



What drives Indonesians Subscribe and Push the Distribution of Disney+ Hotstar?

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Abstract

Purpose: This study aims to test the influence of brand relationship, price, content, brand awareness, and electronic Word-Of-Mouth (eWOM) on willingness to pay for the subscription fee of Disney+ Hotstar. As the latest streaming service provider in Indonesia, Disney + Hotstar under Disney Media and Entertainment Distribution has actively conducted strategies to strengthen the brand and attract consumers. **Research design, data and methodology:** Structural Equation Modelling with WarpPLS approach was used to assess the proposed model gathering data from 316 people who have ever known about Disney+ Hotstar through an online survey using measurement items from previous literature. **Results:** Most responses were obtained from millennial generations. Findings demonstrated that brand relationships, price, content, and brand awareness positively influenced willingness to pay for the subscription fee whereas eWOM showed a negative and insignificant influence on the willingness to pay for the subscription fee. **Conclusions:** The most significant factor towards willingness to pay a for subscription fee is price, followed by brand awareness, brand relationship, and content. The result of this study may be used as a guide for professionals in the streaming service industry to better implement their strategies in influencing people to have the willingness to subscribe.

Keywords : Brand, Content Delivery Network, Digital Movie Distribution, eWOM, Streaming Service

JEL Classification Code : L82, M30, M31, L11

1. Introduction

The rapid development of internet technology, particularly in media, as well as the increasing penetration of smartphones, have changed consumers' viewing behavior. Before the digital era, they were only able to access one-way content on conventional media, such as radio and newspapers, but nowadays, a myriad of digital service is available allowing them to create, access, and distribute

content online anytime anywhere. One service that has gained popularity recently is streaming service, in which consumers can choose content, from videos, music, to books based on their preference. The market of streaming services has continued to soak globally. It was estimated to increase from USD 419.03 billion in 2021 to USD 932.29 billion in 2028 (Fortune Business Insights, 2021).

Numbers of streaming service providers have exponentially grown, such as Spotify, Netflix, Disney+

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Hotstar, Amazon Prime Video, Viu, and so on. Each provider has different and unique characteristics, and offerings, including content, price, accessibility, quality, technology, and features. In general, to access the content, some providers require consumers to subscribe and pay a certain amount of money. Each also conducts marketing strategies to attract and retain consumers.

One of streaming service providers, Disney+ Hotstar, owned by The Walt Disney Company, has entered the Indonesian market in September 2020. As the latest streaming service provider in Indonesia, Disney+ Hotstar has enormous work to compete in the market. It offers more than 500 movies and 7000 episodes from Disney, Pixar, Marvel, Star Wars, National Geographic, and Indonesian movies. Besides, Disney+ Hotstar has recently started to provide 20 new Korean drama and movies with 12 of them are original works, such as *King of Savvy*, *Crazy Love*, *The Zone: Survival Mission*, and *Snowdrop*.

The distribution of Disney+ Hotstar's content and ad sales is conducted by a business unit, called Disney Platform Distribution (DPD). This unit is responsible for managing third-party media sales efforts, particularly for distribution, marketing, business operations, media networks, including contents sales agreements under Disney Media and Entertainment Distribution (DMED), one of The Walt Disney Company's five main business divisions. DMED does not only manage the operations of Disney+ Hotstar, but also other streaming service including Disney+, Hulu, ESPN+, and domestic broadcast and cable television networks (Disney Media & Entertainment Distribution, n.d.). To improve efficiency in film flow, Disney+ relies on third-party Content Delivery Network (CDN) providers, such as Akamai, Lumen, Limelight, Edgecast, Cloudfront, and Fastly, allowing subscribers to enjoy the film instantly from the nearest server which becomes the core point of streaming service.

As a country with 73.7% of the total population are internet users, Indonesia is a promising market for streaming service providers, including Disney+ Hotstar. In addition, spending on digital media grows by 29.1% on the Video-on-demand market and 20.6% on digital music (DataReportal, 2022). During the first quarter of 2021, Disney+ Hotstar was reported to have a significant increasing number of new subscribers in Indonesia (Media Partners Asia, 2021). In entering Indonesian market, Disney+ Hotstar implements strategies, including marketing mix and distribution strategy, for instance, Disney+ Hotstar offers attractive price and content in collaboration with national providers. Above all, Disney+ Hotstar competes on the basis of its brand strength, quality of its intellectual property, and videos with high quality. However, inevitably, brands also face challenges in the digital media ecosystem where other consumers, as a third party, can show, express, and share their opinions and

feelings about a brand through online review or known as electronic word of mouth (eWOM) (Trusov, Bucklin, & Pauwels, 2009). Therefore, it will be useful to conduct research to know the Indonesians' perception about its marketing mix tactics, brand strengths, and eWOM and the impact of each factor on willingness to pay for its subscription fee.

Previously, research has been conducted to examine influencing factors towards willingness to subscribe to streaming services, but there has been little research concerning predictive variables on willingness to subscribe to Disney+ Hotstar. A study by Palomba (2020) showed that consumers had different concerns in determining subscriptions to streaming services. One predictive variable may lead to subscription to one streaming service but not to other services. Prior research found product qualities, such as recommendation systems, resolution, and watching options became essential factors in affecting audiences in China and Korea to subscribe to streaming services (Kim, Kim, Hwang, Kim, & Kim, 2017). Extending Technology Acceptance Model (TAM), researchers found that perceived usefulness, ease, enjoyment, and satisfaction encourage Chinese consumers to pay for streaming services (Sun & Zhang, 2021). In the context of Netflix users in Indonesia, a previous study found that Instagram content, perceived price, content exclusivity, and motivation to be entertained and to have fun, had a significant influence on Indonesian consumers' willingness to pay for subscriptions on Netflix (Auditya & Hidayat, 2021). Furthermore, Nagaraj, Sing, and Yasa (2021) found that among several attributes such as content, the convenience provided by providers, price, features, and quality, price was the most determining factor in motivating Indian consumers to subscribe.

Considering each streaming service has different key predictive variables on willingness to pay for subscriptions, and since the factors influencing willingness to subscribe to Disney+ Hotstar are understudied, current research aims to examine the effect of price and content, brand relationship, brand awareness, and eWOM on willingness to pay for subscription fee. The result is expected to be beneficial for the company and marketing professionals to have and to retain subscription growth. Theoretically, the study expands literature related to the influence of marketing mix, brand, and eWOM in the context of digital distribution, specifically, movie streaming service.

2. Literature Review

2.1. Streaming Service

Streaming service is a service that allows users to watch movies and TV shows online through TV, mobile device,

computer without downloading them from the internet. Streaming service is also recognized as Over-The-Top (OTT) service, defined as “content, a service or an application that is provided to the end user over the public Internet” (Body of European Regulators for Electronic Communication, 2016, p.14). The content distributed online includes books, films, television, television shows, music, and videogames which can be previewed for download by audience. Using digital distribution method, streaming service allows consumers to enjoy the content sent from the internet web server to the personalized device.

In general, the process in streaming service is divided into 5 main phases, first, streaming service providers acquire content from numerous vendors or suppliers, generally purchasing long-term license. In addition, they also create their original content as differentiation strategy to improve the brand and increase watching hours; second, after acquiring the content, providers apply computational method to get the content ready to be circulated and accessed; third, to support effective content delivery globally, they commonly have and use content delivery network (CDN) which operates digitally connecting servers. This phase is labelled as primary distribution; fourth, providers manage content flow to a certain point where the following distribution or the final content delivery is later handled by the internet service provider. At this point, people who pay for the subscription fee are able to watch the content; Finally, streaming service providers have to make sure that their content is accessible by subscribers through multiple devices with different resolutions (Fagerjord & Kueng, 2019).

Streaming service has increasingly gained more audience from year to year. For example, in United States of America, the number of people streaming for contents doubled and reached more than 125 million. Besides, the duration of streaming rose significantly by almost 75% (PwC, 2021). In Southeast Asia, there is a growing demand for streaming service, and it has the potential to expand outside urban region. Between 2020 and 2021, the number of subscribers increased by 30% due to easy internet access and quick access to digital payment system (Davis & Neves, 2021). To be specific, the report of e-Conomy conducted by Google, Temasek, and Bank Company (2021) presented that the popularity of video streaming services continues to grow increasingly in several South East Asian countries, for instance, Vietnam where the interest in video subscription has multiplied 18 times since 2017, Malaysia 10 times, and Indonesia 12 times. Prior research suggests that perceived benefits of streaming providers over traditional media influence people to leave old media and accept streaming service (Tefertiller, 2018).

2.2. Streaming Service in Indonesia and The Penetration of Disney+ Hotstar

Indonesia is a promising market for streaming service providers. As 73.7% of total population is internet users, streaming service user penetration is projected to be 17.1% in 2022 and 20.0% by 2026 with video streaming service as the largest part, having market volume of US\$ 281.40 m in 2022 above digital music (Statista, 2020). During pandemic, there has been a definite transition from offline to online channels in almost all product categories, for instance, household supplies, food take out and deliveries, personal care products, and entertainment at home (Potia & Dahiya, 2020). These tendencies may become a golden opportunity for business in digital platform including streaming service providers.

Recently, there have been some numbers of streaming service providers in Indonesia, such as GoPlay, HBO Go, VIU, and Netflix. The newest one is Disney+ Hotstar. In September 2020, Indonesia became the first country in Southeast Asia to welcome Disney+ Hotstar. To maximize convenience in using streaming service, Disney+ Hotstar offers easy access and several features. Audience can watch movies on Disney+ Hotstar by downloading the application from Google Play Store and App Store or through web browser. Disney+ Hotstar can be accessed from laptops, cell phones, tablet devices, and televisions allowing 4K movie watching experiences with Dolby Vision and Dolby Audio. Disney+ Hotstar has also formed a partnership with Telkomsel, the most widely known provider of internet and SIM cards in Indonesia. Together their collaboration offers attractive price for consumers, particularly, movie enthusiasts. Disney+ Hotstar content comes from various well-known studios under the Walt Disney umbrella, from Disney, Pixar, Marvel studios, Star Wars, National Geographic, to 20th Century Fox. Disney+ Hotstar also cooperates with local filmmakers and local film studios, such as MD Pictures, and Falcon in an effort to attract Indonesian consumers. Moreover, Disney+ Hotstar also provides movies with audio in native language, allowing underage viewers to comfortably watch the movie.

2.3. Marketing Mix to Adjust Consumer Behavior

Marketing mix is a collection of controllable operational marketing instruments that a company uses to get the desirable output in its target market. Marketing mix encompasses 4 groups of variables that a company can manage to influence consumers' demand, namely, product, price, place, and promotion, together known as 4Ps (Kotler, Wong, Saunders, & Armstrong, 2005). Product is any item or service that a company offers to its consumers whereas price is defined as the amount that consumers have to pay to

get the product. Promotion is referred as all communication activities that a company does to introduce and persuade consumers to purchase the product. Finally, place means all activities pertaining to efforts to make the product available to consumers.

Meanwhile, consumer buying behavior, also known as consumer behavior, is conceptualized as consumers who purchase product for consumption (Kotler et al., 2005). Consumer behavior is affected by consumers' characteristics and consumers' decision. The characteristics are influenced by four variables, cultural, social, individual, and psychological whereas decisions can be influenced by marketing mix. This study specifically discusses 2 variables of marketing mix in the context of Disney+ Hotstar, a streaming service provider. Those two variables are, first, content as the part of services that consumers need to pay before watching; second, price or the subscription fee. Both variables of marketing mix will be assessed towards willingness to pay for subscription.

2.4. Brand Relationship

Branding has become one of essential marketing strategies and received attention in consumer behavior research. When interacting with a brand, consumers can have personal connection, such as love and passion with the brand (Fournier, 1998). As a brand, Disney has maintained its relationship with consumers throughout generations through its five principles, namely, impression, connection, attitude, response, and exceptional (Bruce & Brian, 2015). Brand relationship is theorized as personally constructed links that consumers utilize to identify and build their 'selves' in powerful ways (Fournier, 1998) while others consider it as emotional brand relationship which is conceptualized as a strong emotional bond between consumers and a brand (Pourazad, Stocchi, & Pare, 2019).

Brand relationship has been found to be a significant factor in influencing consumers' willingness to pay for some products in several contexts, such as resort brands (Ahn & Back, 2018), and restaurant brands (Ekinci, Yoon, & Oppewal, 2004). In the context of luxurious brands, researchers find that emotional brand relationship positively encourages consumers' willingness to purchase a product (Pourazad et al., 2019). Relationship between brand and its consumers also motivates intention in the future (Park & Kim, 2014). Based on previous literature, researchers hypothesize that:

H1: Brand relationship positively influences willingness to pay for the subscription fee of Disney+ Hotstar.

2.5. Decisive Subscription Price

Price is one of paramount variables when making

decision to buy a product or a service (Brucks, Zeithaml, & Naylor, 2000). Price is also the most principal part in assessing streaming service (Palomba, 2020). Every streaming service has its own price strategies concerning the benefits they offer to consumers. For example, to access premium contents on Netflix, consumers are required to pay \$19.99/month whereas Disney+ Hotstar charges its consumers \$7.99/month.

In the case of music streaming service, consumers consider price as one of predictive variables when purchasing a service. The others are performance expectancy, effort expectancy, hedonic motivation, habit, and attitude towards piracy (Barata & Coelho, 2021). Price is considered as one of affecting factors together with product quality and product design for Indian consumers in purchasing Chinese phone brands (Gupta & Singh, 2019). Furthermore, price is also acting as an essential factor which motivates consumers in subscribing to a streaming service (Auditya & Hidayat, 2021; Palomba, 2020). Based on prior study, the hypothesis for this variable is:

H2: Price positively influences willingness to pay for the subscription fee of Disney+ Hotstar.

2.6. Content

Streaming service providers compete to maintain and gain new consumers by providing consumption values and identities (Oyedele & Simpson, 2018). For instance, Netflix offers global contents and original contents which can be downloaded for certain period. Amazon Prime Video is known for its diverse contents from TV shows, animations, series, and original contents. Meanwhile, Viu, originally from Hong Kong, is well-known for its movies and series from Asian countries such as South Korea, Japan, Thailand, Indonesia, and more. As a newcomer, Disney+ Hotstar offers various family-friendly options, such as Disney classic movies and films from Pixar, Marvel, Star Wars, and National Geographic. Content has been one of the most compelling reasons for consumers to subscribe to a streaming service. Researchers have found that content has positive and significant impacts on consumers' willingness to subscribe to a streaming service (Auditya & Hidayat, 2021; Nagaraj et al., 2021; Palomba, 2020). Therefore, we hypothesize:

H3: Content positively influences willingness to pay for the subscription fee of Disney+ Hotstar.

2.7. Brand Awareness

The starting point of purchase decision is the requirement of products' recognition and awareness (Kotler et al., 2005). When consumers are aware of a product, they will have

positive attitude towards the product, leading to product usage (Chandran, Rangarai, & Parayitam, 2020). Brand awareness is defined as the level of brand familiarity which can be recognized by consumers under certain circumstances. Brand awareness together with brand image shape brand knowledge (Keller, 2013). Brand awareness is built by any means that allow consumers to experience and recognize the brand, this can be implemented through advertising, promotion, and public relations activities. One popular way to enhance brand awareness is through social networking sites.

Prior research showed that an image of a city became the most essential factor of visit intention and visiting behavior. In conjunction with this result, government must implement city branding correctly in order to improve people's intention to visit and city image (Kusumawati, Rahayu, & Putra, 2022). Similarly, in the context of car sales, brand awareness positively influence consumers' intention to purchase the car (Hutter, Hautz, Dennhardt, & Füller, 2013). In contrast, another study found that brand awareness and brand image do not encourage intention to pay for some products (Febriyanto, 2020). Amid contrasting findings, further study is required. Based on literature, the hypothesis of brand awareness is:

H4: Brand awareness positively influences willingness to pay for the subscription fee of Disney+ Hotstar.

2.8. eWOM

eWOM is defined as "any positive or negative statement made by potential, actual, or former consumers about a product or company, which is made available to a multitude of people and institutions via the Internet" (Hennig-Thurau, Gwinner, Walsh, & Gremler, 2004, p.38). The examples of eWOM include brand's websites, retailers' websites, blogs, social media (e.g., Instagram, Facebook), message boards, product review websites (e.g., TripAdvisor), and online shopping platform (e.g., Tokopedia, Amazon). Compared to traditional WOM, eWOM has exceptional feature, such as eWOM is typically anonymous and happens between people who have little relations or even do not know each other, for instance between social media users, and website visitors. This characteristic allows them to share reviews honestly without disclosing their identity. eWOM in this study refers to the activity of consumers of finding online review related to Disney+ Hotstar.

The most commonly trusted form of eWOM as an information source is online consumer reviews (Nielsen, 2015). When the review is positive, consumers will be highly likely to give recommendation about a product to their relatives, but when the review is negative, they are not motivated to recommend the product to others (Lee & Youn, 2009). Prior study showed that eWOM had a direct

influence on intention to purchase. However, if the influence was mediated by trust, it became weakened indicating that eWOM shaped people's trust of a product and the intention to buy a product became higher (Mahmud, Islam, Ali, & Mehjabin, 2020). This result is in line with other studies about positive association between eWOM and willingness to purchase (Kumar, 2017; Mauri & Minazzi, 2013; Nuseir, 2019). Therefore, the hypothesis for this variable is:

H5: eWOM positively influences willingness to pay for the subscription fee of Disney+ Hotstar.

2.9. Willingness to Pay

Subscription to Disney+ Hotstar means consumers are required to pay certain amount of money to be able to access the contents. Economically, willingness to pay for subscription fee refers to the maximum price a consumer is willing to pay for subscriptions (Ahmed, Najmi, Faizan, & Ahmed, 2019). Research concerning willingness to pay have been implemented in varied industries, such as banking industry, involving brand attitude and eWOM (Augusto & Torres, 2018); and logistics industry, by testing four variables, including environment, green packaging quality, commodity, and packaging price (Hao, Liu, Chen, Sha, Ji, & Fan, 2019). Another study found that some people were willing to pay for Halal foods because of religiosity, perceptions towards benefits, concerns of Halal, and ingredients of the product (Ahmed et al., 2019). Sukhu and Bilgihan (2021) found that when people had positive perceptions towards dining experience, they tended to have hedonic value which further motivated them to pay.

In the context of streaming service, some people are willing to pay to stream live sport events because they can enjoy the broadcast and feel satisfied (Sun & Zhang, 2021). A study found that several brand attributes factors such as brand experience, brand love, and brand loyalty motivated young consumers to have willingness to subscribe to Netflix (Santos & Schlesinger, 2021). In India, adults are willing to subscribe to streaming service providers because of two essential factors, namely, consumer engagement and quality of service excellence (Gupta & Singharia, 2021).

3. Methodology

3.1. Survey Instrument

The survey instrument was developed using established scales from previous literature (see Appendix 1). Brand relationship was assessed by nine items adopted from Ekinci et al. (2004), and Pourazad et al. (2019) to identify to what extent people have emotional and personal relationship with

Disney+ Hotstar. Some of the statements were: “Disney+ Hotstar is my favorite streaming service” and “I feel personally connected to Disney+ Hotstar”. Meanwhile, price and content were evaluated by, respectively, four items and six items which were adopted from previous studies (Auditya & Hidayat, 2021; Nagaraj et al., 2021). To measure brand awareness or the level of people’s familiarity towards Disney+ Hotstar as a streaming service brand, five items were used from Anselmsson, Bondesson, and Johansson (2014) whereas to score eWOM, the extent of consumers seeking for reviews to get information related to Disney+ Hotstar, four items were adopted from Mahmud et al. (2020).

Finally, to evaluate willingness to pay, this study adopts measurement items from Augusto and Torres (2018), and Fathi, Zailani, Iranmesh, and Kanapthy (2016). Answers of all items were measured using 5-point Likert scale (1=strongly disagree, 5=strongly agree). The survey also has questions about basic demographics, including gender, age, education level, and occupation in the beginning.

3.2. Participants

The population of interest is Indonesians who have ever known about Disney+ Hotstar. These individuals are targeted to identify whether the variables tested motivate people who have ever known Disney+ Hotstar to have the willingness to pay for subscription fee of Disney+ Hotstar. The sampling technique used for this study was a purposive sampling because it was considered possible to reach particular kinds of people who may have differing and relevant viewpoints on the variables at the research questions, thus they must be included in the sample (Campbell, Greenwood, Prior, Shearer, Walkem, Young, et al., 2020).

Purposive sampling is a part of nonprobability sampling which has several limitations as it is not used to create generalizations of the entire population. However, when the population is very large, purposive sampling technique is very useful. Because the population size of people who have ever known Disney+ Hotstar is unknown, this study applies the estimation of minimal sample size for PLS SEM which is 10 times indicators used to measure a construct (Hair, Ringle, & Sarstedt, 2011).

Data were collected from survey which was distributed electronically through an online survey using Google Form to social media group, such as What’s App, Facebook, Instagram, Line, and others. Before distributing the online survey, a pilot test using SPSS version 26 was conducted to test the validity and the reliability of measurement items with 30 participants from Authors’ What’s App groups. From 32 questions, there was only 1 question unreliable. Referring to PLS SEM, the minimal sample size required for this study is 310. Survey was delivered in Indonesian and

consisted of three different parts. First part contains a screening question whether participants have ever known Disney+ Hotstar. If they declare themselves as people who know Disney+ Hotstar, they are eligible to continue to the second part of the survey. In this part, they are required to fill in some demographic questions, and declare their consent to participate. Finally, they are required to give responses to 31 items concerning Disney+ Hotstar before submitting it.

3.3. Analysis

The model in this study was tested using Structural equation modeling (SEM) with Warp Partial Least Squares (WarpPLS) 7.0. SEM is a multivariate analysis that incorporates elements of a simultaneous equation system, path analysis, or regression analysis with factor analysis. WarpPLS Analysis is an enhancement of Partial Least Square (PLS) analysis that may be used to confirm theories (hypothesis testing) as well as generate models without a theoretical foundation. The stages of SEM analysis using WarpPLS include designing inner model (structural model), designing outer model (measurement model), constructing the path diagram, transforming path diagram to equation system, estimating the parameter, evaluation the goodness of fit, and finally, testing the hypothesis of the study (Wardhani, Nugroho, Fernandes, & Solimun, 2020).

Measurement model must be evaluated with reference to the reliability and validity. The assessment of reliability relies on the value of composite reliability and Cronbach’s alpha whereas the validity assessment concentrates on convergent validity and discriminant validity. To examine convergent validity, researchers focus on the value of average variance extracted (AVE) and for discriminant validity, certain measures should be met based on Fornell-Larcker criterion and cross loadings. Moreover, the evaluation of structural model relies on the R^2 and the level and significance of the path coefficient (Hair et al., 2011).

4. Results

4.1. Descriptive Analysis

Data collection was conducted from March 22nd to April 1st, 2022, resulted in 331 responses recorded. After filtering their familiarity about Disney+ Hotstar and consent, a total of 316 responses were used for further analysis. In the sample, 200 (63.3%) were female and 116 (36.7%) were male. Eligible participants were aged between 17 to 22 20.9% (n=66), 67.7% (n=214) were between 23 to 38, 10.8% (n=34) 39 to 54, 0.6% (n=2) older than 55 years old. The age division refers to Dimock (2019) indicating that most

participants in this study is from millennial generation. Of the participants, 22.8% (n=72) were students, 43.7% (n=138) private sector employees, 11.1% (n=35) government employees, 11.7% (n=37) entrepreneurs, and 10.8% (n=34) were unemployed. Regarding education level, 0.3% of the participants (n=1) had junior high school degree, 24.4% (n=77) had senior high school degree, 3.2% (n=10) had diploma, 58.2% (n=184) had bachelor degree, 12.7% (n=40) had master degree, and 1.3% of population (n=4) had doctoral degree.

To determine the value of indicators and variables, this study used a frequency distribution. The result of the descriptive analysis of variables are presented in table 1. From the table, the value of variables indicated that the level of brand relationship and eWOM among participants is moderate while the level of perception towards price, content, and brand awareness is high.

Table 1: Frequency Distribution of Variables

Variables	Mean
Brand Relationship (BRL)	3.39
Price (PRC)	3.87
Content (CON)	3.98
Brand Awareness (BRW)	4.15
eWOM (EWO)	3.31
Willingness to Pay (WTP)	3.80

4.2. Evaluation of Measurement Model

In evaluating validity, the standard of convergent validity and discriminant validity must be fulfilled. Convergent validity is evaluated based on two criteria, P values which the loadings are equal to or lower than 0.05 whereas loadings are equal to or greater than 0.5 (Kock, 2015b). Furthermore, discriminant validity is assessed generally by looking at the value of Average Variance Extracted (AVE). To be valid, the value of AVE should be 0.5 or greater (Fornell & Larcker, 1981). To measure the reliability, the value of Composite Reliability and Cronbach's alpha coefficients must meet the standard of reliability which the value should be equal to or greater than 0.7 (Kock, 2015b). Based on the result as seen on table 2, the model is declared valid and reliable.

Table 2: Result of Measurement Model

Constructs	Validity		Reliability	
	LF	AVE	CR	CA
BRL: BRL1/BRL2/ BRL3/BRL4/ BRL5/BRL6/ BRL7/BRL8/BRL9	0.766/0.876/ 0.851/0.742/ 0.860/0.893/ 0.827/0.836/0.857	0.698	0.954	0.945
PRC: PRC1/PRC2/ PRC3/PRC4/ PRC5	0.900/0.896/ 0.915/0.917/ 0.910	0.824	0.959	0.947

CON: CON1/CON2/ CON3/CON4/ CON5/CON6	0.672/0.834/ 0.839/0.872/ 0.814/0.827	0.660	0.920	0.895
BRW: BRW1/BRW2/ BRW3/BRW4/ BRW5	0.872/0.826/ 0.832/0.776/ 0.815	0.665	0.908	0.874
EWO: EWO1/EWO2/ EWO3/EWO4	0.957/0.962/ 0.958/0.951	0.916	0.978	0.969
WTP: WTP1/WTP2	0.957/0.957	0.916	0.956	0.909

Note: LF= Loading Factor, AVE= Average Variance Extracted, CR= Composite Reliability, CA= Cronbach's Alpha

In term of model fit assessment, the value of R-squared contribution ratio (RSCR) must be equal to or bigger than 0.9 to meet the standard. The result indicated that R-squared contribution ratio (RSCR) is 0.998. Moreover, another parameter of model fit and quality, such as average path coefficient (APC), average R-squared (ARS), average adjusted R-squared (AARS), average block variance inflation factor (AVIF), average full collinearity VIF (AFVIF), Tenenhaus GoF (GoF), Simpson's paradox ratio (SPR), statistical suppression ratio (SSR), and nonlinear bivariate causality direction ratio (NLBCDR) also showed values that met the value standard (Table 3). Therefore, the model is declared fit.

Table 3: Result of model fit and quality indices

Element	Value	Criteria
APC	0.169, P<0.001	P value ≤ 0.05
ARS	0.566, P<0.001	P value ≤ 0.05
AARS	0.559, P<0.001	P value ≤ 0.05
AVIF	2.334	acceptable if ≤ 5, ideally ≤ 3.3
AFVIF	2.398	acceptable if ≤ 5, ideally ≤ 3.3
GoF	0.664	small ≥ 0.1, medium ≥ 0.25, large ≥ 0.36
SPR	0.800	acceptable if ≥ 0.7, ideally = 1
RSCR	0.998	acceptable if ≥ 0.9, ideally = 1
SSR	1.000	acceptable if ≥ 0.7
NLBCDR	1.000	acceptable if ≥ 0.7

4.3. Structural Model and Hypothesis Testing

Hypothesis 1 to hypothesis 5 were evaluated to forecast the influencing impact of, respectively, brand relationship, price, content, brand awareness, and eWOM on willingness to pay for subscription fee of Disney+ Hotstar (Figure 1). Hypothesis 1 posited a positive association between brand relationship and willingness to pay. H1 was accepted by positive and significant association ($\beta=0.08$, $p=0.034$). Hypothesis 2 predicted that there was positive impact of price on willingness to pay and the result showed that there

was a positive and significant impact ($\beta=0.52$, $p<0.001$). In hypothesis 3, content was posited to have a positive impact on willingness to pay. Result showed that content positively but insignificantly influenced willingness to pay ($\beta=0.05$, $p<0.08$). Hypothesis 4 posited that there was a positive association between brand awareness and willingness to pay. Hypothesis 4 was accepted because the result showed a positive and significant value ($\beta=0.19$, $p<0.001$). Finally, hypothesis 5 forecast a positive relationship between eWOM and willingness to pay. However, hypothesis 5 was rejected by negative and insignificant value ($\beta=-0.00$, $p=0.237$). Overall, all hypotheses are accepted, except for hypothesis 5. When the hypothesis is predicted to have a positive or negative sign, one-tailed test in the calculation of P values is commonly acquired (Kock, 2015a).

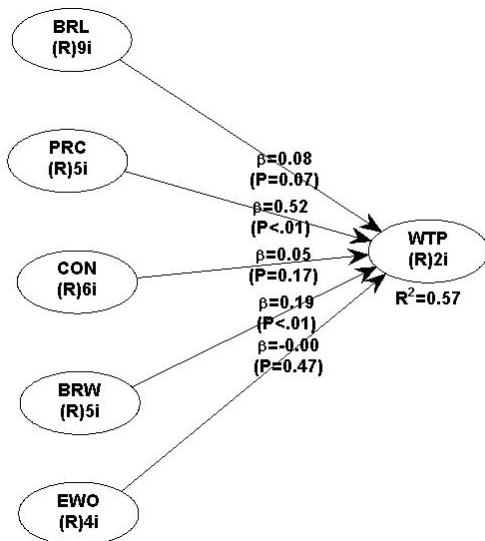


Figure 1: WarpPLS Model

5. Discussion

The purpose of the study is to test the influence of brand relationship, price, content, brand awareness, and eWOM on willingness to pay for subscription fee of Disney+ Hotstar. Results show that brand relationship, price, content, and brand awareness positively encourage Indonesians who have ever known Disney+ Hotstar to have the willingness to pay for Disney+ Hotstar subscription fee. In contrast, different from hypothesis, eWOM is found to have a negative influence on willingness to pay. It means that although people receive or read many reviews about Disney+ Hotstar, it will not motivate them to subscribe. This result is different from prior study which showed that eWOM had a positive and significant impact on online purchase intention in the context of United Arab Emirates

(UAE) (Nuseir, 2019), and hotel industry (Mauri & Minazzi, 2013).

Based on the value of path coefficient, price is the most significant variables in influencing people to have willingness to pay for subscription fee. The result supports finding from another work which indicated low subscription fee as essential factors willingness to subscribe to streaming service (Nagaraj et al., 2021). Price is later followed by brand awareness, brand relationship, and content. Compared to other streaming services in Indonesia, Disney+ Hotstar offers an affordable and attractive subscription fee. It is not surprising as the fact that by March 2021, the number of Disney+ Hotstar subscribers in Indonesia had already surpassed the number of Netflix's subscribers. In contrast, Netflix which applies premium price, experiences slower growth (Sherman, 2022).

Regarding Disney+ Hotstar as a brand, frequency distribution shows that level of brand awareness of Disney+ Hotstar is high. It means that Indonesians are familiar enough with Disney signatures, such as Disney movies, logos, characters and songs. Besides, the level of consumers' perception of brand relationship is moderately high, suggesting that they have sufficient personal relationships and emotional bond with Disney+ Hotstar, probably from other Disney's popular movies, and characters, such as Mickey Mouse, Star Wars, and more. Moreover, result also indicates that Indonesians acknowledge that as a streaming service provider, Disney+ Hotstar offers wide variety of entertaining contents, including movies, shows, and documentaries with good quality. As a result, it is much easier for Disney+ Hotstar to be recognized and accepted in Indonesian market amid its new presence. The findings resonate with Disney's main strategy to amplify its brand strength through increasing brand awareness to motivate people to subscribe.

Findings in this study can be beneficial for streaming service providers particularly in film industry to better understand consumer behavior, so that they can formulate better strategies in obtaining and retaining consumers. To increase brand awareness and brand relationship, Disney+ Hotstar and other streaming service providers can maximize the usage of social media as the number of Indonesians who spend their time to use social media is high. Currently, Disney+ Hotstar has already used YouTube, Facebook, Instagram, and Twitter to maintain its relationships with consumers and to communicate its promotion. Disney+ Hotstar may consider increasing the frequency and the content published on social media. Moreover, offering a pack of high-quality film with a reasonable price can attract and maintain consumers, not only current subscribers but also new consumers. Therefore, it is imperative for streaming service providers to maintain attractive price and providing plenty of film choices, including exclusive and

original content as a differentiation strategy to keep subscribers from cancelling subscription and switching to other providers.

6. Conclusions

The advance of internet technology has changed the landscape of film industry, allowing film flows and deliveries globally through streaming service providers. On the other hand, the internet penetration also changes consumers' behavior to watch and enjoy contents, including film. Accordingly, it is important for business players in this industry to understand better consumers' intention and its influencing factors so that they can craft strategies to win the market.

This study has several limitations. First, it used Indonesians who have ever known Disney+ as population which the size is unknown. When the population is too large, the result of the study is not to be generalized. In addition, current study did not consider other demographic variables, such as, monthly income, or current spending on digital media which may have influence on willingness to pay for subscription fee. Third, the study did not specifically focus on age categorization, such as, millennials, generation X, and so on.

More research pertaining to Disney+ Hotstar in Indonesia is required since it is a new player in streaming service industry and still understudied. Therefore, first, researchers in future studies may use specific characteristics in determining population, for example, members of a movie community, social media followers, digital platform subscribers, generations X, generations Y, and so on. Second, future studies can also test other different predictive variables towards willingness to pay for subscription fee, such as social media ad, influencers, ease of use, habit, and others. These variables can also be tested on different streaming service providers using another theory, for instance Theory of Acceptance Model. Third, future study is expected to involve income and spending as influencing variables on willingness to pay. Next, because the result of eWOM as a predictive variable of willingness to pay is contrasting with prior studies, further research is required to test the influencing variable of eWOM on willingness to pay. Finally, researchers can expand the study by testing current variables on the purchase decision or subscription decision, not merely on intention or willingness.

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Appendixes

Appendix 1: Measurement Items

No	Items	Source
Brand Relationship (BRL)		
1	I feel that I am attached to Disney+ Hotstar.	(Ekinci et al., 2004; Pourazad et al., 2019)
2	I feel personally connected to Disney+ Hotstar.	
3	I feel emotionally bonded to Disney+ Hotstar.	
4	I have nostalgic memories with Disney+ Hotstar	
5	I feel comfortable using Disney+ Hotstar streaming service	
6	Disney+ Hotstar is my favourite streaming service	
7	I have come to realize that at the end, I always choose Disney+.	
8	Disney+ Hotstar increased my interest in watching streaming shows.	
9	Among streaming services, Disney+ Hotstar fits my personality best.	
Price (PRC)		
10	Disney+ Hotstar subscription fee is affordable	(Auditya & Hidayat, 2021; Nagaraj et al., 2021)
11	Disney+ Hotstar subscription price offers proportional service and quality.	
12	Disney+ Hotstar subscription is reasonably priced.	
13	To me, Disney+ Hotstar subscription price is attractive.	
14	The Netflix subscription price fits my budget.	
Content (CON)		
15	Disney+ Hotstar offers a lot of local content.	(Auditya & Hidayat, 2021; Nagaraj et al., 2021)
16	Disney+ Hotstar offers a wide variety of Exclusive video content.	
17	In my opinion, Disney+' Hotstar's selection of content has its own characteristics	
18	Disney Provides highly entertaining content	
19	In my opinion, the movies and tv series on Disney+ Hotstar have great audio-visual quality	
20	Disney provides popular box office films and tv series	
Brand Awareness (BRW)		
21	I am aware of The Disney+ Hotstar brand as a streaming service provider.	(Anselmsson et al., 2014)
22	The Disney+ Hotstar logo is easy to recognize.	
23	I know what Disney+ Hotstar has to offer	
24	I have my own impression of Disney+	
25	I can recognize Disney+ Hotstar among other competing brands, such as Netflix, Viu, and HBO Max.	
eWOM (EWO)		
26	Before I subscribe to Disney+ Hotstar I read reviews or reviews from Disney+ Hotstar subscribers	(Mahmud et al., 2020)
27	I read reviews or reviews from Disney+ Hotstar customers to find out their level of satisfaction	
28	I read reviews or reviews from Disney+ Hotstar customers to gather information about Disney+ Hotstar services	
29	To be sure to subscribe, I read reviews or reviews from Disney+ Hotstar customers first.	
Willingness to Pay (WTP)		
30	I would be willing to pay for Disney+ Hotstar subscription fee	(Augusto & Torres, 2018; Fathi et al., 2016)
31	I do not bother to pay for Disney+ Hotstar subscription fee to enjoy my favourite movies.	