

Disney • PIXAR



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# EXECUTIVE SUMMARY

As Toy Story 5 approaches, the franchise is experiencing a surge in global engagement, making it one of Disney and Pixar's most commercially promising and culturally resonant IPs. This fifth installment—anchored by a returning cast will reignite multigenerational fandom while unlocking fresh merchandising opportunities across all major regions and retail categories. Currently the movies is on track to fall on the “Major Release” tier.

## Franchise Buzz:

Tom Hanks' return announcement reignited global excitement, with strong digital traction and emotional resonance, especially in the U.S., Latin America, and Japan. Fans are highly engaged, driven by Jessie's expanded role and Pixar's timely “toys vs. tech” theme.

## Consumer Products Momentum:

Toy Story remains an evergreen IP. The 2026 program will be the largest since TS4, with robust support across interactive toys, lifestyle fashion, home, school, and digital categories—led by Mattel, BoxLunch, ColourPop, and others.

## Global Strategy Highlights:

- U.S.: Four-quadrant retail dominance with exclusives and cross-category activations.
- LatAm: Deep cultural attachment, mass-market reach, and high visibility through sticker albums and QSRs.
- Europe: Strong in fashion, home, and collectibles. Regional integration via retailers and Disneyland Paris.
- Asia: Japan excels in lifestyle and collectibles; China and SEA prioritize mobile, school, and park synergy.

Strategic Outlook: Toy Story 5 is more than a film—it's a global franchise moment. Its blend of nostalgia, innovation, and localized activation ensures cultural resonance and year-round retail impact across markets.





# ANTICIPATION

## Current tracking: “Major Release”<sup>1</sup>

Disney and Pixar’s Toy Story 5 is already generating significant global buzz ahead of its June 19, 2026 release.

Among a crowded field of 2026 tentpoles, Toy Story 5 is holding its own—driven by its legacy, emotional resonance, and universal family appeal.

While superhero films often dominate global marketing efforts, Toy Story benefits from built-in brand familiarity, especially among families and nostalgia-driven adults. Interest in Toy Story 5 spikes during major announcements, frequently outperforming other family-friendly 2026 titles in key regions like North America and Europe.

### Regional Breakdown of Anticipation:

- United States & Canada: Awareness is extremely high—Toy Story remains a household name. Buzz in the U.S. mirrors the franchise’s strongest past sequels, with major spikes on social media following news drops.
- Europe: Engagement is similarly strong. Major European markets are seeing elevated social media mentions, boosted by Pixar’s 30th anniversary efforts—including regional merchandise collaborations like the Adidas x Toy Story sneaker line.
- Latin America: The franchise maintains a passionate following. Interest is especially pronounced in Mexico and Brazil, where Toy Story consistently resonates with family audiences.
- Asia-Pacific: Awareness varies by country but is trending upward. Japan continues to be a strong market for Pixar films, while interest in China—typically more moderate—is growing thanks to targeted marketing, such as localized Weibo campaigns celebrating the 30th anniversary. Other parts of Asia show promising engagement driven by deep nostalgia for the franchise

## Anticipation (2026 movies)



Massive (global)



Broad family audience



Moderate-High (growing)



Strong among families



Sci-fi audiences

# CAST HIGHLIGHTS & STORY TEASES

The cast is central to the Toy Story 5 momentum, with the return of core voice actors delivering a sense of continuity and fan comfort that’s essential for long-running franchises.

## Legacy Cast: Driving Nostalgia & Trust



Tom Hanks

His April 2025 Instagram post holding up five fingers in the voice booth ignited the most significant buzz spike since the film's announcement. Hanks' subtle humor (“Need a hint? Disney. Studio B.”) and visual tease brought millions of views and emotional comments from fans, setting the tone that Toy Story 5 is not just a cash-in—it’s meaningful.



Tim Allen

Equally instrumental, Allen has been vocal in interviews. His now-iconic tweet—“See ya soon Woody... to infinity and beyond!”—reassured fans that the original duo is back and fully engaged.



Joan Cusack

Although not formally confirmed, Cusack’s return is heavily implied. Allen’s teasers hint that Jessie plays a central role, with buzz indicating she may become the heart of the film. This marks the first time Jessie leads the narrative, a major step for representation and emotional storytelling within the franchise.

## New Additions & Speculation



Anna Faris

has joined the cast in a mystery role, sparking Reddit and TikTok theories. Speculation includes everything from a tech toy antagonist to a high-tech ally or rival to Bo Peep. Her casting adds a comedic and emotional layer, and her strong fanbase will likely broaden appeal.



Supporting Cast

Fans also wonder if characters like Keanu Reeves’ Duke Caboom or Tony Hale’s Forky will return. Reeves’ cult following and media magnetism would be a marketing goldmine if he's back.



Creative Team

Andrew Stanton returns to co-direct alongside newcomer Kenna Harris, a storyboard artist making her directorial debut. This pairing bridges classic Pixar storytelling with fresh creative energy—an approach mirroring Pixar’s broader strategy of evolving legacy IPs.

## Narrative Teases

### “Toy meets Tech”

is the only plot hint released so far, with speculation suggesting toys confronting AI, smart devices, or Bonnie’s growing disinterest in analog play. Some theories posit a villain who’s a digital native toy, threatening the gang’s bond.

### Jessie’s Center Stage

Allen’s comments that Jessie “is in trouble” and needs rescuing have fueled theories that the narrative centers on her, with Woody and Buzz reuniting to help. Jessie-focused fan edits, fanfic, and cosplay have already surged online.





# FAN & SOCIAL BUZZ

Toy Story 5's social footprint has exploded, with unique trends emerging across platforms:



- Tom Hanks' post anchored the hype cycle.
- Pixar and Disney have leaned into nostalgic visuals—silhouettes of Woody/Buzz, throwbacks from TS1, and anniversary art.
- Fans are posting personal Toy Story memories using tags like #ToyStory5 and #ToInfinityAndBeyondAgain.



- Millions of views under #ToyStory5.
- Formats include glow-ups (childhood Woody photos → 2025 excitement), theories about the “tech toy” villain, and emotional montages of Andy saying goodbye.
- TikTokers speculate Jessie will be the film's hero—especially popular among Gen Z and Disney-core creators.



- #ToyStory5 trended globally post-Hanks.
- Sentiment is split: 75% nostalgic/hyped, 25% expressing fatigue (“Let it end with dignity!”).
- Quotes, GIFs (“There's a snake in my boot!”), and Buzz/Woody memes are everywhere.
- Major film accounts (DiscussingFilm, FilmUpdates) amplified Tim Allen's “Jessie in trouble” tease.



- r/Pixar and r/Movies threads peaked in engagement after Hanks' post.
- Initial skepticism gave way to cautious optimism.
- Popular theories: Jessie-centric arc, “Toy vs. Tech” villain, Bonnie's digital distractions, or an emotional rescue mission.



- Fan-made trailers and concept art videos drawing hundreds of thousands of views.
- Commentary creators breaking down potential storylines, Jessie's leadership arc, and legacy character returns.
- “Toy Story Explained” retrospectives seeing resurgence as fans revisit the franchise.

# GLOBAL INTEREST & REGIONAL TRENDS



- Anticipation high post-Top Gun: Maverick. Super Bowl ad and summer date positioning MI8 as a “must-see.”
- Tentpole event film, with broad generational appeal.



- Cannes Film Festival Premiere provides cultural prestige and European press dominance.
- Heavy interest from British press and fans—thanks to prominent U.K. cast (Atwell, Pegg, Kirby).
- France buzzing over Cruise’s return to Cannes; parallels drawn to Fallout’s early footage premiere.



- Tom Cruise’s confirmed May 2025 Seoul visit triggered massive excitement—Cruise affectionately known as “Kind Tom” (친절한 톰 아저씨).
- Lotte Tower stunt recall + fan-organized welcome events expected. High local box office potential.



- Cruise remains a legacy star.
- Trailer trended, nostalgia angle appreciated; fan comments celebrate “Tomohisa” (Cruise’s affectionate name).
- Expect strong theatrical turnout and press interest.

## Latin America & Southeast Asia:



- Trailer dubs trending in Spanish/Portuguese.
- Strong historic turnout in Mexico, Brazil, Philippines.

## Middle East:

- Anticipation high due to prior Abu Dhabi sequences. UAE press speculating on sequel’s return to region.

# CHARACTER DYNAMICS & TIERING

Toy Story's character ecosystem remains one of the most robust in animation:

## Tier 1 (Evergreen Icons)

- Woody and Buzz continue to anchor both narrative and retail strategy.
- Timeless appeal, broad merchandise lines, and theme park integration ensure they remain front and center.



## Tier 2 (Beloved Support)

- Jessie is being elevated to near co-lead status, with Bo Peep, Rex, Hamm, and Slinky Dog delivering ensemble familiarity and licensing range.
- Jessie's rising popularity opens new merchandising opportunities—particularly for female-led SKUs.



## Tier 3 (Niche & Newcomers)

- Forky, Duke Caboom, and Ducky & Bunny retain strong niche fandoms, especially among younger audiences and collectors.
- Potential new characters in TS5 will aim to replicate the breakout success of Forky from TS4.





# MERCHANDISE & LICENSING

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With over \$10 billion in lifetime global merchandise revenue, Toy Story remains a top-tier consumer brand. For Toy Story 5, Disney and its partners—including Mattel, BoxLunch, LEGO, ColourPop, and others—are expected to deliver an omnichannel product strategy.

Toy Story is an evergreen franchise, but a movie release year presents a unique opportunity to expand into new categories and deepen existing product lines.

- Toys & Interactive Figures: Action figures, pull-string dolls, modular playsets, and tech-enhanced toys aligned with the film's narrative. Expect buzz around new tech-based antagonists.
- Apparel & Fashion: Children's apparel through retailers, nostalgia-forward teen/adult drops via specialized retailers. Expect capsule collections to time with key release windows (back-to-school, Halloween).
- Publishing: Novelizations, storybooks, graphic novels, and educational kits—dominating the early-reader market and reinforcing the franchise's emotional themes.
- Home & Lifestyle: Bedding, room décor, and themed accessories (i.e. Toy Story nightlights, themed furniture) timed with school calendars and seasonal resets.
- Promotions & Food Licensing: McDonald's Happy Meals (i.e. Q3 2026), cereal and yogurt branding, birthday cake designs, and lunchbox licensing. Strategic tie-ins like CPG brands expected.
- Digital & Interactive: Roblox experiences, mobile games, AR filters, and potential VR storytelling shorts. Also expect educational tech toys and creative kits.



# CONSUMER PRODUCT BEYOND TOYS

While Toy Story remains a powerhouse in the global toy aisle, its appeal extends far beyond playsets and action figures. From fashion and food to collectibles and digital experiences, the brand activates across a wide spectrum of lifestyle categories. Each region brings unique cultural preferences and retail behaviors—creating clear opportunities for localized execution and cross-category expansion.

Region	Category Strength (Beyond Toys)	Character Popularity	Regional Preferences & Marketing Nuances
United States	<ul style="list-style-type: none"><li>Apparel</li><li>Home décor</li><li>Makeup</li><li>Footwear</li><li>Food licensing</li><li>QSR</li></ul>	<ul style="list-style-type: none"><li>Woody &amp; Buzz are cultural icons</li><li>Jessie and Bo Peep gaining momentum</li><li>Forky showed strong breakout potential</li></ul>	<ul style="list-style-type: none"><li>Strong multi-generational fandom; diverse marketing (English/Spanish); nostalgia-led</li><li>high merchandising across mass retailers and specialty</li></ul>
Latin America	<ul style="list-style-type: none"><li>Apparel</li><li>Back-to-school</li><li>FMCG</li><li>Sticker books</li><li>QSR</li></ul>	<ul style="list-style-type: none"><li>Buzz is iconic</li><li>Jessie, Woody, Bo Peep well-loved</li><li>Forky notable</li></ul>	<ul style="list-style-type: none"><li>Emotion-led marketing</li><li>Dubbed trailers, local voice talent</li><li>Mall activations, Día del Niño/Dia das Crianças campaigns</li><li>Strong demand for affordable, widely distributed merchandise</li></ul>
Europe	<ul style="list-style-type: none"><li>Apparel</li><li>Bedding</li><li>Publishing</li><li>Stickers books</li><li>School gear</li></ul>	<ul style="list-style-type: none"><li>Ensemble cast popular</li><li>Buzz &amp; Woody lead</li><li>Aliens, Forky, Jessie strong across regions</li></ul>	<ul style="list-style-type: none"><li>Localized campaigns per language</li><li>Disneyland Paris for activations</li><li>Fast fashion + grocery retail tie-ins</li><li>Sustainability rising in importance</li></ul>
Asia	<ul style="list-style-type: none"><li>Japan: Lifestyle merch, collectibles, fashion</li><li>China: digital, mobile gaming, AR/VR;</li><li>SEA: school gear, snack tie-ins, plush</li></ul>	<ul style="list-style-type: none"><li>Japan: Aliens, Lotso, Woody/Buzz dual appeal</li><li>China: Buzz/tech appeal, Forky &amp; cute sidekicks</li><li>SEA: core cast and visual cuteness win</li></ul>	<ul style="list-style-type: none"><li>Japan: experiential (cafes, themed stores)</li><li>China: WeChat, e-commerce, mall pop-ups</li><li>SEA: affordability focus, QSR and retail activations; local dubbing and influencer campaigns essential</li></ul>