1994), with ever larger hits from its animated library and Disney Renaissance films. By 1996, six of the top ten US video sales of all time were Disney animated features (Waterman 2009: 88–89), and by 1998 this was seven: *The Lion King* (1994) 28.8 million units, \$427 million wholesale revenues (paid to Disney), *Snow White* 25.1 million units, \$372 million, *Aladdin* 22.4 million, \$352.7 million, *Beauty and the Beast* 20.2 million, \$318 million, *Toy Story* 19.5 million, \$290 million, *Pocahontas* 17.1 million, \$216 million, *Fantasia* 13.3 million, \$209 million (Kramer 2002: 194–195). Disney’s diversified slate also enabled economies of scale, whilst Disney pioneered straight-to-video and DVD products, using runaway production through wholly owned studios in Japan, Australia and Canada, to reduce costs and increase their profitability (Hoffman 1997). *The Return of Jafar* (1994), a straight-to-video sequel sold 10 million copies (Goldstein 1994), followed by *Aladdin and the King of Thieves* (10.3 million in 1996), and *Beauty and the Beast: The Enchanted Christmas* (7.6 million in 1997). *Lion King II: Simba’s Pride* (1998) achieved 12.1 million sales and \$300 million revenues from sales and rental (Arnold 2002; Hettrick 2003). By 2001, 8 of the top 10 ‘all-time direct-to-video’ sales came from Buena Vista Home Entertainment (Walt Disney 2001: 34).

With this mature video market, LaserDisc provided a model for DVD as a replacement format. DVD combined appeal to mass and niche markets with potential for repeat sales of Disney’s library. Disney/Image Entertainment’s LaserDisc of *Snow White* surpassed 100,000 unit sales, with *The Lion King* exceeding 150,000 (McGowan 1995a). LaserDisc demonstrated consumers would pay more for special editions, with ‘exclusive-to-laser supplementary material’ (McGowan 1995b), also consolidated by Disney with their Masterpiece Collection. Whilst extras on VHS, might include ‘documentaries, deleted scenes or video interviews’, such as the ‘The Making of a Masterpiece 40-minute documentary’ on the *Snow White* Masterpiece Collection VHS (Daly 1994), on LaserDisc chapter access made these more accessible, whilst the ability to view with multiple soundtracks enabled filmmaker’s commentaries, alongside enhanced picture and Dolby Digital Surround sound (McGowan 1996). The Hollywood Digital Video Disc Advisory Group (including Disney), recommended requirements for DVD: fit a complete

film of 2¼ hours on one side, with parental lock-out, and piracy protection (unlike LaserDisc), the ‘expectation that DVD would allow for additional value – added behind-the-scenes features; five different audio tracks for multichannel sound, filmmakers’ commentaries, language dubbing and room for up to six subtitle streams for international markets’, as well as ‘multiple aspect ratios for widescreen support’ (Feingold 2006: 411; Sebok 2009: 37, 47–8).

DVD allowed Disney to re-exploit its library, whilst nonetheless stressing the additional value, or enhanced experience (despite its planned obsolescence, with HD television anticipated) (Sedman 1998: 53). The combination of cheap manufacturing costs, increasing sell-through, their established distribution networks and the appeal of the Disney Classics library meant, as Michael Eisner noted ‘DVDs are very profitable’ (Roberts and Croal 2001). Consumers also bought more, ‘15 DVD’s per year’ compared to five VHS (Lyman 2002). For Hollywood, ‘at its peak’ DVD revenues were double VHS and DVD was ‘roughly three times as profitable’ (Smith 2015). A survey found ‘55% likely to replace their Disney videos’ with DVD, compared to 14% for all films, suggesting a ‘Disney difference’ (Eisner 2000: 7). Disney maintained its dominant share in sell-through 2000–2003 (Waterman 2009: 89), but as its DVD sales lagged, its 37.1% share of VHS sales provided only 24.4% share of the overall market (with DVD sales and rentals) in 2003, although *The Lion King*, the ‘biggest reissue’ in history, provided 13 million unit sales (Walt Disney 2003: 22). In 2004 Disney ‘relinquished its overall lead of the video market’, achieving 17.3% market share (Waterman 2009: 340–341). Yet growth in DVDs accounted for about 80% of the \$662 million Studio Entertainment income in 2004 (Epstein 2005). Pixar films helped grow its DVD revenues, with *Monsters, Inc.* 5 million combined VHS and DVD sales, for \$85 million wholesale revenue (Wasko 2003: 134), *Finding Nemo* the biggest selling DVD ever, 40 million and \$476 million in sales and rental revenue, and *The Incredibles* \$325 million sales and rentals (Levine 2005). Pixar films sold 150 million DVDs by 2006, when Disney acquired Pixar, and continued with *Toy Story 3*’s \$650 million home video revenues (Balio 2013: 30). Disney increasingly focused on franchises, which provided their top 3 DVD sellers of 2006: *Pirates of the Caribbean: Dead Man’s Chest* 14.5 million, *Cars* 13 million units, and *Chronicles of Narnia: The Lion, the Witch and the Wardrobe* 12 million (The Numbers 2006). DVD also enhanced globalization, with economies of scale for multiple language production, whilst retaining

territorialization with region coding. International release dates collapsed to fit domestic, as with theatrical releases, to benefit from transnational publicity and counter piracy. In 2006 Hollywood DVD sales/rentals peaked at \$24 billion (Balio 2013: 103).

Inspired by the notion of McDonaldisation (George Ritzer), Bryman outlines how certain practices of the service economy, principles encouraging increased consumption exemplified in the Disney theme parks, have become globalized (Bryman 2004: viii, 1–2). Bryman characterizes Disneyization with four dimensions: theming, hybrid consumption, merchandising, and performative labour (Bryman 2004: 2). Whilst I will develop some of these aspects in relation to Disney's home entertainment, I will use the alternative designation Disneyizing, to suggest how broader strategic practices, not exclusive to Disney but strongly associated with the company, permeate its divisions and subsidiaries, and help to identify its distinctive approach. These practices align with the traditions and corporate history of Disney, explaining how and why Disney has developed in distinctive ways. Synergy, branding, merchandising, and notions of quality and entertainment, feature in wider talk about Disney, critical accounts, and are prominent within its own discourses (Walt Disney 2003; Walt Disney 2009). Discourse also encompasses the promotional, performative nature of the company's way of describing itself and its products: inflationary adjectives for 'exhilarating', 'wonderful' (Fjellman 1992: 13–14), and particularly 'magical' family entertainment.

Disney uses its distributor power to appropriate films from its co-production partners, most notably with Pixar, Walden Media's first two *Chronicles of Narnia* films, the *Air Bud* films, and *The Muppet Christmas Carol*. Preceding another brand or title with 'Disney', positioning its logo or logos more prominently on trailers, posters, DVD cases and opening credits, claims ownership, subsumes the value of the product in question to Disney, and serves as a paratextual frame to delimit its meanings and associations. Disney pursues this practice to a varying degree with its home entertainment products (and theatrical releases)—partially determined by contractual arrangements, as with Marvel, partly dependent on Disney's power in the relationship, whilst also strategically determined, in order to position the film in relation to the Disney brand, or its subsidiaries.

Hybrid consumption, beyond Bryman's account of blurring boundaries between consumption across park attractions, shops, restaurants, and hotels (2004: 58–59), applies to Disney's 'blurring of publicity,

entertainment and education' (Telotte 2004: 79). This dates back to the *Disneyland* television series, which combined entertainment, backstage features, and promotion, for the eponymous park and Disney's theatrical releases. As such it links to synergy, and trailerization, as well as the repurposing of material (and how this is used as additional content, extras to add value to a DVD or Blu-ray). Gillan outlines hybrid content as 'content that promotes other Disney content' (2014: 150), particularly identifying this with the Disney Channel, but also tracing this back to *Disneyland*. She also links this to broader shifts in cross-promotion involving online media—such as *Leo's Little Big Show*, a (mock) vlog used to promote the *Toy Story 3* 4 Disc Blu-ray/DVD combo pack, and others (*Snow White*, *Prince of Persia*, *Tangled*, *Disney Fairies Tinkerbell* DVDs) (Gillan 2014: 191). This incorporates a pastiche of a sponsor message, YouTube music video, and seamlessly integrated clips from the film.

Disney home entertainment has been readily associated with combining adverts, documentaries, and films since video and LaserDisc, and as I note below criticized for inflicting adverts on viewers. Brookey and Westerfelhaus suggest the 'DVD format collapses exposure to promotional material into the experience of viewing the film', accentuating this blurring (2002: 24). Individual Disney DVD extras feature a blend of promotional, informational/educational, and entertainment material. Brown notes the natural history material on *The Lion King* Special Edition, alongside the extended, comedic menu sequence and games (2007: 175, 177). The 'Blu-ray is Suite' on the *Beauty and the Beast 2* Disc DVD uses actors from *The Suite Life on Deck* (Disney Channel) to 'tell [the viewer] about the amazing new way to watch movies called Disney Blu-ray', combining promotional and informational intertitles, inserts from Disney movies, and comedy based on their characters from the programme. More recently 'Discover Blu-ray 3D with Timon and Pumba', similarly pastiches the product demonstration format with animated comedy around the *Lion King* characters with integrated clips from films released in Blu-ray 3D. This builds on the reflexive DVD trailer for *Lion King 3* (or *1 ½*) on the *Lion King* DVD, in which they invite the viewer 'on a backstage tour, behind-the-scenes for a revealing and intimate look at the story within the story' (cited in Brown 2007: 176). These informational features finish with an intertitle or screen of logos advertising the films shown. Such hybrid consumption thus contributes to the branded, Disneyized experience, and synergies with other Disney products and subsidiaries.

Cross-promotional partnerships for Disney's home video releases including their direct-to-video/DVD titles, broadened marketing and shared the cost with retail or corporate partners. Paramount's *Top Gun* demonstrated the potential for adverts on video (for Pepsi), enabling a reduced price for sell-through that expanded sales (Wasko 1994: 135). Disney Home Video partnered McDonalds, 1987 to 1991, who offered Disney videos at reduced price (Wasser 2009: 163). A similar partnership with Burger King, played against its rival, promoted *Pocahontas* and *The Lion King* (ibid.). Then McDonalds and other partners helped advertise direct-to-video sequels *Pocahontas: Journey to a New World* and *Simba's Pride*, as well as the (restored) re-release of *Lady and the Tramp* (Stanley 1998). Disney used cross-promotions seasonally to raise awareness of individual videos, DVD, and Blu-ray; a wider range of retail sites, particularly supermarkets and then mass retailers such as Walmart (Wasko 1994: 157); their premium product lines, such as the Masterpiece Collection; whilst also encouraging consumer upgrading, both to new formats, and premium Special Editions or box sets. Hence *The Lion King* (and *Cinderella*) was available 'with a \$5 rebate' promoting the Masterpiece Collection with General Mills (Spethmann and Stanley 1995), whilst in 2003 a European partnership with Hasbro and retailers, and separately in the USA several grocery brands and supermarkets, promoted the Platinum Edition 2 Disc DVD (Marketing 2003; Casabona and Alaimo, 2004). Wholly Guacamole then provided a \$5 rebate for *The Lion King* Diamond Edition 4-Disc Blu-ray (PR Newswire 2011).

Whilst Bryman emphasizes 'generic' theming in Disneyization, I suggest branding, and providing a branded experience, defines Disney's home entertainment. As already suggested, Disney branding, particularly the use of its (studio) logos to enclose all home entertainment products (physically, their cases/covers, and as they play—paratexts of branding), also functions to appropriate, as a guarantee of quality, and actively demarcate the Disney experience associated with hybrid consumption, synergies, and repurposed extras as additional value. Most prominent in the branding of their library are a succession of 'special' or premium product lines, the Walt Disney Classics, Walt Disney Masterpiece Collection for VHS (from 1994), Disney Gold Classic Collection on VHS and DVD from 2000, Platinum Editions on DVD/VHS then Blu-ray and more recent Diamond Edition (Mack 2011: 6), as well as the Disney 'Vault', but also Disney's branding of formats 'Disney DVD' and 'Disney Blu-ray'. As a branded library, these have functioned to maintain

and promote the economic and cultural value of Disney's animated features, and the broader Disney brand, and underpin premium and tiered pricing practices, which maximize revenue from the most popular legacy films, whilst still dispersing their special qualities across a growing range of Disney properties all sharing 'Disney Magic and More'. This extended to incorporating Pixar films *Toy Story* and *A Bug's Life* in the Gold collection. The Disney Vault, with seasonal 'limited' release pattern and 'moratoriums' when titles are withdrawn, particularly focused on the Disney Platinum collection. Intended for rerelease in the key Fall quarter, with a 10-year cycle starting with *Snow White*, to 'build a company-wide marketing event around each release ... maximizing the value of these ten films and reinforcing their special appeal among consumers' (Eisner 1999: 3). Including *Beauty and the Beast*, *Aladdin*, *The Lion King*, *Bambi*, *The Jungle Book*, *Cinderella*, *The Little Mermaid*, *Lady and the Tramp*, *101 Dalmatians*, this shifted to 7 years, and 13 titles with spring releases in 2003, adding *Peter Pan*, *Sleeping Beauty*, and *Pinocchio*. With other animated films 'available on a year round basis' (Eisner 1999: 3), the status of individual films were also emphasized with Anniversary releases, particularly Disney branded animated films, but also Touchstone, and publicity about restoration of their prints. New formats have also allowed Disney to encourage repeat purchase, with upgrading and enhancements associated with their 'special' and must-own appeal.

Disney home video was notably trailerized, whilst DVD accentuated the use of ads, 'Sneak Peaks', and 'extras' to repurpose and synergize other Disney products within a controlled, branded experience (Brown 2007: 170, 176). The *Tarzan* (1999) DVD utilized User Operation blocking to 'force' 'viewers to sit through' trailers and adverts, including for Disney.go.com. Following consumer complaints this approach was discontinued, for instance with *Buzz Lightyear of Star Command* (2000 release) (Kilker 2003: 28). Disney then developed, and trademarked 'Fast Play', ostensibly to allow consumers to control their viewing, to bypass adverts or 'watch the feature presentation just like you would in theaters'. Disney Fast Play would initiate default settings 'Full Screen, Dolby Digital 5.1, English Language, and Repeat Play (on specially marked children's discs)', so the disc automatically played a selection of adverts, the film, and then 'an exciting selection of Bonus Features' unless viewers pressed to skip to the menu. This developed from Disney VHS, which preceded the film with 'Coming Soon' trailers, and exhorted 'Stay tuned for more news about magical new releases

after the film'. Alongside Fast Play, EasyFind enhanced menus provided a consistent format for menus across Disney DVD, with graphic icons 'to easily guide viewers to their favorite feature' (Disney 2004), including Backstage Disney, Deleted Scenes, Games and Activities, Music and More, and Bonus Shorts on animated and other classic Disney films, and family franchises. This fed into the branded experience of Disney DVD 'Movies, Magic & More'. Blu-ray replaced Fast Play with 'Stay Tuned for Exciting Previews', a more transparent option to keep watching, jump to the 'next preview', or play the movie.

DVD and then Blu-ray multidisc editions were both sold on rare (or exclusive) 'hours of bonus material', successively 'increased interactivity', and enhanced sound and picture, augmenting the LaserDisc approach with expanded storage (Roberts and Croal 2001). 'Disney's Buena Vista Home Entertainment surveyed consumers and found that 63% consider bonus materials important in purchases' (Snider, 2003). Disney combined 'all-family games [and] things they can't find elsewhere' such as the Disneypedia about Hawaii on *Lilo & Stitch* (ibid.), 'virtual safari' or rides that synergized with their parks (Brown 2007), with additional songs (Marketing 2003; Roberts and Croal 2001). *Snow White's* DVD release promised 'the first truly immersive experience' (Roberts and Croal 2001), whilst eight years later its Blu-ray offered 'state-of-the-art immersive bonus content ... unprecedented levels of interactivity, personalization and customization only made possible by Blu-ray technology'. These included 'newly branded features [to] keep families entertained for hours', 'Disney's Family Play' (PR Newswire 2009), albeit the Magic Mirror guide was repurposed from the DVD (Roberts and Croal 2001). 'Disney DVD Pure Digital Magic' transformed into 'Disney Blu-ray disc Magic in High Definition'. As previously noted, paratextual promotion including infotainment extras 'demonstrating' these enhancements, coupled with trailers on the same disc, or other current releases, encouraged upgrading as part of an enhanced, family 'experience'. In *The Incredibles* Blu-ray ad, character Edna E. Mode announces 'Bonus features to die for', and 'Blu-ray is the new black'. Hybrid consumption hence grew and encompassed repurposing. The Disneypedia like 'Living in the Jungle' on *Tarzan 2*, combined educational nature footage and film clips; trailerization as trailers, teasers, production notes, publicity materials, and posters became extras; and content-streamed animated shorts emerged, following Pixar's re-innovation of theatrical shorts, such as *Super Rhino* for *Bolt*, and synergy was found with *Tangled Ever After* on the *Cinderella* Diamond Edition.

DVD had been a cash cow for Hollywood, with sales of \$150 billion from 1997 to 2014 providing ‘nearly \$100 billion’ of profit (Smith 2015: 52). But the global home video market decreased from \$17 billion in 2007 to \$10 billion in 2014 (ibid.: 52). Blu-ray initially offset the decline in sales of DVD (Arnold 2008), but never displaced DVD. Disney pioneered combo packs, Blu-ray with DVD, to encourage adoption of Blu-ray. The *Beauty and the Beast* combo pack generated 60% of its revenue (Gruenwedel 2011), and Disney achieved 17 of the 50 best-selling Blu-rays, seven Disney branded animation and five Pixar films (The Numbers 2016). Four Platinum collection titles repeated their success on VHS and DVD: ranked 17th *Beauty and the Beast* with 3 million units for \$73 million sales, 22nd *The Lion King* around 3 million (\$87 million), 34th *Snow White* 2.4 million, and 37th *The Little Mermaid* 2.3 million. Other titles achieved respectable Blu-ray sales, but were dwarfed by their DVD performance: *The Jungle Book* \$20 million Blu-ray vs \$273 million DVD sales; *Lady and the Tramp* \$34 million Blu-ray, \$130 million DVD; *Peter Pan* \$24 million Blu-ray, \$67.7 million DVD. Whilst further films benefitted from publicity around sequels, or remakes: the *Sleeping Beauty* Diamond edition preceding *Maleficent* on Blu-ray, and *Monsters, Inc.*’s increased Blu-ray sales preceding the theatrical release of *Monsters University* and continuing until that film’s home entertainment release. Yet even *Frozen*, with 3.2 million Blu-ray/DVD sold on its first day (Gillan 2014: 238), the top Blu-ray seller, achieved higher DVD sales. Blu-ray offered an interim technology, between DVD and digital distribution, whilst Hollywood experimented with multiple platforms for bundled or transaction film revenues. Yet ‘DVDs, still provided the 6 major studios with slightly over \$16 billion in 2009, and constituted their main source of revenue’ (Epstein 2010).

Disney restructured to exploit ‘innovative ways to provide quality entertainment that is readily available’ (Graser 2009), responding to changing consumer preferences, amidst an abundance of choice (Walt Disney 2009: 1). Disney, like the other Hollywood studios, had already attempted to develop ways to sell films online, as the first studio to sell movies via iTunes (Perren and Petruska 2012: 109). For Disney, retail of ‘Blu-ray, VOD and electronic sell-through [didn’t] offset declines in DVD sales, which ... dropped 21% since 2005’ (Gruenwedel 2011).

Disney is still experimenting, and hedging its bets, with the transaction model of Blu-ray, Blu-ray Supersets (a combo pack with a digital copy), and ‘Disney All-Studio Access’, or in the UK piloting Disney Life

that bundles the ‘biggest Disney movie collection’ available, to stream and download to multiple iOS or Android devices. Disney All-Studio Access utilizes its proprietary Digital Locker technology Disney Key Chest, an alternative to Ultraviolet used by the other majors, enabling access to digital copies of films to stream or download via multiple platforms and devices. Disney encouraged consumer adoption with earlier availability of *Frozen*, ‘With Extras Worth Melting For’.

Yet despite these potentially fundamental shifts to home entertainment, Hollywood, and Disney, still derive significant revenues from home video (and television sales), from the exploitation of their library, and see new technologies and platforms as further opportunities for extracting value from their films. Given the history of both cinema distribution and home entertainment, it is most likely that people will continue to watch films in some format, and that a small number of film producer/distributors, themselves parts of larger diversified media conglomerates, will maintain control and dominant market share of the variety of delivery platforms and revenue streams for film. More than any other major studio, Disney benefitted from home video/DVD, an additional revenue stream in the 1980s and 1990s that drove studio and company growth. Whilst DVD/Blu-ray revenues have declined, they still provide high profitability with the amortized theatrical marketing costs and shelf-life of the Disney branded studio product, which includes Pixar, Marvel and now Lucasfilm. Disney above all other Hollywood studios has found ways to develop and maintain the value of its library—and to expand the brand, by Disneyizing the library titles of subsidiaries and partner production companies, and even the home entertainment experience.

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