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FIELD LAB ON CONSUMER PERCEPTIONS AND PREFERENCES IN THE GERMAN VIDEO-ON-DEMAND STREAMING MARKET – A PERCEPTUAL MAP ANALYSIS

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Abstract – Group Part

The German video-on-demand (VOD) streaming market is highly competitive and dominated by US players. Private TV providers must adapt to consumer behaviour shifting from linear to on-demand. This thesis addresses a research gap by identifying factors influencing German consumers' choice of VOD streaming services. Findings from the German market confirm the literature and reveal new attributes shaping perceptions and preferences. Netflix emerges as the dominant brand, while private TV providers lag in reputation and preference. Consumers prioritise content type, price, and content origin. These findings offer insights for developing strategies for German TV providers and suggest directions for future research.

Abstract – Individual part

This thesis explores consumers' perceptions of five platforms in the German VOD streaming market and their relative positioning. The factor analysis revealed two dimensions, individuality and reputation, that shape consumer perceptions. The perceptual map indicated that Netflix emerged as the strongest player in both dimensions. The local players, RTL+ and Joyn, lag behind international players in terms of reputation, while RTL+ was the second-most individual platform, driven by its high association with entertainment.

Keywords: Marketing Research, Video-on-demand, German video-on-demand streaming platforms, Conjoint Analysis, Perceptual Map, Consumer Preferences, Consumer Perceptions

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List of Abbreviations

AI	Artificial Intelligence
ARD	'Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland' (Consortium of Public Broadcasters in Germany)
AVOD	Advertising-based Video on Demand
CA	Conjoint Analysis
CLV	Customer Lifetime Value
DAZN	Perform Group’s sports streaming service (no further abbreviation, it is a brand name)
EFA	Exploratory Factor Analysis
FoMBM	Function-oriented Media Brand Model
GDPR	General Data Protection Regulation
Joyn	No abbreviation, it is the brand name of the platform
PCA	Principal Component Analysis
PM	Perceptual Map
PR	Public Relations
R&D	Research and Development
RQ	Research Question
RTL	Radio Télévision Luxembourg

Group Part	
SPSS	Statistical Package for the Social Sciences
SQ	Sub-question
SVOD	Subscription Video-on-Demand
TV	Television
TVOD	Transactional Video-on-Demand
VOD	Video-on-Demand
WTP	Willingness to Pay
ZDF	'Zweites Deutsches Fernsehen' (Second German Television)

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1 Introduction

In recent years, the way people consume media has undergone a major transformation with streaming platforms emerging as dominant players in the entertainment industry, integrating seamlessly into daily life (Pencarelli 2020; Mavale and Singh 2020). Compared to linear TV, video-on-demand (VOD) streaming services distribute digital video content over the Internet (Alukal and Johny 2018; Telkmann 2023). Major American VOD streaming platforms have redefined content consumption by offering greater flexibility, convenience, and personalised experiences, fundamentally altering consumer expectations (Sadana and Sharma 2021). Globally, the VOD streaming market is projected to generate revenues of approximately 126 billion € by 2027, making it one of the fastest-growing sectors in the media industry (Statista 2024a; Wu et al. 2024).

Due to its high revenue and substantial user base, Germany has emerged as a significant VOD streaming market (Rahe, Buschow, and Schlütz 2021; Telkmann 2023). Total revenues are expected to reach approximately 7.3 billion € and 44 million users by 2027 (Statista 2024b, Statista 2024d). This positions Germany as one of the largest streaming markets globally (Telkmann 2023). Furthermore, Germany's diverse and culturally rich media landscape, with a long history of strong public and private broadcasters, adds new complexity dimensions to the competitive dynamics (Telkmann 2023; Rahe, Buschow, and Schlütz 2021). Global VOD services like Netflix, Amazon Prime Video, and Disney+ collectively dominate the market, with more than half of the market share (55.5%), while local platforms such as RTL+ (RTL Group) and Joyn (ProSiebenSat.1 Group) struggle to gain significant market share, accounting for only 5.4% and 8.4% of the market, respectively (Statista 2024c).

This discrepancy is compounded by the distinctive challenges that private TV providers face in adapting their offerings to a digital-first, globalised media environment as viewers have grown increasingly impatient with the limitations of linear TV (Curtin 2009; Tryon 2013). National

private TV providers that transition to VOD services not only encounter technical and strategic challenges but also the need to differentiate themselves from global giants with massive content libraries and sophisticated algorithms (Telkmann 2023). The competitive dynamics highlight the pressure on private TV providers to innovate or risk irrelevance (Telkmann 2023). The German market thus presents a compelling case for analysis, but existing research on the German market remains limited. Most studies focus on the strategies and offerings of the international platforms Netflix and Amazon Prime Video, leaving the digital transformation efforts of German private TV providers underexplored. Due to changing consumption behaviour, German private TV providers are urged to enhance their offerings to compete with international VOD streaming services. By analysing the brand perception and preferences of both international players (Netflix, Amazon Prime Video, and Disney+) and local players (RTL+ and Joyn), this thesis seeks to fill the existing research gap in the German market. The following research question (RQ) is guiding the research: *What are the factors driving consumer perceptions and preferences in the German VOD streaming market, and how can private TV providers adapt their services to keep up with international players?*

This research question is addressed through four sub-questions, that are explored using distinct research methods tailored to their respective focuses:

SQ1: What attributes of VOD streaming services are valued by German consumers?

SQ2: How do German consumers perceive the VOD streaming services available in the German market?

SQ3: What are the preferences of German consumers regarding the VOD streaming services available in the German market?

SQ4: How can Joyn optimise its offerings in the German VOD market?

These questions were answered by following a mixed-methods approach. Qualitative and quantitative research methods were used for a holistic understanding of the research topic (Verhoef and Casbeer 1997). Firstly, a literature review was undertaken to explore the development and competitive landscape of the German TV and VOD streaming market, examine digital business models and subscription factors and understand the drivers of consumers. As a second step, preliminary interviews with industry experts and German consumers were conducted to gain qualitative insights on the research topic and to set up quantitative surveys (Barrett and Twycross 2018). The following quantitative methods, including a Perceptual Map (PM) and Conjoint Analysis (CA), were used to explore how consumers evaluate VOD platforms and their features. A two-dimensional PM was constructed using factor analysis to determine how users rate Netflix, Amazon Prime Video, Disney+, Joyn, and RTL+ across 17 brand-related attributes. CA explored how consumers valued eight attributes of VOD services, revealing trade-offs in decision-making. Supplementary demographic data, including age, gender, and streaming habits, enhanced the segmentation and analysis of consumer perceptions and preferences.

The preliminary interviews confirmed established VOD streaming personas and identified content as the most important attribute, followed by price and the overall user experience. Furthermore, experts predict the increasing role of AI to provide seamless, 'lean-back' streaming experiences and point to live (sports) content as promising areas for growth. The PM analysis revealed that Netflix is positioned as the most reputable and differentiated service in the German VOD market, followed by Disney+. Amazon Prime Video is perceived to lack differentiation. RTL+ is perceived to be highly entertaining, yet with a lower reputation. Joyn has the least favourable position, exhibiting negative scores on reputation and individuality. Furthermore, CA revealed that in the German VOD streaming market, consumers identify content type and price as

the most critical attributes, with international platforms like Netflix and Amazon Prime Video consistently favoured over local competitors.

The findings are then used for a comprehensive case study on the local platform Joyn, offering a recommendations catalogue including a differentiated content strategy, niche audience targeting, an optimised user experience, strategic partnerships, marketing activities as well as the continuation of their freemium pricing model. A quantitative confirmation survey, targeted at Joyn's current product offerings enriched previous findings.

Finally, this thesis concludes by discussing its findings and outlining managerial implications for the offerings of German private TV providers and points out limitations as well as proposals for future research.

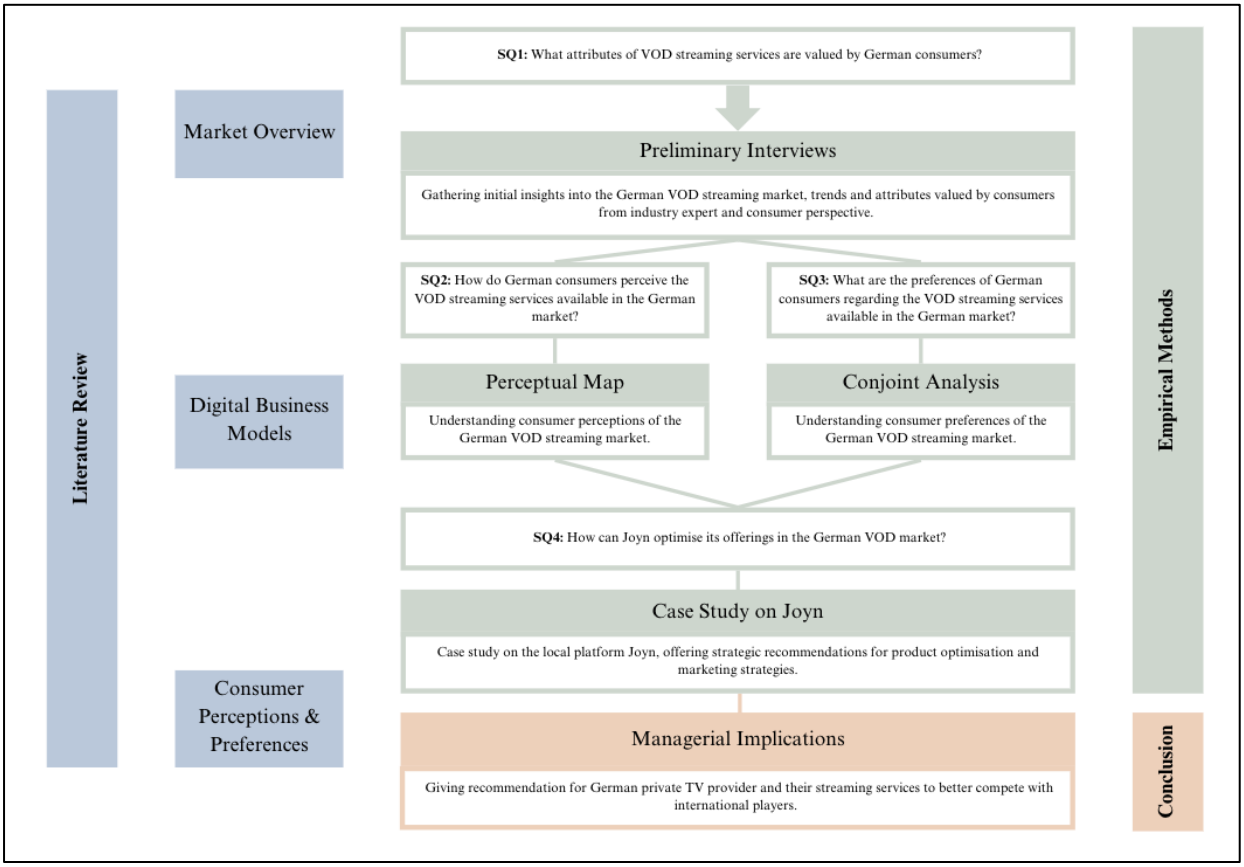

Figure 1: Thesis' Mixed-Method Approach

2 Literature Review

2.1 Emerging Digital Business Models and Subscriptions in the VOD Streaming Market

2.1.1 Threats to Digital Business Models

While digital streaming business models represent an area in which growth is extraordinary and revenues follow, some challenges may pose a threat.

Data Privacy Laws

The GDPR challenges streaming providers by setting a high standard in processing personal data with matching global requirements (Ryngaert and Taylor 2021). Its location of extraterritorial effect under Article 3 (GDPR) impacts the providers globally and increases their regulatory complexity (Ryngaert and Taylor 2021). The principles of minimisation and limitation of data under Article 5 (GDPR) obstruct data-dependent business models since personalisation is usually based on massive data analyses (Dewitte and Ausloos 2021).

The fact of obtaining written consent from users for the use of data-driven recommendation models is costly (Dewitte and Ausloos 2021). This reduces efficiency and increases operating costs (Dewitte and Ausloos 2021). The data subject rights provided by Articles 12 to 15 (GDPR) that are the right to access and erasure-afford weighty administrative and technical burdens on providers (Dove 2018). Moreover, penalties accrue to 4% of annual pan-European turnover, which escalates the financial risks to unbearable levels (Ryngaert and Taylor 2021).

Freemium Conversion Challenges

Freemium business model challenges reveal low conversion from the basic version to the premium (Koch and Belian 2017). Conversion is usually slightly better than 3-5% (Wagner, Benlian, and Hess 2014). With such low conversion rates, many companies' profitability is questioned (Koch and Benlian 2017). The decisive factor is the perceived difference in value between basic and premium offerings (Koch and Benlian 2017). Some services intentionally use

restrictions in the base version, such as limited space or ads, to signal an enhanced premium experience (Wagner, Benlian, and Hess 2014). Convincing aimed to help them attract paid users versus the free offering provides one of the most considerable challenges balancing how attractive the free offer is versus how to drive paid users (Wagner, Benlian and Hess 2014).

The order of user experience with the versions also plays a significant role (Koch and Benlian 2017). The so-called premium-first model positively affects the conversion rate compared to the free-first model (Koch and Benlian 2017). The psychological principle of loss aversion ensures this (Koch and Benlian 2017). When a user views the premium version as a reference, switching to the basic version is perceived as a loss and increases the chance they will engage in subscribing to the premium offer (Koch and Benlian 2017). To sum up, companies must take a strategic view of how to shape the perception of differences in value and the user experience that maximises conversion rates at not too much detriment to the free version's attractiveness (Wagner, Benlian, and Hess 2014; Koch and Benlian 2017). Only through a balance, long-term user retention and monetisation can be guaranteed (Wagner, Benlian, and Hess 2014; Koch and Benlian 2017).

2.1.2 Insights into Digital Subscriptions

Behavioural Economics

The phenomenon of behavioural economics explains the idea that through pricing strategies, consumer perception can be influenced (Sudeep 2022; Kahneman and Tversky 1979). From this, it can be concluded that if potential subscribers see an ad-financed option that offers less content, the premium version is automatically perceived as more attractive (Sudeep 2022). For example, streaming platforms offered lower ad-funded subscription structures, making the premium options more appealing (Sudeep 2022). In this regard, with time, such a pricing structure could find open acceptance (Sudeep 2022).

Customer Lifetime Value

According to Blattberg, Malthouse, and Neslin (2009), customer lifetime value (CLV) is an indispensable metric for assessing the relationship with a customer (Blattberg, Malthouse, and Neslin 2009). It mainly refers to the imminent prospect of that customer's possible long-term economic worth (Blattberg, Malthouse, and Neslin 2009). To be clearer, CLV describes the present worth of free cash flows being cashed into or out of a customer's corporate life, i.e., the difference in cash flows obtained by the firm (Blattberg, Malthouse, and Neslin 2009). Thus, the CLV is widely used by companies to allocate resources effectively to those customers who will realise superior long-term profitability (Blattberg, Malthouse, and Neslin 2009, Venkatesan and Kumar 2004).

Analysing user behaviour over time provides valuable information for companies to adapt the content of their advertising to user behaviour (Blattberg, Malthouse, and Neslin 2009). This results in a strengthening of customer loyalty (Blattberg, Malthouse, and Neslin 2009). The CLV models are indispensable for prioritising customer segments within streaming platforms based on their respective values to channel investments strategically into content or marketing campaigns (Blattberg, Malthouse, and Neslin 2009; Venkatesan and Kumar 2004).

Value Co-Creation in Digital Subscriptions

The shared value theory is based on designing the platform in such a way that user interaction is made possible, thereby increasing the quality of the platforms through feedback (Hein et al. 2019). Here, customised lists can be created by streaming providers and shared with friends, which creates the value of the platform (Ranjan and Read 2016). This enables users to be actively recognised by their peers through their actions on the platform and to have an influence on the platform (Hein et al. 2019). This increases user satisfaction and enables platform providers to

incorporate user feedback directly into the design of the offerings and technical structure (Hein et al. 2019).

The feedback from sharing and interacting with content creates a win-win situation for users and platform providers (Ranjan and Read 2016). This allows more efficient algorithms to be developed for creating offers (Ranjan and Read 2016). This dynamic makes it possible to react quickly to customer needs and include new offers on the streaming platforms (Hein et al. 2019). This dynamic interaction is the core of the shared value theory, which can lead to benefits for users and operators (Ranjan and Read 2016).

Platform strategies and network effects

The concept of the network effect means that attracting a user to a platform can generate a profit for the platform operator (Dai 2023). Network effects make it possible for platforms to operate a larger customer base by rapidly changing the platform's offering (Dai 2023). This mechanism is known as modular platform architecture (Dai 2023). This form of platform design makes it possible to break down the functions and offerings of a platform into individual parts and work on individual points without influencing the entire offering (Dai 2023). As a result, the needs and interests of a platform's users can be addressed very specifically, which is why the modular platform architecture can be described as innovative and flexible (Dai 2023).

The strategy of modular system design has been successfully tested several times on the open market (Rietveld and Schilling 2021). Here, it was seen how modularity has positively developed the platforms (Rietveld and Schilling 2021). This design enables platform providers to compete efficiently, innovate and appeal to a wide audience to win a growing market (Dai, 2023; Rietveld and Schilling 2021).

2.2 Consumer Perceptions and Preferences in the VOD Streaming Market

Brand perception drives audience engagement with media products, thereby playing a pivotal role in fostering customer satisfaction and loyalty (Doyle 2015; Malmelin and Moisander 2014; Singh and Oliver 2015). Nuhadriel and Keni (2022) emphasise that when consumers identify with a brand's personality, such as seeing it as authentic, trendy, or competent, they are more likely to remain loyal and subscribe long-term (Nuhadriel and Keni 2022). This effect is rooted in social identity theory, where consumers prefer brands that mirror their values and characteristics and thus create a strong bond with the brand (Nuhadriel and Keni 2022; Walsh and Singh 2022;). For streaming services, these findings underscore the importance of focusing on a unique value and relatable brand personality that resonates with users' identities and social ties, rather than emphasising technical features alone (Walsh and Singh 2022; Nudadriel and Keni 2022).

These international findings resonate strongly with the German VOD streaming market, where unique brands are seen as both a competitive advantage and a key differentiator in the market (Rahe, Buschow, and Schlütz 2021). The two dominating players Netflix and Amazon Prime Video not only heavily compete for attention and subscribers by 'virtue of their content but also […] by brand perception' (Rahe, Buschow, and Schlütz 2021, 45). By using Berkler's (2008) Function-oriented Media Brand Model (FoMBM), Rahe, Buschow, and Schlütz (2021) identified several brand attributes that position Netflix as the leader in the German market, including its ability to offer cognitive relief, which means reducing complexity by creating a clear and recognisable brand image through a trustworthy and user-friendly interface and a clear focus on original content that simplifies decision-making (Berkler 2008). In contrast, Amazon Prime Video's interface and broader content structure are perceived as less consistent and reliable by German consumers (Rahe, Buschow and Schlütz 2021). Furthermore, the study discusses Netflix as being perceived more favourably in terms of its risk reduction function, which enhances trustworthiness and reassures

users about the value of their subscription (Rahe, Buschow, and Schlütz 2021). The risk reduction function refers to minimising uncertainty and potential dissatisfaction (Berkler, 2008). Netflix 'signal[s] competence as a prerequisite for brand perception', which is regarded by its users as larger than that of Amazon Prime Video (Rahe, Buschow, and Schlütz 2021). Netflix offers a 'clearer performance promise' that reinforces consumers' confidence in the service's overall reliability and quality (Rahe, Buschow, and Schlütz 2021). Moreover, the platform is successful in fulfilling social identity and activation functions, namely identification and prestige, which are essential for the development of brand affinity (Rahe, Buschow, and Schlütz 2021). In particular, younger German consumers consider Netflix as a 'lifestyle brand' that aligns with their identity and social expression needs (Rahe, Buschow, and Schlütz 2021, 53). Meanwhile, Amazon Prime Video is often seen as a secondary add-on to Amazon's broader e-commerce services (Wayne 2018). In addition, Netflix's strategy of promoting binge-watching encourages consumers to habitual use patterns (Rahe, Buschow, and Schlütz 2021; Snider 2016; Wenzel, Mahle, and Pätzmann. 2016). This strongly increases brand loyalty among both global and German viewers by meeting and encouraging their desire to watch multiple episodes or series in one sitting (Rahe, Buschow, and Schlütz 2021; Snider 2016; Wenzel, Mahle, and Pätzmann 2016). In terms of prestige, Netflix is perceived as the pioneer among VOD streamers and primarily conveys notions of 'quality TV' and a high-end entertainment experience (Rahe, Buschow, and Schlütz. 2021, 53; Schlütz et al., 2018; Wenzel, Mahle, and Pätzmann 2016). Therefore, Rahe, Buschow, and Schlütz (2021) identified brand perception at the core of driving German consumers' loyalty and satisfaction. In highly competitive markets with new entrants, like the German market, established brands with strong and distinct brand perceptions appear to have a stronger competitive position (Rahe, Buschow, and Schlütz 2021). According to Rahe, Buschow and Schlütz (2021), Netflix is an unquestioned leader in aligning with brand expectations within the German market.

Other studies confirm Netflix as an industry benchmark in brand perception while indicating a great gap in the perception of private TV providers (Hennig-Thurau and Houston 2019; Telkmann 2023). Building a distinctive brand identity remains the greatest challenge for private TV providers in the VOD streaming industry as they seek a unique selling point for their platforms while differentiating between linear and on-demand offerings (Telkmann 2021).

Regarding functional factors of VOD platforms, Wu et al. (2024) demonstrated that perceived technical quality – smooth and buffer-free streaming with high-definition clarity – impacts decision-making for streaming subscriptions, fostering confidence and enhancing the viewing experience. Similarly, content quality is a major factor influencing user satisfaction and platform stickiness in competitive streaming markets (Yoon and Kim 2023; Periaiya and Nandukrishna 2023). In the German market, technical reliability and content quality are key drivers of platform loyalty (Mikos 2016, Wenzel, Mahle, and Pätzman 2016). Users express strong dissatisfaction with reduced video quality, interruptions, and lagging (Mikos 2016; Wenzel, Mahle, and Pätzmann 2016). Thus, Netflix's superior streaming quality and seamless multi-device usability make it the preferred choice among German users, while Amazon Prime Video’s occasional downtimes and inconsistent interface detract from its usability (Wenzel, Mahle, and Pätzmann 2016). According to Nuhadriel and Keni (2022) technical reliability is a foundational requirement and not the primary driver for customer subscription (Nuhadriel and Keni 2022).

Moreover, Lee et al. (2018) highlight that platforms that are easy to navigate see higher adoption rates. This finding is supported by earlier studies (Lessiter et al. 2001; Bautista, Lin, and Theng 2016). Periaiya and Nandukrishna (2023) also stress the importance of a seamless, user-friendly interface, noting that it significantly contributes to user satisfaction and retention. The convenience offered by video streaming services, such as on-demand access, the option to resume from where you left off, and the ability to watch something later, was especially valuable to time-

constrained Indian consumers (Periaiya and Nandukrishna 2023). Interactive features, such as rating and reviewing content, downloading, and sharing on social media, can also drive VOD subscriptions (Kumar et al. 2025). Lee et al. (2018) further suggest that social influences such as peer recommendations and trends over social media may also be key in streaming adoption.

Findings for the German market indicate that media libraries from TV providers lag behind SVOD services in usability and personalised recommendations, primarily due to challenges German TV broadcasters face with algorithm-based recommendations under strict data protection regulations (Telkmann 2023).

Furthermore, content relevance and variety are essential for consumer satisfaction (Wu et al. 2024). Globally, platforms with diverse, regularly updated libraries that cater to varying tastes attract and retain users more effectively (Wu et al. 2024; Yoon and Kim 2023). A rich selection of diverse content and new releases act as pull factors (Yoon and Kim 2023). Thus, platforms offering diverse but individually tailored content are better positioned to meet user preferences and improve user retention (Periaiya and Nandukrishna 2023). The integration of customisable profiles, watchlists, and preferences fosters a sense of ownership and connection, making users feel the platform aligns with their needs and increasing its perceived value (Wu et al. 2024). Additionally, AI-powered algorithms further enhance personalisation through recommendations, which increase user engagement, loyalty and subsequently the likelihood of subscription commitment in a long-term perspective (Gregory et al. 2021). Moreover, Sharma and Kakkar (2019) found in their CA of the Indian streaming market, that Indian consumers have a strong preference for live and sports content, which indicates demand for real-time, engaging exclusive content. Yoon and Kim (2023) also observed that exclusive content can draw users to a platform. This is supported by studies focusing on younger Indian consumers, where 71% of students answered that they choose platforms based on unique offerings (Mavale and Singh 2020). Content origin, however,

leads to differing findings in the Indian market. While Nagaraj, Singh, and Yasa (2021) researched that global content is requested by Indian users, Kumar et al. (2025) highlighted a preference for regional content.

These global findings partly align with the German market, where users place high importance on the actuality, personalised recommendations and diverse scope of content offerings (Mikos 2016; Rahe, Buschow, and Schlütz 2021; Gutzeit, Dorsch, and Stock 2021). According to Mikos (2016), users wish for a comprehensive, up-to-date content offering with a uniform price, similar to Spotify's model in the music streaming industry. Spotify is valued for its wide choice and immediate availability (Mikos 2016).

In terms of content type, German users favour series (39%), followed by movies (31%), documentaries (23%), and sports formats (12%), while showing rather less interest in reality shows (4%), children's programmes (3%), and live shows (2%) (Telkmann 2023, 192). While SVOD users are motivated by fun, entertainment, and relaxation, media library users are driven by cognitive motives, such as curiosity and a desire to stay informed. Overall, users rate SVOD services higher in satisfying their video content needs than media libraries by TV providers (Telkmann 2021).

Gutzeit, Dorsch, and Stock (2021) focused in their study more closely on the motives behind German users' content selection on VOD services and especially explored the influence of algorithmic recommendations, personal suggestions, and intrinsic motivations. Their findings show that German consumers value personalised content recommendations but also rely on personal recommendations from family and friends (Gutzeit, Dorsch, and Stock 2021). Mikos (2016) reports similar findings, indicating that recommendation systems and genre categorisation are used 'as a sorting function' but are continuously criticised for their algorithms (Mikos 2016, 156). For streaming services, overall findings imply that it is important to invest in reliable

recommendation systems while also fostering a community and word-of-mouth promotion (Gutzeit, Dorsch, and Stock 2021).

Lastly, Wu et al. (2024) further emphasise the importance of the cost-benefit balance in shaping consumer preferences, where users assess whether the financial cost of a streaming service is justified by perceived benefits such as content quality, accessibility, and exclusive features. Flexible pricing options, like tiered plans, free trials, or bundling offers, improve perceived value (Wu et al. 2024; Yoon and Kim, 2023; Elsafty and Boghdady 2022). On the other hand, high costs not bundled with added value may cancel out or push users toward alternative platforms (Wu et al. 2024; Yoon and Kim 2023). Findings from the Indian market identified price sensitivity as the most critical factor in subscription decisions, with a preference for the hybrid model (Nagaraj, Singh, and Yasa 2021; Kumar et al. 2025; Sharma and Kakkar 2019).

In the German market, straightforward pricing is highly valued, and platforms such as Netflix benefit from their clear and transparent pricing strategies (Rahe, Buschow, and Schlütz 2021). By contrast, more complex pricing models, such as those employed by Amazon Prime Video, can confuse German users and diminish perceived value (Rahe, Buschow, and Schlütz 2021).

In terms of demographics, age-related differences in streaming engagement are evident, with younger German users showing significantly more interest and preferences for VOD services than older ones (Gutzeit, Dorsch, and Stock 2021). This difference is likely due to significant differences in internet and technology affinity (Gutzeit, Dorsch, and Stock 2021). Notably, younger consumers tend to use a wider range of streaming services, while older consumers use Netflix and Amazon Prime Video less frequently but have a stronger preference for TV media libraries (Gutzeit, Dorsch, and Stock 2021). No notable differences are identified in streaming interests between

genders (Gutzeit, Dorsch, and Stock 2021). These findings, therefore, confirm the conclusion reached by Lee et al. (2018) that while age significantly influences media adoption, gender does not.

Overall, previous research provides valuable insights into VOD consumer priorities. However, existing research has mainly covered the Indian and US market. A research gap exists in the limited understanding of consumer perceptions and preferences within the German VOD market. The majority of the previous studies on the German market focused on the two international players, Netflix and Amazon Prime Video and thereby ignored the broader and rapidly evolving VOD landscape in Germany. With private TV providers competing in the German market, comparing these local platforms to international giants could provide important insights into how German consumers perceive and prioritise different VOD options. Further understanding these factors is crucial in a situation where competition is growing forcefully in the German market landscape and underscores the importance of conducting this thesis. While existing studies on brand perceptions in the German market have focused on function-oriented brand attributes, looking into brand-related attributes by using PM enriches current findings. Similarly, applying CA provides deeper insights into consumer preferences and decision-making trade-offs in the German market.

3 Consumer Perceptions

3.1 Theoretical Framework

A fundamental aspect of a competitive strategy is the positioning of a product (Huber and Holbrook 1979; Kohli and Leuthesser 1993). Product positioning refers to the process of designing a product's image in a manner that enables target customers to understand and value the product's distinctive features related to those of competitors (Kohli and Leuthesser 1993). Each brand within a group of competing products holds a distinct position within the consumer's 'perceptual space'

(Kohli and Leuthesser 1993). This space can be visualised through the usage of Perceptual Maps (Kohli and Leuthesser 1993).

Perceptual Mapping is a well-known and frequently used technique marketing managers employ to gain insights into the fundamental cognitive dimensions consumers use in the evaluation of products and how products are positioned in relation to these dimensions (Hauser and Koppelman 1979). They can be used for several marketing applications such as 'new product design, advertising, retail location' (Hauser and Koppelmann 1979, 495). Perceptual Maps are created either through decompositional or compositional methods (Huber and Holbrook 1979). Decompositional methods focus on consumers' similarity judgements between brands, using similarity scaling, while in compositional methods brands are examined based on predefined attributes, using factor analysis and discriminant analysis (Steenkamp, Van Trijp, and ten Berge 1994; Hauser and Koppelman 1979). It is recognised that compositional methods offer more precise measurements of consumer perceptions than decompositional approaches, provided that the rating set is comprehensive (Hauser and Koppelman 1979). Factor analysis is considered to be the most effective technique, especially in product categories with a small number of products in the consideration set, significant variation in perceptions, and key attributes identified through qualitative research that define the category (Hauser and Koppelman 1979).

3.2 Selection of Attributes and Platforms

To study consumer perceptions, selecting streaming services and identifying attributes to be evaluated is one of the most important steps (Kaul and Rao 1995). It is unavoidable that brands or attributes are missed out or selected mistakenly, as not all consumers have used every streaming service available (Bijmolt and Van de Velden 2012). Moreover, there is a significant difference in attributes consumers consider important when selecting a service (Bijmolt and Van de Velden 2012). However, if the set of platforms and attributes remains constant from one consumer to

another, some consumers may encounter difficulties in evaluating them due to lacking knowledge, which could lead to data bias (Bijmolt and Van de Velden 2012). Therefore, to overcome this potential data bias, the preceding preliminary interviews were conducted to gather attributes and platforms from consumers and experts (Bijmolt and Van de Velden 2012).

Throughout this thesis, the VOD streaming services Netflix, Amazon Prime Video, Disney+, RTL+ and Joyn will be analysed. These platforms were frequently mentioned throughout the consumer interviews as being familiar and used among respondents. The inclusion of Netflix, Amazon Prime Video and Disney+ is further supported by market figures. In 2022, Amazon Prime Video was the preferred streaming service for Germans (61%), followed by Netflix (55.6%; W&V 2022). Disney+ has rapidly increased its subscription numbers by capitalizing on its high brand recognition and reputation for producing high-quality content, making it a relevant platform to include in the analysis (Sunnebo 2023). The selection of Joyn and RTL+ was further based on the thesis' primary goal, which is to provide actionable recommendations for local platforms to enhance their competitive position against international competitors. There is still potential for growth, as evidenced by low usage rates of both RTL+ (6.7%) and Joyn (4.2%; W&V 2022; see Appendix 1). The inclusion of both global and regional players ensures a comprehensive analysis of the distinctiveness of the German market, allowing for an assessment of how these platforms are perceived in comparison to one another.

Following an extensive literature review and preliminary interviews, a total of 17 brand-related attributes have been selected for inclusion in the consumer perception survey. Since Perceptual Mapping focuses less on physical attributes (Ganesh and Oakenfull 2000), it was opted for psychological attributes. Therefore, the set of attributes is founded upon three models from academic literature: *Brand Personality Model*, *Media Brand Trust Model* and the *Function-oriented Media Brand Model.*

Brands can be associated with a set of human traits, also known as brand personality (Aaker 1997). Aaker's brand personality model provides a framework for understanding consumer perceptions that extend beyond the product-related attributes of a brand (Aaker 1997). The framework encompasses five key dimensions: sincerity, excitement, competence, sophistication and ruggedness (Aaker 1997). Nuhadriel and Keni (2022) observed that brand personality exerts a significant impact on consumer behaviour regarding subscriptions to online streaming services. Consumers tend to be more loyal towards brands whose personalities resonate with their own personalities (Nuhadriel and Keni 2022). They recommend streaming services to establish a distinctive and authentic brand personality in addition to guaranteeing high system quality (Nuhadriel and Keni 2022). The latter is frequently indistinguishable across streaming services (Nuhadriel and Keni 2022). As Nuhadriel and Keni's (2022) have already applied the brand personality model within the streaming context, the attributes ***competent***, ***up to date***, ***authentic***, and ***unique*** were included in the attribute set. ***Uniqueness*** was not only mentioned in academic literature but also emphasised as a key differentiating factor during interviews, as streaming services need to be unique in their offerings to maintain competitiveness in the market (Expert 2). Being ***up to date*** was also highlighted throughout the interviews, as consumers wish to discover new content and not having the feeling of having already seen everything (Expert 1; Student 1 and 2; Senior Professional 2). Additionally, the attributes ***family-oriented*** and ***reliable*** from the brand personality framework (Aaker 1997), were added to the attribute set. Findings from the initial consumer survey showed that senior professionals like to stream in family settings on weekends. Furthermore, the reliability of a streaming service has a great influence on user experience with streaming services (Guo 2022; Expert 1 and 3).

Trust is crucial for shaping how media content is perceived and consumed (Heim et al. 2023). For VOD streaming services, it is important to build trust not only in the content they offer

but also in their platform (Heim et al. 2023). According to the *Media Brand Trust Model* developed by Heim et al. (2023), brand trust significantly impacts the media consumption experience. The study identifies eleven key dimensions: relevance, integrity, transparency, affinity, experience, benevolence, credibility, competence, halo effect, commercialism, and temporal aspects, all relevant to media brands of various sizes, backgrounds, and operational scopes. Based on these eleven dimensions and adapted to the thesis' research question, the following attributes were incorporated: ***competent***, ***credible***, ***transparent***, ***relevant***, ***commercial***, ***established***.

Lastly, another study by Rahe, Buschow and Schlütz (2021), explored brand perceptions of Amazon Prime Video and Netflix in the German media industry employing the *Function-oriented Media Brand Model* as a theoretical framework. To be considered as valuable and unique by consumers, media brands need to fulfil two central brand functions, cognitive relief / simplification and activation (Rahe, Buschow, and Schlütz 2021). In terms of cognitive relief and simplification, media brands facilitate the consideration of a brand by reducing complexity and influencing the selection of a brand by reducing risk (Rahe, Buschow, and Schlütz 2021). Once a media brand has been selected, media brands assist consumers in defining their own identity (identification) and play a role in how they present themselves to others within social contexts (prestige) (Rahe, Buschow, and Schlütz 2021). The attributes ***unique, top-of-mind, entertaining*** were drawn from the items that measure the complexity reduction function. Furthermore, the attributes ***trustworthy, innovative, competent*** were derived from the risk reduction function. In terms of prestige***, recommendable*** and ***prestigious*** were adapted into this thesis.

3.3 Methodology

3.3.1 Survey Instrument

Once the attributes had been selected, an online survey was constructed using Microsoft Forms. The survey was designed in English, but a German translation was included for each attribute to ensure full comprehension. The survey encompassed three sections (see Appendix 2). The first section included pre-screening questions. As this thesis is focused on the German market, participants were required to indicate whether they were German or living in Germany. Additionally, respondents were asked whether they had utilised a VOD streaming service. Respondents who denied these questions were directed to the end of the questionnaire. Those who positively answered both questions were required to select all platforms they had used. These questions should ensure to subsequently filter out all those who were not familiar with all the platforms. The second section focused on the evaluation of the five selected VOD streaming services based on the 17 attributes. Each VOD streaming service was evaluated on a five-point Likert scale (e.g. 1 - Not competent at all, 3 - Neutral, 5 - Very competent). In the third section, respondents were asked to provide demographic and behavioural information. Regarding demographics, respondents were asked to provide their age, gender and employment status. In terms of behaviour, they were required to indicate the frequency with which they used a streaming service, their average viewing time and their monthly expenditure on VOD streaming services. This information was needed to identify differences in perceptions between different demographic and behavioural groups. Prior to the launch of the survey, it was reviewed by the thesis advisor to obtain feedback on the appropriateness of the items and format. Finally, to ensure clarity and understanding of the items and format, a pre-test was completed with four volunteers. As all questions were clear to the individuals and the thesis advisor had approved the questions, the survey was finally published.

3.3.2 Sampling and Data Collection Procedures

The survey was available online from 7 October to 24 October 2024 and was closed after reaching a satisfactory number of participants. For this thesis, a convenience sampling method was employed. The survey link was shared via social media platforms, including Instagram and LinkedIn as well as through family and friends, who also shared it with their colleagues, friends and other family members. Moreover, it was published on the research platforms SurveyCircle and SurveySwap, which facilitate mutual research support. Overall, this approach allowed a broad reach of participants, though it lacked randomisation. The only requirements for respondents were either being German or living in Germany and having used any VOD streaming service.

3.3.3 Data Analysis

A total of 320 responses were collected and subsequently exported to Excel for data cleaning. Initially, any unnecessary columns were deleted from the Excel document and any respondents who did not meet the screening criteria were excluded, resulting in 274 respondents. Moreover, participants who were unfamiliar with at least one of the suggested platforms were excluded, resulting in a sample size of 115, representing 36% of the initial sample. This is in accordance with the general rule for factor analysis, which suggests a minimum sample size of five times the number of variables (Hair et al. 2019). For this thesis, this equates to a minimum of 85 respondents. Additionally, in the survey responses, ratings of 1, 3 and 5 each contained text descriptions, which were converted into numerical values for the analysis. Furthermore, the mean scores for each attribute per platform were calculated (see Appendix 3), which were then imported into SPSS for further analysis.

The objective of this thesis is to identify the dimensions that explain the relationships among the 17 brand-related attributes in order to create a Perceptual Map. Therefore, factor analysis was employed as an analytical technique, more specifically exploratory factor analysis (EFA). EFA

is an approach used to identify a set of factors, also known as dimensions, that explain the interrelationships among variables in the analysis (Hair et al. 2019). Moreover, the thesis employed principal component analysis (PCA) as a method for factor extraction. PCA is an effective technique for reducing data to a minimum number of factors while preserving most of the original data (Hair et al. 2019).

The initial analysis entailed an unlimited and unrotated factor analysis to explore potential dimensions without any constraints. Further, the initial analysis revealed three factors with eigenvalues above 1. This is in line with Kaiser's criterion, which suggests that all factors with eigenvalues above 1 should be retained (Backhaus et al. 2018). The identified factors have eigenvalues of 13.133, 2.264, and 1.427, explaining 77.25%, 13.32% and 8.39% respectively (Table 3). While Component 1 has a high explanatory power, Components 2 and 3 exhibit a lower level of explanatory power. Furthermore, a scree plot can be utilised to illustrate the number of underlying dimensions by illustrating them sequentially on a diagram (Howard and Sullivan 2024). A final point needs to be identified at which eigenvalues significantly decrease in value (Howard and Sullivan 2024). All factors located to the left of this point are included, while those to the right are excluded (Howard and Sullivan 2024). In this thesis, there was the potential for a break after the third component (see Appendix 4). The values in the communalities tables were close to 1 (see Appendix 5), indicating that the variables are well represented by the three factors (Hair et al. 2019). However, limitations were found regarding the factor loadings. Factor loadings indicate the degree of correlation between each attribute and a factor, while a higher loading indicates a stronger representation of that factor through the attribute (Hair et al. 2019). A factor loading exceeding 0.5 is considered as significant for the assignment of a variable to a factor (Hair et al. 2019). However, if an attribute exhibits a loading greater than 0.5 on multiple factors, it impedes a clear interpretation (Backhaus et al. 2018). In the unrotated solution, all variables loaded significantly

on the first factor, with some demonstrating cross-loadings on multiple factors, complicating interpretation (see Appendix 6). Notably, family-oriented was the only variable loading significantly on the third factor. Therefore, a two-factor analysis was chosen in order to facilitate interpretation, especially with regard to the resulting Perceptual Map (Cornelius, Wagner, and Natter 2010), also because the first two factors already explained 90.57% of the total variance.

Component	Extraction Sums of Squared Loadings		
	Total	**% of Variance**	**Cumulative %**
1	13.133	77.254	77.254
2	2.264	13.316	90.570
3	1.427	8.393	98.963

Table 1: Total Variance Explained

In the second round of analysis, a two-factor analysis was conducted without rotation, which revealed that all variables significantly loaded on Factor 1, with cross-loadings for entertaining and reliable on both factors (see Appendix 7). This indicated the necessity for a rotation to potentially eliminate cross-loadings, simplify the factor structure and allow for better interpretation (Hair et al. 2019). In addition, all communalities met an acceptable level of explanation through the two-factor solution. In the third round of analysis, a two-factor analysis with varimax rotation was applied as this method minimises cross-loadings and facilitates interpretation (Hair et al. 2019). Despite the application of Varimax rotation, cross-loadings persisted for several variables, including recommendable, innovative, top-of-mind, trustworthy, competent and relevant (see Appendix 8). Consequently, the oblique rotation method, Direct Oblimin, was applied to allow factors to be correlated and to achieve clearer loadings (Hair et al. 2019). Nevertheless, most variables continued to load primarily onto Factor 1, with cross-loadings for entertaining and reliable (see Appendix 9). As a final step, Promax rotation, a further oblique rotation method, was employed. The Promax rotation yielded more distinct loadings, providing a

clearer differentiation between factors and enhancing the interpretability of dimensions, which will be described in the next chapter.

3.4 Results

3.4.1 Sample Characteristics

The demographic analysis of the survey sample (see Appendix 10) revealed that the majority of participants were female accounting for 86% of the respondents. Only 13% were male and 1% preferred not to indicate their gender. In terms of age distribution, the largest group of respondents were between 25 and 34 (51%), followed by respondents aged 18 to 24 (29%). The 35 to 44 age group made up 14% of the sample while 5% of respondents were aged between 45 to 54 and only 1% were part of the 55 to 64 age group. No respondents were under 18 or older than 65. Regarding occupation status, respondents are found to be in a diverse range of professional stages. Students represent 10% of the respondents with an additional 22% of students who are working or pursuing an internship. The second largest occupational group was senior professionals accounting for 21% of the sample, followed by professionals with 6-10 years of experience (19%) and young professionals with 1-5 years of experience (17%). A small number of respondents were retired (2%), and 10% selected ‘other’ for their occupation status. The concentration on younger professionals and students could be due to the many different student groups the survey was sent to and similar life stages as the personal environment of the researchers.

Moreover, data on behavioural characteristics was collected, revealing insightful patterns regarding the usage of VOD streaming services (see Appendix 11). The majority of respondents (67%) reported streaming content on a daily basis. Another 30% stream content several times a week, while a few respondents watch content weekly (1%) or a few times a month (3%). No participants watched content rarely. When asked about their average viewing time per sitting, 61% of respondents indicated they typically watch between 1 to 2 hours. Another 30% reported

watching for 3 to 4 hours per sitting and 6% stated that their viewing sessions last more than 5 hours. Only 3% of respondents watch for less than 1 hour per sitting. The survey also asked about how much respondents spend per month on streaming services. A total of 23% spend more than 30 € per month on streaming services, being the largest group. Subsequently, 18% of respondents indicated that they spend between 21 € and 25 € monthly, while 16% spend between 11 € to 15 € and 26 € to 30 € respectively. A smaller percentage of respondents (13%) spend between 6 € to 10 € and 16 € to 20 € respectively, and only 2% spend 0 € to 5 €.

3.4.2 Perceptual Map

To be able to give actionable recommendations to platforms of private TV providers, it is first necessary to understand how *German consumers perceive the VOD streaming services available in the German market* (SQ2). This will be achieved through the creation of a Perceptual Map.

A two-factor solution was generated using the Promax rotation method to obtain a clearer and more interpretable structure. This solution explains a substantial amount of variance in the dataset. Component 1 explains approximately 77.25% of the variance, while Component 2 accounts for an additional 13.32%, yielding a cumulative variance explained of 90.57%. This suggests that the two factors adequately represent the original data. To understand the relevance of each variable to the factors, the factor loadings in the pattern matrix are examined (Hair et al., 2019). The higher the factor loading is, especially if it is greater than 0.8, the greater the attribute explains one factor (Hair et al., 2019). Table 4 demonstrates how each attribute loaded on each component. Component 1 is described by entertaining, authentic, transparent, unique, up to date, recommendable, innovative and top-of-mind. In contrast, Component 2 is associated with the attributes reliable, established, family-oriented, prestigious, commercial, credible, trustworthy, competent and relevant. Furthermore, sufficient communalities can be witnessed for all variables

ranging from 0.669 (family-oriented) to 0.996 (prestigious), showing that the variables are well represented by the revealed two-factor solution (see Appendix 12).

Attributes	Component	
	1	2
Entertaining	**1.153**	-0.281
Authentic	**1.042**	-0.100
Transparent	**1.011**	-0.086
Unique	**1.004**	-0.130
Up to date	**0.940**	0.063
Recommendable	**0.821**	0.237
Innovative	**0.777**	0.247
Top-of-mind	**0.552**	0.436
Reliable	-0.260	**1.113**
Established	-0.074	**1.016**
Family-oriented	-0.201	**0.940**
Prestigious	0.094	**0.932**
Commercial	-0.050	**0.908**
Credible	0.138	**0.854**
Trustworthy	0.273	**0.759**
Competent	0.483	**0.602**
Relevant	0.458	**0.574**

Table 2: Factor Loadings of Two-Factor Solution (Promax Rotation)

After ending up in a satisfactory factor solution, where all variables have a significant loading on one factor, is must be given labels or meanings to the factors (Hair et al. 2019). The higher the factor loading the more it influences the meaning of the dimension (Hair et al. 2019). Entertaining, authentic, transparent, unique and up to date are the most important variables for the labelling of Factor 1. A label that is perceived to capture these variables is ***individuality***. Regarding Factor 2, it is mainly positively correlated with reliable, established, family-oriented, prestigious and commercial. Since this factor is associated with attributes related to reputation and presence in the market, it will be labelled as ***reputation***. The resulting Perceptual Map is illustrated in Figure 3. The two factors extracted describe the axes titles, whereas Factor 1 illustrates the X-axis and

Factor 2 the Y-axis. Each attribute on the plot is located based on its factor loadings in the pattern matrix.

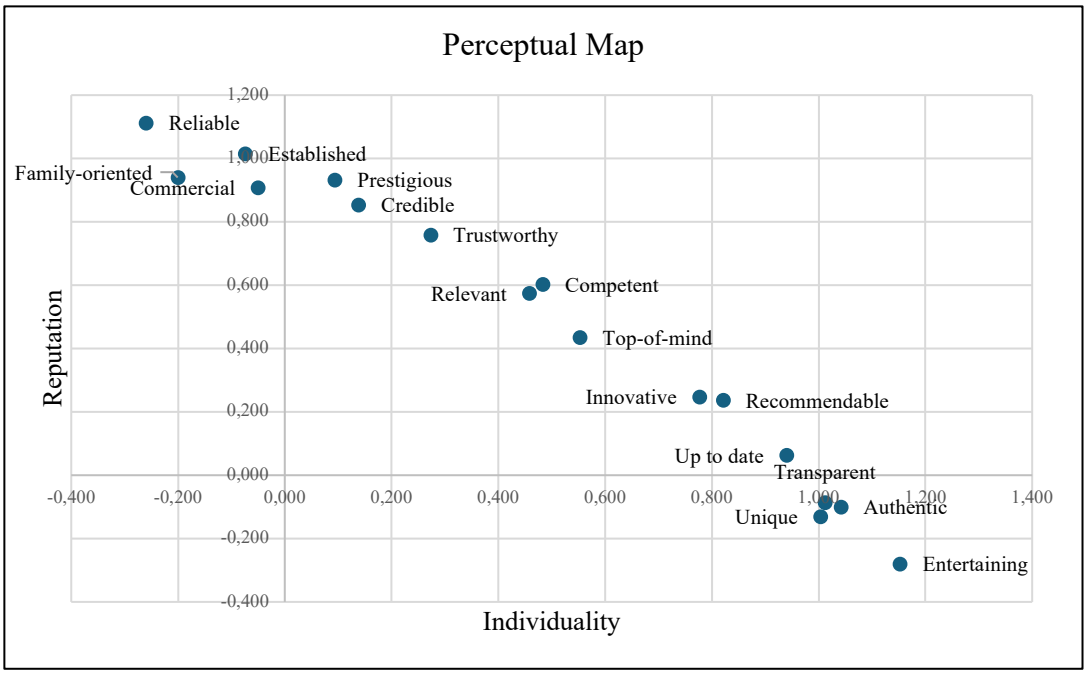

Figure 2: Representation of Attributes in the Perceptual Map

To examine the positioning of the attributes and relative positions of streaming platforms, one has to look at the vector's lengths, proximity and angles. A vector is a straight line linking the origin of the graph to a particular variable (Hair et al. 2019). The direction of a vector represents the degree of association with the corresponding attribute (Cornelius, Wagner, and Natter 2010). The length of a vector determines the differentiation power of an attribute between brands (Cornelius, Wagner, and Natter 2010). The longer the vector, the easier it is for a consumer to differentiate brands based on a distinct attribute (Cornelius, Wagner, and Natter 2010). Looking at the vector length of the thesis's attributes, it can be observed that entertaining, reliable, authentic, established, transparent and unique have the longest vectors and, thus are the attributes differentiating streaming services the most from one another. In contrast, attributes like top-of-mind, relevant, competent and trustworthy set streaming services less apart from other streaming

services. In addition, the proximity of a vector to the axis determines the contribution of one attribute to a dimension (Cornelius, Wagner, and Natter 2010). The closer the vector is located to the dimensions of individuality or reputation, the higher its contribution to the interpretation (Cornelius, Wagner, and Natter 2010). As seen in Figure 4, vectors like established, prestigious, and commercial are the closest located attributes to the reputation axis. This is in line with the factor loadings on reputation. However, as reliable and family-oriented are slightly negatively loaded on individuality, they are farther located from the reputation axis. Up to date, transparent, authentic and unique are the closest vectors to the individuality axis, while entertaining, which has the highest loading, is less closely located as it is slightly negatively loaded on reputation.

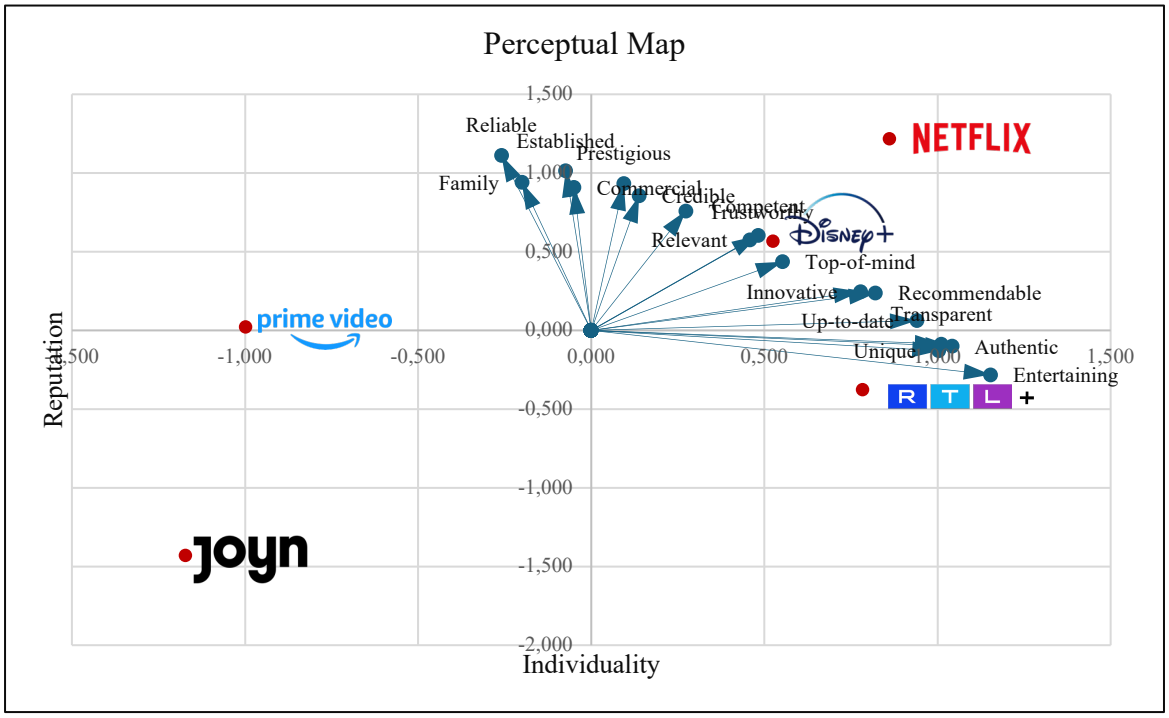

Figure 3: Representation of Attributes and Streaming services in the Perceptual Map

Furthermore, attributes that exhibit small angles between two vectors suggest that they are similar in how they are perceived by consumers and are positively correlated (Cornelius, Wagner, and Natter 2010). Authentic and transparent (0.997) and unique and transparent (0.994), as well as relevant and top-of-mind (0.988) and innovative and up to date (0.986) are highly correlated (see

Appendix 13). This suggest that a streaming service that is perceived as being authentic is also being perceived as transparent. If a streaming service is relevant to the consumer, the streaming service is also top-of-mind for the consumer. Moreover, there are some attributes that do not correlate with each other. For instance, family-oriented and entertaining (0.192) have a weak influence on each other as seen in Figure 4.

The following section will examine the perceived competitive positions of the streaming services based on their coordinates (see Appendix 14). Figure 4 illustrates that Netflix is situated within the top-right quadrant indicating that it achieved the highest scores in both reputation (1.219) and individuality (0.862). Disney+ followed with moderate loadings on both, individuality (0.524) and reputation (0.569). Amazon Prime Video is located in the left-middle part of the Perceptual Map, exhibiting a highly negative individuality score (-0.998) and a slightly positive reputation score (0.021). This indicates that it lacks differentiation and has a neutral reputation. Furthermore, Joyn has the least favourable position among the streaming services. It exhibited the highest negative loadings along both, reputation (-1.431) and individuality (-1.171). Lastly, RTL+ had a high individuality score (0.784) but a negative reputation score (-0.377), which positions it as very differentiated streaming service with less emphasis on reputation.

Examining distances between the streaming services allows for understanding perceived similarities and the intensity of competition (Cornelius, Wagner, and Natter 2010). The proximity of two streaming services suggests that consumers perceive them as similar and that competition between them is intense (Cornelius, Wagner, and Natter 2010). Both Disney+ and Netflix are located in the upper-right quadrant, exhibiting comparable profiles and indicating that they are close substitutes. Furthermore, RTL+ and Disney+ are positioned relatively close to one another, indicating that consumers may perceive them as being similar in terms of individuality, despite RTL+'s comparatively lower reputation score. Finally, the proximity between Amazon Prime

Video and Joyn demonstrates that these services are perceived as somewhat similar, with neither standing out strongly on either dimension. Nevertheless, Joyn's position further to the lower left reflects its weaker reputation and individuality scores compared to Amazon Prime Video.

3.4.3 Differences Between Demographic and Behavioural Groups

To investigate whether demographic and behavioural variables have an impact on consumer perceptions of streaming services, 510 simple linear regressions were conducted. This high number of regressions was necessary to assess the relationship between each demographic and behavioural factor and each attribute-brand combination. The dependent variables were the ratings for each attribute-brand combination (e.g. competent for Netflix), while the independent variables included the six demographic and behavioural factors: age, gender, occupation, streaming frequency, average watch time, and monthly spending. All categorical independent variables were dummy-coded. The category with the largest sample size was selected as the reference group against which the remaining groups were compared. Given the large number of regressions conducted, only results from significant regression models ($p < 0.05$) are presented, with a focus on group differences identified through significant coefficients.

Age. To align with the results of CA, discussed in the subsequent chapter, the original age groups 35-44 and 45-54 were summarised into a single age group, 35-54, as no statistically significant differences were identified between these groups. As a consequence of this adjustment, the following four age groups were used for further analysis: 18-24, 25-34, 35-54, and 55+. Distinct age group predictors emerged during analysis. First, respondents aged 55+ rated RTL+ significantly less up to date compared to people aged 25-34 (ß = -0.200, $p = 0.031$). However, this result should be interpreted with caution, due to the limited sample size ($n = 1$). Moreover, younger consumers (18-24) perceived Netflix to be significantly less authentic (ß = -0.285, $p = 0.003$), less recommendable (ß = -0.298, $p = 0.002$) and less innovative (ß = -0.212, $p = 0.030$). They also

perceived Disney+ significantly less innovative than the reference group (ß = -0.248, $p = 0.011$). People aged 35-54 perceived Disney+ significantly less family-oriented (ß = -0.318, $p = 0.001$) and rated Joyn significantly higher in terms of established (ß = 0.236, $p = 0.014$).

Gender. Significant gender-based differences were particularly observed for RTL+. Male respondents consistently rated RTL+ lower compared to female respondents across the majority of attributes. For instance, male perceive RTL+ as significantly less competent (ß = -0.347, $p < 0.001$), top-of-mind (ß = -0.434, $p < 0.001$), entertaining (ß = -0.459, $p < 0.001$), trustworthy (ß = -0.342, $p < 0.001$), innovative (ß = -0.333, $p < 0.001$), recommendable (ß = -0.391, $p < 0.001$), prestigious (ß = -0.409, $p < 0.001$), credible (ß = -0.234, $p = 0.011$), transparent (ß = -0.183, $p = 0.049$), relevant (ß = -0.358, $p < 0.001$) and established (ß = -0.392, $p < 0.001$). Moreover, differences in perceptions between males and females were observed for Netflix. Males rated this platform significantly lower than females in terms of trustworthy (ß = -0.216, $p = 0.020$), recommendable (ß = -0.355, $p < 0.001$), prestigious (ß = -0.264, $p = 0.005$), credible (ß = -0.222, $p = 0.017$) and transparent (ß = -0.217, $p = 0.019$).

Occupation. Regarding occupation, multiple predictors were identified, demonstrating how occupation influences consumer perceptions of VOD streaming services. Although significant differences were found for the occupation group ‘other’, these results were disregarded due to lack of information about the occupations within this category. Significant differences were also observed in perceptions among students who work compared to those who do not. Students without a job find Amazon Prime Video significantly more transparent (ß = 0.287, $p = 0.006$) but less commercial (ß = -0.230, $p = 0.028$) than their peers who work. Looking at young professionals (1-5 years of experience), RTL+ was rated significantly higher in terms of established compared to working students (ß = 0.245, $p = 0.023$). Senior professionals (more than 10 years) perceived some platforms significantly different than working students. For instance, Netflix was perceived as

more trustworthy (ß = 0.227, $p = 0.045$) and RTL+ as more prestigious (ß = 0.293, $p = 0.009$) than the reference group. Senior professionals also perceived Amazon Prime Video to be less commercial (ß = -0.282, $p = 0.011$) compared to working students.

Streaming frequency. For this variable, significant differences were observed in the perceptions of people who stream weekly and a few times a month. Nevertheless, these results will be disregarded due to the limited sample size for weekly streamers ($n = 1$) and a few times a month ($n = 3$). Furthermore, significant differences were observed in perceptions among respondents who stream several times a week. For instance, this group perceived RTL+ as less unique (ß = -0.214, $p = 0.023$), top-of-mind (ß = -0.215, $p = 0.018$), recommendable (ß = -0.289, $p = 0.002$) and entertaining (ß = -0.191, $p = 0.038$) compared to those who stream daily. Looking at Joyn, they perceived it as less top-of-mind compared to those who stream daily (ß = -0.252, $p = 0.007$).

Average watch time. Lastly, significant predictors were identified, emphasizing how the watch time influences consumer perceptions of VOD streaming services. Significant differences were observed in the group of people who stream less than 1 hour per sitting but due to the limited sample size of this group ($n = 3$), results will not be further discussed. Moreover, significant differences were observed in perceptions among respondents who watch more than 5 hours per sitting compared to those who watch 1-2 hours per sitting. People streaming more than 5 hours perceived Joyn as more competent (ß = 0.027, $p = 0.014$) and top-of-mind (ß = 0.229, $p = 0.015$) than those watching only 1-2 hours. Regarding Netflix, they perceived it to be less established (ß = -0.284, $p = 0.003$) than people streaming only 1-2 hours. They also perceived RTL+ to be more top-of-mind (ß = 0.215, $p = 0.022$) and to be more relevant (ß = 0.188, $p = 0.045$) than people only streaming 1-2 hours. Furthermore, people streaming more than 5 hours (ß = -0.193, $p = 0.040$) and people streaming between 3-4 hours (ß = -0.193, $p = 0.041$) perceived Amazon Prime Video as significantly less innovative than people only streaming 1-2 hours.

Monthly spending. Although data on monthly spending was collected through the survey, this variable will not be analysed further as data on the number of subscriptions was not asked. Without having this information, it is challenging to accurately interpret spending patterns.

4 Consumer Preferences

To understand how German private TV networks should shape their future video streaming offerings to align with German consumer preferences (SQ 3), it is necessary to identify and analyse these preferences through Conjoint Analysis, which will reveal the most valued attributes and guide the development of competitive offerings.

4.1 Conjoint Analysis Methodology

Since its invention in 1971, CA has become one of the most powerful and popular research techniques in marketing studies (Rao 2010). By assisting marketers, CA provides a deeper understanding of the preferences of their customers as well as their choice processes by evaluating how individuals perceive and assign value to numerous attributes of a product or a service (Louviere, Flynn, and Carson 2010; Rao 2010). The basis of the approach is the belief that the customers derive the overall utility from a product or service by combining individual utilities that they enjoy separately from each attribute (Louviere, Flynn, and Carson 2010).

CA has the particular advantage of being able to measure how important these dimensions are relative to one another and what consumers are prepared to give up in order to have them. For example, CA can reveal how much a consumer is willing to pay for an improvement in one feature (e.g., quality or speed) while accepting a decrease in another (e.g., cost). The concept of ‘levels’- specific values or conditions that each attribute can take - is crucial to the understanding of the data and concepts within CA because the direction of consumers’ preferences and trade-offs provided by the respondents are directly linked to these levels. (Louviere, Flynn, and Carson 2010)

The strength of the method has made it particularly effective in determining preferences for new or non-existent products or services in the market. As a result, it has gained wide acceptance in different industries for use in optimizing the design of products, pricing strategies, service configurations and even efforts involving market segmentation (Rao 2010).

4.1.1 Survey Instrument

Eight attributes with varying levels that have an impact on the German VOD streaming market were identified for the CA (see Appendix 15). These attributes were established through an extensive literature review and preliminary interviews with industry professionals and consumers.

Brand. In alignment with the PM, five brands were evaluated: Netflix, Amazon Prime Video, Disney+, RTL+, and Joyn. The selection of brands is backed by research demonstrating their impact on consumer preferences (Expert 2, Sabrina et al. 2022; Teng and Huang 2022).

Price. Four price levels were selected based on the existent price ranges in the German VOD streaming market to accommodate price sensitivity among consumers: Free (Ads & Limited content), 6.99 €/month, 9.99 €/month, and 13.99 €/month. The inclusion of the free price level is justified by the availability of free versions offered by brands such as RTL+ and Joyn. The importance of price in decision-making is supported by several research studies and interview findings (Expert 1, 2, 3, 4, 5; Student 1, 2, 3; Professional 3; Shin, Park, and Lee 2016; Kim et al. 2017; Song, Jang, and Sohn 2008; Lee et al. 2018; Kumar et al. 2025).

Content Origin. Three levels were considered: Local content (German), International content, and a combination of Local & International content. This aligns with research and experts suggesting the impact of content origin on consumer preferences (Expert 1, 2, 3, 4, 5; Kumar et al. 2025).

Advertisements. Two levels were chosen to evaluate user preferences for ads: Ad-based service and Ad-free service. Previous studies and interviews indicate that ad-free experiences can

significantly impact user satisfaction and WTP (Expert 1, 5; Student 1, 2, 3; Professional 1, 2, 3; Senior Professional 2, 3; Nielsen 2020).

User Interface. Three levels of the user interface were considered – Basic (limited search functionality; no content categories; slow navigation; no profiles), Intermediate (search enhancements; basic categories; moderate responsiveness; multiple profiles), and Advanced (smart search; detailed categories & collections; seamless navigation; advanced profiles; voice search & control.). Scholars, experts and consumers highlight the importance of ease of use in consumer decision-making (Expert 1, 4; Student 2, Professional 3, Senior Professional 3; Lee et al. 2018; Nielsen 2020).

Personalisation / Recommendations. Three levels were incorporated, each one being a recommendation system type – Content-based filtering (suggests items based on user preferences), Collaborative filtering (predicts preferences using data from similar users), and Hybrid systems (a combination of both). Personalisation is increasingly more important in improving user engagement (Expert 1, 2, 4; Student 1; Professional 1; Kim et al. 2017; Nielsen 2020; Kumar et al. 2025).

Content Exclusivity. Three levels of content exclusivity were considered: No exclusive content, Some exclusive content, and High amount of exclusive content. Research and interviews indicate that exclusive content differentiates streaming services (Expert 1, 2, 3, 4; 5; Student 2; Professional 2; Senior Professional 2; Nielsen 2020; Shin et al. 2016).

Content Type. Five levels were included – Movies & Series, Movies & Series with Documentaries, Movies & Series with Sports Live streaming, Movies & Series with Reality TV, and a combination of all four genres (Movies & Series, Documentaries, Sports Live Streaming, and Reality TV). Movies & series are the preferred form of content (Telkman 2023) and, therefore, were included in all levels. Additionally, the inclusion of documentaries, sports live streaming and

reality TV is based on the consumer's insights from the preliminary interviews. Content variety plays a critical role in shaping consumer preferences in VOD streaming (Expert 1, 2, 3, 4, 5; Student 1, 2, 3; Professional 1, 2, 3; Senior Professional 1, 2, 3; Shin et al. 2016; Nielsen 2020; Lee et al. 2018).

Based on the methodology of CA (Louviere, Flynn, and Carson 2010; Rao 2010), the inclusion of hypothetical scenarios, such as offering Netflix at a "Free" price point, was deliberate so that consumer preferences beyond the current product range could be investigated. This method allows to identify core preferences by considering a wide range of combinations. As detailed in Appendix 16, none of the attribute combinations were excluded, and every level was available for selection in each brand, ensuring a thorough assessment of consumer choices. However, in order to keep the integrity of the free (ads & limited content) price level, the pairing of this level with the ad-free service level of the advertisements attribute was prohibited. This was done through an advanced setting available on the Conjoint.ly software (see Appendix 17).

In addition to collecting attribute-based data, pertinent participant information was gathered in the analysis of the German VOD streaming market (see Appendix 18). To ensure all collected data was derived from respondents that incorporated the market studied, we asked participants if they were from or lived in Germany and if they were familiar with or had used VOD streaming platforms. The respondent was screened out if the response was negative to any of these parameters. The collected data included age, gender, occupation, frequency of VOD streaming usage, average session duration, and monthly spending. Collecting these demographic variables is essential for effectively segmenting and interpreting consumer preferences in this market, as noted in previous research (Cleveland, Papadopoulos, and Laroche 2011).

4.1.2 Data Collection and Process

The survey was spread through a diverse array of channels, including platforms such as SurveySwap, WhatsApp, Microsoft Teams, and SurveyCircle, along with social media networks like Instagram and LinkedIn. Utilising Conjoint.ly software was pivotal for both the survey administration and subsequent data processing. This software enabled efficient response collection and involved multiple steps for data handling, including the creation of segments for crosstab analysis to facilitate comparability across different respondent groups. Moreover, persona-specific data was captured to enrich analytical insights. These segments are integral features of Conjoint.ly, allowing for comprehensive post-survey analysis (see Appendix 19). In the concluding phases of the analysis, the consolidated data and visualizations were exported to Excel for extended analysis, including the computation of averages to enhance the interpretation of the study's findings.

The analysis section is structured in accordance with the categorical framework within Conjoint.ly. It commences with an examination of eligible participants and subsequently delves into overarching insights, encompassing brand preferences, attribute preferences, and level preferences, alongside crosstab data that uncovers variances among distinct demographic segments and personas.

5 A Case Study on Joyn

5.1 Understanding Joyn

It is not all about the global giants. In this section, Joyn, a German streaming platform will be explored. Joyn was launched in June 2019 as a joint venture by ProSiebenSat.1 Media and Discovery Inc. and has established itself in the market by combining traditional live TV broadcasting with modern streaming offerings (ProSiebenSat.1 Media SE 2019). Headquartered in Munich, the business is directed towards German-speaking audiences. Its freemium business model

encompasses a free ad-supported tier and a premium tier (SVOD) known as Joyn PLUS+ (Joyn n.d.). Joyn's free tier includes more than 60 live TV providers and a large library of on-demand content, featuring popular German shows, movies, and some exclusive series (Joyn n.d.). On top of that, for those looking towards a more diverse experience, Joyn PLUS+ adds more exclusive content and enhances streaming quality (Joyn n.d.). Furthermore, the premium option (SVOD) gives the possibility to watch some shows one week in advance and has six more Pay-TV networks (Joyn n.d.). For simplicity, the following analysis will refer to both Joyn (the free version) and Joyn PLUS+ collectively as 'Joyn'. Summed up, Joyn works with a freemium model, catering to a broad audience by offering free, ad-supported streaming for mass users, as well as premium service for those seeking an enhanced viewing experience (Joyn n.d.).

Joyn focuses on local productions and partnerships (Joyn n.d.). With its German live TV offerings, movie selections and exclusive 'Joyn Originals' this streaming service aims to become the first choice for streaming platforms in Germany (Joyn n.d.). Joyn aims to target an audience that values entertainment which reflects their community and speaks their native language (ProSiebenSat.1 Media SE 2024a).

5.2 Methodology

The following analysis takes a closer look at Joyn's challenges and potentials and gives recommendations on how the platform can optimise its offerings in the German VOD market (SQ4). In addition to findings from the interviews, PM and CA, a confirmation survey was conducted with Google Forms (see Questionnaire; Appendix 20) to identify Joyn's strengths and potential areas for improvement specific to the streaming platform. The primary objective of the survey was to gather insights from individuals who had prior experience using Joyn. However, it was also valuable to get insights from people who had never used Joyn before. That is also the reason why the survey was divided into three parts (see Questionnaire; Appendix 72 and Figure 7).

Respondents were recruited through targeted outreach on WhatsApp and Instagram. The survey link was shared among family members, friends, university groups, and on Instagram pages, ensuring the sample represented a diverse group of Joyn users. The data was analysed using descriptive analysis for closed-ended questions and qualitative content analysis for open-ended questions. The findings form the basis for understanding consumer experiences with Joyn and identifying areas where the platform can enhance its offerings. These insights are crucial not only for evaluating current service levels but also for setting the stage for the strategic recommendations that will address these findings. Furthermore, the survey was available online from 29 October to 6 November 2024 and was closed after reaching a satisfactory number of participants.

The eligibility criteria included being from Germany or speaking German (see Appendix 21). After that, the first part of the questionnaire was clearly designed to segment the audience based on their familiarity with Joyn by asking whether they are current users, have used it in the past, or have never used it (see Appendix 21). For the people who have never used Joyn before, two special ending questions were asked, in which they had to answer why they had never used Joyn before and what would make them use it (see Appendix 22 and 23). After these questions, the survey ended for them. The third part and main body of the survey then focused on the people who are currently using or did use Joyn in the past (see Questionnaire; Appendix 20). Questions covered a range of topics including satisfaction levels, content preferences, unique features, and areas of dissatisfaction. Thereby, the survey aimed to provide actionable feedback on key attributes of Joyn, such as content quality, usability, and affordability, as well as suggestions for enhancement.

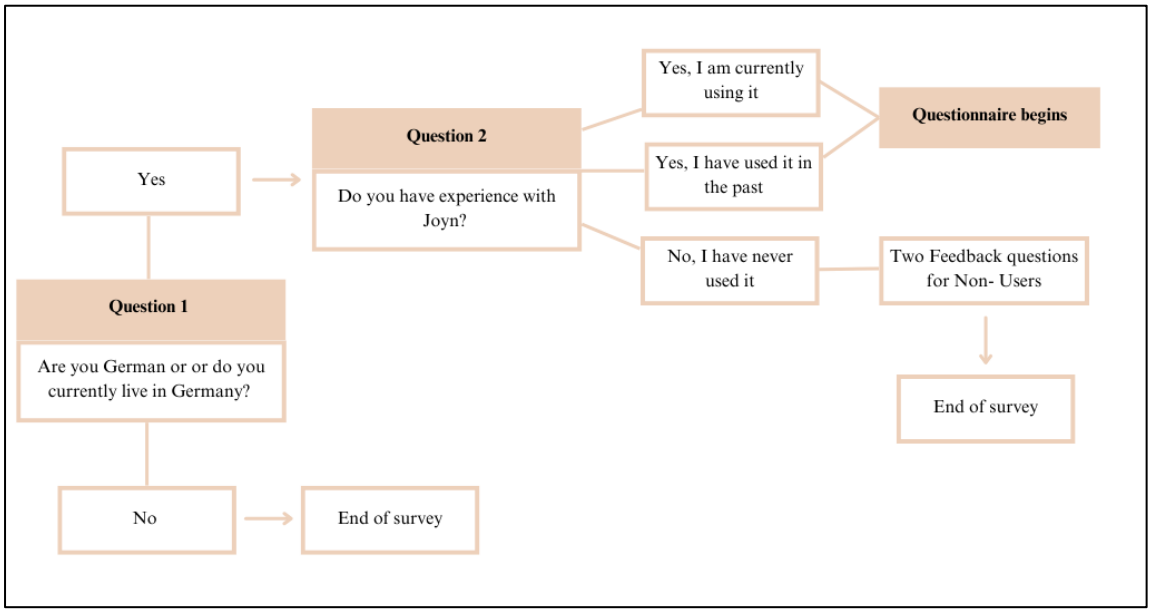

Figure 4: Case Study Survey Procedure

A total of 103 people participated in the survey. Among these, 5 respondents were not German, and an additional 18 participants had never used Joyn before, leaving 80 respondents who were both German and had prior experience with the platform. Notably, 23 of these 80 respondents reported having used Joyn in the past but no longer actively use the service. Therefore, out of the remaining 80 participants, 71% identified as female and 29% as male, with no respondents selecting 'prefer not to say'. The majority were young adults aged 25-34 years (43%) and 18-24 years (27%), with smaller proportions in older brackets: 35-44 years (17%), 45-54 years (4%), and 55-64 years (9%). In terms of occupation, the largest group were students with working jobs or internships (27%), followed by young professionals with 1-5 years of experience (23%) and students without work experience (21%). Additionally, 21% were senior professionals with more than 10 years of experience, 5% had 6-10 years, and 3% selected 'other' occupations (see Appendix 24).

In terms of behaviour, 45% streamed daily, 28% several times a week, and 18% weekly, with only 9% streaming a few times a month. Most watched for 1-2 hours (58%), followed by 3-4

hours (38%), and only 4% exceeding five hours. Monthly spending on streaming services varied, with 26% spending 0 € to 5 €, 15% spending 6 € to 10 €, 14% spending 16 € to 20 €, and 20% spending 21 € to 25 €. A smaller percentage of respondents reported higher spending, with 10% spending 26 € to 30 € and 12% spending more than 30 € (see Appendix 25).

In the following analysis, only the most valuable results from the survey will be considered and discussed, while all the remaining results are provided in the appendix.

6 Conclusion

6.1 Consumer Perception Discussion

Although Netflix and Amazon Prime Video are the main players in the German VOD streaming market (W&V 2022), the two brands are perceived differently, as the results of the PM showed. Amazon Prime Video was perceived less favourably by consumers compared to Netflix. This is in accordance with the findings of Rahe, Buschow and Schlütz (2021), who have already discovered that overall Netflix is perceived more favourably than Amazon Prime Video. In the thesis analysis, Amazon Prime Video's unfavourable position in terms of individuality is driven by its weak scores among entertainment, authenticity, uniqueness and transparency. Contrary to these findings, Amazon Prime Video perceives itself to occupy a unique position in the market, emphasising the provision of live sports content and local original programming with international appeal such as *Maxton Hall* as unique selling points (Expert 2). One possible explanation for its lack of individuality may be its focus on providing a comprehensive range of content and features, including TVOD, SVOD and the adding of external streaming services such as DAZN (Expert 2; Rahe, Buschow, and Schlütz 2021). While these offerings align with Amazon's objective of becoming the leading entertainment platform beyond SVOD (Expert 2), it may result in a fragmented and less cohesive service design, diminishing its appeal to consumers (Wenzel, Mahle, and Pätzmann 2016). As Amazon Prime Video is integrated into Amazon's broader umbrella of

services (Tiwary 2020), consumer associations of other categories may extend to the streaming service. In contrast to Amazon Prime Video, Netflix's focus lies exclusively on its streaming content offerings (Expert 2). Its competitive advantage comes from its consistent delivery of its service offerings, which results in a seamless and user-friendly experience (Expert 1; Wenzel, Mahle, and Pätzmann 2016). Moreover, the difference in perception may also be a result of the discrepancy between the number of subscribers and the actual usage of the streaming services. Perception can differ with different usage levels (Oakenfull and McCarthy 2010). Despite both Netflix and Amazon Prime Video having a similar number of subscribers, Netflix is used more often than Amazon Prime Video (Expert 1; ARD and ZDF 2024). Amazon Prime Video subscriptions are frequently bundled with Amazon's Prime membership. It thus could be that a considerable number of users do not actively subscribe to Amazon Prime Video for its streaming content but instead may gain access as an add-on benefit of their subscription for shipping.

Disney+ has been perceived by industry experts as lagging behind Netflix and Amazon Prime Video in the German market, often considered to be part of a second tier of streaming services (Expert 1 and 2). This perception aligns with subscription numbers, where Disney+ ranks behind its competitors (W&V 2022). However, the findings of this Perceptual Map challenge the conventional view of the VOD streaming market. The association with trustworthy and credible is not surprising, given the Disney brand behind this service and its longstanding reputation for delivering quality family entertainment (Brookey, Phillips, and Pollard 2023). Its association with individuality could be explained by the perceptions of being unique and authentic. Its uniqueness could stem from its legacy brands such as *Marvel* or *Star Wars*, which are exclusively available on Disney+ (Brookey, Phillips, and Pollard 2023). The name of the platform already suggests what content to expect on the platform. Moreover, Disney+ organises its content differently by its legacy brands to be closely associated with them, while competitors organise content by genre (Brookey,

Phillips, and Pollard 2023). This strategic leverage of exclusive intellectual property may allow Disney+ to take a distinct position in the streaming market. In comparison to Amazon Prime Video, Disney+ is also perceived to be more closely aligned with Netflix, although at lower values. The proximity between Netflix and Disney+ could be explained as all offerings of the Disney brand are linked to entertainment, while Netflix as a brand also focuses on streaming and producing entertainment content (Brookey, Phillips, and Pollard 2023). Therefore, both brands demonstrate greater similarities than those offering multiple categories such as Amazon Prime Video (Brookey, Phillips, and Pollard 2023).

Joyn and RTL+ operate differently by targeting consumers looking for local content (Expert 3). The findings of the PM demonstrate that both, Joyn and RTL+, are less reputable than the big US players. Both players are part of the biggest and most established TV networks, RTL Group and ProSiebenSat.1 Group in Germany. However, their established reputation does not seem to be translated to their VOD streaming services. Joyn's low association with being established could be attributed to its short existence. While Netflix started operations in Germany in 2014 (PR Newswire 2014), Joyn was only introduced to the market in 2019 (ProSiebenSat.1 Media SE 2019), making it a less established streaming platform compared to Netflix. Another explanation may be their reliance on local content (Expert 4). While this is a strength to attract people who are seeking German reality TV or German TV shows (Expert 3 and 4), it is perceived to be less relevant and of lower quality when compared to international blockbusters offered on Netflix (Telkmann 2023). Another potential reason for Joyn's unfavourable rating in terms of prestige could be the free subscription model (Freemium). Joyn positions itself as the best alternative to cable connection by offering a large range of linear TV content and highlights its freemium model as a unique selling point in the German VOD streaming market (Joyn n.d.; Comacon Magazine n.d.). However, the

accessibility to a wide audience and the free offerings may result in a dilution of exclusivity and a reduction in perceived prestige, which could explain Joyn's low associations with being prestigious.

Furthermore, it can be observed that there is a negative perception of Joyn in relation to individuality. In contrast, RTL+ exhibits a positive correlation with individuality, ranking second on this dimension and demonstrating high associations with the entertaining attribute. This is an unsurprising finding, given RTL+'s extensive range of reality TV programming. Entertainment is one of the main motives for watching reality TV (Papacharissi and Mendelson 2007). Despite offering reality TV shows, Joyn is less associated with entertainment, potentially due to less popularity of their reality TV shows among consumers. Most of the popular German reality TV shows such as *Bauer sucht Frau*, *Das Dschungelcamp*, *Das Sommerhaus der Stars* or *Der Bachelor* are available on RTL+ (YouGov 2023). Another difference between the platforms can be seen in the perceived actuality of the platforms. The results of the PM show that RTL+ is perceived as more up to date than Joyn. While both platforms lagged behind with conventional features such as the ability to download content (Expert 3, Telkmann 2023), RTL+ has implemented this feature (RTL+ n.d.a). Joyn, on the other hand, has yet to offer the possibility to download titles (Fischer 2024). As Expert 4 confirmed Joyn receives customer support inquiries about when the download function will be implemented, which could explain why the platform is perceived as less favourable in terms of up to date.

6.2 Consumer Preferences Discussion

The trade-offs in attribute-based decision-making mean the compromises that appear when the enhancement of one attribute, such as quality, may be at the expense of another one, for example, cost-efficiency, and reflect the basic constraints in resource-constrained or resource-limited environments (Dathe et al. 2023; Da Silveira et al. 2001). Dathe et al. (2023) and Da Silveira et al. (2001) present the case for choosing a streaming service where content variety is an essential

attribute for customers. However, increasing content variety tends to increase costs, requiring a trade-off with affordability. According to Dathe et al. (2023), successful decision-making should consider pertinent trade-offs to reach a balanced solution that satisfies strategic objectives while staying within the restrictions imposed. Such dynamics can also be observed in the CA conducted. Content-based attributes (content type, origin and exclusivity) were favoured at the expense of product-feature attributes (user interface, personalisation and advertisements). This result is supported by the preliminary interviews and literature, which highlight content as the main driver in the decision-making process and emphasise content quality, variety and new releases as key to engagement (Wu et al. 2024; Yoon and Kim 2023). This is likely due to the appreciation of a vast content library that removes the necessity for additional subscriptions (Wu et al. 2024).

Telkmann (2023) discovered that, in the German market, cognitive motives such as curiosity and knowledge are the main drivers behind the use of media libraries of TV providers. CA aligns with this finding as RTL+ and Joyn are the only brands in this thesis where documentaries draw positive utility for consumers. However, PM findings also highlight a strong association of RTL+ with entertaining content. This suggests that TV providers streaming services need to offer both informing and entertaining content, as people know it from TV (Telkmann 2023). Despite this, with content diversity being a crucial factor in consumer preferences (Wu et al. 2024), SVOD platforms such as Netflix, Amazon Prime Video and Disney+ hold higher value to German consumers. CA results suggest that consumers value a range of different content including movies & series, documentaries, sports live streaming and reality TV. Expert 1 alludes to this point by identifying the variety and novelty of content as the most important factors for users. Furthermore, CA identified that sports live streaming appears to hold significant importance. These findings align with trends suggested by experts and scholars (Expert 1, 2 and 3; Sharma and Kakkar 2019)

Regarding content origin, CA results confirm industry expert opinions. According to Expert 4, for local platforms providing a service which only offers international content 'would be the wrong direction' as consumers seek a 'local feeling through local content that they can identify with'. Thus, Expert 4 states that a combination of local and international content is essential, with an emphasis on prioritising local content. Expert 3 adds to this by highlighting the benefits of complementing international content with local content, providing the example of the existing demand by consumers for the *Love Island* show provided by RTL+. CA confirms the expert's opinions by showing that the combination of international and local content is the preferred content origin approach for Joyn and RTL+. Furthermore, CA highlights that while offering exclusively international content is still well-perceived, and provides significant value to consumers, solely local content is clearly rejected (-11.7%) by the same consumers. This finding highlights a clear preference in the German VOD market.

Furthermore, Yoon and Kim (2023) and industry experts view content exclusivity as a differentiation factor. Experts reinforce that exclusive content is a point of differentiation between brands which strengthens their unique identity. Especially for local platforms, exclusivity over national and regional titles, helps to attract and retain target groups (Expert 1 and 5). However, CA findings place only moderate importance on content exclusivity in the German market, especially compared to the key factors content type and price.

While Expert 2 refers to price as the most crucial factor for consumer choices, CA agrees that it has a great impact but suggests that content type is slightly more important than price in the decision-making process. However, according to Expert 3, there is a cap on the amount consumers are willing to pay, with 10 € identified as the potential WTP price point. CA similarly suggests that this might be the price limit consumers would pay, as 9.99 € is the first price level being slightly negatively associated (-0.6%) while a price of 13.99 € is already strongly rejected. As the most

preferred price level, participants chose the free option that incorporates advertisement, followed by the price level of 6.99 €. This is in contrast to preliminary interview findings where advertisement was perceived as disturbing and annoying but suggests that German consumers are rather cost-sensitive. Therefore, bundling strategies, which have been shown to enhance perceived value and satisfaction, as evidenced by Elsafty and Boghdady (2022), might be appreciated by German users. Flexible pricing structures, including tiered plans, free trials (e.g. my unidays for students) or freemium pricing models can also improve perceived value, whereas high prices without corresponding benefits may result in cancellations or migration to alternative platforms (Wu et al. 2024; Yoon and Kim 2023). Thus, as Wu et al. 2024 highlight, consumers assess the cost-benefit balance when evaluating streaming services, weighing financial costs against benefits such as content quality, accessibility, and exclusivity. In contrast to the preliminary interviews, advertisements seemed to play a smaller role in the CA.

Furthermore, literature and preliminary interviews name personalisation as a highly crucial feature for consumer retention and point out Netflix's strong algorithms as an industry benchmark (Gutzeit, Dorsch, and Stock 2021; Wu et al., 2024; Georgy et al., 2021; Expert 1, 4 and 5). However, CA data ranks personalisation only moderately, which could suggest that it is no longer a key differentiator but is expected by consumers in the German market. Thus, existing literature (Schauerte, Feiereisen, Malter 2020; Mikos 2016; Gutzeit, Dorsch, and Stock 2021, Gregory et al. 2021) and experts might overestimate the impact of personalisation on consumer choice. Cultural preferences for data protection may limit the success of personalisation in Germany (Schauerte, Feiereisen, Malter 2020). Strict laws like the GDPR restrict the range of personalised recommendations, which could make them less interesting and customised (Schauerte, Feiereisen, Malter 2020). Expert 1 further warns about the use of AI as it might be misleading due to biased data models that categorise people into interest groups that might be inaccurate.

Additionally, while industry experts foresee the trend of more engaging platform designs inspired by social media platforms like TikTok (Expert 1), existing research concurs on the need for seamless interfaces and ease of navigation (Rahe, Buschow, and Schlütz 2021; Wenzel, Mahle, and Pätzmann 2016). According to the CA results, the user interface is of moderate importance. Nevertheless, an intermediate or advanced user interface was positively rated while a basic user interface was negatively associated. However, new interactive and engaging interfaces can be innovative and draw attention, especially among younger users (Expert 1).

Overall, the interaction of price, content, personalisation, and user interface reveals that CA's findings show aligning yet slightly different priorities with existing research and the interviews.

Regarding brand preferences, Netflix emerges as the dominant player, which supports existing literature (Telkmann 2023; Rahe, Buschow, and Schlütz 2021; Gutzeit, Dorsch, and Stock 2021) and interview findings while showing that RTL+ and Joyn lag behind. Telkmann (2023) and Hennig-Thurau and Houston (2019) show that private TV providers are being outperformed by Netflix in several areas, including content quality, attractiveness, and relevance, selection of exclusive content, personalisation, usability, and brand strength. Furthermore, Netflix has a clear branding as a 'lifestyle brand' which contrasts with local players who struggle to differentiate themselves beyond content offerings (Rahe, Buschow, and Schlütz 2021, 53; Telkmann 2021).

6.3 Demographic and Behaviour Discussion

Existing research only provides little insight regarding the impact of age and gender demographics on the German VOD streaming market. According to Gutzeit, Dorsch, and Stock (2021) and Lee et al. (2018), age affects consumer preferences while gender does not. While CA supports these findings as more nuanced patterns emerge across different age groups, results for male and female consumers are very similar. Regarding age, it should be noted that the age group

18-24, was the only age group showing a positive score for RTL+. This finding confirms the preliminary interviews and suggests that younger users value the local platform. This could be due to a preference for reality TV in this age group (Rao, Lee, and Dressman 2023; Absar and Verma 2023). Furthermore, in line with the preliminary interviews, price was highly important for this age group. Another interesting finding is that older groups 35-54 and 55+ showed a stronger inclination towards Netflix and Amazon Prime Video while a strong aversion for Joyn and RTL+, suggesting limited interest in their content for this age group. This is in contrast to previous findings, where older consumers used Netflix and Amazon Prime Video less frequently, but had a stronger preference for TV media libraries (Gutzeit, Dorsch, and Stock 2021). This controversy can be explained by the fact that this thesis focused solely on local platforms from private TV providers, targeting a younger audience compared to public media libraries that were included in Gutzeit, Dorsch and Stock's (2024) study. Notably, older users (55+) preferred an intermediate user interface rather than an advanced one, suggesting a preference for simplicity over complexity which confirms findings from the preliminary interviews. In line with findings concerning different age groups, results regarding occupation show that professionals and senior professionals display strong preferences for Netflix and Amazon Prime Video (scores above 30 and 20, respectively), while exhibiting strong aversion to RTL+ and Joyn (scores below -30 and -15, respectively). These findings highlight and reinforce the connection between age and occupation in shaping preferences for streaming services. Additionally, CA findings partly confirm the three established VOD streaming personas (see 3.1.2). CA results match persona one, Emma, as they show a preference for affordability and diverse, exclusive content with a positive attitude towards RTL+. Findings also aligned with persona two, Lukas, for whom content type is the most important attribute, while also preferring personalised recommendations and affordable, ad-free experiences. Finally, CA findings for Thomas differ from the established persona profile as they indicate that older groups

value affordability and exclusivity while demonstrating strong disfavour for local brands. This difference is likely due to the fact that ARD and ZDF media libraries were not asked in this CA but referred to in the preliminary interviews. Surprising is the finding regarding affordability. One possible explanation is that older age groups find VOD services less appealing and thus prioritise affordability (Gutzeit, Dorsch, and Stock 2021).

While PM findings show significant differences across age groups, no clear patterns could be observed, except for younger consumers (18-24), who perceived Netflix to be less authentic, less innovative and less recommendable. This finding is notable, as Netflix is usually seen as the pioneer in the VOD streaming market (Au-Yong-Oliveira, Marinheiro, and Tavares 2020). One possible reason for the lower perception in innovation compared to older age groups may be the rising expectations of younger consumers. This group of consumers, also referred to as digital natives, grew up constantly interacting with new technologies (Prensky 2001; King 2006). Due to perceived time pressure in their everyday lives, young consumers prefer products and services that reduce time and effort required in decision-making (King 2006). The fast-paced nature of TikTok, which is a very popular platform among younger consumers (We Are Social et al. 2024), could have had an impact on the expectations of this younger audience. One industry expert highlighted that TikTok is much more engaging and convenient to use than Netflix (Expert 1), as it benefits from a wide range of user-generated content and therefore users are constantly exposed to new content. If users do not like the content shown on TikTok, they just scroll to the next video. This contrasts with Netflix content discovery. While being highly personalised, consumers still must actively search for new titles and review them, which increases the risk of losing the user (Gomez-Uribe and Hunt 2015). The industry expert emphasised the need of Netflix and other streaming platforms to find innovative and more engaging ways on how users explore content (Expert 1).

The PM analysis revealed differences between genders for the platform RTL+. This suggests that female have a more favourable view of RTL+ than male. For instance, RTL+ is less relevant, less prestigious, less entertaining and less top-of-mind to male than to female. This finding aligns with consumer interviews, which revealed scepticism among male users toward streaming services from RTL+. Findings of the interviews exposed too limited occasions such as football matches to use these services. Other contents besides sports are perceived as irrelevant and to be of poor quality, contributing to the lower perception of males. Although RTL+ has secured rights to stream high-profile sports content such as the UEFA Europa League, UEFA Conference League or UEFA Nations League (RTL+ n.d.b), RTL+ may not communicate or integrate its sports offerings into its overall content strategy enough.

Another interesting pattern from PM was be observed regarding streaming frequency and average watch time. The findings suggest that heavy users, in terms of frequency and average watch time perceive RTL+ and Joyn more favourably than lighter users. A possible reason may be that daily streamers engage more frequently with the platform and thus are more familiar with the platform and its offerings. The relationship between streaming frequency and more favourable perceptions is also consistent with the study by Dwivedi (2015), who observed that higher engagement with a brand enhances user loyalty intentions. This tendency is also seen with CA. Even though RTL+ and Joyn score consistently negative across all streaming frequency levels, rare users rated local platforms the lowest and Netflix the highest. This highlights Netflix's universal appeal and strength in retaining even infrequent users. CA furthermore highlights that while among frequent users (daily and serval times a week) content type is preferred over price, for less frequent users (weekly or rarely) price gains importance.

6.4 Summary

The thesis' overall aim was to answer the following research question: *What are the factors driving consumer perceptions and preferences in the German VOD streaming market, and how can private TV providers adapt their services to keep up with international players?*

The preliminary interviews with industry experts and consumers revealed content, price and the user experience of the service as most important to German users. Platforms benefit from content variety and exclusivity as well as transparent and flexible pricing models. Further personalised recommendation systems were highly valued. Experts predict live streaming, especially for sports content, and AI and social interaction features as new trends to attract users.

Results of factor analysis revealed two dimensions that shape how German consumers perceive VOD streaming services: individuality and reputation. The resulting PM provided key insights into the perceptions of VOD services in Germany. Netflix emerged as the leader, being perceived as highly reputable and individual. Disney+ followed with moderate scores for both reputation and individuality, aligning more closely with Netflix than other platforms, as both have a clear focus on entertainment offerings. Amazon Prime Video was perceived as lacking differentiation due to its wide range of different offers and having a neutral reputation. RTL+ scored high on Individuality thanks to its strong association with entertainment. Other TV provider operating or entering the VOD streaming market could learn from this and leverage on being entertaining. Joyn had the least favourable location on the map, reflecting a less differentiable and reputable service. Thus, while existing studies focus on functional attributes, brand-related attributes that focus on emotional value should not be underestimated.

Furthermore, CA identified Joyn and RTL+ to have the lowest brand preference. It further indicates that overall content type, price and content origin are the most important and decisive factors. For the VOD platforms of private TV providers, consumers prefer local and international

content and perceive especially offers with movies, series and documentaries positively. As for feature-related attributes, consumers prefer a content-based filtering system for these TV providers, favouring recommendations based on their previously watched content. Therefore, CA findings partly confirmed developed streaming personas and existing research but identified price and content type as universal drivers for VOD consumers.

The demographic and behaviour analyses highlighted differences between PM and CA across variables. PM revealed gender differences for RTL+, with female users perceiving it more favourably. CA, however, displayed no major differences for gender but for age, with younger users being the only age groups that rated RTL+ positively. In contrast, older groups showed negative attitudes towards local platforms. Moreover, PM revealed that for behavioural variables such as streaming frequency and average watch time, higher engagement leads to more positive perceptions of local platforms on distinct attributes. CA suggested the same tendency. As frequency decreases, the preferences towards local brands decrease as well.

Overall, the results indicate that currently, international players serve German consumer's expectations best. However, findings from the Joyn survey highlight a strong appreciation for the platform's local content, live TV integration and freemium business model, yet Joyn shows a low brand reputation, limited content offering and differentiation, and inferior technical performance. To improve its position, Joyn must continue to innovate by leveraging partnerships, embracing cultural trends, and combining live TV, premium streaming, and interactive features to meet the evolving demands of its audience.

6.5 Managerial Implications

The findings from this thesis provide strong evidence of what consumers value and where local platforms, represented by Joyn and RTL+ fall short. The following managerial implications provide actionable strategies for private TV providers to close the gap to international players in

the German streaming market by increasing the CLV and attracting new consumers. For practical implications, the four *P's of marketing* by Jerome McCarthy (1960) – product, price, place and promotion – are used.

Product. The product should be at the centre of any streaming platform strategy. German private TV providers should offer a mix of local and international content on their platforms, yet make their local offerings their competitive advantage, given the challenges of competing with global players on international content. The streaming services of TV providers need to remain aligned with their established television programming and strategic positioning, ensuring consistency and reinforcing their brand identity. It is recommended to invest in R&D to ensure consumer's streaming interests and consumer feedback is incorporated early in the production process. Exclusive local productions, national live events including sports, comedy shows and documentaries possess an advantage for private TV providers against international players that mainly guarantee global on-demand content. It is further recommended for local platforms to leverage on and prioritise entertaining content as entertainment motivations are the strongest drivers of subscription and continuation intentions (Menon 2022; Elsafty and Bodgdady 2022).

Furthermore, it is advised for private TV platforms to improve their user interface as technological factors like convenient navigability and system quality are baseline expectations and drivers for user satisfaction and retention, yet global players lead innovation. Further investments into personalisation systems will help providers to better align their content offerings with the users' wishes and self-identification, thereby reinforcing emotional attachment to the platform and enhancing customer lifetime value (Walsh and Singh 2022; Blattberg, Malthouse, and Neslin 2009). Modular platform architectures can be used so that the algorithms can create even better personalised offers (Dai 2023). Local platforms can further consider investing in new technologies and social interaction features to make their platform more interactive and engaging by integrating

ratings, live chats and watch parties within their platform. This could allow local platforms to foster a sense of community and be more innovative.

Price & Place. German consumers, while valuing quality, are also price-sensitive. However, the competitive streaming landscape is shaped by premium prices of international players. Local providers can compete effectively by adopting a pricing strategy that balances affordability with perceived value. For instance, offering tiered subscription plans can cater to diverse consumer segments. TV providers should offer a freemium with a free (ad-supported) tier that attracts price-sensitive users and a premium tier for more exclusive content, download features and without advertisements to appeal to affluent customers. Offerings at different price points with several added-on services increase the perceived value of the product (Bakos and Brynjolfsson 1999). Based on CA results, a price for premium tiers at 6.99 € is recommended.

Bundling services can also enhance the perceived value of the platform. Collaborations with other local platforms or internet service providers and mobile networks to offer discounted or free subscriptions as part of broader service packages can also increase market penetration. Further, forming national TV alliances presents an opportunity for private TV providers to have an impact on international competition by increasing accessibility through a universal platform (Böhm et al. 2018; Telkmann 2023).

Promotion. Promotional activities are key to improve brand reputation. As mentioned before, national TV alliances are recommended to enhance reputation and increase visibility. For a TV provider competing in Germany, promotional efforts should emphasise the unique strengths of the platform. Highlighting cultural proximity and exclusive (live) content can enhance emotional bonding to the service. Lastly, community-driven marketing initiatives can help local platforms build emotional connections by enabling user interaction with the platform. Features like fan voting

and polls, live chats and behind-the-scenes content foster active participation and drive deeper engagement.

6.6 Limitations and Implications for Future Research

This research sheds light on consumer perceptions and preferences in the German VOD streaming market, offering significant insights. However, it is important to recognise the thesis' limitations, which might affect the broader applicability of its conclusions. Future research could expand upon these findings or investigate unexplored dimensions to fill the gaps that this thesis leaves unattended.

Firstly, the scope of this thesis was limited, as it only focused on five players in the German market, including the largest international providers and local platforms from the privately-owned TV networks, RTL Group and ProSiebenSat.1. However, this selection did not mirror the entire market, excluding YouTube as well as public broadcaster media libraries, sports streaming platforms such as DAZN and Sky, and other local services like MagentaTV. Therefore, future research that incorporates a broader range of players, including emerging ones, could provide additional insights and validate or challenge the conclusions of this thesis. Given the streaming industry's rapidly shifting trends and technological advancements, the thesis' findings risk becoming outdated as the market continues to evolve. Therefore, continued research focused on the German market is encouraged. Placing greater emphasis on emerging trends, such as social interactive features could provide further insights. Additionally, due to the limited availability of research specific to Germany, insights from culturally distinctive markets like India and the US were used for comparison. Research on countries with cultural and market similarities to Germany such as Austria or the UK could further enhance and validate the findings of this thesis.

For the qualitative research part, it needs to be mentioned, that the analysis of the qualitative preliminary interviews is shaped by the researcher’s subjective perspectives and may lead to

potential biases in the findings (Mwita 2022). Furthermore, qualitative interviews "[have] limited scope in its generalisability" (Mwita 2022, 618). Thus, the insights drawn from the five industry experts could be significantly enriched by a broader range of experts. Views of other stakeholders, such as the leading player Netflix or a public TV provider, ARD or ZDF, would further enrich the analysis to become even more comprehensive and multi-dimensional. In the same way, a larger sample size in consumer interviews would also have provided better generalisability of the findings to the population (Mwita 2022).

It should be further noted that there are several limitations affecting the consumer perception and consumer preference research parts. Although both studies comprised a sample size of 115 and 121, which were sufficient for the analysis, larger and more representative samples would enhance the generalisability of the findings. Due to the limited sample size, low-quality responses had to be included in the CA to ensure sufficient data for analysis, potentially affecting result accuracy. Another limitation is identified in the convenience sampling method. Although this sampling method allowed to recruit conveniently survey participants, this sample is not representative of the German population, and it is not possible to generalise findings to the German market. Certain respondent groups were underrepresented, making the findings preliminary and not widely generalisable. For instance, the distribution of gender in the consumer perception survey was very unbalanced. Moreover, the groups of individuals aged 55+, individuals being retired from work, individuals streaming weekly or a few times a month and the group of streaming less than 1 hour per sitting, were all underrepresented in the consumer perception part. This is mainly attributable to the removal of numerous responses, as not all participants demonstrated familiarity with all platforms. It was prioritised to avoid participants rating platforms they had no knowledge about or no experience with. Future surveys should aim for larger samples that encompass a well-balanced representation of all demographic and behavioural groups and the German population.

Moreover, the category ‘other’ was included as a potential response for the occupation status, which does not provide sufficient detail about the actual occupation. Future studies should provide a text field that allows individuals who do not belong to other categories to specify their occupation. Additionally, the survey asked for monthly spendings on streaming services, but did not consider how many streaming services, which makes it hard to interpret the results or compare spending habits. Ultimately, this meant that the collected data of monthly spending on VOD streaming platforms was not complete, which led to it being removed from the analysis. This presents an opportunity for future exploration. Additionally, gathering further demographic data across all research parts, such as education level, relationship status, and income would have enriched the thesis’ findings and is recommended for future research.

Furthermore, certain limitations regarding the consumer perception’s part need to be addressed. One limitation emerges in the selection of attributes. Despite the careful selection of attributes and platforms, they remained constant from one consumer to another which presents potential challenges. Certain attributes or platforms a more relevant to some consumers than to others. Consequently, individuals lacking sufficient knowledge or experience of certain attributes or platforms may encounter difficulties in providing meaningful ratings, which could result in less reliable data (Bijmolt and van de Velden 2012). It would be beneficial for future studies to conduct a preliminary survey in which participants indicate the platforms they use and which attributes they prioritise. This would help to avoid missing out on relevant attributes or platforms or including irrelevant ones. A further limitation is evident regarding the regression analysis. The analysis focused on differences in comparison to the reference group (e.g. 25-34) for each variable. Consequently, differences between other groups (e.g. 18-24 and 35-54) were not analysed, potentially overlooking patterns. Therefore, future research should look at comparisons between

all sub-groups to gain a more comprehensive understanding of the differences across the different demographic and behavioural segments.

Another limitation regarding the CA lies in the observed preference for free services with ads for price, along with a clear preference for ad-free services. While these results make sense when analysed individually, their nature makes them exclusive, meaning customers cannot get both making it harder to draw conclusions. Future research could combine both price and advertisements as one attribute and include hybrid options like "Minimal Ads at $3.99" to better reflect real-world offerings.

Lastly, regarding the Case Study Survey about Joyn a couple of limitations emerge, namely the small sample size and the absence of qualitative consumer interviews. The sample size of 103 respondents is relatively small, and only 80 participants had experience using Joyn, limiting the overall representativeness of the findings. Larger and more representative samples would enhance the generalisability of the findings. On the other hand, while the survey captured broad tendencies, qualitative interviews would have allowed a deeper understanding of users' perceptions and experiences with the platform. Future research should continue to look more closely at Joyn, while qualitative methods could help to explore these dimensions in greater depth.

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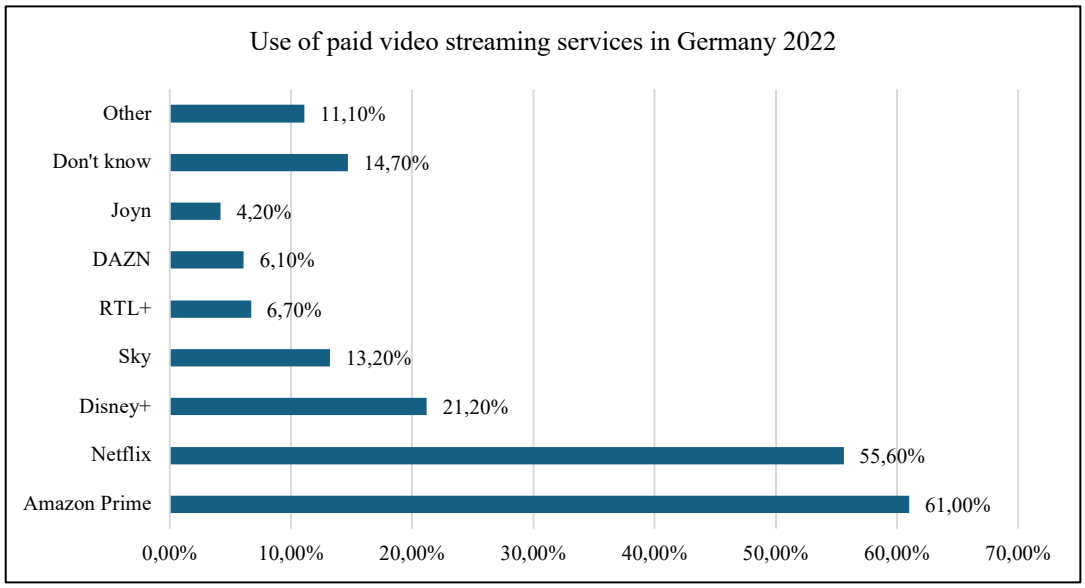
Appendices

Appendix 1: Use of Paid VOD Services in Germany (2022)



Source: *W&V.2022. "Which of these paid streaming services do you use?" Statista. June 22, 2022.* *https://www.statista.com/statistics/1385089/paid-video-streaming-services-use-germany/*.

Appendix 2: Questions from the Consumer Perception Survey

Dear Participant,
Thank you for taking the time to participate in this survey. This survey is part of a master's thesis written by five students at Nova School of Business and Economics. The purpose of this study is to understand consumer perceptions of video-on-demand streaming services in the German market.
All answers will remain anonymous and all information you provide will be used for research purposes only. It will take approximately 5-7 minutes to complete.
If you have any questions or concerns regarding this study, please contact 57503@novasbe.pt
P. S: This survey contains credits to get free survey responses at SurveySwap.io

SECTION 1: PRE - SCREENING	
Are you German or do you currently live in Germany?	Yes / No
Have you ever used any video-on-demand streaming service platform?	Yes / No
Which of the following video streaming platforms do you currently use or have used in the past? (Select all that apply)	○ Netflix ○ Amazon Prime Video ○ Disney+ ○ Joyn ○ RTL+
SECTION 3: CONSUMER PERCEPTIONS In this section, you will be asked to rate different streaming services on certain attributes. For each attribute, you'll rate each platform on a scale of 1 to 5, where 1 means you perceive the platform to be very low in that attribute and 5 means you perceive it to be very high.	
How **competent** (kompetent) do you perceive these brands to be?	1-Not competent at all 3-Neutral 5-Very competent
How **up to date** (zeitgemäß) do you perceive these brands to be?	1-Not up to date at all 3-Neutral 5-Very up to date

How **authentic** (authentisch) do you perceive these brands to be?	1-Not authentic at all 3-Neutral 5-Very authentic
How **family-oriented** (familienfreundlich) do you perceive these brands to be?	1-Not family-oriented at all 3-Neutral 5-Very family-oriented
How **reliable** (zuverlässig) do you perceive these brands to be?	1-Not reliable at all 3-Neutral 5-Very reliable
How **unique** (einzigartig) do you perceive these brands to be?	1-Not unique at all 3-Neutral 5-Very unique
How **top-of-mind** (präsent) do you perceive these brands to be?	1-Not top-of-mind at all 3-Neutral 5-Very top-of-mind
How **entertaining** (unterhaltsam) do you perceive these brands to be?	1-Not entertaining at all 3-Neutral 5-Very entertaining
How **trustworthy** (vertrauenswürdig) do you perceive these brands to be?	1-Not trustworthy at all 3-Neutral 5-Very trustworthy
How **innovative** (innovativ) do you perceive these brands to be?	1-Not innovative at all 3-Neutral 5-Very innovative
How **recommendable** (empfehlenswert) do you perceive these brands to be?	1-Not recommendable at all 3-Neutral 5-Very recommendable
How **prestigious** (angesehen) do you perceive these brands to be?	1-Not prestigious at all 3-Neutral 5-Very prestigious
How **credible** (glaubwürdig) do you perceive these brands to be?	1-Not credible at all 3-Neutral 5-Very credible
How **transparent** (transparent) do you perceive these brands to be?	1-Not transparent at all 3-Neutral 5-Very transparent
How **relevant** (relevant) do you perceive these brands to be?	1-Not relevant at all 3-Neutral 5-Very relevant
How **commercial** (kommerziell) do you perceive these brands to be?	1-Not commercial at all 3-Neutral 5-Very commercial
How **established** (etabliert) do you perceive these brands to be?	1-Not established at all 3-Neutral 5-Very established
Section 4: DEMOGRAPHIC QUESTIONS	
What is your age?	o Under 18 o 18-24 o 25-34 o 35-44 o 45-54 o 55-64 o Over 65
By what gender do you identify?	o Female o Male o Non-binary o Prefer not to say
What is your current occupation?	o Student o Student (with working job or intern) o Young professional (1-5 years of experience) o Professional (6-10 years of experience) o Senior professional (plus 10 years of experience) o Retired from work o Other
How often do you use video-on-demand streaming platforms?	o Daily o Several times a week

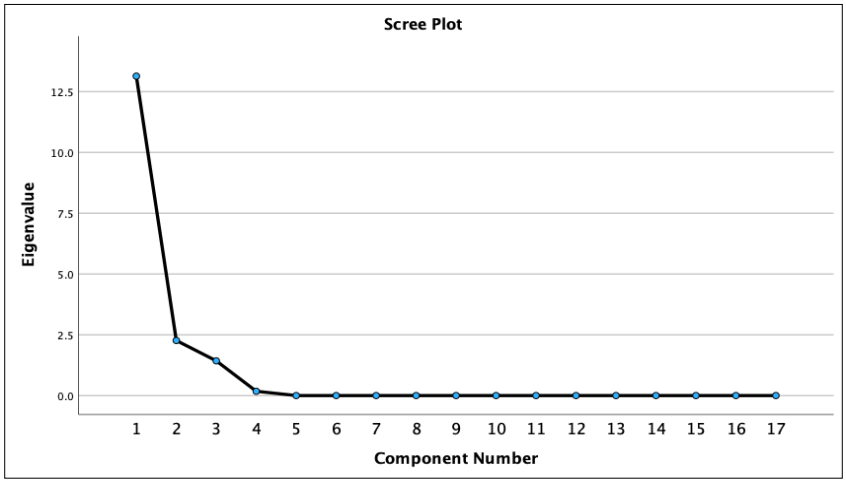
	○ Weekly ○ A few times a month ○ Rarely
How many hours do you typically spend streaming in one sitting?	○ Less than 1 hour ○ 1-2 hours ○ 3-4 hours ○ 5+ hours
How much money do you spend per month for video-on-demand streaming platforms?	○ 0€ - 5€ ○ 6€ - 10€ ○ 11€ - 15€ ○ 16€ - 20€ ○ 21€ - 25€ ○ 26€ - 30€ ○ More than 30€

Appendix 3: Mean Values for each Attribute per Platform

Attribute	Netflix	Amazon Prime Video	Disney+	Joyn	RTL+
Competent	4.10	3.54	3.83	3.17	3.76
Up to date	4.16	3.50	3.91	3.49	4.02
Authentic	3.80	3.31	3.88	3.32	3.85
Family-oriented	4.02	3.31	4.80	2.46	2.50
Reliable	4.17	3.83	4.19	3.26	3.43
Unique	3.64	3.01	3.93	3.10	3.73
Top-of-mind	4.30	3.43	3.50	2.67	3.95
Entertaining	4.04	3.27	3.85	3.22	4.30
Trustworthy	3.99	3.62	3.99	3.38	3.66
Innovative	3.79	3.04	3.43	3.00	3.49
Recommendable	4.11	3.26	3.86	2.94	3.94
Prestigious	4.54	3.58	3.97	2.49	3.43
Credible	3.81	3.35	3.70	3.17	3.33
Transparent	3.21	3.00	3.27	3.01	3.23
Relevant	4.12	3.33	3.48	2.72	3.65
Commercial	4.06	3.90	3.74	3.43	3.80
Established	4.66	3.94	3.84	2.59	3.55

***Source**: Author calculations.*

Appendix 4: Scree Plot



***Source**: Author calculations.*

Appendix 5: Communalities of the Three-Factor Solution

Communalities	
	Extraction
Competent	1.000
Up to date	0.975
Authentic	0.995
Unique	0.993
Top of mind	0.998
Entertaining	0.993
Trustworthy	1.000
Innovative	0.937
Prestigious	1.000
Credible	0.964
Transparent	0.994
Relevant	1.000
Commercial	0.983
Established	0.998
Family	0.998
Reliable	0.999
Recommendable	0.998

***Source**: Author calculations.*

Appendix 6: Factor Loadings of Unlimited and Unrotated Factor Solution

	Component		
	1	2	3
Competent	0.993	0.058	-0.103
Recommendable	0.971	-0.225	-0.068
Relevant	0.945	0.056	-0.322
Trustworthy	0.943	0.205	0.260
Innovative	0.940	-0.203	-0.112
Prestigious	0.936	0.346	-0.060
Up to date	0.922	-0.343	-0.087
Credible	0.906	0.297	0.237
Top-of-mind	0.905	-0.037	-0.420
Authentic	0.866	-0.450	0.205
Established	0.858	0.447	-0.247
Transparent	0.852	-0.432	0.285
Unique	0.805	-0.447	0.380
Entertaining	0.804	-0.568	-0.154
Commercial	0.781	0.393	-0.467
Reliable	0.776	0.560	0.290
Family-oriented	0.672	0.465	0.574

***Source**: Author calculations.*

Appendix 7: Factor Loadings of Unrotated Two-Factor Solution

	Component	
	1	2
Competent	0.993	0.058
Recommendable	0.971	-0.225
Relevant	0.945	0.056
Trustworthy	0.943	0.205
Innovative	0.940	-0.203
Prestigious	0.936	0.346
Up to date	0.922	-0.343
Credible	0.906	0.297
Top-of-mind	0.905	-0.037
Authentic	0.866	-0.450

Established	0.858	0.447
Transparent	0.852	-0.432
Unique	0.805	-0.447
Entertaining	0.804	-0.568
Commercial	0.781	0.393
Reliable	0.776	0.560
Family.oriented	0.672	0.465

***Source**: Author calculations.*

Appendix 8: Factor Loadings of Two-Factor Solution (Varimax Rotation)

	Component	
	1	**2**
Entertaining	0.972	0.155
Authentic	0.935	0.283
Transparent	0.912	0.285
Up to date	0.899	0.398
Unique	0.889	0.242
Recommendable	0.852	0.517
Innovative	0.815	0.511
Top-of-mind	0.674	0.605
Reliable	0.165	0.942
Established	0.303	0.919
Prestigious	0.428	0.902
Credible	0.441	0.845
Commercial	0.285	0.827
Trustworthy	0.532	0.805
Family-oriented	0.157	0.803
Competent	0.670	0.735
Relevant	0.637	0.700

***Source**: Author calculations.*

Appendix 9: Factor Loadings of Two-Factor Solution (Direct Oblimin Rotation)

	Component	
	1	**2**
Competent	0.993	0.051

Recommendable	0.972	-0.232
Relevant	0.944	0.049
Trustworthy	0.942	0.198
Innovative	0.941	-0.210
Prestigious	0.934	0.340
Up to date	0.924	-0.350
Top-of-mind	0.906	-0.044
Credible	0.904	0.290
Authentic	0.869	-0.456
Established	0.856	0.441
Transparent	0.855	-0.439
Unique	0.808	-0.453
Entertaining	0.808	-0.574
Commercial	0.779	0.387
Reliable	0.772	0.554
Family-oriented	0.669	0.460

***Source**: Author calculations.*

Appendix 10: Demographic Profiles of the Respondents

Variable	Frequency	Percent
Gender		
Female	99	86%
Male	15	13%
Prefer not to say	1	1%
Total	115	100%
Age		
Under 18	0	0%
18-24	33	29%
25-34	59	51%
35-44	16	14%
45-54	6	5%
55-64	1	1%
65 and over	0	0%
Total	115	100%

Occupation status		
Student	12	10%
Student (with working job or intern)	25	22%
Young Professional (1-5 years of experience)	19	17%
Professional (6-10 years of experience)	22	19%
Senior Professional (plus 10 years of experience)	24	21%
Retired from work	2	2%
Other	11	10%
Total	115	100%

***Source**: Author calculations.*

Appendix 11: Behavioural Profiles of the Respondents

Behavioural characteristics	Frequency	Percent
Streaming frequency		
Daily	77	67%
Several times a week	34	30%
Weekly	1	1%
A few times a month	3	3%
Rarely	0	0%
Total	115	100%
Average viewing time (per sitting)		
Less than 1 hour	3	3%
1-2 hours	70	61%
3-4 hours	35	30%
5+ hours	7	6%
Total	115	100%
Monthly spend		
0€ - 5€	2	2%
6€ - 10€	15	13%
11€ - 15€	18	16%
16€ - 20€	15	13%
21€ - 25€	21	18%
26€ - 30€	18	16%
More than 30€	26	23%
Total	115	100%

***Source**: Author calculations.*

Appendix 12: Communalities of the Two-Factor Solution

Communalities	
	Extraction
Competent	0.989
Up to date	0.967
Authentic	0.953
Unique	0.848
Top-of-mind	0.821
Entertaining	0.969
Trustworthy	0.932
Innovative	0.925
Prestigious	0.996
Credible	0.908
Transparent	0.913
Relevant	0.896
Commercial	0.765
Established	0.936
Family-oriented	0.669
Reliable	0.915
Recommendable	0.993

***Source**: Author calculations.*

Appendix 13: Correlation Matrix

Correlation Matrix																		
		Competent	**Uptodate**	**Authentic**	**Unique**	**Topofmind**	**Entertaining**	**Trustworthy**	**Innovative**	**Prestigious**	**Credible**	**Transparent**	**Relevant**	**Commercial**	**Established**	**Family**	**Reliable**	**Recommendable**
Correlation	**Competent**	1,000	0,904	0,813	0,735	0,940	0,781	0,922	0,933	0,956	0,892	0,792	0,975	0,847	0,904	0,636	0,773	0,958
	Uptodate	0,904	1,000	0,924	0,848	0,876	0,936	0,774	0,986	0,748	0,742	0,896	0,882	0,606	0,652	0,403	0,492	0,970
	Authentic	0,813	0,924	1,000	0,983	0,719	0,927	0,779	0,866	0,644	0,686	0,997	0,726	0,413	0,495	0,494	0,482	0,932
	Unique	0,735	0,848	0,983	1,000	0,591	0,851	0,768	0,784	0,577	0,670	0,994	0,612	0,287	0,401	0,555	0,487	0,860
	Topofmind	0,940	0,876	0,719	0,591	1,000	0,818	0,738	0,893	0,860	0,700	0,672	0,988	0,895	0,867	0,352	0,562	0,919
	Entertaining	0,781	0,936	0,927	0,851	0,818	1,000	0,603	0,868	0,566	0,507	0,894	0,776	0,488	0,479	0,192	0,264	0,923
	Trustworthy	0,922	0,774	0,779	0,768	0,738	0,603	1,000	0,813	0,939	0,975	0,790	0,819	0,698	0,838	0,880	0,922	0,852
	Innovative	0,933	0,986	0,866	0,784	0,893	0,868	0,813	1,000	0,814	0,812	0,837	0,917	0,675	0,732	0,462	0,575	0,954
	Prestigious	0,956	0,748	0,644	0,577	0,860	0,566	0,939	0,814	1,000	0,935	0,631	0,923	0,897	0,973	0,757	0,903	0,835
	Credible	0,892	0,742	0,686	0,670	0,700	0,507	0,975	0,812	0,935	1,000	0,695	0,799	0,689	0,842	0,875	0,931	0,787
	Transparent	0,792	0,896	0,997	0,994	0,672	0,894	0,790	0,837	0,631	0,695	1,000	0,688	0,373	0,472	0,538	0,504	0,909
	Relevant	0,975	0,882	0,726	0,612	0,988	0,776	0,819	0,917	0,923	0,799	0,688	1,000	0,909	0,915	0,475	0,670	0,926
	Commercial	0,847	0,606	0,413	0,287	0,895	0,488	0,698	0,675	0,897	0,689	0,373	0,909	1,000	0,968	0,445	0,695	0,708
	Established	0,904	0,652	0,495	0,401	0,867	0,479	0,838	0,732	0,973	0,842	0,472	0,915	0,968	1,000	0,645	0,846	0,752
	Family-oriented	0,636	0,403	0,494	0,555	0,352	0,192	0,880	0,462	0,757	0,875	0,538	0,475	0,445	0,645	1,000	0,950	0,511
	Reliable	0,773	0,492	0,482	0,487	0,562	0,264	0,922	0,575	0,903	0,931	0,504	0,670	0,695	0,846	0,950	1,000	0,609
	Recommendabl	0,958	0,970	0,932	0,860	0,919	0,923	0,852	0,954	0,835	0,787	0,909	0,926	0,708	0,752	0,511	0,609	1,000

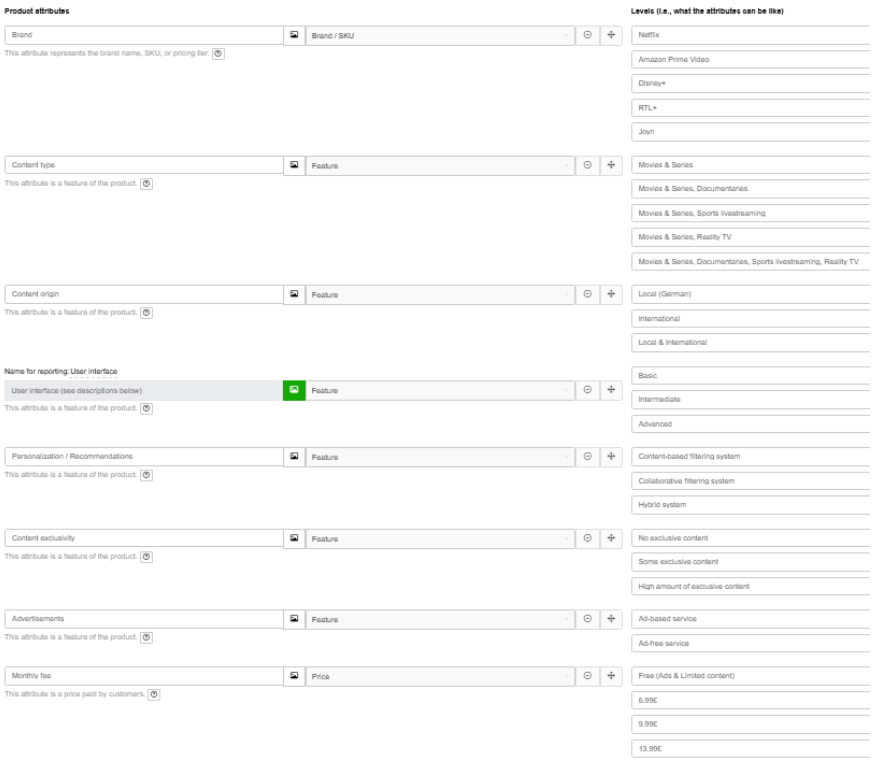
***Source**: Author calculations.*

Appendix 14: Coordinates of VOD Streaming Services in the Perceptual Map

	Individuality	Reputation
Netflix	0.862	1.219
Amazon Prime Video	-0.998	0.021
Disney+	0.524	0.569
Joyn	-1.171	-1.431
RTL+	0.784	-0.377

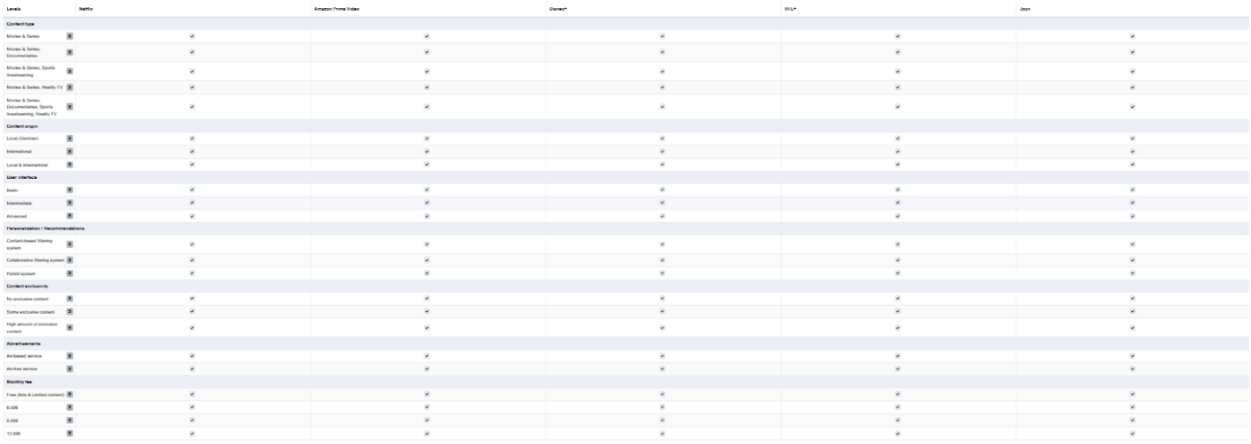
***Source**: Author calculations.*

Appendix 15: Attributes and Levels Overview



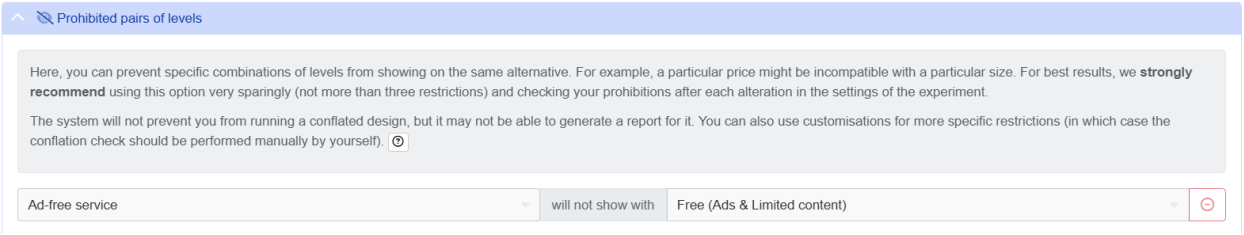
***Source**: Conjoint.ly*

Appendix 16: Brand and Level Combinations



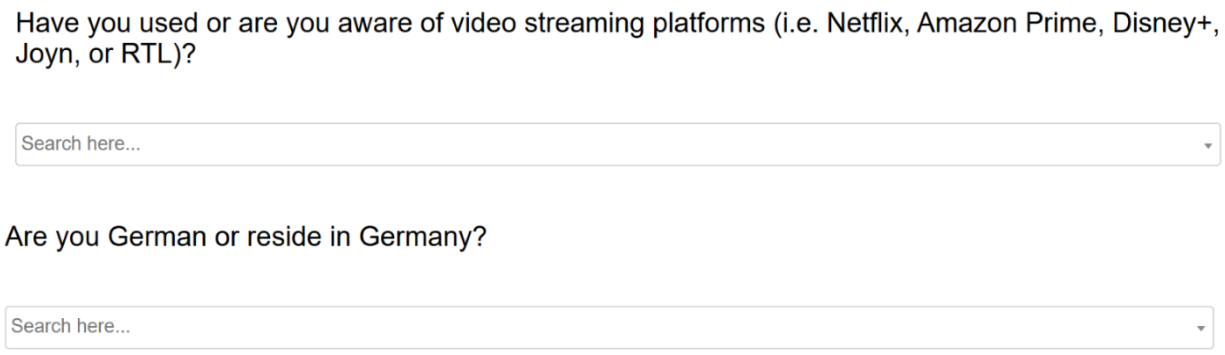
***Source**: Conjoint.ly*

Appendix 17: Prohibited Level Combinations



***Source**: Conjoint.ly*

Appendix 18: Additional Questions



What is your age?

Under 18	18-24	25-34
35-44	45-54	55-64
Over 65		

By what gender do you identify?

Female	Male	Non-binary
Prefer not to say		

What is your current occupation?

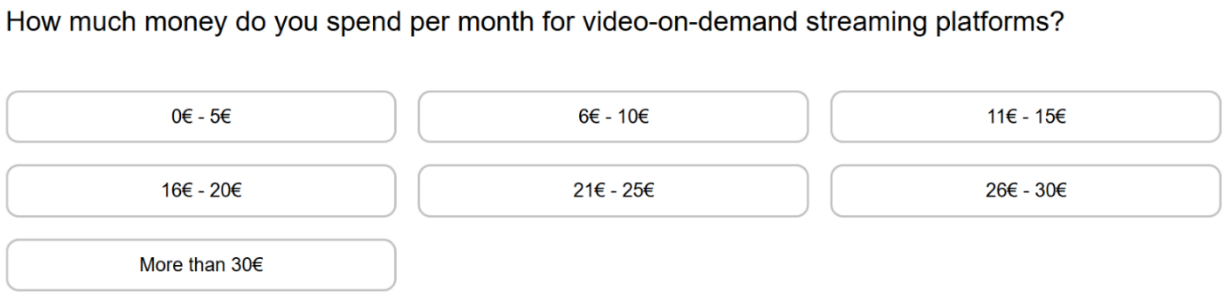
Student	Student (with working job or intern)	Young professional (1-5 years of experience)
Professional (6-10 years of experience)	Senior Professional (10+ years of experience)	Retired
Specify		

How often do you use video-on-demand streaming platforms?

Daily	Several times a week	Weekly
A few times a month	Rarely	

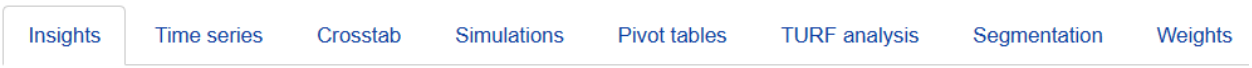
How many hours do you typically spend streaming in one sitting?

Less than 1 hour	1-2 hours	3-4 hours
5+ hours		



***Source**: Conjoint.ly*

Appendix 19: Report Tabs Conjoint.ly



***Source**: Conjoint.ly*

Appendix 20: Questionnaire Joyn and the Future of Digital Entertainment

Description:

Welcome to our survey!
We are Master's students from Nova SBE, currently conducting research for our thesis on **streaming service preferences and improvements**. This brief survey focuses on ***Joyn*** and its premium tier, ***Joyn PLUS+***, to better understand your experiences and expectations. Your feedback will provide valuable insights into how streaming services can enhance viewer satisfaction. Thank you for contributing to our academic research!

Difference between Joyn & Joyn PLUS+
Joyn offers a blend of live TV and on-demand content accessible for free, targeting viewers who enjoy a variety of programming without a subscription fee.

Joyn PLUS+, on the other hand, is a premium subscription service that enhances the viewing experience by providing additional exclusive content, ad-free streaming, and higher quality video options, catering to users looking for a more comprehensive and elevated media experience.

Questions:

1. **Are you German or do you currently live in Germany?**
   - Yes
   - No (ends with No)
2. **Do you have experience with Joyn?**
   - Yes I am currently using it *(jumps to question 2)*
   - Yes I have used it in the past *(jumps to question 2)*
   - No I have never used it *(jumps to question 3)*
3. **If you have never tried Joyn, could you share what has prevented you from using it?**

   Open question
4. **What could Joyn offer that would motivate you to start using it?**

   Open question

5. **On a scale from 1 to 5, where 1 is 'very unsatisfied' and 5 is 'very satisfied,' how would you rate your overall satisfaction with Joyn?**

   Scale 1-5

   - 1 being Very Unsatisfied
   - 5 being Very Satisfied

6. **What is or was your main reason for using Joyn?**

   Multiple selections possible:

   - It offers free content
   - It has local or regional content I enjoy
   - It has specific shows or movies I like
   - It's cheaper than other streaming platforms
   - It offers a good variety of content in my preferred genres I enjoy the user experience and app interface
   - Others:

7. **What kind of content attracted you to start using Joyn? (Please give specific titles, *e.g. "Jerks"*)**

   Open Question

8. **Which of the following would improve your experience with Joyn's reliability?**

   - I am satisfied with Joyn's reliability
   - Faster load times
   - Fewer streaming interruptions
   - Improved video quality
   - Better customer service when issues arise
   - Others:

9. **Do you think Joyn is unique? Please specify:**

   Open Question

10. **Do you think Joyn is entertaining? Please specify:**

    Open Question

11. **How do you feel about the commercials or ads on Joyn?**

    - They are too frequent
    - They are well balanced and don't interrupt too much
    - I don't mind the ads because the content is worth it
    - Others:

13. **What do you think Joyn does better than other streaming services?**

    - Local Content
    - International Content
    - User Interface
    - Pricing Options
    - Free Accessibility
    - Customer Service
    - Exclusive Originals
    - Sports Streaming
    - Live TV Integration
    - Multi-Device Streaming
    - Community Features
    - None Stand Out
    - Sonstiges:

14. **Where do you think it falls short? Are there any specific features on other streaming platforms that you would like to see implemented on Joyn? Please describe.**

    Open Question

15. What type of content do you feel is missing or underrepresented on Joyn?

    - I am satisfied with their content types
    - More movies
    - More international content
    - More kids/family-friendly content
    - More documentaries or educational content More sports content
    - More reality TV
    - Others:

16. **What would make Joyn's paid tier (Joyn Plus+) more appealing to you?** ***(As a Reminder,*** **Joyn** ***PLUS+ includes: additional exclusive content, ad-free streaming, and higher-quality video options)***

    - More Exclusive Content
    - Fewer Ads
    - Higher Quality Streamng
    - Better Device Support
    - Enhanced Download Capabilities Family or Group Plans
    - Live Sports and Events
    - Early Access to New Releases
    - Loyality Rewards
    - Interactive Content

16. **On a scale from 1 to 5, where 1 is 'Very poor value' and 5 is 'Excellent Value,' how do you consider the cost of Joyn compared to other services and how do you perceive the value for money?**

    Scale 1 to 5

    - 1 being Very Poor Value
    - 5 being Excellent Value

17. **How much are you willing to pay for Joyn?**

    - Nothing, I would only use the free version 6,99
    - 9,99
    - 13,99
    - Others:

18. **How Important are social interaction features such as commenting, live chats, and watch parties to you when using a streaming service like JOYN? Please rate their importance on a scale from 1 (not important) to 5 (very important)**

    Scale 1 to 5

    - 1 being Not Important at all
    - 5 being Very Important

19. **What are your expectations from Joyn in the future? What key changes or improvements would make you more likely to continue using Joyn?**

    Open question

<u>Demographic Questions</u>

20. **What is your age?**
    - Under 18
    - 18-24
    - 25-34

- 35-44
- 45-54
- 55-64
- Over 65

22. By what gender do you identify?

- Male
- Female
- Non- binary
- Prefer not so say it

23. What is your current occupation?

- Student
- Student (with working job or intern)
- Young professional (1-5 years of experience)
- Professional (6-10 years of experience)
- Senior professional (plus 10 years of experience)
- Retired from work
- Sonstiges:

24. How often do you use video-on-demand streaming platforms?

- Daily
- Several Times a Week
- Weekly
- A few times a month
- Rarely

25. How many hours do you typically spend streaming in one sitting?

- Less than 1 hour 1-2 hours
- 3-4 hours
- 5+ hours

26. How much money do you spend per month on video-on-demand streaming platforms?

- 0€ - 5€
- 6€ - 10€
- 11€ - 15€
- 16€ - 20€
- 21€ - 25€
- 26€ - 30€
- More than 30€

Appendix 21: Pre-Screening Questions

Variable	Frequency	Percent
Are you German or do you currently live in Germany?		
Yes	98	95%
No	5	5%
Total	103	100%
Do you have experience with Joyn?		
Yes, I have used it in the past	23	23%

Yes, I am currently using it	57	58%
No, I have never used it	18	18%
Total	98	100%

***Source**: Author calculations.*

Appendix 22: Reasons for not using Joyn (non-users)

Category	Frequency	Percent
If you have never tried Joyn, could you share what has prevented you from using it?		
Satisfaction with other streaming services	8	44%
No perceived need	4	22%
Lack of interest in the platform	3	17%
Unclear benefits of the platform	3	17%
Total	18	100%

***Source**: Author calculations.*

Appendix 23: Motivations to use Joyn (non-users)

Category	Frequency	Percent
What could Joyn offer that would motivate you to start using it?		
Free access	2	11%
Free trial	5	28%
HBO content	2	11%
More attractive movies and series	6	33%
More exclusive content	3	17%
Total	18	100%

***Source**: Author calculations.*

Appendix 24: Demographic profiles of the respondents

Variable	Frequency	Percent
Gender		
Female	57	71%
Male	23	29%
Prefer not to say	0	0%
Total	80	100%

Age		
Under 18	0	0%
18-24	22	27%
25-34	34	43%
35-44	14	17%
45-54	3	4%
55-64	7	9%
65 and over	0	0%
Total	80	100%

Occupation status		
Student	17	21%
Student (with working job or intern)	22	27%
Young Professional (1-5 years of experience)	18	23%
Professional (6-10 years of experience)	4	5%
Senior Professional (plus 10 years of experience)	17	21%
Retired from work	0	0%
Other	2	3%
Total	80	100%

***Source**: Author calculations.*

Appendix 25: Behavioural profiles of the respondents

Behavioural characteristics	**Frequency**	**Percent**
Streaming frequency		
Daily	36	45%
Several times a week	23	28%
Weekly	14	18%
A few times a month	7	9%
Rarely	0	0%
Total	80	100%

Average viewing time (per sitting)		
Less than 1 hour	0	0%
1-2 hours	46	58%

3-4 hours	31	38%
5+ hours	3	4%
Total	80	100%
Monthly spend		
0€ - 5€	21	26%
6€ - 10€	12	15%
11€ - 15€	2	3%
16€ - 20€	11	14%
21€ - 25€	16	20%
26€ - 30€	8	10%
More than 30€	10	12%
Total	80	100%

***Source**: Author calculations.*

Disclaimer: Utilization of Artificial Intelligence (AI)

To enhance the readability and language of this work project, ChatGPT and Gemini, AI tools developed by OpenAI and Google, were utilised during the preparation of this thesis. All produced content underwent meticulous review to confirm its precision and conformity with academic standards and the Nova SBE guidelines.

The five authors bear full responsibility for the content of this thesis, including how results are interpreted and the conclusions drawn. AI usage complied with Nova SBE's ethical and academic standards.