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EXPLORING EUROPEAN CONSUMERS' PERCEPTIONS AND PREFERENCES OF MUSIC STREAMING SERVICES – REVIEWING CURRENT LITERATURE ON CONSUMER ATTITUDES AND BEHAVIOUR

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Group Part

Abstract

In a market characterised by content homogeneity and where attraction is crucial, music streaming services must innovate to differentiate and enhance premium offerings. This study analyses European consumer perceptions and preferences, focusing on factors influencing platform choice and interest in trends like AI integration and live experiences. The literature review highlights the shift from ownership to access, the role of psychological ownership, perceived value, and social influence, and the impact of freemium models and AI-driven personalization on engagement and loyalty. Findings provide insights for platforms to refine user experience and remain competitive through price strategies, brand positioning, and feature innovation.

Keywords: Market Research, Expert Interviews, Perceptual Map, Conjoint Analysis, Consumer Preferences, Consumer Perception**,** Music Streaming Platforms, European Market

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Table of Content

Group Part

Group Part

1. Introduction

Subscription-based business models, which offer continuous access to products or services for recurring fees, have redefined consumer engagement and revenue generation driven by evolving consumer preferences and technological advancements (Forbes Business Council 2024). European consumers, in particular, have shown a growing interest towards subscription-based models despite having a lower average number of subscriptions (3.2) compared to Americans (4.5) (Tongue 2024a). Related to this model, particular attention is given to the rise of streaming services, driven by increasing internet access and growing consumer demand for digital content. Characterised by their flexibility, vast content libraries, and affordability, these services have significantly transformed the global media and entertainment industry (Statista Research Department 2024). Music streaming services (e.g., Spotify, Apple Music, YouTube Music, etc.) have reshaped the way individuals access and enjoy music for millions of users worldwide. These services, both offering free and premium versions, have had significant influence on consumer listening habits, other than generating substantial revenue (Leu 2024). Unlike other streaming services, music platforms share almost identical tracks and artists, offering consumers similar listening experiences (Tongue 2024b). In addition, while the catalogue size may differ slightly between platforms in absolute numbers, track exclusivity is rare, thus, most songs are available across all platforms (Knox and Datta 2020). Music remains the core content on these platforms (Runcie 2019), and unlike video streaming (e.g., Netflix) which produce region-specific content (Harber-Lamond, Marshall 2024), music libraries and playlists are globally accessible without limited availability and geographical restrictions (Hansen 2024). These factors highlight the challenge of content homogeneity that these platforms face. In this regard, preliminary interviews with industry experts have revealed the emergence of new trends in artificial intelligence (AI) and

live experiences within the industry. These suggest the platforms' efforts to innovate and diversify (Tongue 2024) while also predicting future changes in the landscape of music consumption.

Consumer behaviour in music streaming platforms in Europe is a notable aspect worth analysing, as it differs significantly from that of other streaming services. Although 34% of European consumers subscribe to music services, compared to 70% for video streaming platforms (Tongue 2024a), they are four times less likely to switch between music streaming platforms compared to video services and tend to use only one music platform (Shaw 2024). These statistics suggest a strong consumer loyalty within the music industry, which is additionally highlighted by Spotify's status as a key competitor to Netflix. Spotify has maintained a low monthly churn rate of 2% throughout the year (Shaw 2024). Additionally, in 2023, Europe was the second-largest region in terms of revenues for the recorded music industry (IFPI 2024). Therefore, the combination of revenue impact and growing interest in subscriptions make European consumers a compelling demographic to investigate. A noteworthy aspect concerns Spotify, which plays a dominant role in the European market, holding more than 50% market share, compared to 30% globally (Apple 2024). As of 2024, Europe represents Spotify's largest regional market for premium subscribers, accounting for 38% of its total premium subscriber user base (BlackLinko Team 2024). This is particularly relevant given that music streaming services, such as Spotify, often operate on a freemium model, offering free access to music alongside a premium, paid subscription. Despite the growing prominence of the industry, however, existing literature has mostly explored issues related to piracy, royalties, artist revenue, and the broader industry, with limited attention given to consumer perception and platform choice (Sinclair and Green 2016).

For these reasons, this study conducts an in-depth analysis of European consumers' behaviours, attitudes, and preferences, focusing mainly on factors influencing platform choice, with the

purpose of assessing how music streaming platforms can diversify and innovate. Specifically, it focuses on the core experience of music provided by these platforms, thus excluding non-music content (e.g., podcasts and audiobooks). Hence, the following research questions are addressed:

- W*hen every music streaming service has almost identical tracks and artists, how is each platform perceived and differentiated by European consumers?*
- *What attributes of music streaming platforms are valued the most by European consumers when selecting a platform?*

This work builds on theoretical input and empirical methods. Following the introduction, **Chapter 2** provides a market overview of the music streaming industry and its key players and **Chapter 3** reviews current literature on consumer behaviour in music streaming platforms. **Chapter 4** applies the perceptual map methodology to examine how platforms are perceived and market players' positioning whilst **Chapter 5** explores how consumers value different features of music services through conjoint analysis. Finally, **Chapter 6** discusses the main findings and draws managerial implications, limitations and suggestions for future research.

Findings from the perceptual map revealed that music streaming platforms differ by affordability, innovation, user experience, and niche appeal, while users prioritise broad content, intuitive experiences, and modern features. Moreover, the conjoint analysis identified price and listening features as key drivers of platform selection, with music recommendation and social interaction as secondary to the music experience.

2. Market Overview and Majors Players

2.1. Market Overview

In 2024, 67% of worldwide music industry revenue came from music streaming services, whereas physical sales only accounted for 16.1% (Duarte 2024). In 2023, the music streaming industry was valued at $41.52 billion (Howard 2024) and is expected to reach $104.09 billion by the end of 2032 – accounting for a compound growth rate of approximately 10.8% (Howard 2024). Music streaming platforms have experienced exponential revenue growth from 2005 to 2022, with the highest increases occurring from 2014 to 2015 and 2020 to 2021 (Duarte 2024; Figure 8 in Appendix). On June 30th, 2015, Apple Music was released (Rogès 2023), a potential cause for the revenue increase of $1.8 billion in music streaming. This impact illustrates that although Apple Music may not be the market leader (Leu 2024), it has played a key role in driving the rapid growth of the global market. Regarding the significant revenue growth in 2020, the COVID-19 global pandemic was undeniably the most impactful factor of that year. Forced into lockdown, consumers may have turned to music as an escape, as supported by studies showing that music can improve mood (Pfizer Medical Team 2023).

The advent of digital music distribution began with file-sharing services (i.e., Napster), which rapidly evolved into a major challenge for the recorded music industry in the late 20th and early 21st centuries (Parvez 2021). These services allowed millions of users to illegally download copies of songs, albums and even unreleased content. As a result, the music industry was severely damaged by depriving artists and record labels of rightful compensation (Parvez 2021).

The launch of Apple's iTunes and iPod in 2001 was revolutionary as digital music legally entered the marketplace. Both enabled users to not only "own" a musical file but also to organise and listen to their music in a personalised manner (Milano 2024). In turn, consumers could shuffle albums

and listen to any desired music genres. iTunes later launched its music store in 2003, which enabled customers to purchase songs for 99 cents (Milano 2024).

Online stores such as iTunes, however, were still an expensive solution as consumers had to buy their preferred music independently. This also failed to provide an effective solution to illegal downloads, as users continued to use websites to save their desired music content on personal devices. To address this high-cost consumption model, which continued to drive online piracy, the concept of music streaming services emerged (Sakpal 2023). These new services allowed users to access an extensive library of songs and albums instantly, online and on-demand, by paying a monthly subscription. Compared to downloading or storing individual files on their devices, the model of music streaming services delivered music files to users' devices via the Internet by hosting and storing these files on the platforms' servers (Sakpal 2023). This enabled users to listen to music on any device with an internet connection. The groundbreaking factor of music streaming services was allowing individuals to discover new artists and genres without repeated monetary investments (Sakpal 2023). Therefore, subscription models have eliminated the risk associated with music purchases, allowing users to explore new music without financial commitment.

Nowadays, the music streaming industry involves the "process of digital distribution and streaming of musical content over the internet" (Howard 2024). All streaming services allow users to access a wide library of music for free in a limited version of the platform or through a paid subscription plan, unlocking the premium version. Furthermore, people can create and share personal playlists, listen to pre-made playlists suggested by the platforms' algorithm, and access a wide catalogue of other audio content, such as audiobooks and podcasts (Howard 2024).

People spend on average, 20 hours per week streaming music (Durrani 2024) – showing individuals' strong engagement with music streaming services. This can be driven by attributes

such as interface, affordability, increase in personalisation, extensiveness or recommendation systems (Durrani 2024). Furthermore, platforms have been diversifying their content by integrating podcasts and audiobooks to retain users and increase platform engagement and appeal. As a result of music streaming's integration into daily routines and lifestyles, streaming time per individual has increased by 1 hour and 42 minutes since 2023 (Durrani 2024).

Regarding the market's development, Figure 9 (in Appendix) reveals that steady growth of subscribers occurred from 2015 to 2023 without decline (Duarte 2024). Given that the revenue and the subscribers' growth are positively correlated, it is not surprising that the development of subscribers follows a linear increase alongside music streaming service's increase in revenue. The rise of subscribers throughout the years may be attributed to the increase in affordability of high-speed internet, technological developments, and advancements of mobile devices- all of which contribute to the convenience of on-demand music streaming (Durrani 2024).

While the music streaming industry has developed widely, it still faces challenges, notably its extremely high competitiveness level. When it comes to competitive advantage, price, features, and content exclusiveness are often the focal points of differentiation (Howard 2024). Furthermore, the music streaming industry is complex and regulated by challenging licensing agreements between record labels, artists, and music publishers (Howard 2024). These agreements facilitate the payment of royalties to ensure that artists and labels are compensated for the use of their music. This complex system presents challenges for streaming platforms, as they must balance the costs of licensing music with the need to generate revenue to sustain their business and provide value to their users (Howard 2024). Having to balance these costs whilst offering an ad- supported free platform version makes it particularly challenging to be profitable for music streaming services, especially for those who rely exclusively on this type of business operation.

Group Part

To ensure profit, music streaming companies have focused on intense cost-cutting efforts and revenue growth achieved through an increase in subscription prices as well as a push to grow paid memberships (i.e., converting users from free to premium plans) (Fischer 2024). For instance, the market leader Spotify has only recently started to report profits and anticipates being on track to achieve its first full profitable year since its launch in 2006 (Fischer 2024). Deezer, on the other hand, continues to report negative figures for 2024 (Dredge 2024).

Examining music streaming, the market faces content homogeneity. All major players have a subscription-based model, a wide-ranging music catalogue, including pre-made playlists, an enjoyable user experience with personalisation features, and a relatively good recommendation algorithm (Howard 2024). Additionally, these must constantly develop their services, leveraging technological advancements in the industry. As most music streaming platforms perform on a global scale, components such as cultural norms, legal licensing terms and regional consumer behaviours may all impact market trends (Howard 2024).

The worldwide music streaming market share in 2023 (Figure 10 in Appendix) reveals that Spotify is the leader, evidenced by a market share of 30.5%. It is followed by Apple Music (13.7%) and Tencent Music (13.4%), a Chinese service (Leu, 2023). Spotify's predominant market share may be due to its early market entry and its innovative features (Garret 2024). Apple Music has achieved a notable market position with its strong brand and exclusive partnerships with artists (Pereira 2024). Amazon Music (13.3%) benefits from being integrated with Amazon Prime and accessing its large client base (Blanchet, Cohen and Tricarico 2024). YouTube Music (8.9%) leverages its seamless integration with YouTube (Rosyadi 2024). Lastly, the French brand Deezer (1.5%) has a small market share due to the competition from larger players (Garret 2024).

3. Literature Review

3.1. Consumer Behaviour in Music Streaming Services

3.1.1. Consumer Profile in Music Streaming Services

The increasing digitalisation of everyday activities has led to continuous shifts in consumer preferences. Today's digital consumers have considerable influence and expect their needs and current situation to be met by digital platforms. As a result, only services viewed as beneficial, simple to use, and user-centred can generate significant client loyalty (Leimeister et al. 2014).

The importance of music in human existence has been extensively researched, with numerous studies exploring its deep emotional, social, and psychological influence on people and groups, sharing similar characteristics and preferences. Music is defined as a cultural product, acting as an instrument for individuals to communicate their identity (Rahmasari et al. 2022). It is important to highlight the distinction between the collective and personal identity that form an individual. The former consists of the beliefs and societal norms of a person's country, community, religion or family (Bennett and Robards 2014). In contrast, personal identity reflects the individual's self-attributes, such as self-knowledge, personal values, goals and unique psychological states (Bennett and Robards 2014). According to Hall and Du Gay (1996), music is both an individualising and collective form due to its abstract nature. It plays a significant role in allowing individuals to explore and form their personal identity due to its strong link to memory and emotional connections with their personal experiences, thus creating "a sense of ownership between the individual and the music" (Rahmasari et al. 2022, 191).

The relationship between individuals' emotions and music is crucial. According to Luck (2016), music can evoke deep emotions as well as intentionally produce or intensify specific moods. Individuals use music to relax, to immerse themselves in a state of nostalgia or reminiscence, to

contemplate their thoughts, or to move their bodies. Moreover, it acts as a source of relieving stress, as studies have shown that it can reduce levels of the cortisol hormone, which is responsible for an individual's stress and anxiety (Wigram 1995).

The way individuals experience music has shifted increasingly with the advent of new technologies. The introduction of music recording at the beginning of the 19th century, followed by the rise of music as a streaming service in the early 2000s, has transformed music from a lively and shared experience to a detached and increasingly individualised one, leading individuals to experience music as passive listeners (Luck 2016). Moreover, as music streaming services have enabled their users to access music from all over the world from any given place, people have been consuming music more regularly throughout the day (Luck 2016).

Many studies have researched the influence of consumer demographics on the consumption of music platforms. Putzke et al. (2014) researched the correlation between cross-cultural gender differences and the adoption and usage of social media platforms. Specifically, they analysed the consumption pattern of British online music website Last.fm from users in Finland, Australia, Germany and the U.S. According to their results, male users tend to consume multiple types of music on social media platforms, whereas female users have shown a preference toward mainstream tastes or "music that is popular at the time" (Putzke et al. 2014, 2).

Moreover, music consumption has been shown to vary across different generations. It has been studied that among user characteristics, age is a determining factor in predicting media usage (Kim 2016). Generation X individuals (i.e., Baby Boomers) tend to perceive online content as a public resource and appreciate its use when free access is provided (Halttunen 2016). In contrast, researchers have studied how younger generations show a higher appeal towards music streaming services, both due to their increased music consumption (Stålhammar 2004) and their ability to

adapt to new technologies faster (Khanna, Sundararajan and Jayashree 2022). Indeed, according to Morris, Goodman, and Brading (2007) and Teo (2001), because of older generations' unfamiliarity with technological advances, they tend to have lower access to digital media such as the Internet.

In the emotional, cognitive and social development of a young individual transitioning from adolescence to adulthood, music is a fundamental component. Their music listening habits are influenced by two interrelated factors, namely musical environment and social background (Stålhammar 2004). Young individuals growing up in the digital age use the Internet to express themselves by sharing their passions and interests, including their music preferences. According to Bennett (2017) and Martin and Morel (2012), an individual's identity is reflected in the activity of music sharing. Their internet consumption is, therefore, influenced by their desire to connect and form strong social relationships (Papacharissi and Rubin 2000). In response to this behaviour, music platforms have improved their user experience by enabling their young users to share their music influences through social media. Moreover, results have shown that "young people choose to have an active relationship with music" (Kokkidou and Tsakaridou 2009, 7). They tend to listen to music for a variety of reasons, including emotional needs and enjoyment, relaxation, background noise, comfort, and isolation from their environment. In other circumstances, it is listened to reflect on the music itself. Finally, the study of the impact of music streaming services on younger generations is of pivotal importance as it has been predicted that soon, the consumption of online content by an even younger demographic will emerge (Khanna, Sundararajan and Jayashree 2022).

3.1.2. The Shift from Ownership to Access in the Evolution of the Music Industry

The rise of technological advancements in the last two decades has been a significant factor in the evolution of the music industry, which has consequently affected and changed the way individuals purchase and consume music. In addition to creating new business models and disrupting established revenue streams, as previously stated, the digital age has challenged this industry's traditional notions of ownership and access in the music world (Guo 2023).

According to research conducted by Belk (2014) concerning the digital revolution on existing ownership-based businesses, there has been a trend towards a "post-ownership" economy, highlighting a shift toward an access model as the dominant consumption mode of music. With the traditional business model preceding the Internet, consumers purchased physical individual music products (e.g., CDs, vinyl records, cassette tapes). With the spread of technology and the evolution of traditional digital music stores (e.g., Apple's iTunes), the industry shifted towards a "download-to-own" model (Doerr et al. 2010), where consumers acquired property rights by downloading the songs that best reflected their personal taste. In both organisational strategies, the concept and evolution of music ownership can be highlighted, where consumers shifted from possessing physical copies to following a model of digital ownership (Guo 2023). From a client's perspective, the benefit is the acquisition and, therefore, the purchase of the song. Indeed, through physical media, such as cassette tapes, consumers could create personalised CDs and share their favourite songs with friends. Similarly, they could purchase licenses to access and download music through Apple's iTunes (Guo 2023).

Furthermore, the revolution of the industry's economic landscape was determined by a significant paradigm shift from the concept of music ownership toward music access following the emergence of streaming services such as Deezer and Spotify. As opposed to the traditional business model,

these were designed to provide consumers with cheaper on-demand access to a comprehensive library of tracks (Fernandes and Guerra 2019), thus addressing the storage limitations when purchasing physical media. As mentioned by Hjelmbrekke (2021), these services are more than their musical content distribution. Indeed, they offer consumers a large variety of recommendation options. These consist of playlists made by friends and other users, curated by Spotify employees and automatic recommendations based on algorithms and past consumption. According to research conducted by Datta et al. (2016) and Luck (2016), the adoption of music streaming services boosts total consumption, promotes greater variety and enables consumers to discover highly valued music easily, as well as promoting psychological and emotional benefits.

As previously discussed, the disruption of the traditional business model in the industry, with the rise of music streaming services, favoured the reduction of piracy, one of the main challenges in the digital era. By providing users with a compelling value that addresses and counteracts their reasons for engaging in illegal music consumption, subscription-based services have emerged as a competitive alternative to online music piracy, according to Cesareo and Pastore (2014). They address emotional, economic, and social needs, elements driving individuals to download music illegally (Sheehan, Tsao and Pokrywczynski 2012). By offering an extensive library of songs at low prices, these services appear highly appealing to consumers looking for convenient and affordable access to diverse music libraries (Dörr et al. 2013). Moreover, they facilitate interaction and connection among users through playlist sharing, thus improving the overall music consumption experience. According to a survey conducted in the UK in 2009, young individuals were increasingly turning to music streaming services such as YouTube and Spotify to regularly stream their music. Furthermore, of the 1000 individuals surveyed, only 26% reported they downloaded music illegally, compared to 42% in the previous year (Nguyen, Dejean and Moreau

2012). Adopting such services is largely influenced by consumers' interest and level of engagement. Indeed, research suggests that the higher the value and relevance found in the service, the higher the likelihood of adopting it (Cesareo and Pastore 2014).

Concerns related to what is known as the "free mentality" mindset, however, remain. The free mentality is described as digital consumers' reluctance to pay for subscription-based digital services, a behaviour mainly adopted by younger users, aware of free alternatives to premium versions such as online piracy (Lin, Hsu and Chen 2013). On the contrary, older generations, generally used to purchasing physical music content, are less likely to follow this mindset (Fernandes and Guerra 2019). This phenomenon, however, occurs primarily in the absence of knowledge and awareness of the music streaming platforms and their alternatives. Indeed, studies highlighted how individuals driven by an interest and a high level of involvement with these platforms were more likely to try them (Cesareo and Pastore 2014). Therefore, subscription-based music platforms must increase the awareness of their services to potentially reduce online piracy by offering quality-focused and affordable alternatives that meet the needs of today's digital world.

3.1.3. Consumer Behaviour Driving User-Centric Solutions

Recent research has extensively explored the consumer behaviour factors that shift individuals towards the adoption of subscription-based music platforms. The following review will analyse literature grounded on consumer models developed since the late 20th century. Building on these findings, factors such as psychological ownership, perceived value, and social influence have been widely examined to assess their impact on the decision-making process for subscribing to music services (Sinclair and Tinson 2017; Belk 2013, 2014; Fernandes and Guerra 2019; Barata and Coelho 2021).

The role of psychological ownership

Psychological factors play a significant role in determining users' attitudes and behaviours when it comes to their application of digital products (Sharma 2024). Understanding consumer psychology, therefore, is pivotal for digital platforms as it illustrates preferences, choices and brand loyalty (Peck and Shu 2018). In this regard, music streaming services have been shifting their focus from understanding the content to offer users to prioritising the way their platforms make their users feel (Hracs and Webster 2020). Indeed, although the rise of access-based music streaming might initially suggest a reduction in perceived ownership due to the lack of possessing the physical object, evidence shows that consumers continue to experience a form of ownership called psychological ownership (Sinclair and Tinson 2017). Developed by Pierce et al. (2001, 299), it is defined as "the feeling of possessiveness and of being psychologically tied to an object". This conceptual framework has been deeply analysed for its influence in determining concepts of loyalty, empowerment and social rewards (Sinclair and Tinson 2017). Psychological ownership is based on self-identity, having a place, efficacy and effectance, three pivotal human needs which respectively refer to "an individual's need to create and communicate an identity, possess a familiar place, and an individual's desire to be competent and perceive themselves as efficacious in relation to his or her environment" (Pierce et al. 2003 as cited in Danckwerts and Kenning 2019, 805). These needs are met when individuals are invested in a specific product, increase their knowledge about the service, and develop their ability to navigate around it. The theory is also analysed by Danckwerts and Kenning (2019), who studied its role in the context of the consumption of music streaming services. According to their research, while intimate knowledge showed negative correlations with the sense of ownership towards a platform, results showed a positive correlation between the control of the object and the psychological ownership towards music. Additionally, the need for "investment of self" contributed significantly to the feeling of

possession towards music streaming services (Danckwerts and Kenning 2019). The latter allows their users to explore and listen to music, create, curate and share their own playlists online. Consumers' time and energy investment and involvement lead them to establish a familiar connection with the platform, establishing a sense of place where consumers can structure their music consumption (Sinclair and Tinson 2017).

Moreover, psychological ownership significantly influences consumers' willingness to pay for a product, specifically when they feel it belongs to their extended self. The intention of paying premium prices for an object individuals deem as theirs is given by their "need to protect this object and have the willingness to sacrifice to maintain the relationship built" (Danckwerts and Kenning 2019, 807). This theory supports the findings of Jussila et al. (2015), which highlight how, compared to its price, an individual's sense of belongingness towards a product is a higher determining factor in the decision-making process of purchasing it. However, there have been contrasting opinions related to the relationship between price and the willingness to subscribe to music streaming platforms. Indeed, research developed by Fernandes and Guerra (2019) has suggested how the subscription fee of a music service is a driving factor in the purchase decision of a user. Specifically, following the survey conducted, it was concluded that the variety of alternatives to these streaming services acknowledge how "the subscription-based model may be unattractive to many consumers" (Fernandes and Guerra 2019, 14).

This theory is highly connected to the concept of extended self, reported by Belk (2013, 2014). Indeed, the psychological ownership that individual's sense over digital services, such as music platforms, plays a role in forming their identity. With the digital age, Belk (2013, 2014) explored five significant changes that influence the extended self to evolve, mainly dematerialisation, re-embodiment, sharing, co-construction of the self, and distributed memory. In the digital realm, the

digital extended self is explained as the way a person presents their identity on the web, which is influenced by a multitude of internal and external factors Belk (2013, 2014). Consumers tend to select products and brands they feel are relevant to themselves and can communicate a specific identity (Thompson and Loveland, 2015).

The role of perceived value

While the theory of psychological ownership significantly influences consumers' willingness to pay, other factors also play an important role in guiding them through their purchasing path. The study performed by Fernandes and Guerra (2019) recalls Doerr et al. (2010), who researched which features offered by music streaming services determined consumers' willingness to pay. According to their results, "contract duration, music quality and the possibility of offline access significantly increase users' willingness to pay by adding customer value to the service" (Fernandes and Guerra 2019, 4). These features relate to the concepts of perceived ease of use and perceived usefulness, factors influencing individuals' perceived value of a service (Suki 2011). In the context of streaming platforms, Suki (2011) refers to perceived ease of use as how effortless listening to music online is according to consumers. Perceived usefulness, on the contrary, is related to "the degree to which the consumer believes that listening to music online would fulfil a certain purpose" (Suki 2011, 3). According to this study, both factors have been found to positively influence a consumer's perception of the value of a streaming service, leading, therefore, to its further usage. Supporting this perspective are research conducted by Keogh et al. (2001) and Bautista et al. (2016), both suggesting the importance of improving the ease of use of streaming services because of their positive relation with the probability of users consuming them (Lee et al. 2018). However, the influence of perceived ease of use and perceived usefulness on consumers' behaviour to adopt music streaming services has been a topic of great discussion, especially with the advances in technology. Indeed, some studies have acknowledged how consumers are

becoming increasingly experienced with technology and, thus, tend to have a pre-existing expectation of dealing with a platform with a good user interface (Chai et al. 2021). In these cases, perceived usefulness is a preferred factor when it comes to analysing users' subscription intentions. An additional point of discussion is the consideration of perceived enjoyment related to the hedonic value of a consumer. While perceived usefulness is a factor encompassing extrinsic, functional and cognitive characteristics, perceived enjoyment covers intrinsic, recreational and affective aspects and does not depend on performance (Kim, Chan and Gupta 2007; Chu and Lu 2007). Music, the product offered by these services, is used to satisfy emotional needs and is listened to both in community and individual settings. Following this statement, consuming music online has been considered mainly as a "leisure-oriented activity" (Wang. Yeh, and Liao 2013, 205). The study conducted by Fernandes and Guerra (2019) has highlighted two distinct behaviours individuals can have, which, in turn, determine whether an individual is more (or less) likely to pay for the premium version of music streaming platforms. Consumers who are functional-driven tend to have a higher value for core services, whereas those who are emotionally involved place greater importance on value-added services. However, research claims perceived usefulness is the main driver of perceived value and is, therefore, the "main source of value to music streaming services users" (Fernandes and Guerra 2019, 13), while the perceived enjoyment towards these services determines whether a user will remain engaged with the service (Chen et al. 2018). This would imply, therefore, that the added value of a service may not be sufficient to convince users on the free tier to pay for the premium version. Besides the basic features previously mentioned, research has revealed the importance of enhancing features such as a large music catalogue, flexibility in use and exclusive content to increase the perceived value of music streaming services (Chai et al. 2021).

The role of social influence

Another point of discussion centres on the role of social influence, a crucial focus for researchers analysing music streaming platforms in relation to consumer behaviour. Results concluded from research developed by Chen et al. (2018) suggest that social activities drive consumers to purchase music streaming services, as they significantly influence consumer attitudes towards the latter. Particularly for younger generations, music has become an instrument to support social activities such as creating their own image, appearing as "trendy", or pleasing their peers by listening to their music (Bennett and Hodkinson 2020). However, recent studies suggest that social influence does not play a significant role in shaping the behavioural intention of a consumer (Barata and Coelho 2021). The study carried out by Barata and Coelho (2021) analysed how surveyed consumers with a high experience in using music streaming platforms were not heavily influenced by their peers to pay for the premium services offered. Therefore, Barata and Coelho (2021) suggested it to be key mainly in the initial stages of the consumer's experience of using the service. In the last two decades, music services have learnt to adjust their platforms according to the needs and behaviours of their users. One of the most important considerations consists in the much-discussed topic of identity, highly correlated to music as a product. Indeed, it has been observed how streaming platforms have effectively captured and grasped the essence of consumers' identities. Recent studies conducted by Prey (2018) and Drott (2018) have analysed how, rather than considering their users as single profiles with one fixed and consistent identity, music streaming services have understood their consumers to possess various identities "that are performed through practices and captured in the digital data traces they leave behind" (Hracs and Webster 2021, 247). Therefore, learning about the many identities of their users is a success factor, as platforms must ensure their adaptability to the evolving needs of their customers.

The challenge of choice overload

One of the major challenges faced by digital platforms, and particularly music streaming services, is linked to the consequences of enhancing and adding content. Although the purpose of increasing the content variety is to improve the quality of the service, research has discussed the concept of choice overload, which refers to the difficulty consumers face in navigating the music platforms due to the wide amount of content offered (Hracs and Webster 2020). Because of this, streaming services have been committed to enhancing their ability to guide their users through the interface by improving their curative practices (Morris and Powers 2015; Barna 2017; Jansson and Hracs 2018; Drott 2018), discussed in more detail further on.

3.2. Digital Business Models and Digital Services

Digitalisation and the development of the Internet of Things have brought a shift in consumer expectations and preferences, defined by a need for personalised, adaptive, and immediate services accessible on-demand (i.e., anytime and anywhere) (Leimester, Österle, Alter 2014). Many services are now available just a click away, which has reinforced consumers' power, enabling them to easily switch to a competitor in case of dissatisfaction with their current offering (Wirtz, Schilke, Ullrich 2010). Hence, companies have had to redesign their business models to identify novel approaches for creating and capturing value in a user-driven market with a strong focus on usability and user experience, thereby demanding business innovation (Wirtz, Schilke, Ullrich 2010).

3.2.1. Digital Business Models

In the digital services sphere, three types of business models have emerged as the most prevalent sources of revenue: ad-sponsored free service, subscription-based and transactional (Taherdoost 2023). The first model enables services to offer their product free of charge to consumers,

generating revenue from advertising and leveraging the masses with the potential to reach high user traffic (Kumar 2014). Subscription-based models charge users a fee, usually paid monthly or annually, to access the services (Anderson 2009). Hybrid variants of this model are also employed by companies to leverage the benefits of different sources of revenue – the case of Freemium will be discussed in this section. Lastly, in the transactional model, users must pay each time they prefer to access specific content (Taherdoost 2023). This corresponds to how digital music was first consumed, mainly when users of a service would download a song by paying for an individual track. Given the topic of this research, music streaming platforms adopt subscription-based models, often with a hybrid structure thus, the literature review will centre on this.

The case of Freemium in subscription-based models

Within subscription-based, many digital services, including music streaming platforms, operate using a two-tiered model known as Freemium, which offers both free and paid product versions (Papies, Eggers, Wlömert 2010). According to Anderson (2009), this revenue model involves providing a free version of a product to attract users and encourage them to upgrade to a premium version for an additional fee. In the context of music streaming platforms, companies provide streaming access to a comprehensive music library in ad-supported versions, albeit with certain restrictions, such as limited skipping of songs, unsupported offline listening, and/or shuffle-based experience (i.e., users cannot select specific songs from a playlist). These restrictions are removed when users upgrade to a premium subscription plan, which unlocks additional features.

Research by Boudreau, Jeppesen and Miric (2022) highlights that continuous platform usage, especially over a long time, fosters brand loyalty, enhances perceived product value and accumulates user-created materials on a platform. All these factors may influence users' willingness to pay for a premium product. From a business perspective, Freemium's key advantage lies in its ability to attract a substantial volume of new users by making the service broadly

available to anyone, thereby increasing the potential user base (Kumar, 2014). According to Wagner, Benlian and Hess (2014), incorporating a free offering within digital services constitutes a particularly strategic approach, especially for businesses operating in markets characterised by direct network effects. This model facilitates the creation of a large user base, thereby increasing the service's value as more individuals join a platform and share their created playlist over the network (Wagner, Benlian and Hess 2014). However, Boudreau, Jeppesen and Miric (2022) point out that attaining a large customer base through free users is only beneficial if the associated lost revenue is effectively outweighed. Additionally, Kumar (2014) underlines that Freemium enables platforms to directly target potential paying customers, as existing free users may develop a positive attitude toward the service, ultimately leading them to upgrade to a paid subscription. Focusing on converting existing free users allows music streaming platforms to reduce costs linked to customer acquisition by limiting significant investments in marketing promotions.

Succeeding at Freemium

For the Freemium model to succeed, companies must adopt a well-defined competitive strategy, robust business model components, and strategic decision-making processes, otherwise, it may threaten the generation of sustainable profits (Holm and Günzel-Jensen 2017). Businesses need to persuade sufficient free users to convert to premium plans, which may be difficult to accept once a zero-cost option is anchored in consumers' minds (Gu, Kannan and Ma 2019). Many users may experience a zero-price effect wherein they develop a positive affective evaluation of a free platform version (Niemand, Mai and Kraus 2019). This, in turn, reinforces users' perceived benefit of a free-of-charge option and reduces their nonmonetary barrier – being more accepting of limitations (i.e., ads and restricted listening) (Niemand, Mai and Kraus 2019). This may result in free users perceiving greater value in the free service than they should and failing to develop a positive attitude towards the premium product, potentially reducing their likelihood of conversion

(Niemand, Mai and Kraus 2019). Often, this is due to a lack of perceived added value in upgrading to a premium version – either because the benefits are not well communicated or understood by users or because the free version closely resembles the premium. On this matter, Wagner, Benlian and Hess (2014) describe the functionality resemblance between a platform's free and premium offering (i.e., "premium fit") as a crucial trade-off to carefully manage. They argue that a high premium fit where a free version shares significant functionality with the premium product helps persuade users of a product's quality but may simultaneously limit incentives to convert (Wagner, Benlian and Hess 2014). Hence, music streaming platforms strategically attempt to reduce the premium fit to create a significant functional difference between the two versions to encourage upgrades and avoid limitations (Wagner, Benlian and Hess 2014). Moreover, firms may also improve the attractiveness of the premium offering by introducing additional content or innovative features to the paid service, which will translate into further value for users (Li, Sanjay and P.K 2019).

By applying a Freemium model to Netflix, Niemand, Mai and Kraus (2019) investigated the factors driving consumers' probability to switch to a premium offering through conjoint analysis. They identified price as the most significant factor, having a negative effect on consumers' choice, with lower price levels being consistently preferred. Additionally, feature levels that provided more value to the service were found to positively influence overall choice (Niemand, Mai and Kraus 2019). The success of a Freemium model, therefore, depends on the innovative approach to deliver value to both free and premium offerings (Holm and Günzel-Jensen 2017).

Additional mechanisms can be implemented by companies to support conversion. Digital products are often goods that need to be experienced prior to purchase to assess their true value (Boudreau, Jeppesen and Miric 2022). In this regard, research has demonstrated that free trials are successful

tools for creating positive attitudes toward a platform and boosting conversions (Liu, Au and Choi 2014). However, platforms offering free samples of their premium product must implement restrictions – storage capacity, time, or content quantity – to prevent the functional equivalence of the sample, which may otherwise lead to substitution (Li, Jain and Kannan 2019). Alternatively, platforms might introduce a higher-priced premium tier to make the current paid offering more appealing, thereby capitalising on the middle-compromise effect (Gu, Kannan and Ma 2019). Lastly, music streaming platforms should use market segmentation to differentiate their user segments to elaborate a specific conversion strategy with effective mechanisms (Sciglimpaglia and Raafat 2022).

Advertisement as a key instrument in Freemium models

For businesses adopting Freemium models, the presence of advertisements serves as a key point of difference between free and premium offerings (Gu, Kannan and Ma 2018). It is a source of revenue for platforms to finance the availability of a free platform whilst attempting to convert users to upgrade to a premium plan (Tåg 2009). Advertisement in music streaming platforms, therefore, functions as an instrument for conversion, either through the content of the ad itself or the reaction it elicits from users. The former approach employs ads as a direct promotional tool for platform upgrades, highlighting the benefit of an interrupted listening experience unlocked by upgrading to a paid plan. This pain point is made particularly salient to free users as the audio ads are played in between song tracks. In their research, Alodia and Qastharin (2024) suggest that such ads, if relevant and informative, can strengthen consumers' attitudes toward the premium offering and positively influence their purchase decisions. However, excessive exposure to ads may be perceived as intrusive, resulting in negative attitude formation, potentially leading to free users using the platform less or even churning (Alodia and Qastharin 2024). Furthermore, according to Alodia and Qastharin (2024), the nuisance provoked by repetitive ads can push free users to

upgrade to a premium plan to avoid such irritation, indicating that this is especially prevalent for younger users aged 18 to 24 as they highly prefer convenience.

Secondly, advertisements act as a conversion incentive due to consumers' natural avoidance of them. Although ads do not hold a monetary value per se, ads represent an implicit form of price for consumers translated as an investment of their time and attention, which consumers still attribute a value to (Papies, Eggers, Wlömert 2010; Goli et al. 2024). When deciding whether to remain on the free version or upgrade, consumers evaluate the utility they derive from accessing the service for free, albeit with some limitations, against the perceived cost, which results in their degree of ad avoidance (Papies, Eggers, Wlömert. 2010). This helps explain why some users may find value in an ad-supported version, and it provides a base for consumers' scepticism of ads. Several studies have found that the level of intrusiveness of ads and the extent to which they disrupt a user's goal achievement whilst navigating a platform are predictors of ad avoidance (Cho and Hongsik 2004; Baek and Marimoto 2012; Li and Huang 2016; Riedel et al. 2024). When users are frequently exposed to ads and feel interrupted by unsolicited pop-ups or audio ads during music playback, their irritation level is exacerbated. This, in turn, motivates their tendency to avoid ads as users construct a certain psychological reactance after perceiving a loss of autonomy or freedom about their consumption desires (Baek and Marimoto 2012; Riedel et al. 2024). Examining the degree of consumer adoption towards ads, Li and Cheng (2014) argued that consumers unfamiliar with ad exposure are more likely to feel at ease with ad-free online content, while those accustomed to online advertisements are more prone to adapt to them. Moreover, studies have also underlined concerns about privacy as a factor directly influencing users' likelihood to seek ad-free services (Baek and Marimoto, 2012; Li and Huang 2016).

Consequently, increased intrusive advertisement is often also a mechanism implemented by digital services to decrease the perceived utility of their free version to move users towards a premium upgrade (Tåg 2009). Nevertheless, as previously mentioned, advertisements could also produce strong negative outcomes such as churning. Hence, digital platforms must balance the trade-offs of advertisement to ensure it remains an effective conversion mechanism and a reliable source of revenue for their free version. Regarding this, a potential approach is through personalisation and tailoring the ad content based on the user's preferences and interests, thereby increasing its relevance (Baek and Marimoto, 2012; De Keyzer, Dens and De Pelsmacker, 2015). These studies suggest that these may limit ad avoidance, although Li and Huang (2016) warn that the latter may be accentuated if utility derived from the ad personalisation does not compensate for the privacy concerns it may raise. According to research conducted by Riedel et al. (2024), freemium services may also introduce control features to allow users to manage their ad exposure, resulting in a lower perceived level of intrusiveness. Depending on their goal, these control mechanisms may include options for skipping ads, choosing the preferred type and timing of advertisements, as well as displaying a countdown of the ad's length (Riedel et al. 2024).

3.2.2. Digital Services

Researchers have characterised digital platforms as being highly dynamic and inherently contingent (Mackenzie 2018; Nieborg and Poell 2018). Their evolution and success depend on three factors, mainly the objectives imposed by the company, the strategic actions taken by their competitors, and the evolving consumer behaviours (Van Dijck 2013; Sanz 2014). Different approaches are taken by digital platforms to generate value both for their users and for themselves.

Approaches to enhance consumer purchase intentions in digital services

The relationship between perceived value and purchase intention, as previously discussed, extends beyond music streaming platforms. Indeed, these factors must be considered by every streaming service when analysing consumers' willingness to pay, given that consumers are more likely to purchase a product or service they deem valuable and enjoyable (Wang, Yeh and Liao 2013). Therefore, digital services must innovate their platforms to address evolving consumer needs driven by technological advancements. In the case of music streaming platforms, for instance, the users' listening experience must be enhanced through engaging features, as it is considered to be an inherently enjoyable activity (Wang, Yeh and Liao 2013). Nonetheless, utilitarian benefits such as quality and convenience also drive consumers' perceptions of value (Wang, Yeh and Liao 2013; Mulla 2022). Under these circumstances, the development of technological components and enhancement of functionality should be combined with entertaining features for a digital service to be considered useful and, therefore, valuable (Wang, Yeh and Liao 2013). Research from Kim and Kim (2020) also found other hedonic motivations, such as novelty, uniqueness and surprising aspects of the service content, to be essential attributes that convince users to subscribe to digital platforms. This underlines the need for digital services to thrive for innovation and stay on top of consumer trends to be able to incorporate novelty that resonates with consumers' latest popular preferences.

Approaches to enhance consumer retention in digital services

The ability to have strong customer loyalty and retention is associated with long-term sustainable competitive advantage (Bokström and Eriksson 2023). This entails that companies must create successful strategies to ensure that customers feel connected to brands. A study indicated that "affective commitment was the most powerful driver of customer retention" (Bokström and Eriksson 2023, 17). This type of commitment is linked to how people can have an emotional

attachment to brands and how loyalty is created by psychological bonds (Bokström and Eriksson 2023,16-20). Trust and customer satisfaction are the pillars that may build or destroy affective commitment (Bokström and Eriksson 2023). Creating a distinctive and dominant brand personality can enhance emotional attachment to customer loyalty and increase customer retention (Palomba 2022, 13). Nonetheless, failing to do so will inevitably impact the business negatively. Therefore, companies can and should improve customer retention by building meaningful emotional connections. Linking this to digital services, including music streaming, especially those adopting subscription-based business models, brands must focus on the longevity of subscriptions to achieve customer retention and competitive advantage (Murali 2016). "Customers will continuously evaluate the level of satisfaction until the day the satisfaction is not in line with the subscription fee" (Bokström and Eriksson 2023, 17). This entails that brands must clearly understand what features consumers value the most and how to leverage those attributes to make them more special. Additionally, to retain their customers, streaming services should focus on nurturing a competitive advantage, which can be achieved by emphasising continuous innovation and developing distinct, relevant and attractive features to continue to set themselves apart from the competition and provide value to their users (Oydele and Simpson 2018; Skog, Sandberg and Wimelius 2021).

Furthermore, researching the factors that influence users' intention to renew their subscriptions to digital services, Becagli et al. (2020) found that perceived pricing value, functional quality, and hedonic motivations all have a major impact on users' decision to renew their subscriptions (Becagli, De Masi, Faraoni, & Zollo, 2020). As the digital music streaming phenomenon gains traction, user habits surrounding features, such as offline accessibility for convenience, bolster perceived value, thus increasing loyalty. Users' perceived enjoyment derived from streaming leads

to active consumer participation, which in turn leads to permanent customer retention (Becagli et al. 2020).

Additionally, Hracs and Webster (2020) also point out that users stay with a platform as a result of all the data they have accumulated on the platform over time. A barrier to switching to another platform is built as users do not want to lose what they have created, nor do they want to rebuild it from scratch (i.e., saved music libraries or watchlists, trained algorithms, recommended and personal playlists, and follower count) (Hracs and Webster 2020). Hence, the platform's assets and features that allow users to create a service which reflects their personal preferences, also serve to ensure brand loyalty and customer retention in digital services.

The consumer's need for connectivity and compatibility

Digital transformation has also redefined consumers' enduring needs as they increasingly seek convenience in their lives, demanding time- and effort-efficient services (Reinartz, Wiegand and Imschloss 2019). Hence, digital platforms need to emphasise convenience as a key perceived benefit to consumers. According to Reinartz, Wiegand and Imschloss (2019), one way to foster convenience-driven value creation is through ambient embeddedness, which is achieved by the integration of the platform into consumers' habits via instant and seamless interactions. Given that consumers listen to music across multiple occasions and devices throughout their day – e.g. at home, in the office, in the car (Greasley and Lamont 2011) –accessibility and compatibility become essential for music streaming services. This can be obtained by connecting user data across channels and continually embedding the digital service into third-party devices and platforms, enabling music streaming users to listen to music from their phones, computers, car systems and smart speakers (Reinartz, Wiegand and Imschloss 2019; Skog, Sandberg and Wimelius 2021). Music and content synchronisation between devices, therefore, allows users to experience uninterrupted and seamless listening across devices whilst listening to the same song (Skog,

Sandberg and Wimelius 2021). Additionally, when a digital platform is accessible across many devices, it also reduces its cost of adoption, as no specific device is required, allowing for services – such as Spotify – to become omnipresent (Skog, Sandberg and Wimelius 2021). Moreover, ambient embeddedness also applies to the ability to connect to the service or share content across other platforms (Reinartz, Wiegand and Imschloss 2019), such as using Facebook credentials to log into apps or sharing songs from the app to Facebook and Instagram.

3.3. Trends

3.3.1. Trends in Music Streaming Platforms Related to AI

Digital platforms and algorithms

Digital services have transformed the way industries function by employing algorithms for customisation and efficiency (Bughin et al. 2017). The underlying principle of many algorithms that enable the operation of digital platforms is to scour and digest an enormous volume of information (i.e., user data), finding similarities or patterns within that data and making tailored recommendations for individual users based on those findings (Bughin et al. 2017). According to Bughin et al. (2017), digital streaming services deploy algorithms to customise how items in the catalogue are presented, thus placing content that is most likely to be consumed, based on historical usage behaviour, in the users' top choice list. With the advancement of technology, AI brings these functionalities to the next level of sophistication and dynamism.

Curation and personalisation strategies

To improve the navigation experience for consumers on their platforms, digital services are prioritising algorithmic personalisation and recommendation features, as well as curation strategies (Freeman, Gibbs, and Nansen 2023). These approaches enable digital platforms to differentiate themselves and provide a more personalised and higher service quality.

Group Part

Music streaming platforms have completely altered how their users consume and organise music by integrating listener data, algorithmic recommendations, and editor-based curation to provide personalised playlist experiences (Hagen 2015). Other than allowing users to generate their own playlists – user-generated playlists (Li et al. 2022) – two additional types are offered: curated and algorithmic. These can either evolve as the users continue to listen or remain the same, representing a specific moment in time or event in the life of the user (Hagen 2015).

The practice of curation, implemented as a process to overcome the challenge of choice overload, is defined as "a strategic selection, presentation and arrangement of information, goods, services, and people" (Hracs and Webster 2020, 241). To meet users' needs, curation practices require close attention to the evolving consumer preferences that influence their use and adoption of digital services. Curation playlists are created leveraging soundtracking strategies, virtual spaces, and context-aware recommendation systems (Hagen 2015; Eriksson et al. 2019; Schedl et al. 2015). Soundtracking strategies are adopted to allow users to access content that aligns with their emotions, memories and daily activities (Hagen 2015), while virtual spaces are leveraged to provide playlists tailored to specific temporal contexts (e.g., morning routines or weekend events) (Eriksson et al. 2019). Moreover, music platforms adopt context-aware recommendation systems to use specific contextual data points (e.g., location, social interactions, cultural background, etc.) to predict the music a user would be more likely to listen to, given a particular situation (e.g., relaxing, working or exercising) (Schedl et al. 2015).

While the process of curation is focused on trends and themes to create content, personalisation leverages big data and advanced algorithms to generate content tailored to users' tastes and behaviours (Drott 2018). In the framework of music streaming services, this process entails creating "taste profiles" based on the user's listening habits, skips, saved tracks, and demographic

data to ensure a frictionless discovery of virtual music (Prey 2016; Webster 2023). However, although some users perceive personalisation as a convenience that reduces the effort required to select music and aligns music content with their lifestyle (Webster 2023), others do not view it as beneficial. Indeed, cultural enthusiast users consider personalisation a threat to their music expertise, as it reduces the effort and intentionality to deeply engage with and appreciate music (Jarness 2015; Prieur and Savage, 2013; Savage and Gayo, 2011).

Consumer demand for live music experiences and events

Consumers seek unique and extraordinary experiences or experiential elements that enhance existing products or services (Gilmore and Pine 2002; Wiedmann et al. 2018). Indeed, although music is mainly consumed digitally through streaming platforms, it remains a good that individuals seek to experience in live contexts (Zhang and Negus 2021). Brands must, therefore, acknowledge the importance of impactful and unique interactions to boost customer engagement, drive perceived value, and foster brand loyalty (Wiedmann et al. 2018). Indeed, in a highly competitive market with content homogeneity, Hracs and Webster (2020) emphasised the importance of music streaming platforms to "engineer compelling experiences", notably through exclusive content. While examining exclusive licensing agreements practices – where artists release a song on a single platform for a limited time – they argued that these are often ineffective and restrict the commercial potential of the music (Hracs and Webster 2020). Other experiential practices include live streaming and virtual music events, particularly popular during the COVID-19 pandemic

(Ducarroz and Albinsson 2023; Hollander-Shabtai and Tzofi 2022). However, by empirically studying consumers' likelihood to attend similar events during and post-COVID, Ducarroz and Albinsson (2023) revealed a significant decline in their intention to participate post-pandemic. This suggests that in the absence of restrictive circumstances, consumers show a strong preference for in-person events. These are valued for their authentic experience, characterised by the energy of the crowd, excitement, and opportunities for physical engagement, which are central to the enjoyment of these performances (Vandenberg, Berghman and Schaap 2020). Therefore, although live streaming offers a degree of digital engagement and fosters an artist-fan connection, it may not be sufficient for music platforms to offer this as sole unique experiences (Hracs and Webster 2020; Ducarroz and Albinsson 2023). This is further supported by the concurrent rise in consumers' interest towards live music, even as the popularity of music streaming has grown in the last decade (Naveed, Watanabe and Neittaanmäki 2017). In this regard, music streaming brands must innovate to deliver distinctive experiences to consumers who demand more enjoyable and authentic interactions (Wiedmann et al.2018).

The opportunities provided by live experiences primarily stem from their influence on music consumption through streaming services. Indeed, research indicates that high-quality live performances, such as festivals and concerts, increase consumer engagement with music on streaming services, as fans intensely revisit the artists' music pre- and post-event (Danielsen and Kjus 2017). Reciprocally, recorded music and streaming have a positive spillover effect on the live music market, as consumers' demand to attend concerts by their preferred artists rises, thereby leading to a higher willingness to pay for live events (Seifert et al. 2024). Indeed, research indicates that consumers are willing to pay more for unique products that will enhance their status and identity (Shipman 2004), thereby suggesting a financial return for businesses that provide

distinctive experiences. Moreover, offering live events may allow streaming platforms to foster a symbiotic relationship that benefits artists, users and the platforms themselves, thereby addressing criticisms regarding low royalty payments to artists (Marshall 2015). According to Hracs and Doreen (2018), such experiences may include 'salon-style' concerts with limited seats, private performances, backstage access, early access to new unreleased projects – songs, video clips, live shows – and "members only" content. Participating in these unique behind-the-scenes creates a sense of belongingness to an exclusive circle, fulfilling consumers' desire for self-actualisation and authenticity (Hracs and Doreen 2018).

3.4. Marketing Methodologies

In this study, two well-established and widely recognised marketing methodologies were applied to gain deeper insights into consumer behaviour and preferences related to music streaming platforms. These methodologies were chosen for their proven effectiveness in gathering nuanced data and offering a solid framework for analysing complex market dynamics, such as the music industry. Their application was tailored to align with the specific goals of this paper, ensuring that the findings are both comprehensive and coherent to the research context.

3.4.1. Perceptual Map

Historically, the process of perceptual mapping has been considered one of the most fundamental analytical tools applied in marketing research (Chadha and Kapoor 2008; Green et al. 1998; Steenkamp et al. 1994). The perceptual map methodology has been defined by Hair et al. (1995, 487) as "a visual representation of a respondent's perceptions of objects on two or more dimensions". More specifically, it combines perceptual data, which refers to consumer attitudes and preferences, with multidimensional analysis techniques used to visually represent the relationship among products, brands, or attributes in a competitive market (Gower et al. 2010).

Perceptual mapping is a methodology that has been widely applied by market researchers to illustrate either the identity of a brand or individuals' responses to product attributes (Gigauri 2019). It allows researchers to demonstrate within an Euclidean space – which symbolises the market – the perspective of targeted customers on competing alternatives and is built by the data points which reflect their opinions on the studied brands (Dallakyan 2014).

3.4.2. Conjoint Analysis

The conjoint analysis is a method that was developed in the '70s by the researchers Green and Srinivasan (1978), designed to analyse how consumers perceive specific attributes during their purchasing path (North and De Vos 2002). More specifically, its principle is grounded in the idea that the value of a product or service is estimated "by combining the separate amounts of value provided by each attribute" (Hair et al. 1998, 392). Indeed, the word "conjoint" refers to the "notion that the relative values of things considered jointly can be measured when they might not be measurable if taken one at a time" (Churchill and Iacobucci 2002, 748).

The technique adopted in this marketing methodology evaluates consumer preferences by examining how they weigh trade-offs between specific attributes of either a product or service whilst evaluating different product profiles and different attributes' levels (North and De Vos 2002). To maintain a consistent level of accuracy with the decision-making processes consumers make in real life, it is important within the conjoint analysis that the attributes chosen are not isolated but rather belong to the broader context in which individuals make their decisions.

According to North and De Vos (2002), the conjoint analysis method is applied by researchers for several reasons, the first being to understand what features of a product or service are most preferred by consumers. Moreover, it allows businesses to develop a plan for their product offerings in a more efficient manner, as well as design their communication strategy more

effectively. For this study, a choice-based conjoint analysis will be performed. This consists of a repeated process in which respondents are presented with a selection of product alternatives in a choice set to understand which of these are their preferred options (Eggers et al. 2022).

4. Consumer Perceptions – Perceptual Map Analysis

To understand European consumers' perceptions of music streaming platforms, addressing the first research question, developing a perceptual map was essential. This process simplifies the understanding of multidimensional data, allowing businesses to gain insights that support informed decision-making and develop effective marketing strategies (Gigauri 2019). To perform the analysis, a survey was built, which was grounded in comprehensive research, including an in-depth literature review and preliminary insights from experts, ensuring that the selected attributes were relevant and representative of actual consumer priorities. Constructed via Google Forms, the survey incorporated pathways, allowing researchers to gather only relevant answers. Using SPSS, the resulting data was analysed, providing a robust statistical foundation for interpreting consumer perceptions and mapping each platform's and association's position in the perceptual space.

4.1. Methodology for Perceptual Map

4.1.1. Selected Associations and Their Rationale

Based on the extensive literature research (Chapter 3) and the preliminary interviews, 14 key attributes were identified to analyse consumer perceptions of the five major music streaming platforms in the study (Figure 1). These attributes were selected to capture both functional and brand-related aspects of each platform, reflecting the core drivers influencing platform choice and consumer engagement with the service.

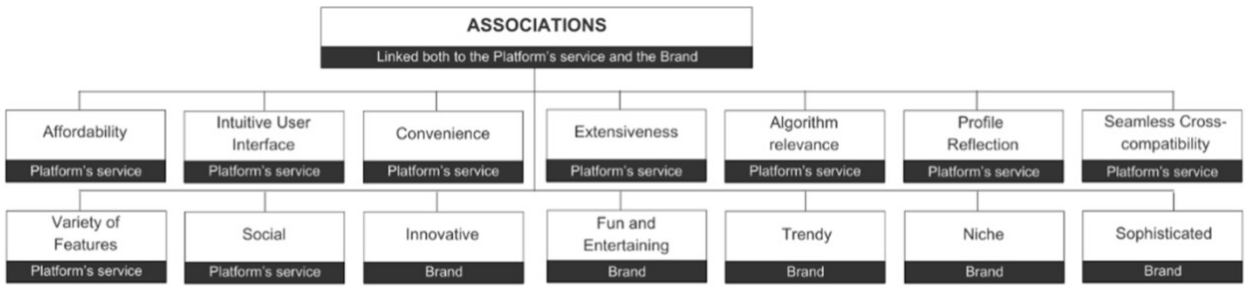

Figure 1: Perceptual Map Associations

The platform's service characteristics serve as the foundation of the analysis, as users expect platforms to offer affordability, ease of navigation, and relevant content, as highlighted in the literature (Chapter 3). Given that consumers prioritise easy-to-use interfaces (from the literature, Chapter 2) and affordable pricing (consumer interviews), Attributes like "Affordability" and "Intuitive User Interface" emerged as critical factors in the consumer decision-making process. Additionally, "Algorithm Relevance" emerged from the literature and the expert interviews as increasingly important, reflecting the platform's ability to effectively tailor recommendations. "Convenience", "Extensiveness", and "Seamless Cross-Compatibility" have been discussed in the literature review (Chapter 3), where ease of access to music across various contexts (e.g., during travel or daily routines) is often cited as a key factor. Additionally, users frequently emphasise the value of platforms with a large catalogue of songs, as it increases the variety and relevance of the service (Rahmasari et al. 2022).

Building upon these core service features, additional specific attributes were included to assess how well platforms mirror individual identity, cultural, and aesthetic aspects of each platform. "Profile Reflection" captures how well a platform's recommendations align with a user's unique musical identity, helping to establish a deeper personal connection with the service. This attribute emerged strongly in the expert interviews, where the idea of music as a cultural product was discussed, with platforms like Spotify being noted for their ability to mirror individual tastes and preferences (Rahmasari et al. 2022). Attributes like "Innovative" and "Trendy" were selected to understand how users perceive the platform's relevance within the rapidly evolving music and technology landscape. "Fun and Entertaining" assesses the broader experience offered by each service, other than just providing access to music online. The "Social" attribute was highlighted across both consumer and expert interviews, with users stating that platforms offering social

interaction features enhanced the overall music experience. "Niche" and "Sophisticated" attributes further refine brand perception, with industry professionals indicating that niche platforms, such as Deezer, which cater to specific music tastes or cultural backgrounds, create a more tailored experience. Instead, "Sophisticated" platforms like Apple Music were associated with higher perceived quality and premium content.

"Audio Quality" was initially considered an attribute to be included in the analysis, but both the literature and interview findings suggested that users prioritise more personalised, community-focused association over technical specifications. Throughout the selection process, several adjustments were made to align the terminology with consumer perspectives. For example, "Accessibility" evolved into "Seamless Cross-Compatibility" to emphasise integration across multiple devices, and "Personal" became "Profile Reflection" to better reflect how a platform connects with user identity and preferences.

4.1.2. Structure of the Survey

The survey was designed to assess customer's familiarity with music streaming platforms. Screening questions were placed at the beginning to ensure that participants were European or European residents with notable exposure to streaming services. An additional sub-screening question allowed to exclude from the analysis individuals who, despite frequently listening to music, had limited awareness of streaming platforms. To reach a broader audience and facilitate survey completion, the questionnaire was also translated by the researchers (who are native speakers) in Italian, French, and Portuguese. Participants could select their preferred language at the beginning of the survey.

After the screening questions were answered and irrelevant responses were excluded from the next section, participants were inquired about their perception of the 14 selected associations. Each

association was better explained to convey an abstract meaning to respondents. For instance, “Social” was presented as “refers to how much the platform fosters community involvement and allows users to connect with others: as users, you perceive you are part of a big group”. Responses were then collected using a five-point Likert scale, ranging from “Strongly Disagree” to “Strongly Agree,” ensuring consistent and interpretable data. This was also chosen to have the possibility for a neutral option. This would be particularly useful for participants who may not have a specific opinion about an association or a platform or who are unfamiliar with a particular one. The Likert scale was adapted for each attribute to measure the degree to which respondents associated each platform with specific characteristics. For example, for the "Social" association, the response options were translated into “Not social at all,” “Not social,” “Neutral,” “Social,” and “Very social,” providing tailored scales that facilitated precise evaluations. Lastly, to obtain comprehensive demographic insights, the survey included questions regarding age, gender, education and occupational levels, as well as music streaming habits (e.g., platform preference and listening frequency) (See the structure of the survey from Table 14 in Appendix).

4.1.3. Data Collection

The survey was distributed through multiple channels, including social media platforms (i.e., Instagram, LinkedIn, and WhatsApp), word of mouth (i.e., friends, family, and colleagues), and online forums (i.e., Survey Circle and Survey Swap). This distribution strategy was designed to capture a diverse demographic range of European consumers. Engagement was monitored throughout the collection period, with follow-up reminders sent to maximise participation. This approach proved to be effective, increasing response rates and supporting a robust dataset. The collection period ran from October 21st to October 28th, providing adequate time for gathering

responses. After the collection period, responses were reviewed, and non-sample-relevant submissions were excluded to ensure data quality and integrity.

4.1.4. Statistical Analysis Techniques

To translate the collected data into the perceptual space, statistical methods such as Principal Component Analysis (PCA) and Factor Analysis (FA) were applied (DeCoster 1998). The analysis was conducted using SPSS software, employing a Varimax rotation of the resulting components to clarify associations and better enhance the interpretability within the perceptual map (IBM 2021). PCA was implemented to streamline the dataset by merging highly correlated attributes into two principal components, which were then used as axes on the map (DeCoster 1998).

The Varimax rotation was applied to make the results more interpretable by adjusting the factor loadings. In this analysis, attributes often have loadings across multiple factors, making it challenging to identify which attributes are most strongly associated with each factor (Stephanie 2018). Varimax Rotation is an orthogonal rotation method that aims to simplify the interpretation of factors by maximising the variance of squared loadings of each factor. This means it adjusts the components so that each attribute has a high loading on only one factor, making the components as distinct as possible. The goal is to achieve a "simple structure" where each component is clearly associated with a small number of associations (Finch 2011).

The multidimensional approach allowed the map to extend beyond simple two-axis analyses, enabling deeper insights into the competitive positioning of each music streaming platform and providing a better understanding of their perceived strengths and weaknesses.

5. Consumer Preferences – Conjoint Analysis

To address the second research question about identifying the most preferred attributes of music streaming platforms by European consumers, a conjoint analysis methodology was conducted. To perform the empirical study, a survey was created, encompassing a selected set of attributes and corresponding levels. The platform Conjointly was used to construct the survey, which asked respondents to choose their preferred platform profile out of the presented alternatives and collected demographics to ensure the sample's relevance for the study. The results were then analysed using both the report from Conjointly and Excel to draw on significant insights into European consumers' preferences when selecting a music streaming platform. Lastly, a segmentation analysis of the results was also performed to explore how preferences differ across relevant consumer segments.

5.1. Methodology for Conjoint Analysis

5.1.1. Selected Attributes and Levels and Their Rationale

The attributes included in this study were selected based on insights from the literature review (Chapter 3) and the preliminary interviews. Initially, a list of 11 attributes was considered, however, this list was refined by excluding those elements that respondents might find challenging to comprehend or that were deemed non-essential based on insights from the interviews. These will be mentioned and explained at the end of this section. Ultimately, seven attributes were chosen for the survey– in line with the upper limit recommended by the platform Conjointly and because additional attributes could potentially overwhelm respondents. The final attributes and the corresponding levels used for analysis are summarised in the following table.

Table 3: Overview of Attributes and levels selected for conjoint study

Attributes	Levels
Brand	• Spotify • Apple Music • Deezer • Amazon Music • YouTube Music
Advertisement	• **Non-targeted** ads • **Personalised** ads • **No ads**
Listening Features	• **Limited features** *(limited song-skipping, shuffle-based listening (radio streaming), no lyrics)* • **Medium features** *(limited skipping, on-demand listening (can directly play the exact song in the playlist), no lyrics)* • **All features** *(unlimited skipping, on-demand listening (can directly play the exact song in the playlist**),** lyrics available)*
Access Mode	• **Online** only • **Offline & Online**
Music Curation Recommendation	• None • **Generic:** Popular & mainstream music recommendation *(based on top charts & top artists)* • **Personalised** recommendation *(Song radio: play similar songs automatically, "Made for you" playlists, Discover: based on your taste)*

Group Part

Social & Community features	• **Basic** *(share playlist on social media)* • **Standard** *(collaborative playlists, follow friends)* • **Advanced** *(in-app messaging, artist broadcast channel – like on Insta)*
Price ** written in alignment with European pricing standards*	• Free (0€) • 4,99€/ month • 9,99€/ month • 15,99€/ month

The inclusion of these attributes with the levels chosen in the survey is explained according to the subsequent motivations.

Brands: Brands were included as an attribute because, as highlighted in the market overview (Chapter 2) and consumer interviews (Chapter 4), consumers exhibit strong preferences for specific brands, which may influence their decision-making. As discussed in Chapter 2, "Spotify", "Apple Music", "Amazon Music", "YouTube Music", and "Deezer" were chosen for this study as they are the most prominent in Europe.

Advertisement: The literature (Chapter 3) underlined that advertisements are perceived by consumers as the cost of a free digital platform, allowing them to distinguish free from premium versions. Hence, it is crucial to consider how it shapes consumers' preferences. The level "No Ads" was included to represent the current premium offering of digital services. Two advertisement levels, "Personalised Ads" and "Non-Targeted Ads", were included since the literature (Chapter 3) suggests that personalisation may reduce the perceived ad intrusiveness. Hence, it is hypothesised that personalised ads may be more prone to drive a positive attitude towards choosing a free ad-supported service rather than non-targeted ads.

Listening features: Although existing literature provides limited insight into users' preferred listening features, consumer interviews (Chapter 4) highlighted the importance of elements such as lyrics and skipping ability – often representing advantages or pain points of certain platforms. Taking the most prevalent features linked to music listening, these were combined to construct

three levels to account for varying user preferences: a limited-feature basic option, an intermediary medium-level and a premium feature offering.

Access Mode: The digital consumer appreciates always available and accessible services, as mentioned in the literature review (Chapter 3). Additionally, for younger generations in particular, music is frequently listened to whilst travelling or commuting, thereby requiring offline access. Therefore, access mode was selected to assess if the possibility of downloading content influences consumers' choices for streaming services. Two levels can be derived from this attribute: content available "Online Only" versus "Offline & Online" (i.e., allowing content downloads).

Music curation recommendation: From the experts' interviews (Chapter 4), the quality of music recommendation and playlist personalisation emerged as essential factors for a good platform. Moreover, personalisation and a greater extent of personalisation are factors that drive choice, according to the literature (Chapter 3). This attribute was categorised into three levels: "None," "Generic" (popular & mainstream music recommendation) and "Personalised" recommendation. The level "None" was included as some interviewed consumers mentioned they only listen to their own created playlist. "Generic" corresponds to playlists curated based on local and global top charts, popular songs and artists. "Personalised" relates to playlists and recommendations tailored to a user's listening history and taste.

Social & community features: The social aspect of music streaming platforms, especially features allowing user interaction, was mentioned as crucial according to our third expert (Chapter 4) – expecting these to develop further. This attribute aims to explore consumers' preferences for in-app social features through three levels – "Basic", "Standard", and "Advanced" – corresponding to varying degrees of user interaction.

Group Part

Price: This attribute was included for its influence on consumers' decision-making when comparing options based on their willingness to pay. As freemium business models are prevalent in music streaming platforms (Chapter 3), the "Free" price level had to be included to represent the platforms' zero-cost version. The "4,99€", "9,99€", and "15,99€" levels were defined after computing the average of current prices for each type of subscription plan across platforms in European countries (see Appendix Table 13). To make the prices more competitive and consistent with typical subscription tiers, which often end in "99 cents" (Hilger 2018), these were rounded, resulting in the previously mentioned levels. 'Price per month' was set to reflect the common payment frequency of subscription tiers for music streaming platforms across Europe.

The attributes initially considered but eventually excluded from the study due to limited relevance or feasibility for inclusion are "Audio Quality", "Music Library Size", "Device Compatibility (including syncing)", "Non-Music Content", and "Type of Subscription Plan". Audio quality was excluded as it was difficult to define levels meaningful to respondents. Measuring units such as bit rate (kbps) or audio frequency range (kHz) were deemed too technical to comprehend for the average music listener, while low, medium and high quality were considered overly abstract. Concerning this, expert interviews further underlined the average user's difficulty in perceiving audio quality differences (Chapter 4) and audio devices (i.e., wireless Bluetooth) may also negatively impact sound quality (Butterworth 2020). Following consumers' and experts' interviews, device compatibility, non-music content, type of subscription plan and music library size were deprioritised as they did not appear as key differentiators in consumer decision-making due to all brands offering largely the same services.

5.1.2. Structure of the Survey

The questionnaire for the conjoint analysis was constructed with the platform Conjointly due to its ease of use, automated experiment setup and data extraction report, which facilitated the analysis. For this study, a choice-based conjoint was employed as opposed to a rating-based conjoint, so respondents selected their preferred product instead of assigning a score to each profile based on their preference (Rao 2014). The purpose of choosing this method is due to its ability to produce results with high predictive power and accuracy (Elrod, Louviere and Davey 1992). This approach is also more realistic, being closer to how purchasing behaviour is stimulated in the real world where individuals prefer to buy one product over another, and it allows to avoid scale biases (Rao 2014). Additionally, this method was more appropriate to convey trade-offs between product attributes by requiring respondents to compare whole products, thereby better reflecting the relative importance of attributes (Rao 2014). Moreover, the study was designed as a brand-specific conjoint to integrate brands as an attribute, allowing for partworth utilities to be generated for each brand (Conjointly 2024a), which is more suitable for identifying how preferences may differ across them.

The questionnaire for the conjoint was divided into five sections: introduction to the survey, screening section, block of conjoint, demographics questions, and additional questions regarding music listening behaviour (see structure and questions in Table 19 in Appendix). As for the perceptual map, after accessing the survey's link, respondents could choose the language between English, Portuguese, French, and Italian to accommodate the participants' nationality and to gather more responses (Figure 16 in Appendix). The introduction explained the aim of the research and provided the task to be completed in addition to prompting respondents to preferably access the survey from their laptop for optimal interface. Furthermore, two screening questions were included

to ensure that respondents were European residents and familiar with the concept of music streaming platforms, verifying their relevance for the market and research topic.

Following this, respondents had to answer the block of conjoint questions – for the layout, please refer to Figure 17 in Appendix. In each choice-set, respondents had to select one platform profile out of five combination alternatives created automatically by Conjointly. To avoid arbitrary responses, the option "None of the Above" was also included to refrain respondents from choosing an alternative if they would not consider buying it, thereby reflecting a real-life scenario. The maximum number of choice-sets was optimised by Conjointly. The order of the platform alternatives within each choice-set was randomised to avoid biases and ensure all levels were considered during the respondents' comparison process. However, to facilitate the survey's comprehension and provide stability, the order of the attributes across sets was fixed. To assist respondents' visual processing, key words describing the level were highlighted in bold and, where relevant, a visual image was included to support the text. To identify areas of improvement, no attribute level was prohibited for a specific brand. This approach aimed to test consumers' interest in features that are not currently provided by certain brands – e.g., Apple Music does not currently offer a free version. However, to avoid unrealistic scenarios incompatible with a profitable Freemium model (Chapter 3), the price-level "Free" was prohibited from being paired with any premium element – "No Ads", "All Features Available" for listening and "Advanced" for the social feature attribute. (Figure 18 in Appendix).

After the conjoint questions, demographic parameters related to respondents' gender, age, nationality, education level and occupation were inquired. In the last part, respondents' music behaviour was explored with questions regarding their professional musical experience, platform usage, subscription plan, listening frequency and situations in which they listen to music. This

section aimed at gathering data which constitutes discriminant variables describing the music profile of respondents to investigate preferences of relevant segments explored later in this chapter.

5.1.3. Data Collection

During its construction and before its launch, the questionnaire was continuously tested by each researcher, both on mobile and desktop devices, to ensure correct pathways and layout. This also ensured the accurate verification of translations as each researcher was a native speaker of at least one of the survey's additional languages. Furthermore, the preview link was shared with selected friends and family members to assess their comprehension of the conjoint parameters. This feedback was used to improve the formulation of attribute levels, helping to guarantee they were clearly understood as intended by the researchers. During this process, detailed level descriptions in italics and brackets were added for the attributes "listening features", "music curation recommendation", and "social & community features", as these were described as ambiguous. However, this adjustment made the profile sets visually text-heavy (Figure 15 in Appendix), requiring additional time to process, read and distinguish among platform alternatives, as noted by some participants after launch. Once finalised, the preview link was shared with the thesis advisor for final approval.

Following Conjointly's recommendation to gather at least 500 responses for meaningful analysis, the survey was shared from October 3rd to October 18th to maximise the response rate. The questionnaire was distributed to family and friends privately as well as on multiple platforms such as Instagram, WhatsApp group chats, Facebook, LinkedIn, X, Reddit, Survey Swap and Survey Circle. Given the more user-friendly interface of the conjoint block when accessed from a laptop, a suggestion of using a PC was included when sharing the survey. This initiative aimed to optimise respondents' experience and minimise early termination of the survey.

5.1.4. Additional Analysis – Preferences per Consumer Segment

The segmentation tool in Conjointly was used to examine whether preferences vary across different relevant consumer groups identified based on the sample and the music streaming user profile discussed in the literature review. While the small sample sizes of some segments and correlations between variables (i.e., age and platform preference) may limit the reliability of this analysis, it aims to generate insights into how preferences may differ across key consumer segments within this study's respondent pool. For clarity, overall preferences are discussed by analysing the averages for each attribute and level across brands, computed separately in Excel.

Young vs older generation

The young generation is defined as respondents aged 34 under (n=150) – encompassing Generation Z and Millennials, who represent the primary user base of music streaming platforms. The older generation segment comprises respondents aged 35 and above (n=21).

Across both segments, Spotify remains the most preferred platform, and Deezer is the least preferred (Table 26 in Appendix). With a higher median value (32.6 compared to 25.5 for older users), younger users show a more pronounced preference for Spotify. Apple ranks second among younger users (3.9) but second to last brand for those aged above 35 (-5.9). Conversely, YouTube Music (4.1) and Amazon Music (-1.2) rank higher among older users, placing 2nd and 3rd respectively, compared to younger respondents, who find these platforms less appealing.

Regarding the attributes' importance by age segment, given their strong representation in the total sample, the preferences of the young segment are consistent with the previous overall analysis (Appendix: Table 27). For younger users, the order of importance is "Price" (29.9%), "Listening Features" (20.6%), "Advertisement" (15.7%), "Access Mode" (15.4%), "Music Recommendation" (10.5%) and then "Social Features" (7.9%). The older segment, however,

places greater emphasis on music curation (13.3%) than on "Access Mode" (10.5%), indicating a stronger interest in features that facilitate music discovery over flexible access. Moreover, older respondents assign less importance to "Listening Features" (16.6%), suggesting a greater tolerance for platform restrictions, such as shuffle-based mode and limited song-skipping, compared to younger users (20.6%). Additionally, price is more critical for older users (36.1% compared to 29.9% for younger users), potentially reflecting the older generation's belief, as suggested in the literature, that digital content is public and should be free (Halttutten 2016). Alternatively, this may be due to younger users not paying for their subscriptions themselves, as they are often financially dependent, thereby being less cost-driven. Supporting this, almost 60% of young adults under 35 still receive financial aid from their parents (Carpenter 2024). Interestingly, the older group also assigns marginally more importance to "Social Features" (8.4%) than younger respondents (7.9%), although still not crucial.

Concerning specific attribute levels (Appendix: Table 28), both segments prefer the "Free", followed by the low-cost plan (4,99€), with minimal interest in the medium and high-tier plan (i.e. 9,99€ and 15,99€). Older users seem more price-sensitive, focusing on cost-saving options, as suggested by a greater preference for the "Free" option (22% compared to 15.2% for the younger segment) and a stronger aversion to higher-priced plans (i.e., 9,99€ and 15,99€). Although both segments prioritise a rich listening experience, older respondents are more willing to accept limitations in lyrics availability and song-skipping, as indicated by their neutral "Medium Features" partworth (-0.5% compared to -1.8% for the younger generation). Both groups prefer ad-free experiences, showing lower preference for "Personalised Ads" and less for "Non-Targeted Ads". Younger users are slightly more ad-sensitive, highlighted by a relatively stronger partworth for "No Ads" and a greater aversion to personalised ad-targeting. Despite the older groups' lower

emphasis on “Access Mode”, both segments value “Offline & Online” connectivity. For “Music Recommendation”, “Personalised” curation tailored to the user’s taste is preferred by both groups over “Generic” and even more so over “No Recommendation”. Lastly, for the social attribute, younger respondents prefer “Basic” features (1%) over “Standard” (-0.7%) and “Advanced” (-0.4%), emphasising the ability to follow others’ playlists rather than playlist collaboration or in-app messaging. Older users, by contrast, show equal preferences for “Basic” and “Standard” features (both 0.2) but share a similar aversion to “Advanced” features (-0,4%), such as artist broadcast channels.

Free vs Premium users

This section aims to assess whether respondents’ current platform experience influenced their preferences by comparing free users (n=32) with premium users (n=135). Spotify leads in brand preference across both segments, with a stronger appeal among free users (Table 26 in Appendix). There is a distinct preference divide between the two segments regarding Apple Music, with premium users showing a higher preference (4.6), resulting in second position, while free users exhibit aversion to the brand (-4.5). This observation could be attributed to the current absence of a free offering from Apple, which may lead free users to perceive that Apple Music is unable to meet their value expectations. Both segments display negative scores for YouTube Music, albeit more pronounced for free users (-8.8 compared to -4.6 for premium users). Although premium users generally prefer Spotify, they appear more open to exploring other options, particularly Apple Music and YouTube Music, compared to free users.

In terms of attributes (Appendix: Table 27), free users place significantly more emphasis on “Price” (44.6% compared to 27.4% for premium users), reflecting a high sensitivity to cost, while also valuing “Listening Features” (14.2%) slightly more than other attributes. Their preferences

for “Access Mode” (11.2%), “Advertisement” (11.3%) and “Music Curation Recommendation” (11.1%) are balanced. This suggests that free users are willing to tolerate service limitations for a satisfactory and cost-effective listening experience. In contrast, although “Price” is the most influential factor, premium users appear more inclined to pay for a higher-quality experience. This is reflected in the greater importance they assign to “Listening Features” (21.5%), “Advertisement” (16.7%), and “Access Mode” (15.6%). Both groups share similar preferences for “Music Recommendation” and “Social Features”, which rank second to last and last, respectively. Regarding level preferences (Appendix: Table 28), free users significantly value the “Free” level (31.7%) and show considerable aversion to more expensive tiers, although they are willing to accept the 4,99€ plan (5.8%). Premium users also show a preference for the free version but are more open to mid-range pricing (4,99€; 5.9%) and display some tolerance for the 9,99€ tier (-2.4%) compared to free users (-11.9%). Both segments prioritise “All Listening Features” over alternatives, though free users (1.3%) are more accepting of “Medium Features” (with limited song skipping and no lyrics) than premium users (13.7%). Moreover, both groups prefer an ad-free experience, though premium users exhibit a stronger aversion to both “Personalised” and “Non-Targeted Ads”, likely due to the ad-free experience being the selling point of premium plans. Interestingly, free users still show a positive score for “Personalised Ads”, suggesting a higher level of tolerance compared to “Non-Targeted Ads”. Both groups prioritise “Online & Offline” access. Preferences for music curation are evenly distributed, with free and premium users both favouring “Personalised Recommendation” over no suggestions. Given its relatively neutral scores, “Generic Curation” appears to be regarded as a minimum requirement. In terms of “Social Features”, free users place greater value on “advanced” options (1.3%), such as in-app messaging and artist channels, as well as “Basic” playlist-sharing features (0.3%) compared to collaborative

playlist abilities ("Standard": -1.6%). In contrast, subscribed users show stronger preferences for basic elements (1.1%) over more premium ones (i.e., "Standard": -0.3%; "Advanced": -0.7%), suggesting that social features are not perceived as a significant value proposition for paid subscriptions.

Spotify users' vs other platforms

This section investigates preference differences between respondents who were Spotify users (n=136) and those who used another platform (n=31). Due to the low count of respondents for each alternative platform (Apple Music, Amazon Music, YouTube Music and Deezer), a platform-specific analysis cannot be performed as it is neither meaningful nor representative.

Both segments exhibit a clear preference for Spotify (Table 26 in Appendix), with Spotify users showing a much stronger affinity (median: 37.4) compared to users of other platforms (median: 18.1). Whilst Deezer remains the least preferred brand across both groups, Spotify users demonstrate less favourable preferences for all other brands. This is reflected in users of other platforms showing slightly more positive preferences for Apple Music (6.1), Amazon Music (0.7), and YouTube Music (-2.9) compared to Spotify users (1.3, -8.8, and -8.3, respectively). These differences support the earlier claim that Spotify users may display strong brand loyalty, which may result in less favourable views of competitors.

For the relative attribute importance (Appendix: Table 27), "Price" ranks highest for both groups. However, users of other platforms appear to assign greater relative importance to "Price" (37.7% versus 29% for Spotify users), suggesting a stronger focus on cost-effectiveness and affordability. Whilst "Listening Features" and "Advertisement" are second and third in importance for both groups, Spotify users prioritise these slightly more, reflecting a preference for a feature-rich and ad-free experience. In contrast, users of other platforms prioritise "Music Curation

Recommendation" over the flexibility of connectivity (i.e., "Access Mode") compared to Spotify users, highlighting a greater need for music discovery support.

Regarding attributes levels (Appendix: Table 28), both segments prefer cost-effective plans, strongly favouring "Free" and the 4.99€/month tier while rejecting the 15.99€ option. However, Spotify users appear more willing to accept the 9,99€ plan, suggesting a greater willingness to pay this price for a feature-rich experience. Both groups value "All Features" (i.e., lyrics included, unlimited skipping and on-demand listening) over "Limited Features". However, "Medium Features" perform worse for Spotify users (-2.2%) than users of other platforms (0.9%). This suggests that non-Spotify users place greater value on upgrading from limited (shuffle-based) to medium-level features (on-demand listening) than Spotify users do. Moreover, both segments prefer "Offline & Online" access over "Online Only" and an ad-free experience over ad-supported options, particularly avoiding "Non-Targeted Ads". Even though both groups dislike "Personalised Ads", users of other platforms appear slightly less reluctant (-1.9% compared to - 4.5% for Spotify users). For "Music Recommendation", both groups appreciate suggestions, especially "Personalised" ones tailored to their taste, with Spotify users being slightly more appreciative of "Generic" curation (-0.1% compared to -1.1%). Lastly, Spotify users and other platforms' users prefer social features related to playlist-sharing (i.e., "Basic"). However, compared to the Spotify segment, users of other platforms favour collaborative playlist features (i.e., "Standard") over in-app messaging and artist broadcast channels (i.e., "Advanced").

This analysis of specific consumer segments in music streaming platforms highlighted key preference differences. It has revealed that younger generations strongly prefer Spotify or Apple Music, valuing price while prioritising a feature-rich, ad-free listening experience. In contrast, older users emphasise price and music curation, displaying greater tolerance for limitations and

openness to exploring other brands. Free users seek a cost-effective service that offers a good experience in terms of listening features, while premium users are willing to pay for a well-rounded service with enhanced features, ad-free access, and offline capabilities. Lastly, the analysis across platforms' users also demonstrated Spotify's dominance and brand loyalty, whilst users of other platforms are driven by cost-effectiveness and lower prices.

6. Conclusion

This chapter discusses the findings of the perceptual map, conjoint analysis and additional research in relation to insights from literature and preliminary interviews to answer this paper's research questions. To do so, European consumers' perceptions and preferences for music streaming platforms can be inferred from the empirical studies' results.

6.1. Discussion

When every music streaming service has almost identical tracks and artists, how is each platform perceived and differentiated by European consumers?

When every music streaming service has almost identical tracks and artists, differentiation in the market comes down to the user experience and platforms' ability to deliver value that resonates with consumer preferences. The perceptual map findings reveal that consumers primarily

differentiate music streaming platforms through aspects such as intuitive user interfaces, profile reflection, ease of access across devices, and alignment with current music trends. These aspects are critical in an industry where content homogeneity is a significant challenge. Differentiation arises not just from catalogues' extensiveness but also from a strategic focus on delivering an easy-to-use interface, staying relevant with music trends, and offering seamless cross-platform access. Spotify emerges as the market leader, closely aligned with attributes such as algorithm relevance and innovative, social, and intuitive user interface in the perceptual map. This positioning highlights its strength in providing personalised experiences and fostering community engagement. The literature supports this perception, with platforms like Spotify recognised for their innovation in features such as Discover Weekly and Spotify Wrapped, which drive user engagement and satisfaction. Additionally, Spotify capitalises on psychological ownership by enabling users to create and share playlists, further enhancing their involvement on the platform (Sinclair and Tinson 2017; Belk 2013, 2014; Fernandes and Guerra 2019; Barata and Coelho 2021). Social interaction plays a key role in driving adoption, as noted by Chen et al. (2018), who argue that social activities significantly shape consumer attitudes toward music streaming services. This aligns with Bennett and Hodkinson's (2020) findings, which highlight that younger generations often use music to support social activities, build their personal image, and connect with peers, further enhancing Spotify's appeal as a trendy and socially engaging platform.

Apple Music, on the other hand, is perceived as sophisticated and convenient, as reflected in the perceptual map. Its seamless integration within the Apple ecosystem ensures a smooth user experience, particularly for those who value efficiency and premium design. This represents a benefit for Apple Music as the literature claims that ease of use provides a competitive edge in terms of how effortless listening to music online is according to consumers (Suki 2011). However,

the platform's algorithm relevance and social connectivity appear to be areas for improvement. The consumer interviews revealed that younger users, in particular, were dissatisfied with the lack of diversity in Apple Music's recommendations, highlighting its algorithmic limitations compared to Spotify. Moreover, the absence of social features, such as playlist sharing, weakens its appeal for users who prioritise social interaction, a key driver of engagement, especially among younger demographics.

YouTube Music is positioned closer to affordability in the perceptual map, indicating its appeal to cost-conscious users. Its pricing strategy is a significant factor in attracting younger users, as highlighted in the literature, which notes a "free mentality" mindset prevalent among digital consumers, particularly students. (Lin, Hsu and Chen 2013) However, its distant positioning from attributes like "Intuitive User Interface" and "Algorithm Relevance" points to areas where it is still positioned far behind competitors. The platform's limited personalisation capabilities and its less intuitive interface undermine its ability to fully engage users, as reflected in the lower ratings in the survey responses. Additionally, confusion between YouTube and YouTube Music continues to affect its brand identity, hindering user engagement. While affordability is a strength and important for budget-conscious users, YouTube Music's lack of advanced features leaves it behind platforms like Spotify and Apple Music on other fundamental aspects.

Fourthly, Deezer is perceived as a niche platform, positioned far from key attributes like "Social", "Innovative", and "Convenience". Its appeal is largely driven by localised strategies, such as partnerships with telecom providers like Orange in France, which make the platform more accessible to certain user segments (Chapter 4). However, Deezer's less intuitive interface and lack of social connectivity limit its competitive edge. While efforts to address choice overload

(Hracs and Webster 2020) through mood-based playlists exist, they have not been sufficient enough to establish Deezer as a major player in the competitive market (Hagen 2015).

Amazon Music occupies a neutral position in the perceptual map, with perceptions spread evenly across key attributes. The platform's primary strength lies in its integration with Amazon Prime, which appeals to users seeking convenience and simplicity. Offline accessibility and perceived ease of use significantly enhance a user's perception of value, increasing loyalty and willingness to pay (Fernandes and Guerra 2019; Suki 2011). However, reflecting its neutral positioning, Amazon Music struggles to stand out in personalisation, innovation, and social — key areas that drive emotional attachment and customer retention. Moreover, consumers increasingly expect platforms to provide tailored, hedonic experiences that reflect their personal preferences, such as curated playlists and algorithm-driven recommendations (Hracs and Webster 2020; Kim, Chan, and Gupta 2007). Without these distinguishing features, Amazon Music risks being perceived primarily as a functional utility rather than an innovative or community-focused platform, limiting its appeal to younger, experience-driven audiences who prioritise personalisation and emotional connections (Bokström and Eriksson 2023; Oydele and Simpson 2018).

The findings from the perceptual map and literature reveal that music streaming platforms manage to differentiate through their ability to deliver personalisation, foster social connectivity, and establish a strong brand identity. Spotify's dominance is rooted in its algorithmic capabilities, social features, and innovative user experience. Apple Music capitalises on its premium image and ecosystem integration but falls short in personalisation and social connectivity. YouTube Music's affordability positions it as a cost-effective alternative, though its algorithm and navigation challenges hinder its competitive potential. Deezer's niche appeal relies on localised partnerships,

while Amazon Music emphasises convenience and neutral positioning but lacks features that would set it apart from competitors.

What attributes of music streaming platforms are valued the most by consumers in Europe?

Although some academics have argued that a consumer's sense of belongingness toward a product is a decisive factor in their decision-making process (Jussila et al. 2015), the conjoint analysis revealed that price is the most critical attribute when selecting a music streaming platform. This different perspective aligns with consumers' preliminary interviews and Fernandes and Guerra (2019), who identified subscription fees as a determining element in users' purchase decisions. Additionally, from the analysis, consumers gravitate toward free and low-cost options, potentially explained by the concept of "free mentality" described by Lin, Hsu, and Chen (2013). As the literature highlights, positive affective evaluations of free offerings (i.e., "zero-price effect") may hinder conversion to premium tiers (Niemand, Mai, and Kraus 2019), creating a challenge for Freemium platforms such as Spotify, Deezer and YouTube Music.

The study also found that consumers prioritise functional enhancements that directly improve their music experience, as evidenced by the importance of listening features, particularly advanced capabilities such as unlimited skipping, lyrics, and on-demand listening. This insight complements the preliminary interviews, where consumers expressed frustration with restrictive features that caused interruptions in their free experience. This underscores how listening features, which include functional and cognitive characteristics that impact performance, play a significant role in perceived usefulness, a key factor in shaping consumer satisfaction (Fernandes and Guerra 2019; Kim et al. 2007).

Access mode and advertisement share a similar moderate level of importance for consumers. The conjoint study highlighted the importance of access mode, especially offline functionality, for consumers, supporting the findings of Chai et al. (2021) and Fernandes and Guerra (2019), which

argue that flexibility in use adds significant value to a service. The analysis suggests that, as consumers listen to music on multiple occasions (Park et al. 2012), offline access is a necessity for most. Therefore, platforms not offering this feature may find it difficult to compete. Moreover, the conjoint confirmed the much-discussed topic related to consumers' tendency to avoid ads, perceiving them as intrusive, as shown by their preference for ad-free services. While ad relevance may reduce avoidance (De Keyzer, Dens and De Pelsmacker, 2015), this study suggests that personalised advertisements still undermine user consumption autonomy (Baek and Marimoto, 2012) and represent a significant cost (Papies, Eggers, Wlömert 2010) that outweighs the benefits of a platform's free version.

In contrast, music curation and social features are less influential in consumers' decision-making, according to the analysis, diverging from expert insights who claim the increased importance of personalisation and social features to foster differentiation. The conjoint analysis demonstrated that these elements are secondary in the selection process when compared to other core factors related to the purpose of music platforms (i.e., listening to music). Nonetheless, with regard to curative practices, it found that personalised music recommendations are preferred by consumers compared to the absence of suggestions. Therefore, this indicates that consumers find value in practices that help limit the choice overload associated with music discovery (Hracs and Webster 2020). The low importance of music curation recommendation may reflect previous findings that some consumers dislike curation as they perceive it to undermine their autonomy in music discovery and diminish the effort associated with a deeper appreciation of music (Jarness 2015; Prieur and Savage 2013; Savage and Gayo 2011). Although the literature discussed social aspects as potential influencing factors in music streaming (Bennett 2017; Martin and Morel 2012), the conjoint findings support research conducted by Barata and Coelho (2021), arguing that social

factors play a limited role in platform choice. Nevertheless, consumers prioritise functional sharing features over advanced social elements that focus on in-app communication. This preference for sharing music, rather than deeper in-app social interactions, reflects its role as a means for consumers to express and reflect their identity, as discussed by Bennett (2017) and Martin and Morel (2012).

Moreover, it is noteworthy to mention that the analysis found strong brand loyalty from consumers toward Spotify, which aligns with the loyal user profile depicted by experts during preliminary interviews. Given consumers' preference for Spotify and Apple, as illustrated by the analysis and the preliminary interviews, this suggests that brand image, particularly a platform's reputation, may influence decision-making.

Additionally, a segmentation analysis performed on the results revealed that, overall, the attributes were prioritised following the same order of preferences across different consumer segments, with price and listening features being the most important aspects. However, the degree of importance varies depending on generations, whether people were free or premium users, or on the music streaming platform they used. Younger users, for instance, prioritise a feature-rich and ad-free experience, while older users place greater emphasis on music curation and are more accepting of platform limitations, confirming that music consumption varies across generations (Kim 2016). This also underscores the importance of market segmentation for music streaming platforms to understand how consumer needs vary across different user segments so that they may develop targeted and efficient conversion strategies, as suggested in the literature by Sciglimpaglia and Raafat (2022).

Concerning specific key players, with price remaining a dominant factor, all platforms must carefully balance affordability with compelling premium offerings. Spotify's analysis results

demonstrate a strong brand image and alignment with consumer priorities, evidenced by consumers' tolerance for limited listening features. This indicates its effective approach to a two-tiered freemium model, which lowers non-monetary barriers and encourages widespread adoption (Niemand, Mai, and Kraus, 2019). Nonetheless, the literature warns that customer satisfaction needs to be continuously maintained through innovative strategies, such as exclusive content or enhanced features, to sustain the longevity of subscriptions (Bokström and Eriksson 2023; Murali 2016). Given consumers' strong interest in free options for Apple in the conjoint analysis, its lack of free offerings places it at a competitive disadvantage, potentially limiting its appeal. However, consumers show reluctance to more autonomy-restrictive, shuffle-based listening features. Regarding Amazon Music, consumers expressed the strongest inclination to avoid ads and sought personalised guidance in discovering music, whereas they resonated less with offline functionality. For YouTube Music, perceived usefulness drives consumers' preferences as they prioritise feature-rich listening and offline functionality and value preserving their autonomy for independent music exploration. Lastly, consumers highly valued personalised music recommendations and an ad-free experience for Deezer while showing reluctance toward personalised ads. This may potentially be explained by privacy concerns (Baek and Marimoto, 2012; Li and Huang 2016), particularly given their limited familiarity with the platform.

Therefore, this study concluded that European consumers are heavily driven by price for their platform choice while simultaneously prioritising a platform that offers a music experience without listening restrictions. This study, recalling the findings of Niemand et al. (2019), highlighted that consumers prefer free and low-cost options but value premium features that enhance service quality. To convert free users to paid plans, platforms must effectively balance the premium fit, as emphasised by Wagner, Benlian and Hess (2014). Consumers' preference for functionality over

social interaction suggests that platforms should prioritise practical, value-driven innovations related to the experience of listening to music rather than relying on community-building features.

6.2. Managerial Implications

The findings of this study present actionable strategies for music streaming platforms to meet the changing consumer needs and differentiate themselves in an evolving market. Platforms should focus on offering comprehensive features set to attract and retain users, as the demand for full functionality is evident across respondents and brands. Moreover, as price is among consumers' most considered factors, it is crucial to justify higher price points by increasing the value of their offerings, developing unique features that further fulfil consumers' needs, and effectively communicating their benefits.

Spotify's success in the market is a good representation of how brand image and reputation are key. Given the challenge of content homogeneity, platforms must prioritise current and upcoming features (e.g., in-app music identifiers, personalised recommendations, etc.) that enhance their image and give value to their users' experience. For instance, Spotify should continue to enhance its advanced personalisation and cross-compatibility features to maintain its leadership position in the market. Other than including listening features, music platforms should leverage consumers' attractiveness towards live experiences by focusing on features which allow them easier access to live events and a closer connection to their preferred artist. This not only strengthens the symbiotic relationship between platform, artist and user but also increases consumer engagement with the brand.

An additional key recommendation is to invest in marketing campaigns to raise awareness of the music platform itself and its new premium features. Referred to the latter, this study underlines how consumers are largely uninformed of the new initiatives currently implemented. Despite this, however, most surveyed consumers valued features such as "Access to Concert Tickets" and "Unique Live Experiences" enough to consider upgrading to the premium version of a music

platform, if these features were included. A potential solution, therefore, is to adopt a targeted advertising strategy that delivers different personalised ads, each highlighting the distinct benefits of the premium features offered. By integrating these into the listening experience of free-tier users, music platforms can effectively communicate the value of their premium offerings. For premium users who are not exposed to advertisements, communication through in-app notifications and newsletters should be improved, for users to stay informed about the recently introduced initiatives. Another finding highlights consumers' difficulty in distinguishing YouTube Music from YouTube. To tackle this, YouTube Music could strengthen its communication strategy by leveraging its parent platform to increase its budget-friendly positioning, as well as improve its algorithmic and interface functionalities.

To address the diverse consumer preferences, it is crucial for music platforms to conduct an effective market segmentation, considering consumers' price sensitivity as a key factor. To tackle the "free mentality" mindset and the "zero-price effect", platforms such as Apple Music could benefit from implementing a Freemium model to broaden their appeal and increase consumer attraction. Alternatively, platforms could introduce subscription plans tailored to specific user segments, differentiated by the features included. For instance, higher-paying consumers who are more driven by features could be interested in subscribing to a plan which includes exclusive features present in the premium version. Instead, entry-level plans offering basic features related to the core listening experience could attract price-sensitive users.

This study mentions Deezer's strong position in the French market and its untapped potential to enhance its competitiveness in the European landscape. Despite providing features that align with consumer preferences, it struggles with delivering users a seamless and intuitive experience compared to its competitors. Furthermore, its limited international awareness hinders its potential

Group Part

success. To address these, Deezer should prioritise its improvement of the user interface as well as refine its strategies to strengthen its international presence by building on existing and new partnerships to strengthen its brand image across European countries.

To conclude, leveraging the insights from this research, music streaming platforms must adopt strategies focusing on effective communication, introducing innovative features, and emphasising differentiation to attract consumers and tackle challenges such as price sensitivity and content homogeneity. In doing so, they meet their users' evolving expectations while navigating the dynamic music streaming landscape.

6.3. Limitations of the Study and Implications for Future Research

The research conducted for this thesis was subject to several limitations that should be acknowledged and that may represent opportunities for future research.

Common to all analysis

Firstly, the study group for both the interviews and surveys (i.e., perceptual map and conjoint analysis) were predominantly Spotify users. This could have biased the results as respondents may have had a more positive perception of Spotify due to familiarity and personal preference as well as its position in the market. For the perceptual map, this may have resulted in limited perceptions and more neutral ratings for other platforms of this study. In the conjoint analysis, participants may have chosen a profile containing Spotify without considering other platforms, leading to biased responses. Future research should recruit participants from a wider range of music streaming platforms to capture a more diverse set of perceptions and preferences. This would ensure a more balanced distribution of respondents across streaming platforms to mitigate platform-centric bias and allow for a clearer comparison.

Group Part

Secondly, most respondents were young individuals, limiting the relevancy of the findings to a wider demographic. Older generations may have different preferences and priorities when choosing a music streaming service. Although this was discussed during the analysis, future research should aim to collect a wider variety of answers, with each age group being sufficiently and equally represented, to increase the accuracy and representation of the results.

Thirdly, the concentration of respondents from specific European countries, primarily Belgium, Italy, Portugal, France, Germany, and the UK, may limit the relevancy of the findings. While these countries are significant markets for music streaming services, they may not fully represent the diverse preferences and behaviours of all European consumers. The study does not account for potential regional disparities in user preferences and pricing sensitivities, which may vary across countries. Future research should limit the scope of analysis by focusing on a selected European country or region with similar behaviours to better localise the research. Alternatively, if studying the broader European market, future research should expand data collection across multiple European countries to ensure a broader and more balanced representation, which would allow to better account for regional disparities in user perceptions and behaviours.

Lastly, respondents were unfamiliar with Deezer as evidenced by the low count of Deezer users in the analyses, suggesting that the platform is not widely known across the European market. However, excluding Deezer from the study could have potentially limited the overall understanding of the music streaming European market as well as the credibility of the final conclusions. Hence, future research should access a larger sample of Deezer users to enhance the reliability of the analysis for the brand.

Applicable to the perceptual map

The perceptual map analysis was limited by a relatively small sample size, with only 150 valid responses collected. This small sample constrained the diversity of impressions captured, limiting

Group Part

the generalisability of the findings. A larger sample size would have allowed for more comprehensive insights and ensured a more robust representation of user perceptions. Future research should aim to increase the number of participants to enhance the reliability of the analysis. Moreover, some of the associations used in the perceptual analysis, such as “Algorithm Relevance”, “Seamless Cross-Compatibility”, and “Intuitive User Interface”, were not abstract enough. While efforts were made to explain these associations in more conceptual terms to gather abstract perceptions from respondents, the level of abstraction may have still influenced participants' ability to provide immediate and instinctive associations. Future analyses should focus on incorporating more abstract and intuitive associations to capture spontaneous and instant perceptions from users, ensuring a deeper understanding of their brand impressions.

Applicable to the conjoint analysis

Firstly, the conjoint analysis was also limited by a relatively small sample size, falling short of Conjointly’s recommended minimum responses due to time constraints imposed by the thesis timeline. Given the limited pool of participants, the findings may not be entirely representative of the broader population. To address this limitation, future research should extend the data collection period, ensuring that the minimum sample size requirements are met before closing the survey. This approach would enhance reliability and would make the results more meaningful.

Secondly, the vertical layout of the conjoint choice-sets on mobile devices made it difficult to compare options side-by-side, requiring respondents to remember the options available. This may have impacted their decision-making and results’ accuracy. Future research should consider using another platform than Conjointly, or simplify profile sets by reducing text, using images instead of text if possible, and providing level descriptions beforehand or above the page to improve visual processing and comprehension.

Group Part

Finally, the study focuses on a limited set of attributes such as “Price”, “Advertisement” and “Social Features”. Additional factors such as audio quality, subscription plan options, music size library and member accounts per plan could influence consumers’ preferences. Additional research should incorporate other attributes to investigate their importance and accurately illustrate consumers’ complex decision-making process.

Applicable to the additional research

The additional research which investigated consumers’ interest in emerging trends within the music streaming market also suffered from a small pool of respondents. This may have been impacted by a limitation in time to collect responses, which in turn may have prevented the accuracy in determining consumers’ interest towards the new trends. Future research should consider a larger timeframe to collect more answers from a diversified pool to improve the meaningfulness of the analysis.

Implications for future research

Future research could focus exclusively on consumer preferences for premium offerings specifically, to analyse consumers’ willingness to pay beyond the subscription prices currently set by streaming platforms, considered for this study. Subsequently, this approach could help identify the optimal pricing of subscription plans to secure conversions from free to paid plans, which may limit the zero-price effect bias.

Additionally, future research could also investigate how the recent introduction of non-music content, such as podcasts and audiobooks, into music streaming platforms, adds value to the offering and how it may influence consumer preferences and perceptions when differentiating between and selecting a platform.

Given the importance of user attraction over retention within the music streaming market, future research should thoroughly investigate the behaviour, motivations and boundaries faced by non-

users, whereas this paper primarily focused on current users. A comprehensive understanding of the reason why people do not subscribe to music streaming services could help identify strategies and business opportunities that support customer acquisition.

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10.Appendix

Appendix: Market Overview

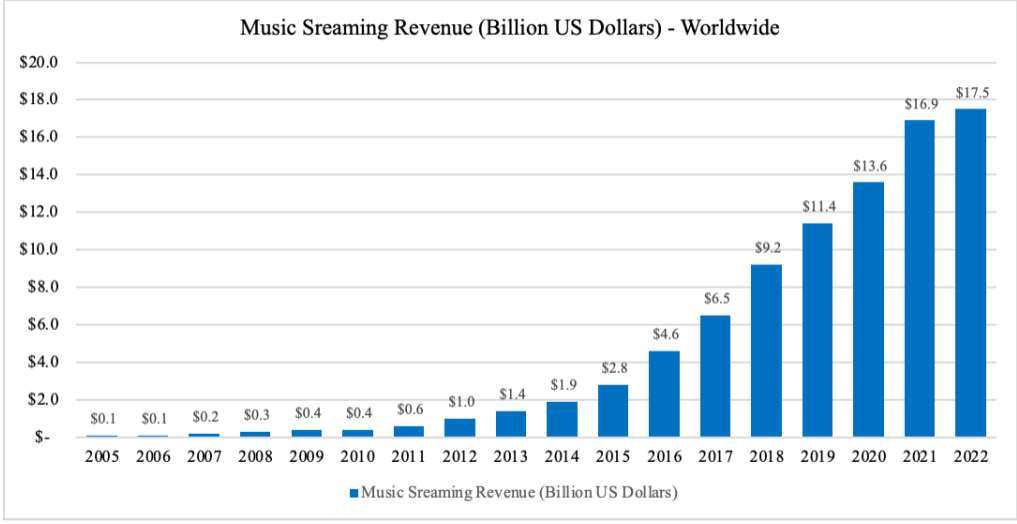


Figure 8: Growth of Music Streaming Revenue Worldwide from 2005 to 2022 (Source: Moore 2023)

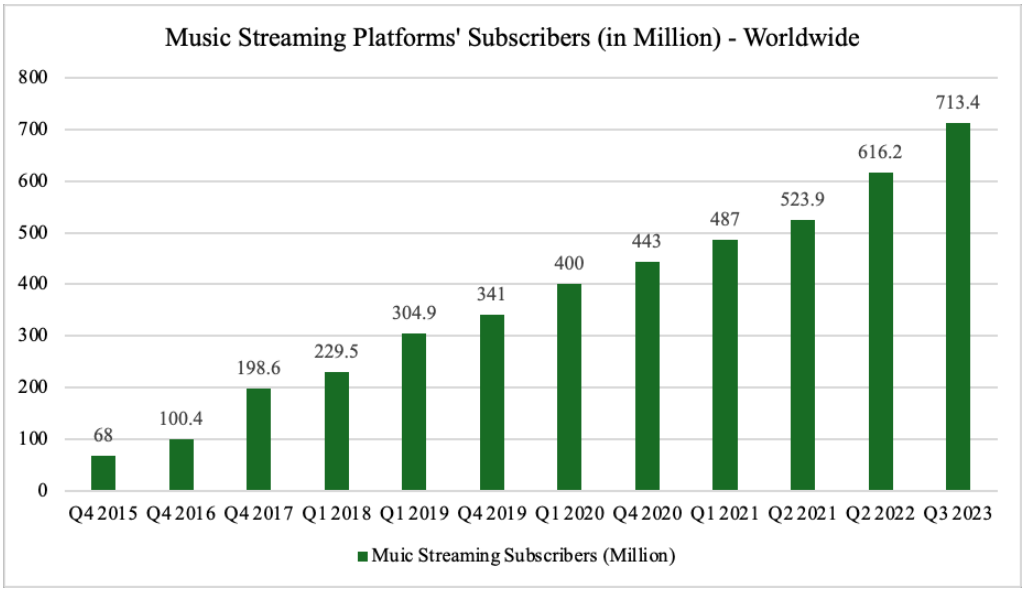


Figure 9: Growth of Music Streaming Subscribers Worldwide from 2015 to 2023 (Source: Moore 2023)

Group Part

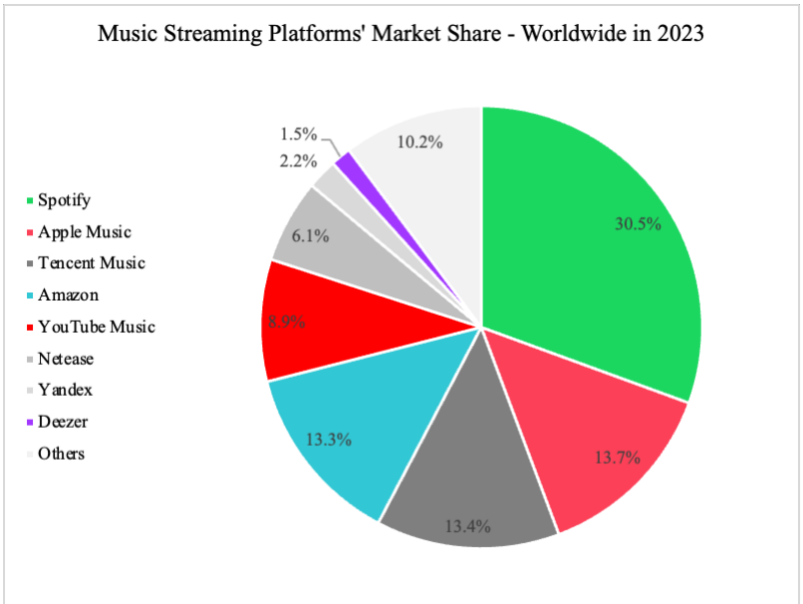


Figure 10: Music Streaming Services Market Share Worldwide in 2023 (Source: Leu, 2023 in Statista

Appendix: Current Subscription Prices Analysis

Table 13: Overview of Subscription Plan Prices - per type and per platform

	Spotify			Apple Music		Deezer	YouTube Music	Amazon Music	Average	Final Conjoint Prices
	(PT)	(BE, IT, DE, ES)	(FR)	(PT)	(FR/IT/DE/ ES/ BE)	(FR/IT/DE/ ES/ BE/PT)	(FR/IT/DE/ ES/ BE/PT)	(FR/IT/DE/ ES/ BE/PT)		
Student	4,49 €	5,99 €	6,06 €	3,99 €	5,99 €		3,49		**5,00 €**	**4,99 €**
Individual	7,99 €	10,99 €	11,12 €	7,49 €	10,99 €	11,99 €	6,99	10,99 €	**9,82 €**	**9,99 €**
Duo	10,49 €	14,99 €	15,17 €	/	/	/	/	/	**13,55 €**	
Family (always 6 people)	13,99 €	17,99 €	18,21 €	11,99 €	16,99 €	19,99 €	10,99	17,99 €	**16,02 €**	**15,99 €**

Appendix: Perceptual Map Survey design

Table 14: Perceptual Map Survey Structure & Questions

Section	Questions	Remark
Introduction to Survey	This survey has been designed to gather insights into how European customers perceive popular music streaming platforms, including **Spotify, Apple Music, Amazon Music, YouTube Music, and Deezer.** The focus is on evaluating service characteristics such as affordability and user interface, as well as brand personality traits like innovation and design. Your responses will contribute to the development of our master's thesis, by exploring the role of these platforms in shaping the music streaming landscape in Europe. The survey will take approximately 10 minutes to complete. *Thank you for your invaluable contribution to this project!* *P.S: This survey contains completion codes for SurveySwap & Survey Circle. The codes are at the end of the survey after submission*	/
Pre-Screening Questions	**Q1: Are you European or reside in Europe?** • Yes • No	*If no, survey ends*
	Q2: How often do you listen to music? • Very rarely (a few times in a month but not every week) • Rarely (1-2 days per week) • Sometimes (3-4 days per week) • Often (5-6 days per week) • Every day	*Single-choice question*
	Q3: Are you familiar with the concept of music streaming platforms (i.e., Spotify, Apple Music, Amazon Music, YouTube Music, Tidal, Qobuz, Deezer...)? • Yes • No	*If no, demographic*
	Q4: Do you use any music streaming platforms? • Yes • No	*If no, survey ends*

Group Part

	Q5: Which music streaming platform do you use as your primary means to listen to music (on regular basis)? • Spotify • Apple Music • Deezer • Amazon Music • YouTube Music • Soundcloud • Tidal • Qobuz	*Single-choice question*
Block of Perceptions *Likert Scale questions*	**Q6: Affordability** (Refers to the overall pricing of the service, including subscription fees, and value for money) *Please rank how you perceive the following platforms according to this scale* **"Very Expensive" to "Very Affordable**	*Likert scale from 1 to 5 the following platforms:* • Spotify • Apple Music • Amazon music • YouTube Music • Deezer
	Q7: Intuitive User Interface (Refers to how intuitive and easy-to-use the interface of the platform is, including navigation and usability features) *Please rank how you perceive the following platforms according to this scale* **"Very Difficult to use" to "Very Easy to use"**	
	Q8: Convenience *(Refers to how convenient it is to manage music & other services all in one app, stream on-the-go with minimal interruptions)* *Please rank how you perceive the following platforms according to this scale* **"Highly Inconvenient" to "Very Convenient"**	
	Q9: Extensiveness (Refers to the breadth of the music library, the extent to which there is a large variety of choices in terms of music offered, genres, global and local content) *Please rank how you perceive the following platforms according to this scale* **"Very Limited" to "Very Extensive"**	
	Q10: Algorithm relevance (Refers to how effectively the platform suggests music and playlist recommendations	

	that fit your taste) *Please rank how you perceive the following platforms according to this scale* **"Very Irrelevant" to "Highly Relevant"**	
	Q11: Profile reflection (Refers to the extent to which the platform can effectively grasp and represent your identity (e.g. how well does the platform know you)) *Please rank how you perceive the following platforms according to this scale* **"Very Impersonal" to "Highly Personal"**	
	Q12: Seamless Cross-compatibility (Refers to the extent to which users can access the platform on different devices and digital platforms (e.g; social media, car play) without limitations or issues) *Please rank how you perceive the following platforms according to this scale* **"Very Limited" to "Highly Compatible"**	
	Q13: Variety of Features (Refers to how much the platform offers beyond just music, like extra features and content.) *Please rank how you perceive the following platforms according to this scale* **"Very Limited" to "Very Rich"**	
	Q14: Social (Refers to how much the platform fosters community involvement and allows users to connect with others: as user you perceive you are part of a big group) *Please rank how you perceive the following platforms according to this scale* **"Not Social at all" to "Highly Social"**	
	Q15: Innovative (The extent to which the platform introduces new features and adopts cutting-edge technology to enhance the music experience) *Please rank how you perceive the following platforms according to this scale*	

	"Very Traditional " to "Highly Innovative"	
	Q16: Fun and Entertaining (The extent to which users find the platform enjoyable, engaging, and worth spending time on) *Please rank how you perceive the following platforms according to this scale* **"Very Boring" to "Very Fun"**	
	Q17: Trendy (Refers to how well the platform keeps up with current music trends, new releases, and cultural relevance) *Please rank how you perceive the following platforms according to this scale* **"Very Outdated" to "Highly Trendy"**	
	Q18: Niche (Refers to the platform's focus on specific genres, artists, or musical subcultures, appealing to specialized or underground music fans) *Please rank how you perceive the following platforms according to this scale* **"Very Mainstream" to "Highly Niche"**	
	Q19: Sophisticated (Refers to the platform's appeal to more professional or discerning audiences, with a focus on high-quality, thoughtful content) *Please rank how you perceive the following platforms according to this scale* **"Very Unsophisticated" to "Highly Sophisticated"**	
Demographics Questions	**Q20: Which gender do you identify with?** • Woman • Man • Other • Prefer not to say	Single-choice question
	Q21: Which age group do you belong to? • <18 • 18-24 • 25-34 • 35-44 • 45-54 • 55-64	Single-choice question

Group Part

	• 64+	
	Q22: What is your nationality?	Short text question
	Q23: Which of the following options best represents your education level? • No formal education • High school diploma or equivalent • Bachelor's degree • Master's degree • Doctorate (PhD) or professional degree	Single-choice question
	Q24: Which of the following options best represents your occupation? • Student • Employed • Self-employed • Unemployed • Retired • Other	Single-choice question

Appendix: Conjoint Methodology

Table 19: Conjoint Analysis Survey Structure & Questions

Section	Questions	Remark
Introduction to Survey	Welcome to this study and thank you for supporting our thesis. This study aims to find out consumers' preferences regarding music streaming platforms. It will require less than 10 minutes of your time. You'll be presented with different profile scenarios for music streaming platforms, please take the time to consider the different platform variants before **choosing your preferred option** out of the presented combinations. To successfully count your participation in our study, it is **essential that you complete the entire survey without going through the questions too fast and that you do not omit any question**. For a better experience, we strongly recommend responding the survey on a **PC/laptop/tablet if possible**! Thank you for your participation! All information is collected anonymously and will be kept strictly confidential at all times.	
Pre-Screening Questions	**Q1: Are you European or reside in Europe?** • Yes • No	*If no, survey ends*
	Q2: Are you familiar with the concept of music streaming platforms (i.e., Spotify, Apple Music, Amazon Music, YouTube Music, Tidal, Qobuz, Deezer...)? • Yes • No	*If no, response marked as low quality*
Block of Conjoint	Choice sets out of 5 platform profiles	/
Demographics Questions	**Q3: Which gender do you identify with?** • Male • Female • Other • Prefer not to mention	Single-choice question
	Q4: Which age group do you belong to? • <18 • 18-24 • 25-34 • 35-44 • 45-54 • 55-64	Single-choice question

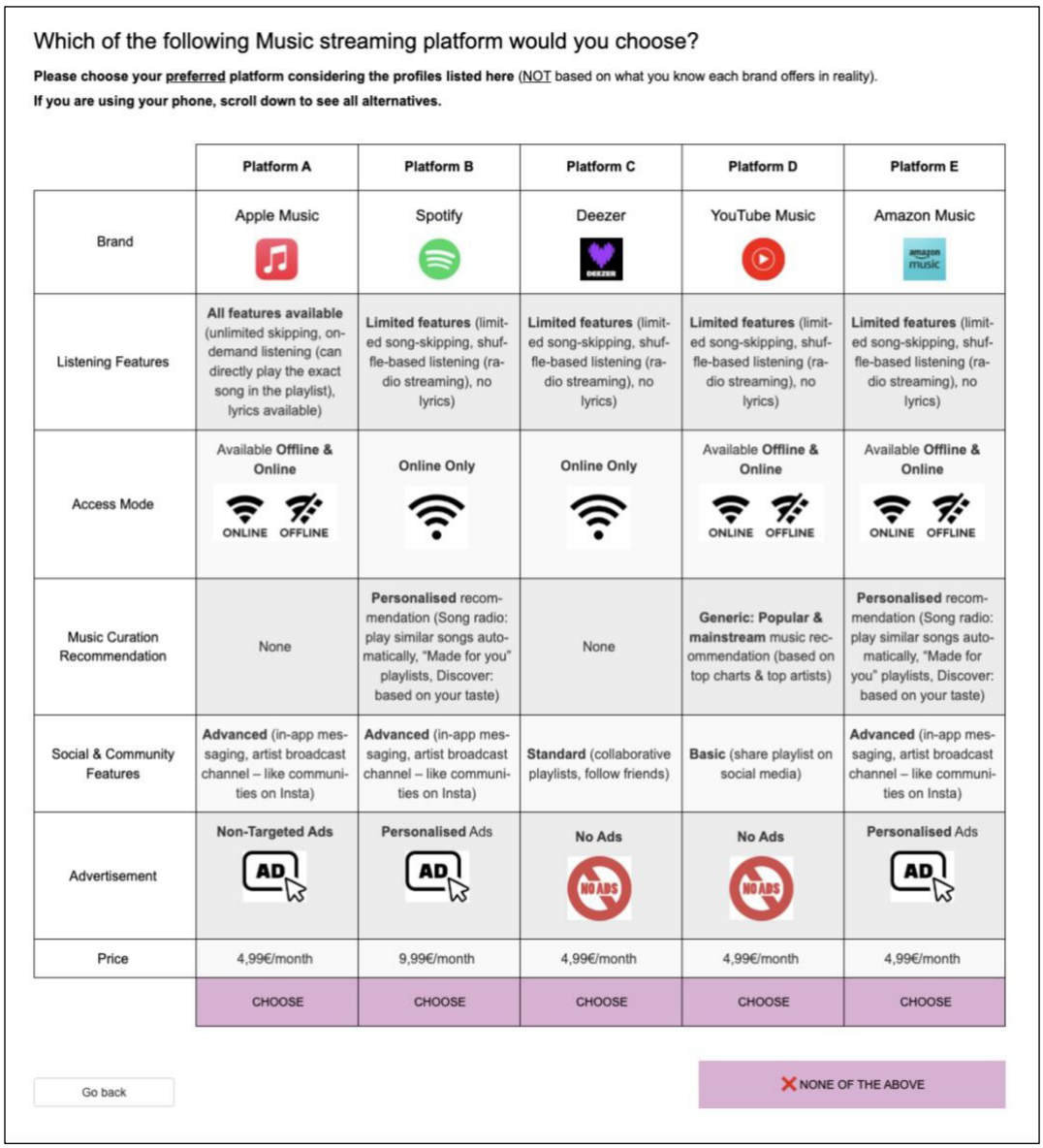
Group Part

	• 64+	
	Q5: Where are you from? Please write your country's name in English.	Short text question
	Q6: Which of the following options best represents your education level? • No formal education • High school diploma or equivalent • Bachelor's degree • Master's degree Doctorate (PhD) or professional degree	Single-choice question
	Q7: Which of the following options best represents your occupation? • Student • Employed • Self-employed • Unemployed • Retired • Other	Single-choice question
Music Listening Habits (Discriminant variables)	**Q8: Do you have experience in the music sector (DJ, singer, musician, composer, music technician)?** • Yes • No	Single-choice question
	Q9: Please specify your experience. Please select all that apply. • I am a DJ/ producer • I am a singer • I am a musician • I am a music composer • I am a music technician/ audio engineer	Multiple-choice. *Only asked if replied "Yes" to Q8*
	Q10: Do you use any music streaming platforms? • Yes • No	Single-choice question
	Q11: Which music streaming platform do you use as your primary mean to listen to music (on regular basis)? • Spotify • Apple Music • Deezer • Amazon Music • YouTube Music • Soundcloud • Tidal • Qobuz	Single-choice question. *Only asked if replied "Yes" to Q10*
	Q12: Which subscription plan are you currently using? • None (Free) • Individual • Student	Single choice. *Only asked if replied*

Group Part

	• Duo • Family (4-6 members)	*"Yes" to Q10*
	Q13: How often do you listen to music? • Very rarely (a few times in a month but not every week) • Rarely (1-2 days per week) • Sometimes (3-4 days per week) • Often (5-6 days per week- • Every day	Single-choice question.
	Q14: When do you usually listen to music? In which occasions or situations? Select all that apply. • I rarely listen to music • While commuting (e.g., driving, on public transport, walking) • While working/studying • During exercise or physical activity • When relaxing or unwinding • During social gatherings or parties • While cooking or doing household chores • While showering/getting ready • During travel or long trips • I have music on as a background	Multiple-choice question (can select up to 9 options)

Group Part



Which of the following Music streaming platform would you choose?

Please choose your preferred platform considering the profiles listed here (NOT based on what you know each brand offers in reality).

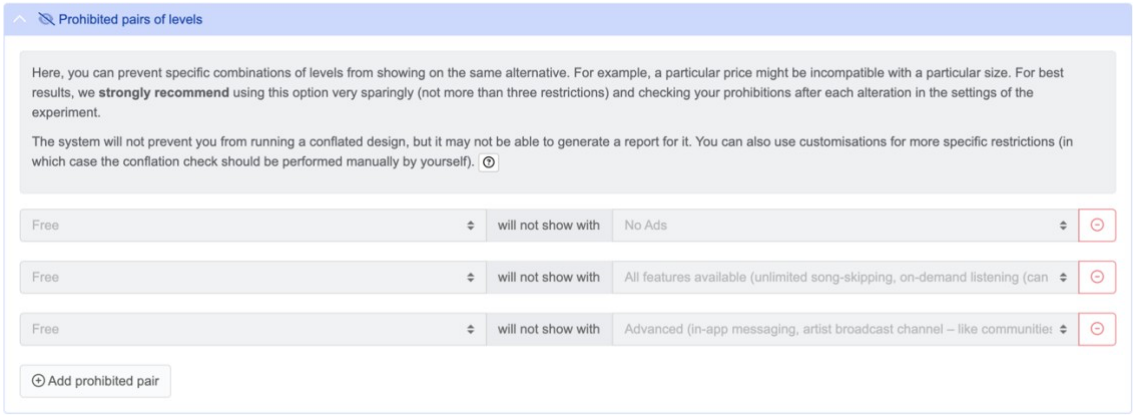
If you are using your phone, scroll down to see all alternatives.

	Platform A	Platform B	Platform C	Platform D	Platform E
Brand	Apple Music	Spotify	Deezer	YouTube Music	Amazon Music
Listening Features	**All features available** (unlimited skipping, on-demand listening (can directly play the exact song in the playlist), lyrics available)	**Limited features** (limited song-skipping, shuffle-based listening (radio streaming), no lyrics)	**Limited features** (limited song-skipping, shuffle-based listening (radio streaming), no lyrics)	**Limited features** (limited song-skipping, shuffle-based listening (radio streaming), no lyrics)	**Limited features** (limited song-skipping, shuffle-based listening (radio streaming), no lyrics)
Access Mode	Available **Offline & Online** ONLINE OFFLINE	**Online Only**	**Online Only**	Available **Offline & Online** ONLINE OFFLINE	Available **Offline & Online** ONLINE OFFLINE
Music Curation Recommendation	None	**Personalised** recommendation (Song radio: play similar songs automatically, "Made for you" playlists, Discover: based on your taste)	None	**Generic: Popular & mainstream** music recommendation (based on top charts & top artists)	**Personalised** recommendation (Song radio: play similar songs automatically, "Made for you" playlists, Discover: based on your taste)
Social & Community Features	**Advanced** (in-app messaging, artist broadcast channel – like communities on Insta)	**Advanced** (in-app messaging, artist broadcast channel – like communities on Insta)	**Standard** (collaborative playlists, follow friends)	**Basic** (share playlist on social media)	**Advanced** (in-app messaging, artist broadcast channel – like communities on Insta)
Advertisement	**Non-Targeted Ads** AD	**Personalised** Ads AD	**No Ads** NO ADS	**No Ads** NO ADS	**Personalised** Ads AD
Price	4,99€/month	9,99€/month	4,99€/month	4,99€/month	4,99€/month
	CHOOSE	CHOOSE	CHOOSE	CHOOSE	CHOOSE

Go back

NONE OF THE ABOVE

Figure 15: Layout of Choice sets in Conjoint.ly



Prohibited pairs of levels

Here, you can prevent specific combinations of levels from showing on the same alternative. For example, a particular price might be incompatible with a particular size. For best results, we **strongly recommend** using this option very sparingly (not more than three restrictions) and checking your prohibitions after each alteration in the settings of the experiment.

The system will not prevent you from running a conflated design, but it may not be able to generate a report for it. You can also use customisations for more specific restrictions (in which case the conflation check should be performed manually by yourself).

Free will not show with No Ads

Free will not show with All features available (unlimited song-skipping, on-demand listening (can

Free will not show with Advanced (in-app messaging, artist broadcast channel – like communities

Add prohibited pair

Figure 16: Prohibited pairs of levels set in Conjoint.ly

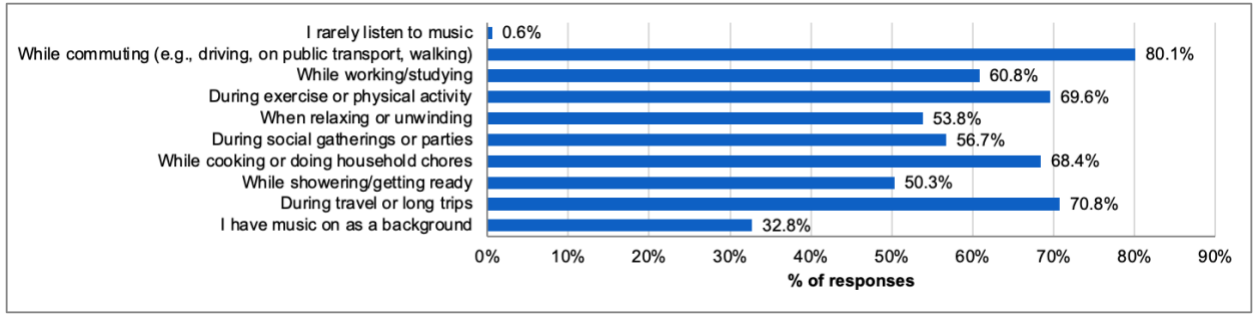


Figure 17: Music Listening Occasions of Respondents from Conjoint Survey

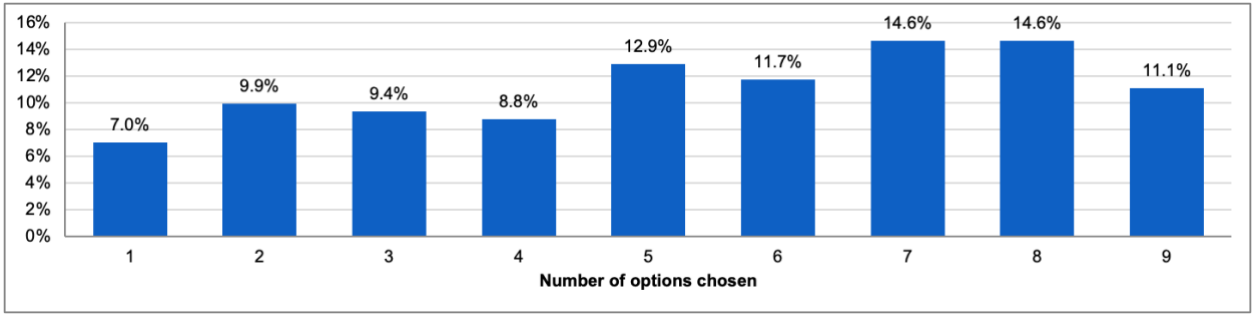


Figure 18: Distribution of number of options chosen by respondents for Music Listening Occasions from Conjoint Survey

Group Part

Appendix: Conjoint Results per Segment

Table 26: Brand Preferences across Segment

Attribute	18-34 Segment (n=150)	35-64+ Segment (n=21)	All responses
Spotify	32.6	25.5	35.8
Apple Music	3.9	-5.9	1.7
Amazon Music	-6.7	-1.2	-7.3
YouTube Music	-6.5	4.1	-7.6
Deezer	-20.6	-20.0	-20.5

Attribute	Spotify Users (n=136)	Users of other platforms (n=31)	All responses (N=171)
Spotify	37.4	18.1	35.8
Apple Music	1.3	6.1	1.7
Amazon Music	-8.8	0.7	-7.3
YouTube Music	-8.3	-2.9	-7.6
Deezer	-19.2	-18.8	-20.5

Attribute	Free users Segment (n=32)	Premium users Segment (n=135)	All responses (N=171)
Spotify	32.9	30.2	35.8
Apple Music	-4.5	4.6	1.7
Amazon Music	-5.7	-6.5	-7.3
YouTube Music	-8.8	-4.6	-7.6
Deezer	-17.7	-18.9	-20.5

Group Part

Table 27: Relative Attribute Importance per Segment

	Price	Listening Features	Access Mode	Advertisement	Music Curation Recommendation	Social & Community Features
Spotify users segment (n=136)						
Spotify	30.2%	19.6%	15.6%	14.1%	10.6%	10.0%
Apple Music	31.9%	21.6%	14.3%	15.6%	8.9%	7.6%
Amazon Music	29.0%	20.0%	12.0%	19.5%	12.6%	7.0%
YouTube Music	25.5%	23.1%	16.9%	14.6%	11.4%	8.4%
Deezer	28.6%	19.4%	18.4%	17.2%	9.6%	6.7%
Average for the segment	**29.0%**	**20.7%**	**15.4%**	**16.2%**	**10.6%**	**7.9%**
Users of other platforms segment (n=31)						
Spotify	40.5%	16.0%	9.8%	13.1%	11.3%	9.4%
Apple Music	39.8%	18.8%	12.5%	11.6%	10.2%	7.1%
Amazon Music	36.7%	16.0%	9.4%	15.7%	15.0%	7.2%
YouTube Music	34.9%	17.7%	13.0%	11.7%	12.8%	9.9%
Deezer	36.7%	17.7%	13.3%	13.8%	11.1%	7.4%
Average for the segment	**37.7%**	**17.2%**	**11.6%**	**13.2%**	**12.1%**	**8.2%**
Free users segment (n=32)						
Spotify	48.2%	12.5%	10.4%	11.0%	10.0%	8.0%
Apple Music	44.0%	16.1%	11.1%	11.0%	8.7%	9.2%
Amazon Music	44.1%	11.8%	9.2%	15.0%	13.0%	7.0%
YouTube Music	42.0%	14.7%	14.0%	8.4%	13.1%	7.9%
Deezer	44.5%	16.1%	11.1%	11.1%	10.6%	6.6%
Average for the segment	**44.6%**	**14.2%**	**11.2%**	**11.3%**	**11.1%**	**7.7%**
Premium users segment (n=135)						
Spotify	28.2%	20.5%	15.4%	14.7%	10.9%	10.3%
Apple Music	30.8%	22.3%	14.7%	15.8%	9.3%	7.1%
Amazon Music	27.2%	21.0%	12.0%	19.7%	13.1%	7.0%
YouTube Music	23.8%	23.9%	16.7%	15.5%	11.3%	8.9%
Deezer	26.7%	19.8%	19.0%	17.9%	9.7%	6.9%
Average for the segment	**27.4%**	**21.5%**	**15.6%**	**16.7%**	**10.9%**	**8.0%**
<18-34 segment (n=150)						
Spotify	31.1%	19.4%	15.5%	13.7%	10.5%	9.7%
Apple Music	32.7%	21.3%	14.4%	15.1%	9.1%	7.4%
Amazon Music	30.0%	20.2%	11.9%	18.9%	12.2%	6.8%
YouTube Music	26.3%	22.5%	16.9%	14.4%	11.3%	8.6%
Deezer	29.3%	19.5%	18.5%	16.4%	9.4%	6.9%
Average for the segment	**29.9%**	**20.6%**	**15.4%**	**15.7%**	**10.5%**	**7.9%**
35 to +64 users segment (n=21)						
Spotify	38.3%	15.4%	9.1%	14.8%	12.5%	10.0%
Apple Music	38.2%	19.6%	11.9%	12.4%	9.4%	8.6%
Amazon Music	34.1%	13.0%	8.7%	17.5%	18.5%	8.2%
YouTube Music	33.8%	18.8%	11.8%	12.9%	13.6%	9.1%
Deezer	36.3%	16.0%	11.2%	17.8%	12.6%	6.2%
Average for the segment	**36.1%**	**16.6%**	**10.5%**	**15.1%**	**13.3%**	**8.4%**
All responses (Total sample N=171)	**30.6%**	**20.1%**	**14.8%**	**15.6%**	**10.9%**	**7.9%**

Group Part

	Listening Features			Access Mode		Music Curation Recommendation			Social & Community features			Advertisment			Price		
	All features	Medium features	Limited features	Online Only	Offline & Online	None	Generic	Personalised	Basic	Standard	Advanced	No Ads	Personalised	Non-Targeted	Free	4,99€/ month	9,99€/ month
Spotify users segment (n=136)																	
Spotify	12.8%	-0.5%	-12.3%	-11.0%	11.0%	-3.4%	1.0%	2.4%	0.6%	0.8%	-1.4%	6.7%	-5.1%	-1.6%	12.4%	3.7%	-0.3%
Apple Music	12.8%	-0.5%	-12.3%	-9.1%	9.1%	-1.3%	-0.2%	1.4%	2.2%	-2.5%	0.3%	8.8%	-3.0%	-5.9%	15.9%	6.7%	-8.9%
Amazon Music	12.1%	-1.7%	-10.4%	-6.1%	6.1%	-5.3%	-0.2%	5.5%	2.7%	-2.1%	-0.6%	13.2%	-4.8%	-8.3%	15.2%	6.6%	-8.6%
YouTube Music	16.9%	-7.7%	-9.2%	-12.1%	12.1%	-2.0%	-0.9%	2.8%	-0.4%	-0.1%	0.5%	10.1%	-2.5%	-7.6%	13.2%	5.0%	-5.1%
Deezer	10.8%	-0.7%	-10.1%	-11.5%	11.5%	-3.9%	-0.3%	4.2%	-0.4%	0.1%	0.3%	10.7%	-6.9%	-3.8%	12.7%	2.7%	-1.8%
Average for the segment	**13.1%**	**-2.2%**	**-10.9%**	**-10.0%**	**10.0%**	**-3.2%**	**-0.1%**	**3.3%**	**0.9%**	**-0.7%**	**-0.2%**	**9.9%**	**-4.5%**	**-5.4%**	**13.9%**	**5.9%**	**-8.2%**
Users of other platforms segment (n=31)																	
Spotify	7.3%	-0.2%	-7.1%	-6.1%	6.1%	-2.6%	-3.2%	5.7%	0.1%	2.5%	-2.7%	2.4%	-1.1%	-1.3%	27.8%	3.8%	-8.7%
Apple Music	6.7%	4.4%	-11.2%	-7.8%	7.8%	-3.4%	-1.9%	5.3%	0.4%	-3.2%	2.8%	0.8%	-0.6%	-0.2%	28.3%	3.9%	-10.2%
Amazon Music	5.4%	1.3%	-6.7%	-3.7%	3.7%	-3.0%	0.8%	7.2%	2.9%	-1.6%	-1.3%	10.4%	-3.1%	-7.3%	22.9%	6.2%	-8.8%
YouTube Music	9.5%	-2.9%	-6.6%	-9.4%	9.4%	-3.4%	-1.5%	4.9%	1.1%	2.3%	-3.4%	4.8%	0.3%	-5.1%	24.1%	7.2%	-13.9%
Deezer	5.1%	2.1%	-7.2%	-7.3%	7.3%	-6.5%	0.4%	6.2%	-0.5%	0.9%	-0.4%	6.6%	-4.9%	-1.7%	22.3%	9.2%	-6.2%
Average for the segment	**6.8%**	**0.9%**	**-7.8%**	**-6.9%**	**6.9%**	**-4.8%**	**-1.1%**	**5.8%**	**0.8%**	**0.2%**	**-1.0%**	**5.0%**	**-1.9%**	**-3.1%**	**25.1%**	**6.1%**	**-8.6%**
Free users segment (n=32)																	
Spotify	3.3%	0.7%	-4.0%	-6.6%	6.6%	-0.7%	-1.0%	1.7%	-2.3%	1.1%	1.2%	-2.3%	2.9%	-0.5%	36.0%	1.5%	-5.3%
Apple Music	5.7%	2.4%	-8.0%	-6.6%	6.6%	-3.5%	-0.2%	3.7%	1.3%	-5.5%	4.2%	-0.4%	1.4%	-1.1%	31.1%	2.7%	-11.0%
Amazon Music	1.7%	1.8%	-3.5%	-3.4%	3.4%	-6.4%	0.9%	5.5%	2.1%	-2.9%	0.7%	10.0%	-2.9%	-7.2%	30.5%	6.4%	-13.6%
YouTube Music	6.5%	-3.6%	-2.9%	-9.6%	9.6%	-4.0%	-3.4%	7.4%	0.3%	0.7%	-1.0%	-0.5%	2.2%	-1.7%	32.3%	7.2%	-21.6%
Deezer	0.3%	5.4%	-5.6%	-5.7%	5.7%	-6.6%	2.4%	4.2%	0.1%	-1.5%	1.4%	1.9%	-2.4%	0.6%	28.5%	11.1%	-8.2%
Average for the segment	**3.5%**	**1.3%**	**-4.8%**	**-6.4%**	**6.4%**	**-4.2%**	**-0.2%**	**4.5%**	**0.3%**	**-1.6%**	**1.3%**	**1.7%**	**0.2%**	**-2.0%**	**31.7%**	**5.8%**	**-11.9%**
Premium users segment (n=135)																	
Spotify	13.3%	-0.7%	-12.7%	-10.6%	10.6%	-3.7%	0.4%	3.3%	1.2%	1.1%	-2.3%	7.6%	-5.9%	-1.7%	10.1%	3.9%	0.1%
Apple Music	13.1%	-0.1%	-13.0%	-9.4%	9.4%	-1.2%	-0.5%	1.7%	2.0%	-2.0%	-0.1%	9.2%	-3.5%	-5.8%	14.8%	7.0%	-3.5%
Amazon Music	13.0%	-1.8%	-11.2%	-6.2%	6.2%	-5.7%	-0.2%	5.9%	2.8%	-1.8%	-1.1%	13.2%	-4.9%	-8.4%	13.3%	6.6%	-7.4%
YouTube Music	17.5%	-7.5%	-10.0%	-12.0%	12.0%	-1.8%	-0.4%	2.3%	-0.2%	0.3%	-0.1%	11.2%	-2.9%	-8.3%	11.4%	5.0%	-3.4%
Deezer	11.5%	-1.3%	-10.2%	-11.6%	11.6%	-3.8%	-0.7%	4.5%	-0.5%	0.6%	-0.1%	11.4%	-7.3%	-4.1%	11.3%	2.3%	2.2%
Average for the segment	**13.7%**	**-2.3%**	**-11.4%**	**-9.9%**	**9.9%**	**-3.2%**	**-0.3%**	**3.5%**	**1.1%**	**-0.3%**	**-0.7%**	**10.5%**	**-4.9%**	**-5.6%**	**12.2%**	**5.9%**	**-2.4%**
<18-34 segment (n=150)																	
Spotify	12.0%	-0.7%	-11.4%	-10.7%	10.7%	-3.3%	0.3%	3.0%	1.0%	0.7%	-1.7%	5.7%	-4.6%	-1.1%	14.4%	8.2%	-1.0%
Apple Music	12.1%	0.2%	-12.3%	-9.3%	9.3%	-1.3%	-0.6%	1.8%	2.0%	-2.4%	0.4%	7.8%	-2.6%	-5.1%	17.4%	6.6%	-4.8%
Amazon Music	11.4%	-1.2%	-10.2%	-6.1%	6.1%	-5.2%	-0.1%	5.2%	2.6%	-1.9%	-0.7%	12.7%	-4.8%	-7.9%	16.2%	8.4%	-8.2%
YouTube Music	15.9%	-7.0%	-8.9%	-12.1%	12.1%	-2.4%	-0.8%	3.2%	0.0%	0.0%	-0.1%	9.4%	-1.9%	-7.5%	14.5%	5.5%	-6.0%
Deezer	10.1%	-0.2%	-9.8%	-11.4%	11.4%	-4.2%	0.0%	4.2%	-0.5%	0.3%	0.2%	10.0%	-6.6%	-3.4%	13.6%	3.7%	0.8%
Average for the segment	**12.3%**	**-1.8%**	**-10.5%**	**-9.9%**	**9.9%**	**-3.3%**	**-0.2%**	**3.5%**	**1.0%**	**-0.7%**	**-0.4%**	**9.1%**	**-4.1%**	**-5.0%**	**15.2%**	**6.1%**	**-3.8%**
35 to +64 users segment (n=21)																	
Spotify	7.9%	0.8%	-8.7%	-5.5%	5.5%	-2.5%	-1.0%	3.5%	-2.6%	4.6%	-2.0%	6.4%	-1.5%	-4.9%	23.3%	3.3%	-2.1%
Apple Music	8.8%	1.9%	-10.7%	-7.0%	7.0%	-4.1%	0.5%	3.6%	0.5%	-4.2%	3.7%	4.7%	-2.1%	-2.6%	23.8%	2.1%	-5.2%
Amazon Music	5.3%	0.5%	-5.8%	-2.4%	2.4%	-10.3%	-0.1%	10.4%	3.0%	-2.7%	-0.4%	11.5%	-2.2%	-9.4%	20.3%	6.4%	-10.2%
YouTube Music	13.3%	-5.4%	-7.9%	-8.5%	8.5%	-1.9%	-2.2%	4.1%	-0.5%	2.9%	-2.5%	7.8%	-2.4%	-5.4%	22.9%	5.2%	-13.9%
Deezer	7.2%	0.0%	-7.1%	-6.3%	6.3%	-5.5%	-1.9%	7.3%	0.8%	0.3%	-1.0%	10.4%	-6.3%	-4.1%	19.9%	4.3%	-2.3%
Average for the segment	**8.5%**	**-0.5%**	**-8.0%**	**-5.9%**	**5.9%**	**-4.9%**	**-0.9%**	**5.8%**	**0.2%**	**0.2%**	**-0.4%**	**8.2%**	**-2.9%**	**-5.3%**	**22.0%**	**4.3%**	**-6.9%**
All responses (Total sample N=171)	**11.9%**	**-1.6%**	**-10.3%**	**-9.5%**	**9.5%**	**-5.4%**	**-0.3%**	**3.7%**	**0.9%**	**-0.6%**	**-0.4%**	**9.0%**	**-4.0%**	**-5.0%**	**16.0%**	**5.9%**	**-4.1%**

Table 28: Relative Level Importance per Segment