

# Disney Plus Hits 130 Million Subscribers and Shows No Signs of Stopping

The service goes from strength to strength, but can it challenge Netflix?

[Kostas Farkonas](#)

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Disney Plus had an impressively good year in 2021 and there's every reason to believe that, helped by blockbuster movies such as "Lightyear", it will have a very good one in 2022 too. (Image: Disney)

**It's no secret** that the COVID-19 pandemic helped practically all digital entertainment subscription services, but none more than Disney Plus: the service started out in

November 2019 with a goal of around 65 million subscribers in its first 4 years of operation and was able to build a userbase of almost 70 million subscribers in less than a year, shattering all expectations. It turned out that prolonged pandemic lockdowns around the world, the need for a Netflix alternative, and a few noteworthy blockbuster films offered as part of a Disney Plus subscription attracted subscribers in droves for all of 2020 — a perfect storm that did not hit in the same way during 2021, as pandemic restrictions started being lifted and movie theatres began operating again.

Still, Disney Plus managed to finish 2021 with another leap forward: the service attracted almost 12 million more subscribers during the last quarter of last year, blowing past analysts' expectations of around 7.5 million and rounding off its subscription base to almost 130 million subscribers worldwide. Disney's service managed to grow by no less than 37% in 2021, going from 95 million subscribers to 130 without being available to most countries around the world yet — unlike its main rival, Netflix, which is available everywhere but only managed to add around 18 million subscribers during the same year.



Boosted by exclusive quality content consumers are interested in, such as the “Obi-Wan Kenobi” TV show slated for 2022, Disney Plus will easily expand its user base even further. (Image: Disney)

“We’ve had a very strong start to the fiscal year, with a significant rise in earnings per share, record revenue and operating income at our domestic parks and resorts, the launch of a new franchise with *Encanto*, and a significant increase in total subscriptions across our streaming portfolio to 196.4 million, including 11.8 million Disney Plus subscribers added in the first quarter”, Disney’s CEO Bob Chapek noted. “This marks the final year of The Walt Disney Company’s first century, and performance like this coupled with our unmatched collection of assets and platforms, creative capabilities, and unique place in mainstream culture gives me great confidence we will continue to define entertainment for the next 100 years”.

Corporate exaggeration aside, Disney Plus seems to be

well-positioned for another year or two of growth, probably more. The service [will expand to many more countries](#) by the end of summer 2022, a move that will add several million subscribers to its userbase all by itself. Disney's report on the service also mentions that it has attracted "just" 43 million subscribers in the US and Canada so far, so there's definitely room for growth in those markets still. There's a number of notable exclusive TV shows that will be offered to Disney Plus subscribers throughout the year, such as *Moon Knight*, *Andor*, *Baymax*, *Ms Marvel*, *Obi-Wan Kenobi*, *She-Hulk*, *Secret Invasion*, *Willow*, and others. Plus: almost all of Disney's 2022 upcoming films will be exclusively available on Disney Plus at some point or another, including *Death on the Nile*, *Turning Red*, *Doctor Strange in the Multiverse of Madness*, *Thor: Love and Thunder*, *Lightyear*, and *Black Panther: Wakanda Forever*.



Disney Plus has had an extremely good start and chances are that it will be able to

maintain its impressive momentum all through 2022. Becoming profitable will be more of a challenge. (Image: Disney)

In other words: for Disney Plus the room for expansion to new markets is there, the room for growth in all markets is there, the upcoming exclusive content is there. Whether all this will be enough for Disney's service to catch up with Netflix will be quite interesting to see. The latter's growth has been slowing down for some time — and how much room for growth is actually left for it is anybody's guess — but having surpassed 222 million subscribers worldwide it still commands a considerable lead over everyone else. Unless some spectacular change happens in the home entertainment market in the next year or two, Netflix's userbase will not be easily matched. But it's already clear that if there's one Hollywood studio capable of truly challenging Netflix in the future, then Disney is that studio.

Then again, maybe Disney Plus does not actually have to catch up with Netflix in subscription numbers in order to be successful: it just has to become profitable for Disney sooner rather than later (the company's direct-to-consumer division posted an operating loss of \$600 million in 2021 after all). What, at this point in time, Disney Plus actually is cannot be more obvious: it's a costly but absolutely necessary investment that a traditional entertainment company had to make in order to not be left behind in the fast-moving, network-centric modern entertainment market. Disney Plus ended up being an investment bearing fruit much sooner than anyone

expected. It's now up to Disney to make sure that this strong start is not squandered and that its service does not lose momentum anytime soon.