

A Work Project, presented as part of the requirements for the Award of a Master's degree in
Management from the Nova School of Business and Economics.

**FIELD LAB ON CONSUMER PERCEPTIONS AND PREFERENCES IN THE
GERMAN VIDEO-ON-DEMAND STREAMING MARKET
– A QUALITATIVE RESEARCH**

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Abstract

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

Abstract – Individual Part

The qualitative research incorporates expert and consumer interviews to validate literature review findings and assess current market dynamics and consumer perceptions. These interviews provided market-specific insights into the German VOD streaming industry, enriching the literature and confirming established streaming personas. Content emerged as the most influential factor shaping consumer preferences, followed by pricing and user experience. Experts further emphasised the growing role of AI and personalisation in delivering seamless, 'lean-back' viewing experiences and identified live (sports) content as a significant growth opportunity.

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

Group Part

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List of Abbreviations

AGF	'Arbeitsgemeinschaft Fernsehforschung' (Working Group on Television Research)
AI	Artificial Intelligence
ARD	'Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland' (Consortium of Public Broadcasters in Germany)
AVOD	Advertising-based Video on Demand
CA	Conjoint Analysis
CAGR	Compound Annual Growth Rate
CLV	Customer Lifetime Value
DAZN	Perform Group's sports streaming service (no further abbreviation, it is a brand name)
EFA	Exploratory Factor Analysis
FoMBM	Function-oriented Media Brand Model
GDPR	General Data Protection Regulation
Joyn	No abbreviation, it is the brand name of the platform
PCA	Principal Component Analysis
PM	Perceptual Map

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PR	Public Relations
QR	Quick Response (Code)
R&D	Research and Development
RQ	Research Question
RTL	Radio Télévision Luxembourg
SPSS	Statistical Package for the Social Sciences
SQ	Sub-question
SVOD	Subscription Video-on-Demand
TV	Television
TVOD	Transactional Video-on-Demand
VOD	Video-on-Demand
WTP	Willingness to Pay
ZDF	'Zweites Deutsches Fernsehen' (Second German Television)

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1. Introduction

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

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

This discrepancy is compounded by the distinctive challenges that private TV providers face in adapting their offerings to a digital-first, globalised media environment as viewers have

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grown increasingly impatient with the limitations of linear TV (Curtin 2009; Tryon 2013). National private TV providers that transition to VOD services not only encounter technical and strategic challenges but also the need to differentiate themselves from global giants with massive content libraries and sophisticated algorithms (Telkmann 2023). The competitive dynamics highlight the pressure on private TV providers to innovate or risk irrelevance (Telkmann 2023). The German market thus presents a compelling case for analysis, but existing research on the German market remains limited. Most studies focus on the strategies and offerings of the international platforms Netflix and Amazon Prime Video, leaving the digital transformation efforts of German private TV providers underexplored. Due to changing consumption behaviour, German private TV providers are urged to enhance their offerings to compete with international VOD streaming services. By analysing the brand perception and preferences of both international players (Netflix, Amazon Prime Video, and Disney+) and local players (RTL+ and Joyn), this thesis seeks to fill the existing research gap in the German market. The following research question (RQ) is guiding the research:

What are the factors driving consumer perceptions and preferences in the German VOD streaming market, and how can private TV providers adapt their services to keep up with international players?

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

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

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

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

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

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

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

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

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

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

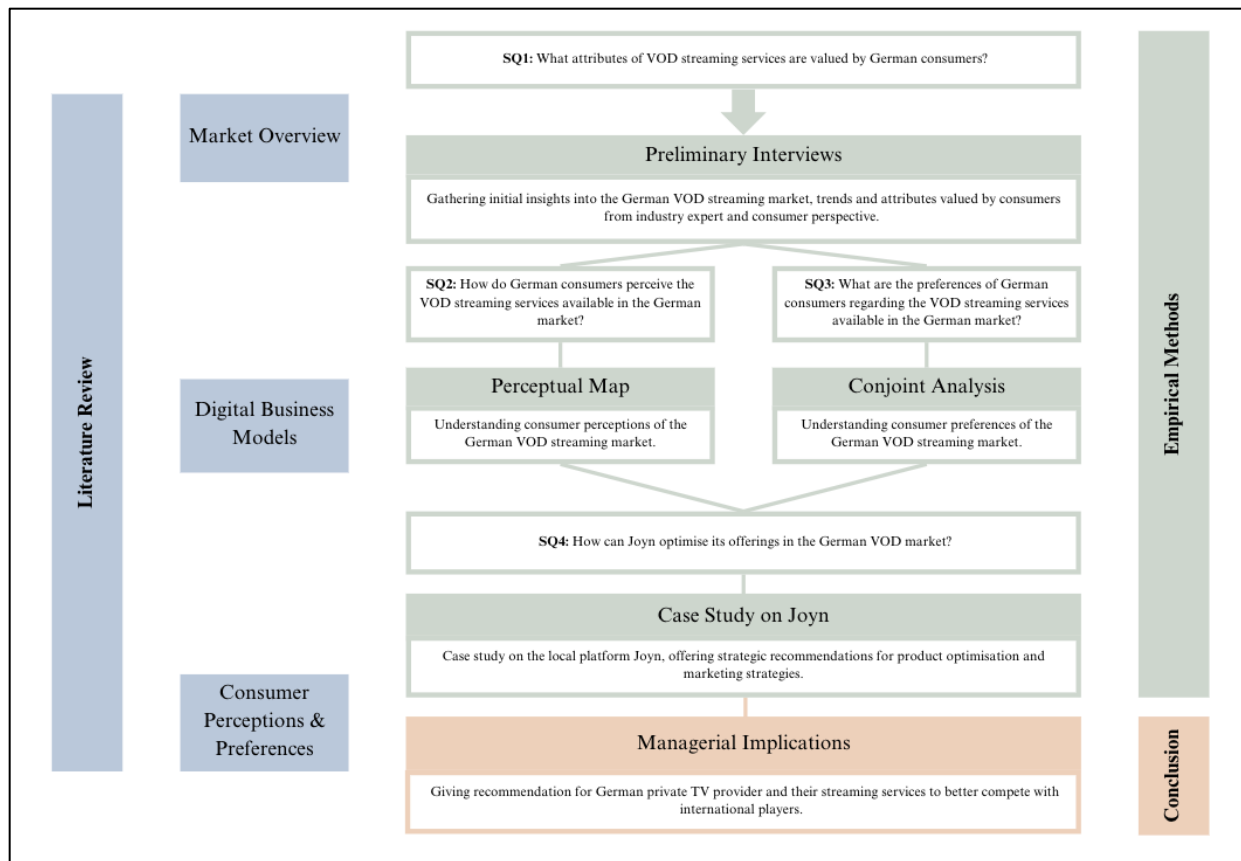


Figure 1: Thesis' Mixed-Method Approach

2. Literature Review

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

2.1.1 Threats to Digital Business Models

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

Data Privacy Laws

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

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

Freemium Conversion Challenges

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

between basic and premium offerings (Koch and Benlian 2017). Some services intentionally use restrictions in the base version, such as limited space or ads, to signal an enhanced premium experience (Wagner, Benlian, and Hess 2014). Convincing aimed to help them attract paid users versus the free offering provides one of the most considerable challenges balancing how attractive the free offer is versus how to drive paid users (Wagner, Benlian and Hess 2014).

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

2.1.2 Insights into Digital Subscriptions

The success of digital subscription models in the streaming industry is rooted in leveraging behavioural economics, customer lifetime value (CLV), value co-creation, and platform strategies and network effects to enhance user engagement, drive loyalty, and create sustainable growth.

Behavioural Economics

The phenomenon of behavioural economics explains the idea that through pricing strategies, consumer perception can be influenced (Sudeep 2022; Kahneman and Tversky 1979). From this, it can be concluded that if potential subscribers see an ad-financed option that offers less content,

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the premium version is automatically perceived as more attractive (Sudeep 2022). For example, streaming platforms offered lower ad-funded subscription structures, making the premium options more appealing (Sudeep 2022). In this regard, with time, such a pricing structure could find open acceptance (Sudeep 2022).

Customer Lifetime Value

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

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

Value Co-Creation in Digital Subscriptions

The shared value theory is based on designing the platform in such a way that user interaction is made possible, thereby increasing the quality of the platforms through feedback (Hein et al. 2019). Here, customised lists can be created by streaming providers and shared with friends,

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which creates the value of the platform (Ranjan and Read 2016). This enables users to be actively recognised by their peers through their actions on the platform and to have an influence on the platform (Hein et al. 2019). This increases user satisfaction and enables platform providers to incorporate user feedback directly into the design of the offerings and technical structure (Hein et al. 2019).

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

Platform Strategies and Network Effects

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

The strategy of modular system design has been successfully tested several times on the open market (Rietveld and Schilling 2021). Here, it was seen how modularity has positively developed the platforms (Rietveld and Schilling 2021). This design enables platform providers to

compete efficiently, innovate and appeal to a wide audience to win a growing market (Dai, 2023; Rietveld and Schilling 2021).

2.2 Consumer Perceptions and Preferences in the VOD Streaming Market

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

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

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Buschow and Schlütz 2021). Furthermore, the study discusses Netflix as being perceived more favourably in terms of its risk reduction function, which enhances trustworthiness and reassures users about the value of their subscription (Rahe, Buschow, and Schlütz 2021). The risk reduction function refers to minimising uncertainty and potential dissatisfaction (Berkler, 2008). Netflix 'signal[s] competence as a prerequisite for brand perception', which is regarded by its users as larger than that of Amazon Prime Video (Rahe, Buschow, and Schlütz 2021). Netflix offers a 'clearer performance promise' that reinforces consumers' confidence in the service's overall reliability and quality (Rahe, Buschow, and Schlütz 2021). Moreover, the platform is successful in fulfilling social identity and activation functions, namely identification and prestige, which are essential for the development of brand affinity (Rahe, Buschow, and Schlütz 2021). In particular, younger German consumers consider Netflix as a 'lifestyle brand' that aligns with their identity and social expression needs (Rahe, Buschow, and Schlütz 2021, 53). Meanwhile, Amazon Prime Video is often seen as a secondary add-on to Amazon's broader e-commerce services (Wayne 2017). In addition, Netflix's strategy of promoting binge-watching encourages consumers to habitual use patterns (Rahe, Buschow, and Schlütz 2021; Snider 2016; Wenzel, Mahle, and Pätzmann. 2016). This strongly increases brand loyalty among both global and German viewers by meeting and encouraging their desire to watch multiple episodes or series in one sitting (Rahe, Buschow, and Schlütz 2021; Snider 2016; Wenzel, Mahle, and Pätzmann 2016). In terms of prestige, Netflix is perceived as the pioneer among VOD streamers and primarily conveys notions of 'quality TV' and a high-end entertainment experience (Rahe, Buschow, and Schlütz. 2021, 53; Schlütz et al., 2018; Wenzel, Mahle, and Pätzmann 2016). Therefore, Rahe, Buschow, and Schlütz (2021) identified brand perception at the core of driving German consumers' loyalty and satisfaction. In highly competitive markets with new entrants, like the German market, established brands with strong and distinct brand perceptions appear to have a stronger competitive position (Rahe,

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Buschow, and Schlütz 2021). According to Rahe, Buschow and Schlütz (2021), Netflix is an unquestioned leader in aligning with brand expectations within the German market. Other studies confirm Netflix as an industry benchmark in brand perception while indicating a great gap in the perception of private TV providers (Hennig-Thurau and Houston 2019; Telkmann 2023). Building a distinctive brand identity remains the greatest challenge for private TV providers in the VOD streaming industry as they seek a unique selling point for their platforms while differentiating between linear and on-demand offerings (Telkmann 2021).

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

Moreover, Lee et al. (2018) highlight that platforms that are easy to navigate see higher adoption rates. This finding is supported by earlier studies (Lessiter et al. 2001; Bautista, Lin, and Theng 2016). Periaiya and Nandukrishna (2023) also stress the importance of a seamless, user-friendly interface, noting that it significantly contributes to user satisfaction and retention. The

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convenience offered by video streaming services, such as on-demand access, the option to resume from where you left off, and the ability to watch something later, was especially valuable to time-constrained Indian consumers (Periaiya and Nandukrishna 2023). Interactive features, such as rating and reviewing content, downloading, and sharing on social media, can also drive VOD subscriptions (Kumar et al. 2025). Lee et al. (2018) further suggest that social influences such as peer recommendations and trends over social media may also be key in streaming adoption.

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

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

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focusing on younger Indian consumers, where 71% of students answered that they choose platforms based on unique offerings (Mavale and Singh 2020). Content origin, however, leads to differing findings in the Indian market. While Nagaraj, Singh, and Yasa (2021) researched that global content is requested by Indian users, Kumar et al. (2025) highlighted a preference for regional content.

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

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

Gutzeit, Dorsch, and Stock (2021) focused in their study more closely on the motives behind German users' content selection on VOD services and especially explored the influence of algorithmic recommendations, personal suggestions, and intrinsic motivations. Their findings show that German consumers value personalised content recommendations but also rely on personal recommendations from family and friends (Gutzeit, Dorsch, and Stock 2021). Mikos (2016) reports similar findings, indicating that recommendation systems and genre categorisation

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are used 'as a sorting function' but are continuously criticised for their algorithms (Mikos 2016, 156). For streaming services, overall findings imply that it is important to invest in reliable recommendation systems while also fostering a community and word-of-mouth promotion (Gutzeit, Dorsch, and Stock 2021).

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

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

In terms of demographics, age-related differences in streaming engagement are evident, with younger German users showing significantly more interest and preferences for VOD services than older ones (Gutzeit, Dorsch, and Stock 2021). This difference is likely due to significant differences in internet and technology affinity (Gutzeit, Dorsch, and Stock 2021). Notably, younger consumers tend to use a wider range of streaming services, while older consumers use Netflix and

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Amazon Prime Video less frequently but have a stronger preference for TV media libraries (Gutzeit, Dorsch, and Stock 2021). No notable differences are identified in streaming interests between genders (Gutzeit, Dorsch, and Stock 2021). These findings, therefore, confirm the conclusion reached by Lee et al. (2018) that while age significantly influences media adoption, gender does not.

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

3. Preliminary Interviews

3.1 Interview Methodology

A qualitative research approach was conducted for a preliminary understanding of German VOD streaming market trends and for identifying relevant product and brand attributes that influence consumers' perception and preference for VOD streaming services. Qualitative research

offers to thoroughly explore a social phenomenon by deeply understanding the subject rather than predicting outcomes (Malterud 2001; Denzin and Lincoln 2011). Therefore, it is effective for capturing the dynamics of the German VOD streaming market in general, together with the depth and nuances of individual streaming experiences and behaviour (Verhoef and Casebeer 1997; Tomaszewski, Zarestky and Gonzalez 2020). By conducting qualitative interviews, it is ensured that the preliminary findings are grounded in the experiences and perspectives of professionals and consumers that provide the basis for the following quantitative research.

3.1.1 Research Design and Data Analysis

Semi-structured interviews with industry experts and German consumers were selected to examine the complex factors that influence consumer choices and satisfaction with VOD streaming services. Thereby, the interviewer uses a set of open-ended questions to drive the conversation (Britten 1995). These questions are broad in nature to capture experiences from a wide range and allow for personal interpretation while at the same time being specific enough to elicit relevant information (Charmaz and Belgrave 2012). Although the interview guide is supposed to provide structure, flexibility remains an important aspect to allow the researcher to pose follow-up questions on individual responses (Gall, Gall, and Borg 2003; Turner 2010).

The interview guide was first designed for the industry experts (see Appendix 1) and divided into three sections. In the first section, the market landscape was covered, aiming to identify key trends, opportunities and challenges. The second section aimed to explore consumer groups by examining consumer behaviours from the experts' perspectives. Finally, the third section covered the expert's views on product attributes and feature importance.

Based on the industry expert interview guide, a consumer interview guide (see Appendix 2) was developed with two sections, focusing on personal streaming habits and valued attributes and features of German VOD streaming services.

The interviews were conducted throughout September and October 2024 and recorded via Microsoft Teams, each lasting between 20 and 60 minutes. They were then transcribed to ensure accuracy and facilitate detailed analysis. Finally, thematic analysis was applied to identify repeating themes and attributes within the data set (Clarke and Braun 2013).

3.1.2 Participant Selection

Participants were purposively selected for profound insight into the German VOD streaming market (Patton 2015). Purposive sampling selects data based on its importance regarding research objectives and questions and allows to choose interviewees who offer rich, relevant insights (Tracy 2020; Subedi 2021). As recommended by Gentles et al. (2015), the thesis involved 14 participants, comprising five industry experts and nine consumers, carefully selected to gain a multifaceted perspective on the market.

Selection of Industry Experts. Industry experts were selected based on their professional experience and affiliation with the relevant players in the German VOD streaming market. The selection aimed to provide a comprehensive view by incorporating experts from international players as well as from local platforms from German private TV providers: Expert 1 is working as a Commercial Planner for Disney+ (see Appendix 3) and Expert 2 is working for the Marketing Department of Amazon Prime Video (see Appendix 4). For the understanding of the perspectives of private TV providers, Expert 3, who has previously worked for the Marketing Department of RTL 2, (see Appendix 5) and Experts 4 and 5, currently working for the PR & Communications Department of ProSiebenSat.1 & Joyn, (see Appendix 6 and 7) were interviewed.

EXPERT	GENDER	AGE	BUSINESS FUNCTION	BRAND
1	Male	30	Commercial Planning	Disney+
2	Female	27	Marketing Management	Amazon Prime Video
3	Male	57	(Ex) Marketing Department	RTL 2 / RTL+
4	Female	26	PR & Communications	ProSiebenSat.1 / Joyn

5	Male	29	PR & Communications	ProSiebenSat.1 / Joyn
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Table 1: Overview Industry Experts

Personas for Selection of Consumers. To select consumers for the interviews, a preliminary Microsoft Forms survey (see Appendix 8) was developed to identify distinct personas, and their streaming behaviour as existing research did not provide sufficient information on streaming personas. The survey was approved by the thesis advisor and pretested.

Personas provide 'fictitious, specific, concrete representations of target users' by embodying shared characteristics and needs of real consumer groups (Pruitt and Adlin 2006, 11; Turner and Turner 2010). They enhance the understanding of the needs, motivations, and behaviours of different consumer groups (Miaskiewicz and Kozar 2011). The personas, as advised by industry experts, should be grounded in a combination of age and life stage differences as this influences streaming behaviour. Thus, the personas reflect real behavioural patterns that are unique to different demographic segments concerning streaming habits, content preferences, device usage, and key decision factors. Thereby, the thesis provides specific insight into the dynamics of the German streaming audience. Drawing from the survey results (see Appendix 9-12), the following three personas were created:

Persona one, Emma, is between 18 to 24 years old. She is classified as a young adult who balances her life as a **student** with a part-time job or internship to help cover her expenses. VOD streaming forms a considerable portion of her daily activities. She streams daily or several times a week at varying times, from morning to evening. On weekends, she does longer binge-watching sessions. Emma streams across multiple devices but primarily uses her laptop, tablet or smartphone. Her content preferences lean towards action, romance, drama and comedy, with trendy originals being her first choice. She also enjoys watching reality TV. When subscribing to a VOD streaming service, content selection is her top priority as she seeks a balance between the latest releases and

international classics. Given her cost-consciousness, Emma looks for a reasonable price-performance ratio and frequently shares subscriptions with friends to save money. Emma uses a broad range of streaming services including Netflix, Amazon Prime Video, Disney+ and RTL+.

Persona two, Lukas, is a 25-34-year-old **professional**. Since he works full-time, his streaming behaviour is dictated by the schedule of his work. He usually streams alone during evenings after work and on weekends together with his partner. He enjoys high-quality dramas, action movies, and comedy and, occasionally, watches sports or sci-fi movies. The flexibility streaming offers is very important to him due to his tight work schedule. Given his limited free time, he seeks a seamless viewing experience and is willing to pay for premium, ad-free subscriptions. Lukas places great importance on content quality, variety and topicality and thus primarily uses Netflix and Amazon Prime Video and sometimes DAZN or Sky for sports.

Persona three, Thomas, is a **senior professional** between the ages of 45 and 64. He usually streams with his partner in the evening or on weekends, sometimes with his whole family. Thomas values an immersive experience with quality visuals and sound, so his most-used streaming device is his Smart TV. With regards to content, he is interested in educational and thought-provoking productions and particularly enjoys documentaries, dramas, crime series and thrillers. His main selection criteria for streaming services include the subscription model since he prefers the comfort of ad-free viewing and is less price-sensitive. He also considers the variety of content highly important and seeks both international and local productions. Thus, Thomas mostly uses Netflix, Amazon Prime Video and the local ARD and ZDF media libraries.

Based on the personas, a sample of nine participants for consumer interviews was selected, with three interviewees for each identified persona.

RESPONDENT	PERSONA	GENDER	AGE	PROFESSION
Student 1	1	Male	21	Student

Student 2	1	Female	24	Working Student
Student 3	1	Male	24	Working Student
Professional 1	2	Female	25	Consultant
Professional 2	2	Female	28	Digital Marketing Manager
Professional 3	2	Male	26	Sales Manager
Senior Professional 1	3	Female	59	Flight attendant
Senior Professional 2	3	Male	61	Project Engineer
Senior Professional 3	3	Male	63	Sales Manager

Table 2 2: Overview Consumer Interviewees

To improve readability, interviewees are cited only as 'Expert 1' instead of 'Expert 1, personal interview, 2024' throughout the thesis. Full details of the personally conducted interviews are provided in the interview transcripts in Appendices 3–7 for industry experts and 13–21 for consumers.

3.2 Market & Consumer Insights

Experts confirm literature findings, saying that the US streaming giants have shaped the German VOD streaming market and initiated a shift in viewer behaviour (Expert 1, 3 and 5). Linear TV consumption is declining, particularly among younger audiences, as they prefer non-linear, on-demand content and transition to streaming, media libraries and YouTube (Expert 1, 3 and 5). At the same time, on-demand content transforms viewing behaviour in terms of the duration people watch (Expert 1). Experts confirm existing research by pointing out binge-watching as a notable trend that has emerged from VOD streaming (Expert 1).

Expert 1 further highlighted that today, due to their first-mover advantage and substantial investments, Netflix and Amazon Prime Video have dominant positions in most European countries and have created a challenging environment for smaller players, many of which face financial pressure and are unable to focus solely on growth, given the need to maintain profitability (Expert 1). As a result, they are unable to pursue an aggressive pricing strategy, and only a smaller budget can be allocated to content creation (Expert 1). It is therefore not anticipated that any smaller

player will pose a significant threat to the market leaders as 'the field is relatively clearly defined' (Expert 1). Nevertheless, the market is highly competitive due to the presence of numerous competitors and the limited time and budget that users have for streaming services, meaning that they are unlikely to subscribe to numerous services (Expert 1, 2 and 3).

Since major players dominate with international hits like *Emily in Paris*, local content that resonates with German audiences is a key strategy for German private TV providers in the VOD streaming market (Expert 4 and 5). National celebrities, local productions and reality shows remain their key differentiators (Expert 3, 4 and 5). However, lately, international players have also started to invest in local content, recognising its importance in appealing to regional audiences (Expert 1, 2 and 3). Their method is slightly different, in that they are targeting content that would be popular locally and successful in other markets to retain their global coverage and appease local tastes at the same time (Expert 1, 2 and 3). Expert 2 confirms that, in Amazon Prime Video's case, '[its] local offering, which also has international potential, is one of the things that sets them apart.' She further identified RTL+ as Amazon Prime Video's largest competitor in terms of local content, primarily due to its popular reality TV offerings (Expert 2).

For private TV providers entering or competing in the highly competitive VOD streaming market, it is essential to understand *what attributes of VOD streaming services are valued by German consumers* (SQ1) to effectively improve their offerings.

The interviews with consumers and experts revealed that **price** is 'an important factor' when choosing VOD services and 'certainly makes a big difference at the end of the day' (Student 2 and Professional 3). However, individuals from different personas have varying attitudes towards price. Individuals representing persona one, Emma, are price-sensitive and prefer monthly-based subscriptions as they are likely to 'switch [their subscription] from month to month' (Student 1, 2 and 3). As such, price is a deciding factor for them, and they stop services

that fail to offer adequate value for the cost, showing how critical pricing and perceived value are in their decision-making process (Student 1). Experts validate that younger generations prefer services with flexible pricing models, and ad-supported tiers, to keep costs down (Expert 2, 3 and 4). In contrast, individuals representing persona two, Lukas, and three, Thomas, are more likely to pay a premium price for an ad-free experience or their preferred streaming service (Professional 1 and 2; Senior Professional 1 and 2). This suggests that their WTP is conditional on whether there is *advertising* or not. However, individuals across all persona groups express dissatisfaction with platforms that have or introduced ads or paywalls, such as Amazon Prime Video or Sky WOW, and prefer fewer or no ads for an uninterrupted streaming experience (Student 2 and 3; Professional 2 and 3; Senior Professional 1 and 2). Transparent pricing seems to increase user loyalty and satisfaction by providing users with a clear understanding of the subscription model (Expert 5). Many consumers prefer Netflix due to its straightforward pricing (Expert 5).

Industry experts agree that in the future, a dual pricing strategy with hybrid models at different price points could be most effective (Expert 1, 2, 3 and 4). It allows customers to select the option that best suits their preferences and gives non-users the possibility to try a service and later upgrade to the premium ad-free model (Expert 1 and 4).

Finally, Expert 1 emphasises that 'price plays a bigger role when choosing a second or third subscription'. Thus, for main subscription services, like Netflix, content and performance are more critical than price, but when adding services, price promotions and special offers can influence consumer choices (Expert 1 and 2). Aligning with this, for all interviewees, a good price-performance ratio is essential, however, *content* and *content variety* seem to be the most critical factors for subscription choices. All interviewees say they enjoy a broad range of content that includes a mix of international new releases and classics. While individuals representing persona

three, Thomas, predominantly watch documentaries and crime series on Netflix or the ARD or ZDF media library, individuals representing persona one, Emma, value reality TV shows besides internationally recognised content and use a range of different services from Netflix, Amazon Prime Video and Disney+ to RTL+ or Joyn (Senior Professional 1 and 2; Student 1, 2 and 3).

Furthermore, the investment in *exclusive content* tends to attract all personas as it adds a layer of value and uniqueness distinguishing a platform from others (Student 2; Professional 2; Senior Professional 2). In line with this argument, Expert 3 has pointed out the great importance of exclusive local content for TV providers. Due to international content being widely available, local reality shows have a unique appeal, particularly for younger audiences (Expert 1 and 3). Expert 4 and Expert 5 further support the significance of exclusive productions and culturally resonant content featuring local celebrities and local humour for local platforms of private TV networks in attracting and engaging German viewers. This supports the importance of discovering a competitive edge and 'uniqueness [...] to stand out from all the other platforms' (Expert 2). In the case of Amazon Prime Video, live sports is currently their most important driver for user acquisition (Expert 2). The streaming service takes advantage by offering exclusively popular live sports events, such as the Football Champions League, besides access to other sports streaming platforms like DAZN (Expert 2).

Experts agree on the growing role of *sports content* in the streaming landscape, with both international and local players recognising its value in attracting and retaining subscribers (Expert 1, 2 and 3). Consumers across all ages confirm that they are particularly interested in football and bigger sports events (Student 1, 2 and 3; Professional 3; Senior Professional 2). According to Expert 3, sports fans are often willing to pay extra for platforms that provide exclusive rights to major events, which was confirmed by Student 2 and 3 and Senior Professional 2. Male consumers

from personas one and two point out that they prioritise platforms that have the necessary broadcasting rights for sports they are interested in (Student 3 and Professional 3).

Besides the content offering itself, its *availability and the frequency of new releases* are important to consumers as streaming frequency and subscription decisions of individuals are heavily tied to the content that is accessible (Student 1; Professional 1 and 2; Expert 2). Continuous new content releases are vital to keeping the platform up-to-date and consumers interested in using the streaming service (Expert 1; Student 1 and 2; Senior Professional 2 and 3). Furthermore, it makes them remain loyal to a platform as they feel no need to switch the service (Expert 1 and 2).

Another key feature valued by consumers is *personalisation*. Individuals across all personas appreciate personalised recommendations and search algorithms, as they minimise the time spent browsing and help discover new content that aligns with individual preferences (Student 1, 2 and 3; Professional 1; Senior Professional 1 and 2; Expert 1, 4 and 5). Individuals note that they especially enjoy Netflix's recommendation system, which is based on users' viewing habits and the viewing history of similar users (Student 2 and 3; Professional 1; Senior Professional 1 and 2). Experts agree that Netflix excels at suggesting personalised content that enhances user satisfaction (Expert 1, 2, 4 and 5). Expert 1 adds that while tailored content is important, users also want to see what others are watching to keep up with social conversations, indicating that platforms should aim to balance individual preferences with broader cultural trends. However, Expert 1 also highlights that personalisation through artificial intelligence (AI) may lead to biased data and biased data models that might not be accurate. Furthermore, both Expert 1 and Expert 4 draw a comparison to TikTok's algorithm, which stands out for its ability to keep up user engagement by providing a continuous stream of personalised content without requiring them to search actively. Expert 1 suggests that in the future, VOD streaming services may need to transition from a fixed 'digital video store' model of navigating through content tiles to a more dynamic and engaging

interface akin to that of TikTok. This could also involve integrating clips or social posts to make content discovery more interactive and entertaining (Expert 1). However, its implementation presents a significant challenge (Expert 1 and 5).

While personalisation is highly valued by consumers to find relevant content, the *user interface and its ease of use* are equally important. Expert 2 emphasises that the platform has to be intuitive for the consumer. Expert 4 adds that 'the user interface and user-friendliness are the first things people complain about'. As poor navigation or complex searching can easily lead to subscription cancellations, a well-structured user interface is essential for keeping users loyal to a platform (Expert 3). Once more, Expert 1 draws the comparison with TikTok, saying that 'it is more convenient and [...] fun to open TikTok than Netflix' due to its design, which facilitates discovery. It is evident that individuals from all personas value easily structured platforms and appreciate a user-friendly design, as it allows them to efficiently find the content they are seeking (Student 2; Professional 2 and 3; Senior Professional 1, 2 and 3). However, an intuitive user interface seems to be more important for older individuals compared to younger ones (Student 1 and 2; Senior Professional 1, 2 and 3). While Netflix and DAZN were highlighted for their simple interface with clear categories and well-curated trailers, Amazon Prime Video's interface has again been found to frustrate users, as it presents navigation and content access confusingly and difficult (Student 2; Professional 2 and 3; Senior Professional 1). However, even small, advanced features, such as Amazon Prime Video's QR code as an easy way to sign in to a new device, can be perceived as very pleasant (Professional 2).

In terms of *streaming quality and platform reliability*, Expert 4 emphasises the role of image quality as streaming devices advance, noting that the higher resolutions on new televisions are driving demand for high-quality content. However, she points out that its importance highly depends on the device the viewer is using (Expert 4). While older generations watching on large

TVs value high streaming quality, younger users primarily watching on mobile devices, such as laptops, tablets and smartphones, may not find Ultra HD necessary nor see a difference on their devices (Expert 4). Younger individuals matching persona one and two confirm that they primarily watch on smaller devices, 'where the screen isn't that big anyway. That is why [they] don't really care about the quality as long as [they] get a sharp picture' (Student 1 and 2; Professional 1). Individuals representing persona three pay more attention to streaming quality and highlight that they usually watch via a large TV, where the streaming quality makes the TV experience extremely enjoyable (Senior Professional 1 and 2). However, streaming quality is also contingent upon the nature of the content. High resolution is particularly important when watching live sports or action movies (Student 3; Senior Professional 2). Expert 4 concludes that these days, the streaming quality is 'definitely one of the biggest challenges for local streamers', as they struggle to produce or acquire content at the same level as global giants due to financial constraints. Lastly, it is mentioned that technical issues such as disrupted transitions and minimal delays in terms of video playback and navigation can significantly impact user loyalty and make them switch platforms (Senior Professional 3; Expert 1, 3). Thus, platform reliability is crucial for consumer satisfaction.

In addition, all personas value the *download feature* for offline viewing, especially for travelling and appreciate the flexibility that it offers (Student 1, 3; Student 2; Professional 1; Senior Professional 1). At the same time, consumers report not considering this feature a priority as they rarely find themselves in situations where they are not connected to the internet (Student 1 and 3; Senior Professional 1 and 2). Expert 4 confirms that the download feature is a valued characteristic for certain user cases, but 'it's generally not that necessary anymore since content is always available via streaming'. However, she adds that at Joyn, they 'regularly [receive] customer support inquiries about when the download function will be available', which indicates that its absence can still cause frustration (Expert 4).

Lastly, Expert 2 predicts the importance of the *multifunctionality* of platforms, meaning the integration of different services into one single platform. 'The trend will be to try to offer everything on one platform like Amazon Prime Video already does' as consolidating subscriptions and combining SVOD and TVOD is very attractive to consumers who are looking for convenience and cost-efficiency (Expert 2). Consumers support this, by expressing the desire for a single platform that offers TV, live sports and the latest series and films (Student 1, Professional 2).

Attributes, mentioned by consumers only. Younger consumers matching persona one and two appreciate *account sharing* as it makes streaming services more accessible for them (Student 1 and 2; Professional 3). They specifically highlight the financial benefit, allowing them to access multiple platforms without paying full price. Recent restrictions on sharing across different locations have led to frustration among some consumer groups (Student 1 and 2; Professional 3). Additionally, the ability of *multiple-device streaming* is valued by consumers due to its flexibility and convenience but does not necessarily influence their choice of platform (Student 2 and 3; Professional 1 and 2; Senior Professional 1 and 2). Consumers across all personas consider seamless streaming across multiple devices an additional benefit (Student 2 and 3; Professional 1 and 2; Senior Professional 1 and 2).

Attributes, mentioned by experts only. Expert 4 further underscores the importance of *customer support* as 'user have questions from time to time'. A positive example from the industry is the AI-based customer service of Disney+, which can answer questions and help cancel subscriptions (Expert 4). User-friendly customer support can improve the user experience (Expert 4).

Industry experts further see an upcoming trend in integrating *social interaction features* into streaming services. As current platforms lack meaningful social interaction, a key element on competing platforms like YouTube and Twitch, adopting such features becomes increasingly

important to engage audiences and foster a sense of community (Expert 1 and 4). Expert 5 adds that Netflix already offers watch parties, where users meet online to watch together synchronised content while communicating through an added group chat. Joyn, on the other hand, tries integrating social elements like live chats and real-time interaction during TV shows and live events by use of an additional app (Expert 5). This allows users to engage with both the content and other users, enhancing the appeal and interactivity of the service (Expert 5). There is a consensus among experts that the shift toward social engagement is an emerging trend that is set to transform the future of streaming services, making them more interactive for users (Expert 1, 3, 4 and 5). Notably, younger interviewees confirmed that they sometimes prefer watching YouTube (Student 1 and 3).

Lastly, Expert 2 mentions that **branding** also plays a role in influencing consumer choices as it helps a platform remain top of mind, increasing reliability and trustworthiness for consumers. In the case of Netflix and Amazon Prime Video, being the first major players in the VOD streaming industry has given them the significant advantage that streaming is often closely associated with their brands (Expert 2).

To conclude, the preliminary interviews with industry experts and consumers reveal meaningful insights in response to SQ1. The answers provided by the interviewees seemed to have a close correspondence with the characteristics within each persona. Thus, the developed personas have been verified. Individuals that match persona one, Emma, demonstrate similar streaming behaviour, such as being price-sensitive and opting for monthly-based subscriptions. Furthermore, they indicate to use different streaming platforms from Netflix and Amazon Prime to RTL+ or Joyn and primarily smaller devices like laptops and tablets for streaming. Those representing persona two, Lukas, preferred high-quality content and were willing to pay a premium for an ad-free experience. Persona three, Thomas, was confirmed by the older interviewees, who emphasised a

preference for a user-friendly design and immersive, high-quality visuals and sound on their smart TVs. Their preferred content types are documentaries and dramas on Netflix or in the ARD or ZDF media library, while price is also less important to them.

Moreover, the interviews indicated that the content was the most important attribute, followed by price, and the overall user experience. Regarding content, a broad variety, exclusive productions and steady new releases were highlighted, while for price, a good price-performance ratio, transparency and flexibility seemed to be most important. In terms of user experience, for older individuals, an intuitive design as well as a high streaming quality were also important. Generally speaking, advertisement has been perceived as disturbing while personalisation and effective recommendations were highly appreciated. This is in line with the expectations of industry experts, who say that the role of AI is foreseen to become increasingly important in future (Expert 1, 4 and 5). Providing a 'lean-back' experience for the user, requiring less active decision-making is a growing trend that highlights the idea that streaming services should cater to similar needs as classic television (Expert 1). Experts further suggest that to enhance customer engagement and build a platform community, adding social features that make streaming more interactive, and a shared experience can be an innovative approach for streaming (Expert 1, 4 and 5).

Lastly, it can be inferred that high-value content is attached to live sports content. Experts foresee its integration as a key trend in the streaming market since the field remains unsettled and attracts a new segment of users willing to pay for exclusive streaming rights (Expert 1 and 3; Student 2, Senior Professional 2). Expert 2 finds that 'streaming all types of live events', including concerts and other big events like the *Bambi Awards*, is extremely promising beyond the realm of sport. This scenario creates a strategic possibility to grow the live experience beyond the traditional on-demand services, increasing market share accordingly (Expert 1, 2 and 3).

Finally, this knowledge provides a preliminary understanding of the German market and its consumers and thus forms a base for the following research while being further explored.

4. Consumer Perceptions

4.1 Theoretical Framework

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

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

the consideration set, significant variation in perceptions, and key attributes identified through qualitative research that define the category (Hauser and Koppelman 1979).

4.2 Selection of Attributes and Platforms

To study consumer perceptions, selecting streaming services and identifying attributes to be evaluated is one of the most important steps (Kaul and Rao 1995). It is unavoidable that brands or attributes are missed out or selected mistakenly, as not all consumers have used every streaming service available (Bijmolt and Van de Velden 2012). Moreover, there is a significant difference in attributes consumers consider important when selecting a service (Bijmolt and Van de Velden 2012). However, if the set of platforms and attributes remains constant from one consumer to another, some consumers may encounter difficulties in evaluating them due to lacking knowledge, which could lead to data bias (Bijmolt and Van de Velden 2012). Therefore, to overcome this potential data bias, the preceding preliminary interviews were conducted to gather attributes and platforms from consumers and experts (Bijmolt and Van de Velden 2012).

Throughout this thesis, the VOD streaming services Netflix, Amazon Prime Video, Disney+, RTL+ and Joyn will be analysed. These platforms were frequently mentioned throughout the consumer interviews as being familiar and used among respondents. The inclusion of Netflix, Amazon Prime Video and Disney+ is further supported by market figures. In 2022, Amazon Prime Video was the preferred streaming service for Germans (61%), followed by Netflix (55.6%; W&V 2022). Disney+ has rapidly increased its subscription numbers by capitalizing on its high brand recognition and reputation for producing high-quality content, making it a relevant platform to include in the analysis (Sunnebo 2023). The selection of Joyn and RTL+ was further based on the thesis' primary goal, which is to provide actionable recommendations for local platforms to enhance their competitive position against international competitors. There is still potential for

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growth, as evidenced by low usage rates of both RTL+ (6.7%) and Joyn (4.2%; W&V 2022; see Appendix 22). The inclusion of both global and regional players ensures a comprehensive analysis of the distinctiveness of the German market, allowing for an assessment of how these platforms are perceived in comparison to one another.

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

Brands can be associated with a set of human traits, also known as brand personality (Aaker 1997). Aaker's brand personality model provides a framework for understanding consumer perceptions that extend beyond the product-related attributes of a brand (Aaker 1997). The framework encompasses five key dimensions: sincerity, excitement, competence, sophistication and ruggedness (Aaker 1997). Nuhadriel and Keni (2022) observed that brand personality exerts a significant impact on consumer behaviour regarding subscriptions to online streaming services. Consumers tend to be more loyal towards brands whose personalities resonate with their own personalities (Nuhadriel and Keni 2022). They recommend streaming services to establish a distinctive and authentic brand personality in addition to guaranteeing high system quality (Nuhadriel and Keni 2022). The latter is frequently indistinguishable across streaming services (Nuhadriel and Keni 2022). As Nuhadriel and Keni's (2022) have already applied the brand personality model within the streaming context, the attributes *competent*, *up to date*, *authentic*, and *unique* were included in the attribute set. *Uniqueness* was not only mentioned in academic literature but also emphasised as a key differentiating factor during interviews, as streaming

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services need to be unique in their offerings to maintain competitiveness in the market (Expert 2). Being *up to date* was also highlighted throughout the interviews, as consumers wish to discover new content and not having the feeling of having already seen everything (Expert 1; Student 1 and 2; Senior Professional 2). Additionally, the attributes *family-oriented* and *reliable* from the brand personality framework (Aaker 1997), were added to the attribute set. Findings from the initial consumer survey showed that senior professionals like to stream in family settings on weekends. Furthermore, the reliability of a streaming service has a great influence on user experience with streaming services (Guo 2022; Expert 1 and 3).

Trust is crucial for shaping how media content is perceived and consumed (Heim et al. 2023). For VOD streaming services, it is important to build trust not only in the content they offer but also in their platform (Heim et al. 2023). According to the *Media Brand Trust Model* developed by Heim et al. (2023), brand trust significantly impacts the media consumption experience. The study identifies eleven key dimensions: relevance, integrity, transparency, affinity, experience, benevolence, credibility, competence, halo effect, commercialism, and temporal aspects, all relevant to media brands of various sizes, backgrounds, and operational scopes. Based on these eleven dimensions and adapted to the thesis' research question, the following attributes were incorporated: *competent, credible, transparent, relevant, commercial, established*.

Lastly, another study by Rahe, Buschow and Schlütz (2021), explored brand perceptions of Amazon Prime Video and Netflix in the German media industry employing the *Function-oriented Media Brand Model* as a theoretical framework. To be considered as valuable and unique by consumers, media brands need to fulfil two central brand functions, cognitive relief / simplification and activation (Rahe, Buschow, and Schlütz 2021). In terms of cognitive relief and simplification, media brands facilitate the consideration of a brand by reducing complexity and influencing the

selection of a brand by reducing risk (Rahe, Buschow, and Schlütz 2021). Once a media brand has been selected, media brands assist consumers in defining their own identity (identification) and play a role in how they present themselves to others within social contexts (prestige) (Rahe, Buschow, and Schlütz 2021). The attributes *unique, top-of-mind, entertaining* were drawn from the items that measure the complexity reduction function. Furthermore, the attributes *trustworthy, innovative, competent* were derived from the risk reduction function. In terms of prestige, *recommendable* and *prestigious* were adapted into this thesis.

5. Consumer Preferences

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

5.1 Conjoint Analysis Methodology

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

CA has the particular advantage of being able to measure how important these dimensions are relative to one another and what consumers are prepared to give up in order to have them. For example, CA can reveal how much a consumer is willing to pay for an improvement in one feature

(e.g., quality or speed) while accepting a decrease in another (e.g., cost). The concept of ‘levels’ - specific values or conditions that each attribute can take - is crucial to the understanding of the data and concepts within CA because the direction of consumers’ preferences and trade-offs provided by the respondents are directly linked to these levels. (Louviere, Flynn, and Carson 2010)

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

5.1.1 Survey Instrument

Eight attributes with varying levels that have an impact on the German VOD streaming market were identified for the CA (see Appendix 24). These attributes were established through an extensive literature review and preliminary interviews with industry professionals and consumers.

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

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

Content Origin. Three levels were considered: Local content (German), International content, and a combination of Local & International content. This aligns with research and experts

suggesting the impact of content origin on consumer preferences (Expert 1, 2, 3, 4, 5; Kumar et al. 2025).

Advertisements. Two levels were chosen to evaluate user preferences for ads: Ad-based service and Ad-free service. Previous studies and interviews indicate that ad-free experiences can significantly impact user satisfaction and WTP (Expert 1, 5; Student 1, 2, 3; Professional 1, 2, 3; Senior Professional 2, 3; Nielsen 2020).

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

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

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

Content Type. Five levels were included – Movies & Series, Movies & Series with Documentaries, Movies & Series with Sports Live streaming, Movies & Series with Reality TV, and a combination of all four genres (Movies & Series, Documentaries, Sports Live Streaming, and Reality TV). Movies & series are the preferred form of content (Telkman 2023) and, therefore, were included in all levels. Additionally, the inclusion of documentaries, sports live streaming and reality TV is based on the consumer's insights from the preliminary interviews. Content variety plays a critical role in shaping consumer preferences in VOD streaming (Expert 1, 2, 3, 4, 5; Student 1, 2, 3; Professional 1, 2, 3; Senior Professional 1, 2, 3; Shin et al. 2016; Nielsen 2020; Lee et al. 2018).

Based on the methodology of CA (Louviere, Flynn, and Carson 2010; Rao 2010), the inclusion of hypothetical scenarios, such as offering Netflix at a "Free" price point, was deliberate so that consumer preferences beyond the current product range could be investigated. This method allows to identify core preferences by considering a wide range of combinations. As detailed in Appendix 25, none of the attribute combinations were excluded, and every level was available for selection in each brand, ensuring a thorough assessment of consumer choices. However, in order to keep the integrity of the free (ads & limited content) price level, the pairing of this level with the ad-free service level of the advertisements attribute was prohibited. This was done through an advanced setting available on the Conjoint.ly software (see Appendix 26).

In addition to collecting attribute-based data, pertinent participant information was gathered in the analysis of the German VOD streaming market (see Appendix 27). To ensure all collected data was derived from respondents that incorporated the market studied, we asked participants if they were from or lived in Germany and if they were familiar with or had used VOD streaming platforms. The respondent was screened out if the response was negative to any of these parameters. The collected data included age, gender, occupation, frequency of VOD streaming

usage, average session duration, and monthly spending. Collecting these demographic variables is essential for effectively segmenting and interpreting consumer preferences in this market, as noted in previous research (Cleveland, Papadopoulos, and Laroche 2011).

5.1.2 Data Collection and Process

The survey was spread through a diverse array of channels, including platforms such as SurveySwap, WhatsApp, Microsoft Teams, and SurveyCircle, along with social media networks like Instagram and LinkedIn. Utilising Conjoint.ly software was pivotal for both the survey administration and subsequent data processing. This software enabled efficient response collection and involved multiple steps for data handling, including the creation of segments for crosstab analysis to facilitate comparability across different respondent groups. Moreover, persona-specific data was captured to enrich analytical insights. These segments are integral features of Conjoint.ly, allowing for comprehensive post-survey analysis (see Appendix 28). In the concluding phases of the analysis, the consolidated data and visualizations were exported to Excel for extended analysis, including the computation of averages to enhance the interpretation of the study's findings.

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

6. A Case Study on Joyn

6.1 Understanding Joyn

It is not all about the global giants. In this section, Joyn, a German streaming platform will be explored. Joyn was launched in June 2019 as a joint venture by ProSiebenSat.1 Media and

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Discovery Inc. and has established itself in the market by combining traditional live TV broadcasting with modern streaming offerings (ProSiebenSat.1 Media SE 2019). Headquartered in Munich, the business is directed towards German-speaking audiences. Its freemium business model encompasses a free ad-supported tier and a premium tier (SVOD) known as Joyn PLUS+ (Joyn n.d.). Joyn's free tier includes more than 60 live TV providers and a large library of on-demand content, featuring popular German shows, movies, and some exclusive series (Joyn n.d.). On top of that, for those looking towards a more diverse experience, Joyn PLUS+ adds more exclusive content and enhances streaming quality (Joyn n.d.). Furthermore, the premium option (SVOD) gives the possibility to watch some shows one week in advance and has six more Pay-TV networks (Joyn n.d.). For simplicity, the following analysis will refer to both Joyn (the free version) and Joyn PLUS+ collectively as 'Joyn'. Summed up, Joyn works with a freemium model, catering to a broad audience by offering free, ad-supported streaming for mass users, as well as premium service for those seeking an enhanced viewing experience (Joyn n.d.).

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

6.2 Methodology

The following analysis takes a closer look at Joyn's challenges and potentials and gives recommendations on how the platform can optimise its offerings in the German VOD market (SQ4). In addition to findings from the interviews, PM and CA, a confirmation survey was conducted with Google Forms (see Appendix 29) to identify Joyn's strengths and potential areas for improvement specific to the streaming platform. The primary objective of the survey was to gather insights from

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individuals who had prior experience using Joyn. However, it was also valuable to get insights from people who had never used Joyn before. That is also the reason why the survey was divided into three parts (see Appendix 29 and Figure 7).

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

The eligibility criteria included being from Germany or speaking German (see Appendix 30). After that, the first part of the questionnaire was clearly designed to segment the audience based on their familiarity with Joyn by asking whether they are current users, have used it in the past, or have never used it (see Appendix 30). For the people who have never used Joyn before, two special ending questions were asked, in which they had to answer why they had never used Joyn before and what would make them use it (see Appendix 31 and 32). After these questions, the survey ended for them. The third part and main body of the survey then focused on the people who are currently using or did use Joyn in the past. Questions covered a range of topics including satisfaction levels, content preferences, unique features, and areas of dissatisfaction. Thereby, the survey aimed to provide actionable feedback on key attributes of Joyn, such as content quality, usability, and affordability, as well as suggestions for enhancement.

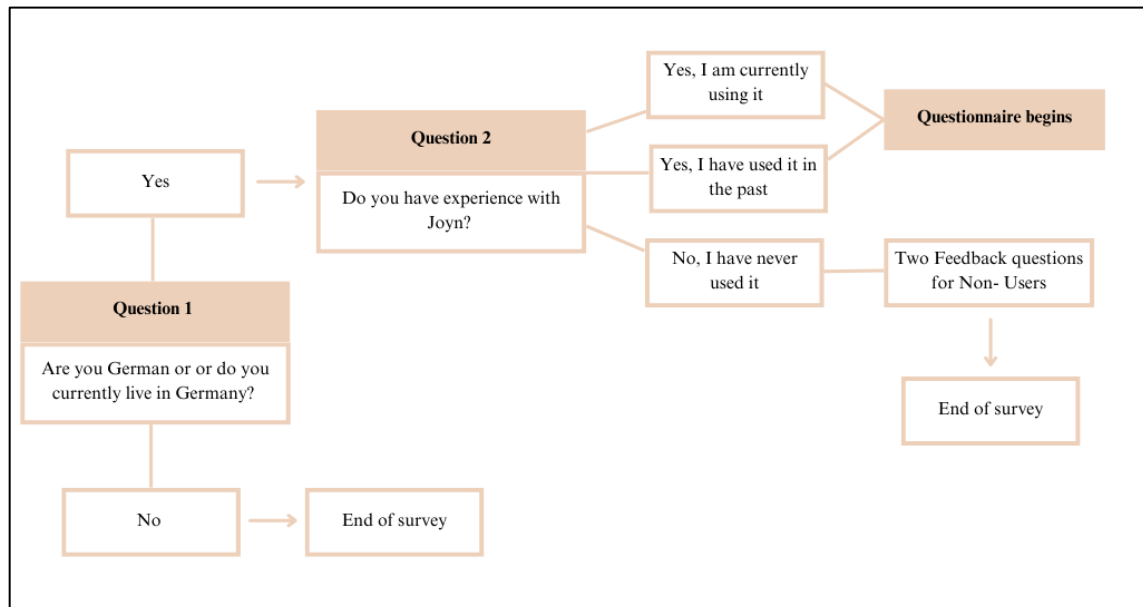


Figure 2: Case Study Survey Procedure

A total of 103 people participated in the survey. Among these, 5 respondents were not German, and an additional 18 participants had never used Joyn before, leaving 80 respondents who were both German and had prior experience with the platform. Notably, 23 of these 80 respondents reported having used Joyn in the past but no longer actively use the service. Therefore, out of the remaining 80 participants, 71% identified as female and 29% as male, with no respondents selecting 'prefer not to say'. The majority were young adults aged 25-34 years (43%) and 18-24 years (27%), with smaller proportions in older brackets: 35-44 years (17%), 45-54 years (4%), and 55-64 years (9%). In terms of occupation, the largest group were students with working jobs or internships (27%), followed by young professionals with 1-5 years of experience (23%) and students without work experience (21%). Additionally, 21% were senior professionals with more than 10 years of experience, 5% had 6-10 years, and 3% selected 'other' occupations (see Appendix 33).

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

hours (38%), and only 4% exceeded five hours. Monthly spending on streaming services varied, with 26% spending 0 € to 5 €, 15% spending 6 € to 10 €, 14% spending 16 € to 20 €, and 20% spending 21 € to 25 €. A smaller percentage of respondents reported higher spending, with 10% spending 26 € to 30 € and 12% spending more than 30 € (see Appendix 34).

In the following analysis, only the most valuable results from the survey will be considered and discussed, while all the remaining results are provided in Appendix 29-39.

7. Conclusion

7.1 Consumer Perception Discussion

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

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

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

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

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

point in the German VOD streaming market (Joyn n.d.; Comacon Magazine n.d.). However, the accessibility to a wide audience and the free offerings may result in a dilution of exclusivity and a reduction in perceived prestige, which could explain Joyn's low associations with being prestigious.

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

7.2 Consumer Preferences Discussion

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

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(2001) present the case for choosing a streaming service where content variety is an essential attribute for customers. However, increasing content variety tends to increase costs, requiring a trade-off with affordability. According to Dathe et al. (2023), successful decision-making should consider pertinent trade-offs to reach a balanced solution that satisfies strategic objectives while staying within the restrictions imposed. Such dynamics can also be observed in the CA conducted. Content-based attributes (content type, origin and exclusivity) were favoured at the expense of product-feature attributes (user interface, personalisation and advertisements). This result is supported by the preliminary interviews and literature, which highlight content as the main driver in the decision-making process and emphasise content quality, variety and new releases as key to engagement (Wu et al. 2024; Yoon and Kim 2023). This is likely due to the appreciation of a vast content library that removes the necessity for additional subscriptions (Wu et al. 2024).

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

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

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

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

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

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

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

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

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

7.3 Demographic and Behaviour Discussion

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

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

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

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

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

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

7.4 Summary

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

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

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

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

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

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

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

7.5 Managerial Implications

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

implications, the four *P's of marketing* by Jerome McCarthy (1960) – product, price, place and promotion – are used.

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

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

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

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

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

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

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

7.6 Limitations and Implications for Future Research

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

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

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

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

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

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

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

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

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

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

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Appendices

Appendix 1: Interview Guide – Industry Experts

Note: Not all questions will be asked! The questions rather serve as a question pool. The interview will be conducted individually, allowing flexibility based on the flow of conversation and the expertise of the interviewee. .

Introduction & Purpose

- Brief explanation of the purpose of the interview and our research focus in the German VOD streaming market, specifically on identifying key consumer perception drivers and preferences.
- Ensuring confidentiality and consent for recording the interview.

Part 1: About the Market

1. What major trends or developments have shaped the German VOD streaming market in recent years?
2. How have consumer expectations and behaviours toward video streaming services evolved in Germany?
3. What strategies do video streaming platforms use to stay competitive, particularly in content acquisition, pricing, and user experience?
4. What opportunities and challenges do you foresee for video streaming platforms in the German market over the next five years?
5. How do you think new entrants or innovations could challenge the dominance of established video streaming platforms in Germany?

Part 2: Preferences & Consumer Types

6. Can you share insights into the different consumer segments within the German VOD streaming market?
7. What key characteristics define video streaming consumers in Germany in terms of demographics and content preferences?
8. How have streaming behaviours or preferences shifted among consumers in recent years?

Part 3: Product Attributes & Features

- From your experience, what specific product attributes (e.g., content quality, platform design, ease of use) do German consumers value most in video streaming services?

Deep Dive:

9. **Content Differentiation:** How do exclusive content (originals) and licensed content impact consumer preferences, and is one valued more than the other in the German VOD streaming market?
10. **Content Variety:** Have you noticed a shift in demand for certain types of content (e.g., local productions vs. international blockbusters, specific genres)?
11. **Pricing Models:** How do different pricing models (e.g., monthly vs. yearly, ad-supported vs. premium) influence consumer behaviour in terms of both acquisition and retention in the German market?
12. **Customisation & Personalisation:** How important are personalisation features (e.g., curated playlists, personalised recommendations) to consumers, and are there emerging trends in this space that resonate with them?
14. **Streaming Quality:** How do technical aspects such as streaming quality (4K, HD), buffering, and smooth performance influence overall consumer satisfaction and loyalty to video streaming platforms?
15. **Technical Features:** How important are advanced features like offline viewing, multi-device streaming, and downloads for later viewing? Do these features influence consumers' platform choices in the German VOD streaming market?
16. **User Interface & Recommendations:** How does the design of the user interface (ease of navigation, search functionalities) and the quality of content recommendations affect consumer perception and engagement with a platform?
17. **Multi-device Flexibility:** How significant is the ability to stream content across multiple devices (smartphone, tablet, smart TV) for consumer satisfaction? Does device flexibility impact loyalty to video streaming platforms?
18. **Social and Community Features:** To what extent do social interaction features (e.g., watch parties, sharing recommendations, live chat) and community-driven features (ratings, reviews) play a role in consumer engagement and platform choice?

End:

Demographic Data:

- What is your age?
- How do you identify your gender?
- What is your current profession?

Appendix 2: Interview Guide – Consumer

Note: Not all questions will be asked! The questions rather serve as a question pool. The interview will be conducted individually, allowing flexibility based on the flow of conversation.

Introduction & Purpose

- Brief explanation of the purpose of the interview and our research focus in the German VOD streaming market, specifically on identifying key consumer perception drivers and preferences.
- Ensuring confidentiality and consent for recording the interview.

Part 1: Preferences

1. Which streaming services are you familiar with?
2. Which streaming services do you currently use?
3. Can you describe your typical video streaming habits (e.g., how often you watch and what types of content you prefer)?
4. Are there specific features or qualities that differentiate one video streaming platform from another in your opinion?
5. Have you noticed any recent changes in your streaming behaviour or content preferences?

Part 2: Product Attributes & Features

6. What specific product attributes (e.g., content quality, platform design, ease of use) do you value most in video streaming services?

Deep Dive:

7. **Content type:** What types of content (e.g., series, movies, sports, documentaries) are most important to you when choosing a video streaming platform?
8. **Content Differentiation:** Do you value original content (produced by the platform) more than licensed content, and how does that affect your choice of platform?
9. **Content Variety:** Have you noticed any changes in the types of content you prefer, such as local productions vs. international blockbusters or specific genres?
10. **Content Variety:** How does the frequency of new content releases (e.g., new shows, exclusive content) influence your loyalty to a video streaming platform?
11. **Pricing Models:** How do different subscription options (e.g., monthly vs. yearly, ad-supported vs. premium) impact your decision to subscribe to or stay with a video streaming service?
12. **Customisation & Personalisation:** How important are features like personalised playlists or recommendations to you? Are there any recent trends in customised viewing options that you've found appealing?
13. **Streaming Quality:** How does streaming quality (4K, HD), buffering, or smooth performance impact your satisfaction and loyalty to a video streaming platform?
14. **Technical Features:** How important are advanced features like offline viewing, streaming on multiple devices, or downloading for later? Do these options affect which video streaming platforms you choose?
15. **User Interface & Recommendations:** How does the design of the platform (ease of navigation, search functions) and the quality of content recommendations affect your experience with video streaming services?
16. **Multi-device Flexibility:** How significant is it for you to be able to stream content across multiple devices (smartphone, tablet, smart TV)? Does this flexibility make you more loyal to a specific platform?
17. **Social and Community Features:** How important are social features like watch parties, sharing recommendations, or live chat in enhancing your experience with a video streaming service? Do reviews and ratings influence what you watch?

End:

Demographic Data:

- What is your age?
- How do you identify your gender?
- What is your current profession?

Appendix 3: Transcript Interview Industry Expert 1

Personal interview, conducted on 10. September 2024

Interviewer:

Then I would just start straight away and simply ask you how media behaviour has changed in recent years and what trends can currently be observed.

Expert 1:

Oh ok, so basically, I mean, you can really read that from statistics and studies, but what you can see is that the time budget used for linear television consumption has decreased significantly in recent years.

Television is still number one when it comes to the consumption of moving images, but it is becoming less and less. And if you look at target groups and age groups in particular, the decline is of course most noticeable in the young target group. And that of other uses of media libraries, of streaming, of YouTube, it has become more and more gradual in the target group, so to speak, and that is a trend that we have simply seen over a longer period of time, over several years. And yes, it will continue.

Interviewer:

What trends can currently be observed in consumer behaviour, including specifically on streaming platforms?

Expert 1:

In general, this whole non-linearity is simply not really a trend, it's more of a technical possibility. For example, there are currently platform-specific trends such as the increasing use of AI in the form of personalisation. At the same time, personalisation is also an interesting point, because I think that personalisation is almost a bit overrated, because you're seeing more and more now that you could personalise extremely well, if you think about how TikTok personalises - it's incredibly good, they're incredibly fast, how the algorithms react to it, but it's leading more and more to it still becoming a hit business. And people don't necessarily want to see what suits them 100%, but rather what suits them 80% and what everyone else sees so that they can join in the conversation and you always have different devils that you pull out of such media consumption and your personal entertainment is certainly one thing, but there are certainly also social benefits that you pull out and these are to be able to join in the conversation and somehow be part of the community when you have seen something and accordingly, for example, this top ten from Netflix works mega well.

There's a reason why they put it on the homepage, because they know that people want to know what others have seen so that you can simply be part of the conversation. But it is of course extremely difficult to carry out personalisation and ensure the corresponding relevance. How are you supposed to know what a person is currently watching? Of course, you could try to draw conclusions based on the viewing habits of others, but that always leads to people being categorised into interest groups. That's basically the whole point of artificial intelligence (AI). The data you use to train your models has a direct influence on how the model behaves. If this data is already biased, the model will also have a bias.

This is particularly critical when it comes to sensitive topics such as racism, where it can be a major problem. I think this is probably less pronounced with content recommendations.

Interviewer:

Now we've already got very specific straight away, I wanted to come back to the macro level and talk about the market again. How do you currently perceive the market? How do you see the distribution of players?

Expert 1:

What you can already see, even if the subscriber figures are not officially reported per country in some cases, is that Amazon Prime Video and Netflix are the two largest providers in almost all European markets, and then nothing happens for a long time.

In most cases, there is then a group of other platforms that occupy positions 3 to 6 and are in a similar range. Among them are many others that are slightly lower.

This leads to a dynamic in which there are two major players, one of which is used significantly more. Netflix is used much more intensively than Prime, although both have a similar number of subscribers. After that, nothing happens for a long time, and then the other providers follow. Many of them are currently under greater financial pressure than they were a few years ago.

It is therefore extremely difficult for this dynamic to change. Providers can no longer concentrate so much on growth but have to focus on profitability. This means that they can no longer operate as aggressively with low prices and have to increase prices in order to secure their sales and market share. At the same time, there is less budget for content, which means a good balance has to be found.

It is therefore not currently foreseeable that anyone will pose a serious threat to the two leading players. It's not as if a local provider will suddenly overtake Netflix. At the moment, the field is still relatively clearly defined. Of course, there are various other providers that want to increase their market share or defend their position, but this success is not currently visible.

The market is certainly very competitive, but it is extremely difficult to penetrate this relevance set. Users will not sign up for an unlimited number of subscription services, simply because their time for such offers is limited. Although you can currently see that the number of subscriptions per person is increasing, partly because account sharing has been made more difficult, this does not mean that it will be easier for smaller providers to take market share from the big players.

Interviewer:

Mhm, quite interesting you just mentioned that there is just this pressure to be profitable. Why has it developed so strongly in recent years and is currently so present? What is the reason behind it?

Expert 1:

Mhm, that's a good question.

Interviewer:

Is it simply because there are now so many players on the market?

Expert 1:

Yes, the streaming market is already characterised by normal stock market dynamics. Companies like Netflix were quite indebted for years and focussed entirely on growth instead of profits. This allowed them to greatly expand their marketing. Many other companies have then travelled on this wave.

In the beginning, there was a lot of euphoria, and many companies were valued extremely highly. Even traditional players like Disney were valued higher a few years ago than they are today, simply because of all this streaming euphoria. People thought that traditional television was over and that they had now found the perfect new model.

Interviewer:

Corona certainly still had an influence on that, didn't it?

Expert 1:

Then corona came along, absolutely. There was also a clear upward trend at the time, but it's almost always the case that you notice a consolidation movement at some point. You realise that the companies are all valued very highly, but none of them are profitable in any way and then of course the sensible shareholder says yes at some point, so will we see something of profitability at some point or not?

This has then also rubbed off on the other companies. Netflix also experienced a pretty severe price correction but managed to become profitable pretty quickly. They have been profitable for some time now, and the other players in the market are slowly making it too. Of course, it's still a tough business, and even now billions are still being invested every quarter, which you have to recoup first.

Interviewer:

So the fact is profitability is a challenge. What other challenges are there in the German streaming market?

Expert 1:

Perhaps back to profitability, which is of course also related to the fact that many traditional companies are simply losing advertising revenue because, together with this advertising reach, you have simply increased advertising costs for years, even though the reach has constantly declined, and at some point the system collapses and the advertising market simply no longer works as it did before and the money has to come from somewhere. In addition to profitability, you also have regulatory and political challenges. On the one hand, there are discussions about investment obligations, especially in the area of production. Many providers also produce locally in their respective markets, but this has decreased in some cases. Last year, for example, both Sky and Paramount announced within a few weeks that they would no longer be making local productions in the German market. That's definitely a big issue.

Interviewer:

That's great, exciting. To be honest, I have to interject briefly, because what I heard in another interview is that the big players, i.e. Netflix and Prime, are increasingly focusing on German productions because they realise that local content is also attractive. With Prime, Maxton Hall immediately springs to mind.

Expert 1:

Yes, of course.

Interviewer:

So that the big players also want to adapt more and more to the market actually. It's exciting that, in turn, others are saying that we're stopping with German productions, so that there's a countermovement.

Expert 1:

Yes, but I think we're already a bit further along. So, this hype that Amazon and Netflix in particular are now investing and producing really large, large sums in the German market is actually already over.

That, that was a few years ago, maybe 2-3 years ago, it started in the early 2020s, and a lot was produced within a very, very short space of time. In the beginning, it was still extremely competitive as to which production company would get a Netflix production and within 2-3 years, everyone had one at some point and since then it has decreased significantly. So, you hear from the market that they are commissioning less than they used to, and that they have become much more restrictive and are also looking at budgets more than they used to. Of course, they are still producing and remain connected to the German market. There are also regular press releases announcing new productions, but no longer in the 'throw money away mode' that existed a few years ago. So perhaps it's not so surprising that some players are pulling out.

We took a look at how many local productions there actually are in Germany - and it's really a lot. It's super hard to really stand out and get attention. When you consider that a project like this can easily cost 20 million euros in Germany, you have to think carefully about how to calculate it so that it is profitable in the end.

So, the business with local productions is definitely difficult, and I think other streaming providers are realising that too. Maxton Hall - that was a huge hit for Prime. But if you look at how many big hits they had in fiction before that, there weren't that many.

Interviewer:

Kaulitz & Kaulitz on Netflix also comes to mind right now. At first glance, the format seems to be aimed specifically at the German market, but it also appeals to international viewers, as Bill & Tom live in America and are also successful there and worldwide. So it's probably about finding the perfect balance.

Expert 1:

Yes, it really isn't easy. There were times when everyone said that the focus should be on 'travelability', i.e. making content globally successful. Then that changed and it was said that you should produce 'local for local', i.e. focus primarily on success in the domestic market before expanding internationally. Sometimes, however, a product, such as Liebeskind, has a rather mediocre start in Germany and only becomes successful in America, which then also boosts its success in Germany. These dynamics are difficult to predict and that's why content is such a big challenge.

Also, because there are many different aspects. You can be active in different areas, be it non-fiction or fiction, and these differ mainly in terms of price. You can often achieve more reach with non-fiction content. Of course, you want a platform to be heavily used and watched for as many hours as possible. At the same time, however, you also need outstanding flagship projects that are considered 'must-sees'. These are usually big and spectacular and not just everyday content that could also be shown on TV in the afternoon. This leads to large investments and raises the question of how you position your content to differentiate yourself. This is an extremely complex issue that all platforms face and it depends heavily on positioning. If you look at the TV market, this becomes particularly clear. It's easier to recognise which channel a format belongs to if you happen to see it. You can tell pretty well whether it fits in with ProSieben, Sat.1 or RTL because you know what the brands stand for. It's much more difficult with streaming services. Often you could watch a series on almost any platform, and it wouldn't really be surprising. And accordingly, that is certainly something that will and must somehow clearly emerge in the next few years.

Interviewer:

Mhm. Now we've said Netflix and Prime are a bit at the tip of the iceberg. What do these platforms do better than others?

Expert 1:

They definitely do a lot of things right and very well. Of course, they had the advantage that they started earlier, invested more and are therefore already more developed. I wish we (Disney+) had another 3-4 years to invest massively and take the platform to a higher level. We no longer have that time; we now have to focus on profitability and can no longer invest indefinitely.

Netflix, on the other hand, had this long phase in which they could do exactly that. That's why they probably have the best technology platform now. Their product runs brilliantly, with impressive recommendation algorithms, fast loading time and almost no crashes. It's just fun to use Netflix - it really is. Achieving such success is really not easy. As you may have noticed, they are constantly changing things, experimenting and trying to keep their platform fresh and optimised. As long as they don't sit back, it will be extremely difficult to challenge them. They are currently very fast and good at keeping their platform up to date.

Of course, you're competing on different levels: Platform performance, content, brand perception, and so on. Some argue that the most valuable thing about Netflix is the brand itself because it has become synonymous with streaming - so a real first mover advantage.

Prime, on the other hand, offers many bundles and additional benefits such as shipping discounts and Apple Music, which is also a big plus. Prime and Netflix are also investing heavily in sports rights. Prime is already showing the Champions League and Wimbledon in Germany, while Netflix will soon be showing wrestling and has two NFL games on offer over Christmas. These developments show that both platforms are trying to position themselves in new areas and make sports a bigger part of their offerings. As long as they are setting such trends themselves rather than just reacting to them, it will be hard to attack their brand position logically, as they are all competing in the same market, it is not impossible to make progress, as soon as they start to rest and become less innovative, movement can come back into the market.

Interviewer:

How specifically can one compete with these large platforms? Should you pursue a niche strategy or position yourself better technically? How can smaller companies really become serious competitors?

Expert 1:

I think there are certainly different strategies, so of course this niche strategy is definitely something that will work for certain providers, something like Mubi, for example, has been doing quite well on the market for years and is certainly a great platform for people who are simply interested in arthouse films and film art.

Of course, there will still be something like that. However, it is of course not the ambition of the studios, who want to compete with the platforms for one of the top spots, or the TV channels, who ultimately want to get in on the action. And that's difficult, of course, because you have to consider what value can I convey, what can I offer and why does it make sense for people that I should actually be their first choice and not Netflix? At the moment, Netflix's value is simply still extremely high, but it doesn't have to stay that way, depending on how you put together your offers, how you perhaps bundle with other providers, how you perhaps forge alliances, join forces, expand into certain other areas, open up sports or sign up any talents exclusively. In this way, you can strengthen your competitive position. For TV broadcasters in particular, it's a good idea to use local production to your advantage. Sure, Netflix, Prime, Disney and Paramount can also produce local content - maybe 5 or 10 productions a year. But TV broadcasters produce several hours of local content every day, which is their core competency and makes them particularly strong in this area. If you look at what 7 Jahre does, for example, you can see that they offer an infinite number of show formats that also work well on social media. RTL is currently trying to gain a foothold in this area with a new edition of Stefan Raab, and this programme has just been launched.

Interviewer:

Oh, now I'm stopping you from doing that...

Expert 1:

Nah, I'll just watch it in the replay. But that's exactly the argument: you offer local content and people watch it. You often get the impression that Germans only consume international content. But the reality shows that almost all of the 1000 most successful TV programmes are German productions, such as 'Tatort'. This shows that there is a large audience for German content, even if this audience is not yet on streaming platforms. Sooner or later, however, they will switch there and not stay with linear television. This is precisely the area in which German broadcasters have the greatest advantage when it comes to meeting this demand.

Interviewer:

Very exciting. Which consumer personas would you say exist specifically in the German market?

Expert 1:

I don't have a specific theory on this, but I think you can distinguish between different phases of life that influence viewing behaviour. For example, there is the family sector, where the presence of children has a major influence on the type of content consumed. Viewing behaviour is often shaped by the needs and preferences of children. As soon as the children leave home or before starting a family, viewing behaviour usually changes.

Another aspect is the distinction between event-driven streamers. This group of users often consumes content based on certain events or occasions, such as the current hype surrounding a new series or major sporting events. And then there are the so-called habit streamers, who are interested in long-running series where there are already hundreds of episodes, and they can watch a new episode every day. Of course, this differs from high-end series such as 'Game of Thrones' or 'House of the Dragon', where you wait for the new season and then binge-watch it all at once. These are definitely different viewing behaviours.

There are also distinctions between fictional content and unscripted formats, such as reality shows and documentaries. Reality fans often favour formats like these, while others are more interested in fiction.

At the end of the day, it's often a mixture of different factors. To keep the dimensions tight: You have life stages and demographics that play a role. It's hard to separate by income bracket, and the influence of gender is also there, although it's not always clear-cut. The type of content people watch is another important distinction.

Interviewer:

Can the life stages you mentioned also be equated a bit like that with age? Or are you saying that's something completely different?

Expert 1:

Yes, you can. They are two different things, but of course they are closely connected and therefore overlap.

Interviewer:

All right. Which product features are currently most important to consumers when it comes to streaming providers?

Expert 1:

I think there is a difference between what consumers say is important to them and what is actually important to them. The most important factors are probably the variety of content and how up to date it is - in other words, that new content is always available and that you can constantly discover something new without feeling like you've already seen everything.

In my opinion, the price plays a bigger role when choosing a second or third subscription, such as when deciding whether to add Paramount for a few months. Promotions and special offers are therefore also important.

Categories such as the quality of the product and the recommendation algorithms have more of a downstream influence. They do not necessarily influence the decision in favour of a main subscription, but rather long-term satisfaction. These are rather hygiene factors that are expected. If the product keeps crashing, users will eventually stop using it because it simply doesn't work. Your product has to run reliably, otherwise people will be dissatisfied.

Interviewer:

And I have one last question about advertising. You mentioned at the beginning that advertising is becoming more difficult and works less as a source of income for streaming providers. How useful is an ad-financed subscription model? Should you offer both, one with adverts and one without? What is currently more popular with consumers?

Expert 1:

Advertising is declining on TV and is more or less building up in streaming. I think it's not so much a question of better or worse, but rather a question of preferences and choices.

There are certainly streaming users who are looking for a premium experience without adverts and are willing to pay for high-resolution content and features like Dolby Atmos. You can fulfil these needs with a premium offering.

However, for providers that are active in the mainstream and want to appeal to a broad target group, it is important to also offer an ad-financed model. This enables a lower entry price and lowers the barrier to entry, allowing more people to try out the service. If users are satisfied, they can always upgrade to the premium offer. But for those who just want to watch a series, it can be perfectly acceptable to use an ad-financed option from time to time.

Interviewer:

That's right.

Expert 1:

It's about giving consumers the choice. Similar to the different iPhone models - the normal iPhone and the iPhone Pro are ultimately comparable, but they fulfil different needs. You can't really say which one is better because it depends on what suits the person best.

Interviewer:

Absolutely true. Finally, I wanted to ask if there's anything else you'd like to get rid of?

Expert 1:

I can think of a few more trends. Sport is an area that is becoming increasingly important in streaming and will probably be particularly competitive in the coming years. The fronts in fictional and non-fictional streaming are largely clear, but the sports sector is still in a state of flux. Broadcasting rights are constantly being reallocated and it is unclear who will prevail in the long term. Nevertheless, it is highly likely that Netflix and Prime will not be left behind in this area and will invest accordingly.

Another trend that is currently being observed is in the area of ad-financed streaming services. Many are trying to transfer the 'lean back' behaviour of television to streaming. This means that you don't have to actively search for content or make decisions. Instead, you can simply sit back, and the content will start automatically. For example, you can indicate that you're in the mood for comedy and then an episode of *How I Met Your Mother* will play, followed by *Two and a Half Men*, or you can decide for yourself what you want to watch next.

Enabling this kind of lean-back experience in streaming fulfils the need for a TV experience, even as traditional TV is increasingly replaced. This trend, which is gaining traction, reflects the logic that streaming services should serve similar needs as traditional TV.

Interviewer:

It's interesting that people are really taking inspiration from linear television again.

I actually have another question that arose from another conversation. There is currently a trend in TV shows where viewers are given the opportunity to get involved during the show - be it by sharing their opinions, having their say or voting. Do you think that such chat integrations or voting will also be more present on streaming platforms in the future? Could this be a way to promote social interaction, as streaming is currently often perceived as an activity that people do alone? Would that also be a strategy to differentiate yourself from other providers in the future?

Expert 1:

That's a super exciting question, because it hits exactly on the point that you don't really see in the business model of streaming providers at the moment. Interestingly, when you look at digital TV usage in America, you see that YouTube is the biggest streaming provider in terms of minutes consumed - even bigger than Netflix. YouTube integrates social interaction options such as commentary functions, which makes the platform much more social than Netflix and other pure streaming services.

At the moment, the worlds are actually still quite separate: on the one hand, you have social media such as TikTok and Instagram, where a lot of moving images are consumed, and social interactions play a major role. On the other hand, there are streaming platforms such as Netflix, Prime and Disney+, which do not yet offer any significant opportunities for interaction. Will that change? Will these boundaries become blurred? It's hard to say, but in my opinion, streaming providers will have no choice but to adapt their user experience to the standards of social networks in the medium term. Otherwise, they risk losing the engagement of younger target groups. At the moment, streaming platforms are basically like digital video

stores: you go in, scroll through shelves and choose a DVD that interests you. It's not exactly an exciting experience. In contrast, social networks like TikTok have solved the problem by continuously presenting you with new content without you having to actively search. This makes consumption much more seamless and engaging.

Interviewer:

Yes, that's right.

Expert 1:

It's much more convenient and much more fun to open TikTok than Netflix. I believe that streaming platforms will sooner or later be forced to adapt their user experience so that you don't just discover series based on the small tiles, but through clips and social posts from users who share their recommendations. It will certainly be important to design the entertainment experience in such a way that it is fun to open the app and discover content.

But that's a huge challenge. It's not easy to implement such a feature, and it also requires a lot of content that is not easily provided. TikTok works so well because there is a huge amount of user-generated content that is constantly being updated. So streaming platforms would need to find ways to integrate similarly dynamic and engaging content to make discovering series and films just as entertaining.

Interviewer:

Exactly, that's also hard to plan and implement because you're reliant on user engagement.

Expert 1:

Exactly, and you can't just switch that on. You have to actively motivate and attract users by offering them fun interaction options and similar features. So sooner or later it will probably be necessary to at least offer such options.

Interviewer:

Yes, totally exciting. Really an interesting outlook. Now I have one last question about YouTube: Would you also put YouTube on the same level as Netflix, Prime and Disney+ as a streaming provider?

Expert 1:

Yes, in itself. Even though YouTube is different from the classic streaming services because it offers a mix of user-generated content and professional productions, it boils down to the same basic idea: content is streamed over the internet and can be watched anytime, anywhere. They have a different business model but they're competing for the same amount of people's time so definitely a competitor with a different approach and a very strong approach that obviously works very, very well.

Interviewer:

All right, that's it from my side then. It was really super, super exciting. Finally, I would just like to ask you about your demographic data. Firstly, I would like to know your age.

Expert 1:

Sure, 30.

Interviewer:

Your gender or how you identify yourself?

Expert 1:

Male.

Interviewer:

And your current profession?

Expert 1:

I am working in Commercial Planning for Disney+.

Interviewer:

All right, great then thanks again very much for the cool insights and for taking the time!

Expert 1:

Thank you and good luck!

Appendix 4: Transcript Interview Industry Expert 2

Personal interview, conducted on 09. October 2024

Interviewer:

Maybe you can first describe the German VOD streaming market and its players, how the players position themselves.

Expert 2:

So, from Prime Video's point of view, Netflix is the biggest competitor - that's quite clear. If you then look at the market, Prime Video comes next and then Disney Plus, I would say - in other words, the classic VOD streaming providers. And then on the other side you have the providers that

come from the direction of linear TV, i.e. RTL Plus, Joyn, Waipu Tv. Prime Video stands for the fact that it is a platform that offers different formats, whereas with Netflix you can only watch SVOD.

Prime Video, on the other hand, offers a large selection and we really see ourselves at the top because you can not only watch SVOD but also TVOD, i.e. for a one-off payment, and you can even add different channels, such as Paramount+ or Hey You or DAZN, i.e. sports. Discovery plus is also an advantage. And with Freevee we also offer a kind of free version. This means you can watch films for free without a Prime subscription. We're trying to attract the younger generation in particular.

It's a bit like YouTube. YouTube is also a really big, big competitor in the whole thing. A good example is Seven vs Wild. That was hugely popular on YouTube and is now available on Freevee to attract a few more young people to Prime Video. Basically, you have to say that the streaming market is incredibly competitive and it's a tough market for everyone because there are so many providers.

Interviewer:

And can you perhaps highlight any trends that have developed over the last few years?

Expert 2:

Well, what I'm noticing now, and we're also seeing this strongly at Prime, is that live streaming in particular is doing great in terms of sport. For example, we always show the Champions League on Tuesdays, and you can also book DAZN via Prime Video. So, sport is definitely a big trend. And then there are now also concerts or the Bambi. So, streaming all kinds of live events is also a trend that can be observed.

And then you can also watch live TV on Prime Video, and we also have all the public broadcasters. But many people don't even know that this exists, for example. Only a few people use it, so a really small proportion, let's say maybe 5 to 10%. The figure is only an estimate.

And otherwise, you can say that it's primarily about content. So, the more content you have on the platform, the better you actually are. That's what Netflix is so good at. Disney+ as well, although they have more children's content, which is of course also tempting. For us, it would certainly also be an advantage if we could give our subscribers the option of booking Disney+ as well.

Interviewer:

Can I just ask a quick question about that, because you just said everyone wants more and more content. How important is it to remain unique?

Expert 2:

Uniqueness is important, because somehow you have to differentiate yourself from all the other platforms. With Prime, it's our live sports content and our local originals, such as LOL. It's not only available in Germany, but also in France and Spain. LOL and Maxton Hall have also been really well received. But also, all kinds of local documentaries, whether it's an FC Bayern documentary or a Sebastian Schweinsteiger documentary - these things are extremely well received. So, I think our local offering, which also has international potential, is one of the things that sets us apart.

And then we at Prime Video have the ambition to be the number one entertainment platform, which doesn't just mean in the SVOD sector, but for all forms of entertainment, i.e. everything that counts as OTT content.

Interviewer:

You had mentioned earlier with Disney that they are heavily targeting a younger demographic. How important is it that the platform is family-orientated? Do they try to appeal to a broad spectrum of viewers, or do they tend to focus on a niche? That probably also depends on the provider, doesn't it?

Expert 2:

Yes, so I think family-orientation depends a lot on the positioning. With Prime Video it's really very extreme, we also have children's content, but we don't focus on it as much as Disney+. We don't just want to serve a niche. With Prime, it's actually more the case that we try to cover a broad mass with a broad offering. And Prime Video often also offers cinema highlights directly for purchase or rental. These kinds of offers also keep us top of mind with users, which is also important.

Interviewer:

Mhm right now I interrupted you a bit earlier. If we come back to the trends for a moment. What trends do you see for the future?

Expert 2:

So, what I know that will remain a real trend now is binge watching. As a platform, if you offer a series, you have to release all seasons at once. If you only offer one season but there are seven, it leads to frustration among customers. At the same time, however, a negative trend can also be observed, namely that the younger generation in particular is spending less time on streaming platforms. It is currently only a matter of minutes, but a decline is evident. In the long term, this could pose a threat to a few streaming providers. And then personalisation will also play a major role in the future. Personalised content is something that Netflix does extremely well and that will also be a big topic for Prime in the future and what you can already see now is that prices are going up, as with Netflix, for example, and more and more ad-based subscription models are being offered. And the price plays an extremely important role for the consumer. I think I once read somewhere that people only want to spend around €20 on streaming services on average. This makes it difficult to have several subscriptions if you prefer models without adverts. And if you want to have several providers, you quickly end up with €50 or €70. That's why I think the trend will be to try to offer everything on one platform, like Prime Video already does.

Interviewer:

Mhm, yes, totally exciting point because, as you've already mentioned, you can see that ad-based models are becoming increasingly popular with providers. How important is it to be transparent? Especially in terms of pricing policy. With Prime, it's often the case that you want to watch something but it's behind a paywall. Do you get consumer feedback on this, or is it not a big issue?

Expert 2:

Transparency is important, no question, but it's not really an issue for us because the customer pays for it in the end anyway. It's not about where the customer watches the content, but that they watch the content and if you have the content and the customer really wants to watch it, then they'll pay for it. If you want to watch Gossip Girl, for example, then you don't first look to see where it's available and if the format is only available to rent on Prime and you want to watch it, then you buy it.

Interviewer:

Absolutely, but there are also a lot of films that are offered on Netflix and on Prime Video, for example. Doesn't the transparency of a provider play a big role here?

Expert 2:

Yes, so I mean transparency, especially now from a customer perspective, is very important, but I can't tell you exactly what Prime Video's position is on that.

Interviewer:

No problem. Let's come back to the German users. Is it possible to observe different viewing behaviour or streaming preferences in the German VOD streaming market?

Expert 2:

I just worked for the channels, so that means I didn't work for SVOD directly, although I am also in close contact with the SVOD team. What you can say is that there are times when consumption is extremely high, such as at the weekend and/or in the evening, when you can really see it. And what we see on the channels, it's a bit random now, but in Germany, horror movies in particular are very well received. And what we also see is that local originals, but also basically local titles, are extremely well received, so as soon as the title is translated into German, it's even better received.

Interviewer:

Now you had already mentioned that you guys are focussing more and more on local content, especially local originals. To what extent are the local TV providers and their digital platforms, i.e. Joyn and RTL+, competition? Because they also specialise in the local market.

Expert 2:

Definitely also competition that we take very seriously. The biggest competitor is RTL plus. RTL plus has an extremely good reality TV programme, which is particularly popular with the young target group. Here's a fun fact. I was at the media trade fair in Munich and one evening the DFB Cup semi-final was on ZDF and Temptation Island was on RTL and I spoke to people from ZDF and RTL, and it really was a case of more people actually watching Temptation Island, i.e. reality TV, that day than the DFB semi-final or whatever it was. And you can already see from that that RTL+ with all its trash TC, so Joyn as well, but above all RTL+ is an extreme competitor.

Interviewer:

You've just said now that RTL+ is once again a much bigger competitor than Joyn. Can you say exactly why that is?

Expert 2:

I don't know exactly, but I would personally say that Joyn doesn't really attract me because of its content and user interface, Joyn doesn't really attract me because of its content and user interface, whereas RTL plus is a thousand times more attractive for me in terms of the structure of the streaming app, i.e. the interface, and the content is also much more attractive in terms of trash TV and sport. RTL also shows DFB games and the NFL.

Interviewer:

That's exciting. To what extent do you have to remain innovative as a provider?

You also said at the beginning that it is currently a very competitive market. How do you stay innovative and how important is it to constantly rethink and improve your own business model in order to be able to offer customers even more?

Expert 2:

Yes, firstly it's extremely important. You really have to keep an eye on the market at all times and we have people who do exactly that so that we can get on top of trends immediately. It doesn't work any other way. And above all, AI has become incredibly important, so the keyword is personalised content. You have to offer that in the best possible way, because that's what keeps customers on the platform, because they think, oh cool, they know exactly what I like, and I get exactly the content that interests me. And what Prime Video does, which I also mentioned earlier, is live TV or live streams.

For example, we also streamed the Spring Festival live and that was very well received and other platforms don't currently do that. With Prime, you can be there live at concerts that some people can't get to. You have to make sure that your platform is attractive because it benefits so many people. You also have to be affordable, which is also important for us with Prime, and more people can watch Prime Video at the same time than with Netflix or Disney+. And you have much, much more choice in all areas of entertainment, and that's exactly why I would say that we are currently very innovative - but the question is what else you can do with it. You always have to come up with new ideas to make the platform even more attractive and innovative. One idea, for example, would be to link live TV with live shopping, i.e. to link Amazon products with each other and then offer a kind of teleshopping service where the products are presented. There is already something like this in America, where there are videos under each product showing how the product is tested by users and something like this, i.e. recommendation marketing, is extremely well received and Prime Video could also become more innovative. In other words, we could utilise the advantages that Amazon's platform offers even more.

Interviewer:

Very exciting! Finally, can you perhaps say which specific product features are most important to consumers in Germany?

In other words, product features that consumers might use to make their purchasing decisions.

Expert 2:

Well, I would say price is definitely number 1, which also includes the pricing model in general, i.e. that you can cancel monthly, how you pay and that you offer student pricing models, etc. And then definitely content. And I would say that branding certainly plays a role too, because it builds trust and recognition that makes the platform appear more reliable and a strong brand also keeps the service top of mind which helps the consumers to feel confident in their choice. Look at Netflix and Prime Video. For them being the first big names in the streaming market gives them a major edge, because when you think of streaming, you immediately associate it with these brands.

And lastly what you also have to consider is that the user is lazy, you also have to bear that in mind, which means that the user interface has to be intuitive and easy to use.
I think that's also extremely important.

Interviewer:

Great! Then thank you very much for answering my questions. That was really exciting! Finally, I have a few demographic questions: how old are you and what gender do you identify as?

Expert 2:

I am 27 years old and female.

Interviewer:

And what is your profession?

Expert 2:

I work in marketing management at Prime Video.

Interviewer:

Great, thank you again then!

Expert 2:

You're very welcome! It was fun!

Appendix 5: Transcript Interview Industry Expert 3

Personal interview, conducted on 13. September 2024

Interviewer:

Great. My first question is: What key trends and developments have shaped the German VOD streaming market in recent years?

Expert 3:

The trend is set by the viewers. There is the issue of changing media usage behaviour and of course, as is often the case in the German market, my perception at least is that the Germans are lagging a little behind the big US players. The biggest trend was certainly the establishment of the major US streamers on the German market. In the pay sector, Netflix and Amazon, as they followed suit, it was a huge issue. Then, of course, the increasing digitalisation or changing media usage behaviour, especially among young target groups, who have changed their media consumption behaviour via the other largest actual streaming platform, YouTube. As a result, we have target groups, but now all of them, formerly the very young, now they've grown old, we've been in this business for a long time, who have changed their media usage behaviour, who no longer watch television in a linear fashion, but whenever they want to. And above all, they've also started binge-watching, i.e. they've changed their usage behaviour or the length of time they use YouTube and, of course, the other platforms that have followed in the moving image market, such as Facebook, Instagram and TikTok, which didn't used to exist in moving images. They actually used to have these posts, i.e. a major change in media usage behaviour, which was driven by US players.

The Germans have followed suit. From my point of view, the public broadcasters offer free programmes and then in Germany there is this special feature of the public broadcasters, which are fully financed from a private perspective and can create such offerings under unfair market conditions, and then there are the private broadcasters, who have to think about how to refinance something like this, like all private media. Up to now, the refinancing of media, and we are seeing the same thing now, was either through advertising, in the case of television it was exclusively through advertising in the private sector, or through advertising and pay models. Newspapers and magazines have advertising in their products and also have subscription prices, so you pay to buy the product. Television was an exception, German private television, which was available free of charge and then there were questions of philosophy and trends and so on and then the big players, i.e. ProSieben Sat 1 Group and RTL Group, defined different strategies for themselves. One of them is going fully into the pay model, the RTL Group, which relies on pay, and the ProSieben Group with its Joyn offer, which is completely ad-financed. Themes. These are the developments that have taken place, so to speak, and then of course in recent years there have been additional offerings from other major US players, whether it's Discovery or Disney+ or Apple, which have all greatly increased their streaming offerings.

Interviewer:

Now you've just mentioned that private TV stations in particular are now also focussing on digital business models with Joyn and RTL Plus. What strategies should traditional TV stations use in order to be competitive?

Expert 3:

With RTL Plus, first of all, there is the big difference of going for pay models and also offering an all-in-one solution. The app was actually also a huge project from them, where the print topics were also to be included, the Gruner und Jahr Group, where a huge offer is now also being created with Spotify and podcasts. So, it's going in the direction of creating a platform where the customer can get everything that serves the entertainment, sports or information segment. I don't think you can ask the question of what TV stations or broadcasters can actually do in Germany anymore, because there are no more broadcasters, so there are no more independent stations. They all belong to camps. RTL 2 is actually my former employer and still one of the few independent ones. Very few people realise that RTL 2 doesn't belong to RTL, but RTL 2 is 35.9% owned by RTL, 31.5% by Leonine, 31.5% by Heinrich Bauer Verlag and 1.1% by Burda. It is an independent player with its own marketer. The other channels from NTV to Sat 1 and Kabel are all owned by larger companies, which in turn determine the strategy. So, the question of what a single channel can do is, in my view, a procedural error, because they are all in networks. So, it's not Sat 1 that can say, I'll do it this way or that way, but SAT 1 belongs to the ProSieben Sat 1 Group, which has a streaming strategy that is predetermined, and it has to go along with it or not. Even we as independent

broadcasters could decide. We started a project 7/8 years ago called RTL 2 You, where we wanted a streaming platform to take place, which we gave up after one and a half years because it was too cost-intensive and, above all, technologically impossible to keep up to date. So, what do you recommend when it comes to networks that - in terms of usability and technology - certainly have to be able to do everything that the US players can do, they are still setting the pace today, and for a long time, platforms like RTL plus and Joyn were also viewed very critically in terms of usability. You couldn't download, it wasn't allowed - which you can of course do on the big platforms and that's why young users say it's not state of the art. But I think they've done a good job of that now - they're on the right track as far as the platform is concerned. And what the strategy of both companies is actually saying is that you can only survive alongside the other players through local content. And that's exactly what the big broadcaster groups are trying to do. They try to offer local content through reality shows with locals, they make docu-soaps, local crime dramas and if you like that, then you go to this platform, if you want US American fiction, then you go to the US American platforms. American fiction is also available on free TV and partly also on their digital streaming platforms, but you don't subscribe to RTL plus because you want to watch an American series or film.

You subscribe because you want to watch the new season of Love Island or because you want to watch the latest season of Temptation Island - trash TV, which is very popular with the younger generation - in other words, local content. And the next thing they do that also generates subscriptions is certainly sport. Why is the RTL Group so interested in football? Why has it now bought the NFL away from ProSiebenSat1? Why are they bringing Raab back? Raab is now supposed to mainly make content on RTL Plus over the next 5 years, because the assumption is that Raab's target groups are not yet on the streaming platforms, and it is precisely these that now need to be brought to RTL Plus. And it's quite clear that you can attract them with local content because they know it from television. And the funny thing is that the big US players have already recognised this and are also offering German content, such as 'Too hot to handle' in German, especially in the reality segment. So, the big players are also localising content, but of course with a completely different requirement, namely that the German content must also work internationally. That is the claim. That's why not all content is made, but one example is Kaulitz & Kaulitz, these documentaries should also work abroad, just like we have Spanish programmes and suddenly Japanese and Korean series.

Interviewer:

Yes, super exciting. What opportunities and challenges do you currently see - both for the big players and for the channel groups?

Expert 3:

As far as streaming is concerned, the channel groups are organised in clusters. This means that the individual broadcasters have no choice - they can't say I don't want or don't believe in the subscription model but would rather be financed by advertising and therefore go to Joyn. The broadcasters are then effectively trapped in the segments. In addition, content is certainly always a challenge, as is the mix of content and technology. The technology has to be very user-friendly to use. Because if something bothers me about the app, then I won't use it any more. Wherever I see the streaming offer, I have to be able to use it. And in terms of content, I only actually go to a platform because I'm a fan of one season or another, or of the protagonists.

Interviewer:

And how important will AI be in the future? I've already conducted a few consumer interviews, and the keyword personalisation came up quite often.

Expert 3:

Yes, of course, that's where the media have always tried their hand. Personalisation has advantages, you always see what you want, but it has disadvantages, because you no longer get something that surprises you. But you would actually be interested because you might only rarely watch it. But in principle, individualisation is important. In media companies, AI is already being used in a wide variety of value chains: whether it's trailer creation, whether it's treatments, whether it's press releases.

Interviewer:

Okay and how important will price be in the future?

Expert 3:

Price is an important issue. There is simply a price limit - how much consumers will spend. I once gave an interview, which is still online, about a similar topic and then I was asked how much I spend on streaming platforms. And I spend €140, €150 because I subscribe to everything on the one hand because of my job and on the other because I'm addicted to sport. I have all the sports subscriptions and sport is very expensive.

It adds up, but not all households can afford it. So, price is a big issue. People are thinking, do I cancel my Netflix subscription to maybe do RTL plus, they have maybe €10 a month that they might spend on content. The masses can't spend €100 a month on content. One thing is price, but then there's also content. You have to be a fan, because otherwise there's always the option of watching something on TV.

Interviewer:

And what other product features do you think will be important for German consumers in the future?

Expert 3:

I think content is really the key issue here. People are trying to offer consumers additional benefits or added value, for example by streaming platforms often making new seasons available seven days in advance. So before the episodes are shown on linear television, they are first released on digital platforms. Such campaigns are of course intended for fans who may also want to watch the old seasons. A media library is important for this, where older programmes can be accessed or where you can watch the new season in conjunction with the old seasons. So if I'm a fan and want to watch the new season, it might be interesting for me to watch the earlier episodes again. After a year or two, you might just want to see the beginning again.

Interviewer:

Mhm I already had an interview with a contact from Joyn and there the topic of 'making streaming more social' was very present. In other words, trying to enable dialogue between sighted people via a chat.

Expert 3:

Exactly. I don't even know which platform does it, but the function that you can also watch together. Amazon does it, or Netflix too.

Interviewer:

How important will something like that still be in the future, or is it more something that's dying down a bit again now?

Expert 3:

I grew up in a generation where we often talked about these things being important. I also still hear that there are traditions like girls' nights where you get together to watch a new episode of Love Island or a new show. But I know that this now works via digital platforms, where watching and commenting together is a big issue. So, developing parallel apps that enable exactly this kind of interaction. For example, the target group can exchange ideas via the Love Island app, vote there and decide who gets together with whom. Such activities are no longer limited to platforms such as Instagram or Facebook, but now also take place on special broadcasting platforms.

I'm not sure whether this also happens on streaming platforms, but it would be obvious. In any case, it promotes interaction within the community - in other words, the bond - which I think is an important aspect.

But it's just effort.

Interviewer:

Yes, yes, you probably also have to look at how best to position yourself.

I have one final question: We've talked a lot about product features. Can you also derive current personas from German streaming consumption behaviour?

Expert 3:

Yes, of course, we at RTL 2 have worked with personas and then made assumptions that these personas exhibit this media consumption behaviour. This ranges from Peter, 44, the father of a family, who wants the widest possible range of programmes so that everyone in the family can find something, to Laura, 19, a student who no longer has a TV at all.

At RTL 2, we had around 5-6 personas that we used to model content. We made certain assumptions about the content and also took socio-demographic characteristics such as occupational groups, age or marital status into account, and then supplemented these with assumptions about user behaviour.

Do they stream or not? What are their professions? We analysed all of this. And this was then used in the editorial offices in particular to verify the assumptions again and again. The editors had a look: Does the content match the personas? Am I on the right track with my offering, or would the target person say: 'What nonsense, I don't even watch that at a quarter past 8, it doesn't fit into my reality at all.'

Let me put it this way: we have worked with these personas, but not always, and I don't think everyone does. For me, it's more of a theoretical construct from economics, even if it certainly includes psychological elements.

But is it really used in everyday working life? I don't know, I often doubt it.

Interviewer:

All right, that was actually it from my side. It was super, super, interesting! Thank you very much for taking the time!

Expert 3:

With pleasure. Maybe something about the industry in general. The industry is changing, and I also reckon that the small channels will be swallowed up at some point. But the big players like RTL or ProSiebenSat.1 are also under immense pressure, of course. They don't manage to capitalise on everything one hundred percent, especially with regard to changing media usage behaviour. They are simply not yet capitalising to a sufficient extent. You have to remember that advertising used to bring in endless amounts of money. This money is now distributed differently. The linear sector still gets a lot of money, but more and more are flowing into the digital sector.

Interviewer:

And above all, because many consumers don't want to see adverts on these digital platforms. Many people prefer Netflix if there are no adverts, they'd rather pay the extra €5 somehow and then have no adverts.

Expert 3:

The crazy thing is that people are now actually prepared - and the Americans have managed this - to pay money to not see adverts. But that only works up to a certain point, and not for all target groups.

Because not everyone has the choice. If you earn €3,000 and have a family with two children, then you may not have a choice, you have to take the ad-financed offer. You may not like it, but you have no other choice. What's the point?

It's not any easier in Germany. You have the public broadcasters here, who offer you everything for free. Sure, you don't get the latest Netflix series, but you still have content - whether better or worse is in the eye of the beholder.

And then there's YouTube, Instagram and Facebook, all these platforms are free. How much time do you actually have left to consume paid content?

It's not that simple. The industry is good, but it's not really a growth industry.

It will grow in parts, especially in the pre-web sector, but there are just other factors and there will be phases of contraction where not everyone will survive.

Interviewer:

Absolutely. Finally, we'd like to get some demographic data from you. How old are you?

Expert 3:

I am 57.

Interviewer:

And how would you characterise your gender?

Expert 3:

Male.

Interviewer:

And what is your current profession or job that you do?

Expert 3:

I'm Head of Marketing and Sales at Kick Media and was CMO of RTL 2 for a long time.

Interviewer:

Super perfect! Thank you very much!

Appendix 6: Transcript Interview Industry Expert 4

Personal interview, conducted on 12. September 2024

Interviewer:

Perfect, then I would start by asking you how media behaviour has changed in recent years from your perspective and what trends can currently be observed.

Expert 4:

Well, I think media behaviour is and is currently moving in a very clear digital direction, i.e. practically away from classic TV and more and more towards streaming, not only in our generation, but also in the generations above it, so when I think of my parents now, until two years ago Netflix and the like were somehow nothing for them, they really only watched what was on TV and now? In the meantime, they've discovered smart TV and all the streaming providers. For example, they now simply watch the content that they would normally watch linearly, such as RTL or ProSieben, at a different time via the corresponding apps. And in our generation, i.e. among 20-30 year olds, it is becoming increasingly prominent that you really mix streaming with social media, so that you also have this interactivity with it. People want to participate in the programme, they don't just want to watch it whenever they have time, they also want to get involved in the programme and I think that's a very clear trend that you can see now, that this interactivity of users has somehow become more and more important.

Interviewer:

You've already touched on the point that will probably become increasingly important in streaming in the future. So at the moment or in the last few years, the coronavirus has given us the feeling that streaming is a bit of a solitary activity, but if you're just saying that people want to participate, then this social component is somehow being taken up more in streaming again and you're also pursuing this approach with Joyn, right?

Expert 4:

Yes, definitely with us at Joyn, it's already a bit in the name. So watching this together and that's actually also, in addition to the whole thing, that you say you want to bring all channels onto one platform, it's also definitely a component that we have with Joyn and what we want to achieve is that Joyn is simply a platform where the whole family can come together and watch something, so there's content for everyone. For the parents, for the 18-year-old daughter, but also for the younger siblings. So that the whole family and every age group can find content there and of course you can watch something together in the end, yes.

Interviewer:

Cool! And what other trends and developments are you currently seeing specifically on the streaming platforms?

Expert 4:

One development is definitely the whole topic of bringing social media to streaming, so Twitch more or less started it years ago and we at Joyn have followed suit very strongly and we still have our creator offensive at the moment, where we run a lot of creator programmes that would otherwise run on YouTube or Twitch for free. On the one hand, we have Joyn Originals with creators that are simply included in our programme, and, on the other hand, we also have many programmes, such as Bulletproof or Desert Warrior or now Dinner Duel, so-called YouTube previews. And so, we also combine a bit of this interactivity, this social media world and this bubble and draw them to streaming and that is a very clear trend that has also emerged in recent years.

What we no longer do at Joyn, what we did last year, are now streamer events, for example. We did big events like the Winter Games or the Great Fight Night, where we even brought this bubble of social media into a room in analogue form and then streamed it again at the same time. So, a lot of components came together that we simply combined a little bit, which also made up this 'joining'.

Interviewer:

So, if I understand correctly, you're also specifically trying to attract a new target group to the platform, right?

Expert 4:

Yes, absolutely! On the one hand, the new target group, the young target group with the creators, and on the other hand, it has to be said that the classic target groups are also very strong drivers. The TV target group, I would say. Our strongest formats of Joyn are clearly the channel formats. So, whether it's the country doctor's surgery on Sat.1 or Germany's Next Top Model, or Wer steht mir die Show on ProSieben. These are clearly the best performers of Joyn, and you can also see that this classic TV target group is also increasingly switching to streamers, so you can practically see that you're picking up the young, the affine, the social media world on the one hand, but also all the TV people like our parents on the other. People are slowly realising more and more 'Hey, I don't necessarily have to watch this on TV at 8:15 pm when I can watch it on Joyn at 8:45 pm.' I think the goal is to bring the two consumer groups a little bit closer together.

Interviewer:

Mhm, now you've just talked a bit about your content a moment ago, but how specifically should TV providers set up their platform to be able to compete with the big players as well? How can TV providers position themselves in the best possible way?

Expert 4:

I actually think the key is the mix, but with a focus on local content. Because let's be honest, Amazon, Netflix and Sky are simply too big and too international, and people have already learnt far too much that you can find the big, international formats on these players. But we all grew up with traditional television and channels like ProSieben, RTL etc. because there was no streaming back then. The generations above that too. I think going solely for international content would be the wrong direction, because people also want a bit of that local feeling through local content that they can identify with. So on the one hand, all the reality formats that work really well for us, but also for RTL Plus, or another good example of what we actually do, for example Jerks? That was local content because it was local humour. If you showed someone the translated version in English in the UK or maybe in Italy or somewhere else, they wouldn't laugh at it because it's just such specific jokes that only we find funny here in Germany because it reflects our culture a bit. Another good example: Tatort has been super successful for years, of course the local content par excellence. Everyone watches it, every generation and I don't think it can compete with any US crime series, so I think the direction is clearly to offer international content as well, but not to put the main focus on it because it already exists. This market is completely oversaturated, you don't have to get involved in it, you have to do what you're actually good at and maybe just make it a bit more appealing and a bit better for the streamer.

Interviewer:

Absolutely, because we've just been talking about the big players as well, how do you currently see the market and distribution? And what are the chances of TV streaming providers in the future?

Expert 4:

Mhm good question. I think that when you think of streaming, you always think of Netflix at first. Even with the big players, I would say that when I think about what streaming services my friends and I have subscribed to, everyone actually has Netflix. That's actually out of the question, but then it's split up again, some people might still have Amazon Prime, some have Disney plus.

Very few have Sky or Magenta. Because on the one hand, I think that's a cost factor and on the other hand, the content sometimes overlaps. And I just think Netflix, they were kind of the first and only then did the others come to Germany, so I would say Netflix is still clearly in a pioneering position from a subjective perspective without having any figures in mind.

And then I don't really see a gap between the big streaming providers and the TV providers like Joyn and RTL, because to be honest, the strategies and the content are just so different. That's why I would rather put RTL Plus and Joyn in a bubble and the US streaming providers in a bubble, because it's just completely different content and a completely different level. In the beginning, they tried to keep up, so we made a few series, RTL Plus made a few series where they tried to produce at this level, but it just didn't go down well with the community.

You go to Joyn or RTL Plus because you expect local content that you can identify with, so these early evening series like Landarztpraxis or GZSZ. That's what you want when you go to the local streamers. If you say, I want to watch a film or a series tonight, then I think you go to the streamers a bit more. It's not really a gap, it depends on the content and what people want to watch.

Interviewer:

Right, that you can't always equate it like that.

Expert 4:

Yes, exactly yes.

Interviewer:

And now more specifically about the TV platforms: RTL Plus and Joyn are currently very much in the spotlight. How do you think this will develop in the future?

Will it stay with these two camps, or do you think that more and more broadcasters will jump on this bandwagon on their own in the future and change their business model a little to go digital?

Expert 4:

Mhm good question so I think there will always be these two camps in any case. ProSiebenSat.1 and the RTL Group already have a really large market share, and then of course there's the public broadcasters.

We are now seeing a bit of a turnaround in that RTL is now cooperating with the public broadcasters, with ZDF, and they have taken on a lot of content. But we've also had ARD and ZDF in the livestream for years, for example.

Precisely because they are the public broadcasters, they are not allowed to position themselves in this way or have any preferences, so I believe it will always remain fairly divided. And as far as other smaller private broadcasters are concerned, I can imagine that they will either join RTL plus or Joyn. I don't think anyone else will dare to set up competition because everyone else in the industry simply sees what a tussle it is between each other, so I mean we and RTL are really begging each other for market share all the time, in advertising videos, views etc. and I think another player in there would simply not be worthwhile for the third player. Both companies are already too big and too far advanced for there to be any room for other players. And of course, the technical requirements are also a hurdle.

Interviewer:

Super exciting, but do you think that the public broadcasters will join forces one day and maybe create a third player like this after all?

Expert 4:

I almost don't think so, because they have their own media centres, the ARD media centre and the ZDF media centre. It has to be said that they are advertising these more and more prominently and I think their media centres are already quite successful.

I don't quite see the two merging because I think there's just no incentive for that, to be honest, because they're not allowed to take advertising revenue like we do.

Interviewer:

And they're probably not even allowed to have subscription models because they're not allowed to take money from consumers either, because we're all already paying GEZ.

Expert 4:

Exactly. But what's currently being talked about a bit is the sale of series. ZDF has already sold some series to Netflix. That's perhaps another exciting component, i.e. selling their content to private players. But even there, I think they probably have to be very careful that they don't favour anyone, and they won't sell their own media libraries because they also access large numbers of videos.

Interviewer:

And what opportunities or challenges do you still currently see in the market for you guys, but also for the big players?

Expert 4:

Well, the challenge is clearly not to overwhelm viewers, as they often don't realise how much content there actually is because it's simply too much. I mean, we've all been there: you sit in front of the streamer and scroll through for minutes until you finally find something you want to watch. And half of the content remains hidden because of course you can't display everything on the surface.

So that's one aspect that we tackle in PR and marketing by trying to emphasise and advertise the highlight content so that people out there know what we offer - that's what we do.

Of course, RTL does the same, with lots of great PR stunts, and you really have to recognise that. I think that's the biggest challenge: all of us have great content - RTL has great content and we have great content. But showing it to people, getting them to that content, and at the same time making sure they don't get overwhelmed on the platform is the difficulty.

It's about making it as easy as possible for them to watch. I think that's one of the biggest challenges we - and RTL - have right now, to be honest.

Interviewer:

Mhm absolutely and if we look at German consumers again now, are there any personas that you can observe a bit like that?

Expert 4:

Yes, definitely, there are definitely different target groups in this sense, clearly divided by age. You have the, let's say, eighteen- to mid-thirty-year-olds, who are particularly interested in reality. At the same time, however, this is also the generation that does a lot of second screening, so the format runs more in the background and you're on your cell phone or iPad at the same time. In this respect, for example, with Celebrity Big Brother, we do it so that you can vote in the Joyn app at the same time. There are definitely users and this reality bubble, they only want to see that. Then there is the user group that has always watched or still watches all the early evening series, such as Landarztpraxis or GZSZ on RTL, etc. This is becoming more and more common on the platforms, as we, and also RTL, offer the feature of watching all the episodes in advance - if you have the premium model. The "Landarztpraxis" is one of our most successful formats on Joyn, for example - you can see that very clearly.

Then you have shown that people always like to watch. So, who's stealing the show from me, Germany's Next Top Model, but also The Taste, and so on: You start again with a preview where you can say that the episode can be watched a week before it's broadcast on TV.

This target group is definitely always very present when these shows are on here.

And then I would say there are the classic binge-watchers who are currently watching all of our US series.

Like all the ProSieben series like Young Sheldon, How I Met Your Mother and so on. That's still a very large group that, to be honest, generates endless minutes of watch time because they probably have series like How I Met Your Mother running in the background all day.

And last but not least, you have the group that watches the older content. We often see that formats like Anna and the Love, which haven't been broadcast for years, suddenly reach a peak on Joyn and you wonder where that suddenly came from. I call them the nostalgia viewers. They like to watch old content like that again and I'm sure it's similar on RTL - where they watch Cobra 11 or something like that, for example.

Interviewer:

Very exciting. Then I'd like to go into product features again.

Which do you think are the most important ones that currently lead consumers to make purchasing decisions?

Expert 4:

I would say the user interface and user-friendliness are the first things people complain about. To be more precise, that you can find your content, and that you are given watch recommendations based on what you've already watched. And that it's easy for you to search for your content. That means that there's a search bar, that you have to make as few clicks as possible to get where you want to go. Otherwise, people just don't want to spend ages searching for something or scrolling down or anything else. User-friendliness is super important and also the be-all and end-all of technical features so that users feel comfortable and stay on the platform.

And another big point is certainly advertising, i.e. how much advertising is shown to you? How long does the advertising last? How many ad breaks etc.

Interviewer:

It's really exciting that you said earlier that you have to make it as easy as possible for the user - I agree. Yesterday I had a conversation with someone who also said that he sees the integration of social media on such platforms as relevant in the future because TikTok does it so well with its algorithm by simply showing users content directly. If you don't like it, you just keep scrolling, and if you're interested, you stay. That could well be the future of streaming, where you try to captivate the viewer. If they like something, they stick with it; if they don't like it, they can just skip ahead - similar to linear television.

What do you think? Do you also think that this will be important in the future?

Expert 4:

Yes, definitely, because then you are of course addressing the problem that I just said, that you scroll forever because you don't know what to look at, and that is clearly going to be a big issue and that is also an issue that we are working on a lot.

What also plays a role here is the issue of AI, of course, with an AI that then measures it. It looks at what you are looking for, where you might get stuck with your mouse, etc., like how TikTok actually does what you just said, and then based on this data, the next time the user opens the join app, they are immediately suggested 10 formats that are a perfect fit for them based on their usage profile.

I think that is exactly what is going to be a big issue for us and certainly for other streamers too.

I think Netflix, for example, does it very well. I personally always have the impression that it gives me very good suggestions for things that I can watch and also series, because I've watched I don't know Emily Paris and Gossip Girl and then it shows me the next teen series because it probably assumes that I like that too and I like Spoiler Alert too and then of course I watch that too, I think they do it very well and that's definitely the case. We can also learn something from local streamers, yes.

Interviewer:

Mhm how important do you think functions like that will be, such as being able to download things and then watch them offline?

Expert 4:

Mhm subjectively I would say "it's not that necessary anymore since content is always available via streaming, except when you're flying on vacation and you say you want to watch something on the plane, but otherwise I think it's just because the streamers make all the content available at any time, so you don't need much, you can watch it in the app, you can watch it on your laptop.

You can watch it on your iPad, you can watch it anywhere, there's actually no reason to have to download the stuff anymore, at least I don't see any, and neither I nor anyone I know can find anyone who would like to do that.

On the other hand, I also know from professional experience that this is a big demand that we regularly get in customer support inquiries about when the download function actually be available. Personally, I don't think it's up to date anymore, because you don't really need it, but apparently there still seems to be a bit of demand, yes.

Interviewer:

Mhm and how important will the streaming quality be?

So that you somehow have to know exactly that.

Expert 4:

The picture quality Mhm.

That is definitely very important, simply because of course all the streaming devices are constantly evolving, if you look at what kind of quality is available on the latest televisions. In theory, of course, we have to catch up and I think that is definitely one of the biggest challenges for local streamers, that we produce our content in such a high quality and buy the licensed content in such a high quality, which of course the big players with more money do better, like Netflix, Amazon and the like.

Yes, that is definitely still a challenge for us, but it is definitely very important, yes, that is a big aspect that we still have to do, yes.

Interviewer:

But do you think that you can also differentiate in price in this respect?

For example, I have to say that I have spoken to many people in my everyday life who tell me that the image resolution is not so important as long as I can see everything clearly and clearly, because I primarily watch on my iPad or my laptop anyway, so I think there is a huge difference in terms of which devices you watch on, because our generation rarely has just one TV, I would say, and then our parents, for them it is perhaps really important because they have a big TV at home and they knew from their childhood that you watch things on it and yes, so something like that will also be reflected in the price and then you say you do it.

Expert 4:

Let's put it this way, I think it would be wrong to reflect that in the price, because as you say, I think the motivation to pay more just to have a sharper picture is perhaps there for some people, as you said, for example my stepdad, for him that would be really important, because he always thought it was great when he could watch something in Ultra HD, on the big TV at home in the living room, but for me, for example, I don't have a TV at home.

I watch everything on my laptop and then, to be honest, as your friends have already said, if I can see the picture clearly, of course it's not pixelated for God's sake, but I have a good picture, then I wouldn't see the point in it either.

To pay €3 more a month for Ultra HD, well, I personally wouldn't do that, and I would guess that the majority of people actually wouldn't, so I would say I think it would be wrong to do it that way.

You can offer that, but I think it's difficult to make price differences.

Interviewer:

Ok, can you think of any other product feature that is important or will be in the future?

Expert 4:

Yes, I think customer support is definitely an issue, because users have questions from time to time. We often hear about it from PR, because we regularly receive inquiries from our users who, for example, can't find an email for customer service or no information on the Internet. That's exactly the problem.

It's about creating accessible customer support that helps people without having to employ too many staff. A positive example of this would be Disney Plus.

They have a small AI-based chatbot. If you have a problem, you can talk directly to the chatbot, and it will help you immediately. I recently cancelled my Plus subscription, and I couldn't find how to do that on the website. Suddenly this little help chatbot popped up and I just chatted with it – and it cancelled my subscription for me.

That was super customer friendly because I thought I was chatting with a person. In the end, it was a computer, but it pointed out to me that it might not be able to help with everything. But for simple things like cancelling a subscription, it was perfect, and everything was done within five minutes.

I think that's something we still need to work on. I don't know exactly how other providers solved this, but Disney Plus is a good example. Especially in an increasingly digital world, it's important to offer people an easy way to find their way around the website - whether it's when they have problems or queries. That's an aspect that shouldn't be underestimated.

Interviewer:

Absolutely. One more question about price: What is the best strategy? Should you offer an ad-financed and an ad-free subscription, like Joyn, or a fixed price without advertising, like Netflix? Can every provider choose that, or do you just have to let customers choose these days?

Expert 4:

I actually believe that you have to give the customer the choice, and more and more people are doing that. Disney Plus, for example, has also introduced the option of choosing between an ad-free and an ad-financed subscription, which costs less as an end consumer, but you then get ads displayed before all of your content.

I think that's the right way to go, because there are enough people who say: "Oh, I don't mind if I see three commercials."

I'd rather pay just €4.99 a month for that instead of €12.99. Others say: "Oh God, I hate advertising! It's worth it to me to pay €5 more so that I don't have to watch advertising."

I think that's the right approach - to offer people both options, because for some people one is more important and for others the other. Especially with the younger generation, or perhaps even the younger ones among them, who often don't have that much money, many think: "Oh, never mind, I'll just watch three spots, but it only costs me €4.99, and I think that's great." On the other hand, my parents: They would be really upset and would rather pay €12.99 because advertising just annoys them.

That's why I think it's so great about Joyn that we have a completely free offer where you can watch almost 90% of our content without having to pay anything at all - with advertising, of course.

But if you don't want advertising, you have the option of subscribing to Joyn Plus. I think it's good that Netflix, Disney and Amazon are now following suit and have reduced their prices accordingly to give you the choice: Do you want to watch with advertising or pay full price?

Interviewer:

A somewhat provocative question: Is it really just about the consumer perspective, or do you also consider that you can earn more with advertising than with a €12 subscription?

Expert 4:

I actually think so, I don't actually know the exact numbers, but purely from a gut feeling I would say yes, I believe that if you have enough people who watch the advert and who watch the whole advert and you can track after certain seconds, i.e. after 0 seconds, after 3 seconds, after 10 seconds and depending on how many stay there, then you are of course more attractive to the advertisers. If you can now show that people have really watched all 3 spots to the end, because that's when the content comes, that's really good.

We can go to the advertisers with the information, they all book with us and we can make the advertising space quite expensive.

That's why I think it's always a bit selfish. You can see at the moment that it's somehow become a trend that these ad-financed subscriptions are increasing more and more.

Interviewer:

It was mega, mega, cool, very exciting, what you had to say, if you can think of anything else, feel free to say it, otherwise do you have any more questions for me? Now I've been pestering you the whole time.

Expert 4:

No, actually not, well, I don't think I can think of anything else either.

Interviewer:

Then I just have three short questions to finish: how old are you? What gender are you? And what job do you have?

Expert 4:

I'm 26 years old, female and work at ProSiebenSat.1 & Joyn in the PR & Communications department.

Interviewer:

Then thank you very much again! I really enjoyed chatting with you!

Expert 4:

Me too! You're welcome!

Appendix 7: Transcript Interview Industry Expert 5

Personal interview, conducted on 11. September 2024

Interviewer:

Let me start then and I would first like to ask something general about the market, specifically the German VOD streaming market. Are there any trends or developments that have characterised the market in recent years?

Expert 5:

Well, I think what I've noticed in the last few months and in the last two years has developed very strongly, especially with platforms like Netflix and now also Joy.

platforms like Netflix and now Joyn are live events.

Live events are something that Netflix has recently started doing, while Joyn has been offering them for some time. Specifically, events from various streamers and YouTubers are broadcast live on Joyn or Netflix. I think this is a trend that is getting stronger and stronger and is forcing other platforms to follow suit because people are increasingly accessing platforms like Joyn that offer this. When people say that an event is being shown

live, such as the Baller League, which is now available on Joyn, it attracts an additional audience. I think that's the trend that's becoming more and more prevalent on the platforms.'

Interviewer:

Great, interesting! I'd like to ask you about that again. How exactly does that work? Do you also offer a kind of chat on the side where the streamers can exchange ideas or how is this live event organised? and is the intention behind these events specifically to attract a new consumer group, which is mainly represented on YouTube and Twitch as a 'live platform', over to your own platform?

Expert 5:

Well, I think the main aim of such streaming platforms is to appeal to the younger target group. This target group in particular, who don't want to watch TV, should be brought to platforms like Netflix or Joyn. Joyn is currently trying to attract people from Netflix by offering similar content. The main aim is to get in touch with the younger target group and say: 'Look, we're showing this live event that you've only ever seen on YouTube - why don't you come and have a look? The chat feature is also particularly important, as you just mentioned. Joyn is currently trying not only to offer live streams, but also to encourage contact with viewers to create a more interactive experience. The focus is on getting viewers more involved. Incorporating a chat function, as we know it from live events on YouTube, is an important point right now. This allows viewers to comment in the chat while watching the event. I think this is crucial for providers because it allows them to get in direct contact with the target group. Only when you have this contact do you really understand what the target group wants. Otherwise, you just offer a live stream without knowing whether the viewers are satisfied or perhaps want to see something else. There will certainly be more to come in the future, especially in terms of direct contact with the target group

Interviewer:

Super exciting, because that kind of implies that streaming, which in recent years has tended to be seen as something you do on your own, could now encourage sharing and watching together again. Would you say that this is something of a competitive advantage that Joyn is trying to exploit? I have to say it's the first time I've heard that this interactive component is really being integrated into the platform.

Expert 5:

Mhm, yes, ProSieben has actually tried that before. I can't remember exactly how it went back then, but there was this app - what was it called again? I can't remember exactly. But as an example, there was already this attempt at interaction in 'The Masked Singer'. During the show, you could use the app to vote for who was under the mask. And you could see that people thought it was really quite cool to be able to take part a little on their mobile phones during the live show. Involving the viewers in the programme itself by showing what they say via the app is pretty exciting. For example, when viewers vote on which celebrity is hiding under the mask and the result is then shown live on the programme. This direct feedback from viewers in real time is fascinating. This is exactly what we are now trying to implement with Joyn, and I think that this really is the future - actively integrating viewers into the programme.

Interviewer:

Very exciting! Can you think of anything else that is currently important to consumers or that encourages them to buy or take out a subscription?

Expert 5:

I think artificial intelligence, AI, is now one of the most important topics for streaming providers. It will hardly work without AI, as AI is able to display personalised content. On many platforms, I am often not shown the content that really interests me. It is extremely important that a user receives recommendations based on their previous preferences. The most important thing is that I as a user don't have to search for a long time for content that might interest me. Netflix, for example, does this very well by suggesting content that is similar to what you have previously watched. For example, if I've watched action films, I might want to watch more action films or series afterwards.

In my opinion, this is one of the crucial points: A streaming platform must manage to present the user with suitable content right from the start. Many providers still lack this. With Joyn, I first have to search where I can find the right content. There are live platforms, live TV, films and series - it all seems a bit confusing. It's similar with Amazon Prime: I see content that I can watch with Prime, others that I have to pay extra for, and some with adverts only. I find that quite confusing and complicated.

With Netflix, on the other hand, I log in and have immediate access to all content. I can see at a glance what I've already watched and what new recommendations might be of interest to me. That's the crucial point for me - personalised suggestions and a user-friendly interface that makes it easy for me to quickly find something that interests me.

Interviewer:

Because you just touched on it a bit, do you think consumers are willing to pay more to get unrestricted access to all content? How important is unrestricted access? How should streaming providers set up their pricing strategy in the future?

Expert 5:

I think that most people watch Netflix because there is a certain price that you pay monthly and then you can really watch everything. You don't suddenly have the frustrating experience of not being able to watch films because you're paying too little. Even Netflix still doesn't show any adverts. Amazon Prime already does that.

You didn't have to watch adverts in the past, but now I think it's the same for every series and every film. There are also adverts every now and then. I think it's a bit annoying for Amazon Prime viewers that you pay and then suddenly you still get adverts and if I don't want any adverts, I have to pay even more. That's the point that's a bit difficult.

Most people would rather pay a bit more but get everything as it is with Netflix and not pay as with Prime and still get adverts or have to pay extra for some films.

So I think Netflix does it better in that respect. What's really cool about Joyn is the Joyn Plus subscription, where some shows or series are shown 7 days in advance, for example, before they are broadcast. I can imagine that this will be much more in demand in the future.

I do believe that this will arouse interest because it's a bonus, so to speak. I watch something before everyone else - I think that's a point that many people find very, very good.

But I think a subscription model with adverts, on the other hand, is something that is becoming increasingly difficult. People want advertising less and less. Unless it's like Joyn, where I can watch everything with adverts that works.

Interviewer:

Yes, this 'watching everything at once' is also a bit of a binge-watching phenomenon that is currently shaping our younger generation and that Joyn would probably like to specialise a bit more in the younger generations with its Plus subscription in order to serve their wishes in the best possible way, right?

Expert 5:

I think what the younger target group wants is to be flexible. The younger target group watches less television because they say they won't switch on just for a programme. For example, if their favourite film is on Saturday night on ProSieben at 8:15 pm, none of the target group will watch TV unless it's a live event such as a football match or Stefan Raab's boxing match. But many also watch such events afterwards on Joyn. That's not possible on live television. On linear television, you can't simply watch a programme again the next day because you have to watch it live. This makes platforms like Joyn particularly attractive, especially for the younger target group, who often don't have time to watch live TV. They then have the opportunity to watch the show after a few days. Particularly with formats such as 'Joko and Klaas' or 'Duell um die Welt', which already have many episodes, many people say: 'I still have episodes that I haven't seen.'

If someone wants to watch an episode from two years ago again, they can simply go to Joyn and call it up there. Streaming makes it more exciting and interesting, especially for younger viewers, because they can catch up on content flexibly.

Interviewer:

Since you've already mentioned the Plus subscription, could you perhaps briefly explain again how the free and Plus versions of Joyn differ? And why you are running this two-track model?

Expert 5:

There are two subscription models with Joyn: a free version, which allows you to watch TV as normal, and the Joyn Plus subscription, which allows you to watch programmes seven days earlier, for example. Most people, especially students or younger people who live in shared flats, use Joyn because it's free. Many of them don't even have a TV these days. I, for example, watch programmes via Joyn, and I even did that before I started working at ProSieben. When I tell people that it's possible to watch TV for free, many are surprised. Because many people pay for services like Amazon Prime or Zattoo to watch live TV. When I then explain that with Joyn they only have to watch a few adverts and then they can watch ProSieben, Sat.1 or even ARD and ZDF for free, they are thrilled because they often don't even know that. The advantage of Joyn is that viewers can watch TV for free, while Joyn earns through advertising. For the target group that doesn't want to spend money on television, this is of course attractive. For real TV fans who can't get enough of reality shows, for example, there is also the Joyn Plus subscription, which offers them additional benefits such as earlier access to programmes.

Joyn Plus costs 6.99 a month, but it allows you to watch all films and series on Joyn without adverts, which is really handy. The most exciting thing is that Joyn now works in a similar way to Netflix or Amazon Prime - you can also stream films. For example, there's an action film on ProSieben tonight that I used to love watching. Unfortunately, I can't watch it today, but with Joyn Plus I could just catch up on it tomorrow, and I think that's really great.

Another special thing about the subscription is that it gives you early access to new episodes, such as 'Beauty and the Nerd', where Joyn Plus allows fans to watch the first episode 6 or 7 days before the official broadcast. So, you get to see the episodes before it's talked about anywhere in the media or on social media. I think that makes it interesting for a lot of people and could attract even more viewers in the future.

Interviewer:

Just to clarify: Joyn Plus allows both previews and re-watches, while the free version only allows you to watch live TV and episodes that have already been saved.

Expert 5:

Yes, exactly. You can't watch programmes in advance with the free version. If you want to watch something on TV, you have to wait until it has been broadcast. Only then, about two hours later, can you watch it directly.

This is free of charge. But as I said, you usually have to watch adverts beforehand and also during them, which means you somehow watch a minute of adverts beforehand and then you watch the first 10 minutes and then you watch adverts again?

So, it's actually the same as it was on live TV, except that you can watch it afterwards and I don't know what it's like with films.

For example, you can't watch every film I mean.

There are a few films that you can watch for free, but you have to watch adverts before, in the middle and at the end.

Interviewer:

Ok and now you've already mentioned a bit that you now also have films on Joyn, but of course you also have local content. How important do you think the content is and what strategy is Joyn pursuing in terms of content? How do you try to differentiate yourselves?

Expert 5:

I think that the ability to watch live TV via Joyn is a nice-to-have, but not absolutely necessary for everyone. Most people probably use Joyn for other content. What is particularly exciting about Joyn is that there is a strong focus on Originals. There are formats and series that are exclusively available on Joyn. For example, something like Jerks or now 'Der Upir'. This is a new vampire series with Fahri Yardim, for example, which is actually very funny. Many people have already heard about it, and for viewers from our target group or slightly younger viewers who know Fahri Yardim, from Joyn, they want to watch the new series because of him. However, the series will not be on TV at first, but only exclusively on Joyn. This could be a crucial point for Joyn, as such exclusive originals can attract and retain target groups on Joyn.

Interviewer:

If I may ask again, do the originals on Joyn mainly relate to German main characters? It seems to me that Joyn wants to optimally serve the German market by focussing on German content and integrating German stars. Compared to international content, which platforms like Netflix or Amazon Prime cover better, Joyn is focussing more on national shows and originals. Is that right?

Expert 5:

Exactly, that's the point. While Netflix, Amazon Prime and Disney+ all come from America, Joyn is trying to gain its own advantage here in Germany, primarily through originals and with the help of German celebrities. Joyn also wants to push streamers and YouTubers more, as YouTube is also a strong competitor. One example is 'The Race' on Joyn. It is a new format in which well-known YouTubers who are normally only active on YouTube compete in a special challenge. They have to get from Morocco to Cologne with no money and no mobile phone, and the first to arrive wins the show. This simple concept actually brought many viewers to Joyn because the show was exclusive to Joyn. Even though it was available on YouTube later, viewers were able to watch the episodes on Joyn a week earlier. This made many people subscribe to Joyn. To summarise, Joyn does this well by attracting German celebrities and their own productions as well as well-known YouTubers to their platform.

Interviewer:

Yeah, great, great, exciting! Strategically, but it makes total sense.

Back to consumer behaviour and Joyn's offering. Do you think series previews are so popular because people like to have a knowledge advantage over others, or do you think it's because people generally like to binge-watch. You just said that Rails was so successful with you and that a lot of people had already watched it on your channel beforehand and took out a subscription. Why is that?

Expert 5:

I think a lot of people around me have noticed that 'The Race' is already being talked about everywhere because everyone has subscribed to Joyn. If you didn't subscribe yourself, you'd immediately be confronted with spoilers, because the episodes don't appear on YouTube until a week later. Many people therefore opt for Joyn to be the first to see the latest episodes and to be able to join in conversations at school or work. It's different with GNTM, for example, where there's no idea to make the first episode available on Joyn seven days before next year, because GNTM is such a big brand that it doesn't necessarily need to be shown on Joyn. There are currently still enough viewers who watch it on Thursday evenings and if there is a small group of viewers days beforehand who are already spoiling who is going to progress or who is in the final, then it doesn't make much sense. With larger formats, there is no preview on Joyn, but with smaller formats like 'The Race', which is not yet so well known, the episodes can be published seven days in advance, because that helps because the people who watch it early automatically advertise it and thus attract more viewers.

And then there is also the group that is really behind reality television, like Beauty & the Nerd, for example, and simply has to watch everything straight away.

Interviewer:

Okay, that's really exciting. Given the time, I have one last question I'd like to ask: What is the situation with Joyn when it comes to sharing the account? Is it possible to use the account on several devices at the same time or even a kind of family subscription? Do you know how this is organised?

Expert 5:

Mhm, I can only say what I've heard so far. As far as I know, Joyn doesn't have a family subscription like Netflix, where you can register as a family and then use several accounts, for example five, with one subscription.

That doesn't exist with Joyn, but I can definitely watch on several devices at the same time. That means, for example, if my flatmate in the shared flat wants to use Joyn Plus, I could give him my account and we could watch at the same time - he in his room and I in mine.

So exactly, you can even watch different things at the same time, it works. Of course, that could change at some point, as happened with Netflix. They said that if you're not in the same household, you'll be kicked out - which is really annoying. Joyn doesn't do that yet. Of course, it's a disadvantage for Joyn because they can't get all potential customers to pay directly. But it can also serve as advertising: If someone looks through another account and thinks it's cool, they might think to get a subscription themselves. In a way, this is also positive advertising, and Joyn is still focussing on this at the moment.

Interviewer:

Very cool! Before we finish, I wanted to ask if you could answer a few more demographic questions. How old are you?

Expert 5:

I am 29 years old.

Interviewer:

And how would you describe your gender?

Expert 5:

As male.

Interviewer:

And what is your current job or occupation?

Expert 5:

I work in the PR & Communications department at ProSiebenSat1. / Joyn.

Interviewer:

Super perfect, yes, it really was. It was great fun with you! Thank you very much!

Appendix 8: Survey: Understanding Streaming Behaviour and Preferences

Section 1: Streaming Preferences

1. **How often do you watch streaming content?**
 - ☐ Daily
 - ☐ Several times a week
 - ☐ Weekly
 - ☐ A few times a month
 - ☐ Rarely

2. **How many hours do you typically spend watching content in one sitting?**
 - ☐ Less than 1 hour
 - ☐ 1-2 hours
 - ☐ 3-4 hours
 - ☐ 5+ hours

3. **Which genres do you enjoy the most? (Select up to 3)**
 - ☐ Action
 - ☐ Comedy
 - ☐ Drama
 - ☐ Fantasy
 - ☐ Horror
 - ☐ Sci-Fi
 - ☐ Documentary
 - ☐ Romance
 - ☐ Thriller
 - ☐ Other (please specify)

4. **How do you usually watch streaming content?**
 - ☐ Alone
 - ☐ With family
 - ☐ With friends
 - ☐ It varies

5. **What time of day do you typically watch streaming content?**
 - ☐ Morning
 - ☐ Afternoon
 - ☐ Evening
 - ☐ Late Night

6. **Which streaming platforms do you use regularly? (Select all that apply)**
 - ☐ Netflix
 - ☐ Amazon Prime Video
 - ☐ Disney+
 - ☐ Joyn
 - ☐ RTL Plus
 - ☐ Magenta TV
 - ☐ Other (please specify)

7. **How do you typically watch streaming content? (Select all that apply)**
 - ☐ Smart TV
 - ☐ Laptop/PC
 - ☐ Smartphone
 - ☐ Tablet
 - ☐ Gaming Console
 - ☐ Other (please specify)

8. **What is the most important factor when choosing a streaming service?**

- ☐ Content selection
- ☐ Subscription cost
- ☐ User interface
- ☐ Availability of new releases
- ☐ Ad-free experience
- ☐ High-definition quality
- ☐ Other (please specify)

9. **How do you feel about the cost of streaming services?**

- ☐ I'm willing to pay a premium for a high-quality experience.
- ☐ I prefer lower-cost options and will prioritise affordability.
- ☐ I look for a balance between cost and features.
- ☐ I use free or ad-supported services to avoid subscription costs.
- ☐ I often share subscriptions with others to reduce costs.
- ☐ Other (please specify)

10. **Is there anything about current streaming services that frustrates you? (Open-ended)**

Section 2: Demographics

11. **Age:**

- ☐ Under 18
- ☐ 18-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ 65 and over

12. **Gender:**

- ☐ Female
- ☐ Male
- ☐ Non-binary
- ☐ Prefer not to say

13. **Occupation**

- ☐ Student
- ☐ Student (with working job or intern)
- ☐ Young Professional (1-5 year experience)
- ☐ Professional (6-10 year experience)
- ☐ Senior Professional (plus 10 year experience)
- ☐ Retired from work

Appendix 9: Survey Results: Demographics

Variable	Frequency	Percent
<i>Gender</i>		
Female	22	42%

Male	29	56%
Prefer not to say	1	2%
Total	52	100%
<i>Age</i>		
Under 18	0	0%
18-24	16	31%
25-34	24	46%
35-44	0	0%
45-54	3	6%
55-64	9	17%
65 and over	0	0%
Total	52	100%
<i>Occupation status</i>		
Student	6	11%
Student (with working job or intern)	17	33%
Young Professional (1-5 years of experience)	13	25%
Professional (6-10 years of experience)	4	8%
Senior Professional (plus 10 years of experience)	11	21%
Retired from work	1	2%
Total	52	100%

Source: Author calculations.

Appendix 10: Survey Results: Persona One

Variable	Frequency	Percent
<i>Gender</i>		
Female	8	50%
Male	8	50%
Prefer not to say	0	0%
Total	16	100%
<i>Occupation status</i>		
Student	5	31%
Student (with working job or intern)	11	69%
Young Professional (1-5 years of experience)	0	0%

Professional (6-10 years of experience)	0	0%
Senior Professional (plus 10 years of experience)	0	0%
Retired from work	0	0%
Total	16	100%

Question 1	Frequency	Percent
<i>How often do you watch streaming content?</i>		
Daily	5	31%
Several times a week	8	50%
Weekly	2	13%
A few times a month	0	0%
Rarely	1	6%
Total	16	100%

Question 2	Frequency	Percent
<i>How many hours do you typically spend watching content in one sitting?</i>		
Less than 1 hour	3	19%
1-2 hours	8	50%
3-4 hours	5	31%
5+	0	0%
Total	16	100%

Question 3	Frequency	Percent
<i>Which genres do you enjoy the most?</i>		
Action, Comedy, Drama	2	13%
Action, Comedy, Sci-Fi, Documentary, Sports	1	6%
Action, Documentary, Sports	1	6%
Action, Documentary, Thriller	1	6%
Action, Drama, Documentary, Thriller, Reality TV, Sports	1	6%
Comedy	1	6%
Comedy, Documentary, Reality TV	1	6%
Comedy, Drama, Romance	2	13%
Comedy, Drama, Romance, Sports	1	6%
Comedy, Drama, Sci-Fi, Thriller	1	6%
Comedy, Fantasy, Sci-Fi	1	6%
Comedy, Romance	1	6%
Drama, Documentary, Romance	1	6%

Sci-Fi, Reality TV, Romance	1	6%
Total	16	100%

Question 4	Frequency	Percent
<i>How do you usually watch streaming content?</i>		
Alone	9	56%
With family	0	0%
With friends	0	0%
It varies	7	44%
Total	16	100%

Question 5	Frequency	Percent
<i>What time of day do you typically watch streaming content?</i>		
Morning	2	12%
Afternoon	2	12%
Evening	6	38%
Late Night	6	38%
Total	16	100%

Question 6	Frequency	Percent
<i>Which streaming platforms do you use regularly?</i>		
Netflix	3	19%
Netflix, Amazon Prime Video	4	25%
Netflix, Amazon Prime Video, Disney+	5	31%
Netflix, Amazon Prime Video, RTL+	2	13%
Netflix, Amazon Prime Video, RTL+, Sky	1	6%
Netflix, RTL+	1	6%
Total	16	100%

Question 7	Frequency	Percent
<i>How do you typically watch streaming content?</i>		
Laptop/ PC	2	12%
Laptop/ PC, Smartphone, Tablet	5	31%
Smart TV, Laptop/ PC	2	12%
Smart TV, Laptop/ PC, Smartphone, Tablet	1	6%
Smartphone	2	12%
Smartphone, Tablet	2	12%

Tablet	2	12%
Total	16	100%

Question 8	Frequency	Percent
<i>What is the most important factor when choosing a streaming service?</i>		
Content selection	9	56%
Subscription cost	5	31%
User Interface	0	0%
Availability of new releases	2	13%
Ad-free experience	0	0%
High-definition quality	0	0%
Total	16	100%

Question 9	Frequency	Percent
<i>How do you feel about the cost of streaming services?</i>		
I look for a balance between cost and feature	6	38%
I'm willing to pay a premium for a high-quality experience.	0	0%
I prefer lower-cost options and will prioritise affordability.	4	25%
I use free or ad-supported services to avoid subscription costs.	2	12%
I often share subscriptions with others to reduce costs.	4	24%
Total	16	100%

Question 10	Frequency	Percent
<i>Is there anything about current streaming services that frustrates you? (Open-ended)</i>		
Advertisement in prime	1	6%
Denying account sharing	2	12%
Excessive advertisement	1	6%
No answer	12	75%
Total	16	100%

Source: Author calculations.

Appendix 11: Survey Results: Persona Two

Variable	Frequency	Percent
<i>Gender</i>		
Female	9	38%

Male	14	58%
Prefer not to say	1	4%

Total	24	100%
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Occupation status

Student	1	4%
Student (with working job or intern)	6	25%
Young Professional (1-5 years of experience)	13	54%
Professional (6-10 years of experience)	4	17%
Senior Professional (plus 10 years of experience)	0	0%
Retired from work	0	0%

Total	24	100%
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Question 1	Frequency	Percent
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How often do you watch streaming content?

Daily	9	38%
Several times a week	6	25%
Weekly	4	17%
A few times a month	3	12%
Rarely	2	8%

Total	24	100%
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Question 2	Frequency	Percent
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How many hours do you typically spend watching content in one sitting?

Less than 1 hour	6	25%
1-2 hours	15	63%
3-4 hours	3	12%
5+	0	0%

Total	24	100%
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Question 3	Frequency	Percent
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Which genres do you enjoy the most?

Action, Comedy, Drama	1	6%
Action, Comedy, Romance	2	12%
Action, Comedy, Sci-Fi	2	12%
Action, Comedy, Sci-Fi, Documentary, Romance, Thriller, Sports	1	6%
Action, Comedy, Sci-Fi, Sports	1	6%

Action, Drama, Documentary, Thriller, Reality TV, Sports	4	25%
Comedy	1	6%
Comedy, Documentary, Sports	1	6%
Comedy, Drama, Fantasy	1	6%
Comedy, Drama, Fantasy, Romance, Sports	1	6%
Comedy, Drama, Romance	1	6%
Comedy, Drama, Romance, Reality TV, Sports	1	6%
Comedy, Drama, Sci-Fi, Thriller	1	6%
Comedy, Fantasy, Sci-Fi	1	6%
Documentary, Sports	2	12%
Drama, Fantasy, Sci-Fi	1	6%
Drama, Sci-Fi, Thriller	2	12%
Total	24	100%

Question 4	Frequency	Percent
<i>How do you usually watch streaming content?</i>		
Alone	10	42%
With family	0	0%
With friends	3	12%
It varies	11	46%
Total	24	100%

Question 5	Frequency	Percent
<i>What time of day do you typically watch streaming content?</i>		
Morning	0	0%
Afternoon	0	0%
Evening	18	75%
Late Night	6	25%
Total	24	100%

Question 6	Frequency	Percent
<i>Which streaming platforms do you use regularly?</i>		
Amazon Prime Video, Wow	1	4%
Netflix	4	17%
Netflix, Amazon Prime Video	9	38%
Netflix, Amazon Prime Video, Disney+	4	17%
Netflix, Amazon Prime Video, Disney+, DAZN	2	8%
Netflix, Amazon Prime Video, RTL+, Sky	2	8%

Netflix, Disney+	1	4%
Netflix, YouTube	1	4%
Total	24	100%

Question 7	Frequency	Percent
<i>How do you typically watch streaming content?</i>		
Laptop/ PC	4	17%
Laptop/ PC, Smartphone	4	17%
Smart TV	2	8%
Smart TV, Laptop/ PC	2	8%
Smart TV, Laptop/ PC, Tablet	6	25%
Smart TV, Smartphone	4	17%
Smart TV, Tablet	2	8%
Total	24	100%

Question 8	Frequency	Percent
<i>What is the most important factor when choosing a streaming service?</i>		
Content selection	16	67%
Subscription cost	2	8%
User Interface	0	0%
Availability of new releases	2	8%
Ad-free experience	4	17%
High-definition quality	0	0%
Total	24	100%

Question 9	Frequency	Percent
<i>How do you feel about the cost of streaming services?</i>		
I look for a balance between cost and feature	11	46%
I'm willing to pay a premium for a high-quality experience.	8	33%
I prefer lower-cost options and will prioritise affordability.	1	4%
I use free or ad-supported services to avoid subscription costs.	0	0%
I often share subscriptions with others to reduce costs.	4	17%
Total	24	100%

Question 10	Frequency	Percent
<i>Is there anything about current streaming services that frustrates you? (Open-ended)</i>		
It's getting too expensive	1	4%

Denying account sharing	1	4%
To many streaming services	3	13%
Removing movies and series from the system	2	8%
(Blank)	17	71%
Total	24	100%

Source: Author calculations.

Appendix 12: Survey Results: Persona Three

Variable	Frequency	Percent
<i>Gender</i>		
Female	5	42%
Male	7	58%
Prefer not to say	0	0%
Total	12	100%

<i>Occupation status</i>		
Student	0	0%
Student (with working job or intern)	0	0%
Young Professional (1-5 years of experience)	0	0%
Professional (6-10 years of experience)	0	0%
Senior Professional (plus 10 years of experience)	11	92%
Retired from work	1	8%
Total	12	100%

Question 1	Frequency	Percent
<i>How often do you watch streaming content?</i>		
Daily	3	25%
Several times a week	3	25%
Weekly	2	17%
A few times a month	0	0%
Rarely	4	33%
Total	12	100%

Question 2	Frequency	Percent
<i>How many hours do you typically spend watching content in one sitting?</i>		

Less than 1 hour	2	17%
1-2 hours	8	66%
3-4 hours	2	17%
5+	0	0%
Total	12	100%

Question 3	Frequency	Percent
<i>Which genres do you enjoy the most?</i>		
Action, Documentary, Thriller	1	8%
Action, Sci-Fi, Documentary, Thriller	1	8%
Comedy, Drama, Sci-Fi, Thriller	1	8%
Documentary, Thriller	2	17%
Documentary, Thriller, Sports	1	8%
Drama, Thriller	1	8%
Drama, Documentary, Romance	3	25%
Drama, Documentary, Romance, Sports	2	17%
Total	12	100%

Question 4	Frequency	Percent
<i>How do you usually watch streaming content?</i>		
Alone	2	17%
With family	7	58%
With friends	0	0%
It varies	3	25%
Total	12	100%

Question 5	Frequency	Percent
<i>What time of day do you typically watch streaming content?</i>		
Morning	0	0%
Afternoon	1	8%
Evening	11	92%
Late Night	0	0%
Total	12	100%

Question 6	Frequency	Percent
<i>Which streaming platforms do you use regularly?</i>		
Amazon Prime Video, Disney+, ARD/ ZDF Mediathek	2	17%

Netflix	1	8%
Netflix, Amazon Prime Video	3	25%
Netflix, Amazon Prime Video, ARD/ ZDF Mediathek	4	33%
Netflix, Amazon Prime Video, Sky	2	17%
Total	12	100%

Question 7	Frequency	Percent
<i>How do you typically watch streaming content?</i>		
Smart TV	5	42%
Smart TV, Laptop/ PC	2	17%
Smart TV, Tablet	4	33%
Tablet	1	8%
Total	12	100%

Question 8	Frequency	Percent
<i>What is the most important factor when choosing a streaming service?</i>		
Content selection	4	33%
Subscription cost	1	8%
User Interface	0	0%
Availability of new releases	0	0%
Ad-free experience	5	42%
High-definition quality	2	17%
Total	12	100%

Question 9	Frequency	Percent
<i>How do you feel about the cost of streaming services?</i>		
I look for a balance between cost and feature	7	58%
I'm willing to pay a premium for a high-quality experience.	5	42%
I prefer lower-cost options and will prioritise affordability.	0	0%
I use free or ad-supported services to avoid subscription costs.	0	0%
I often share subscriptions with others to reduce costs.	0	0%
Total	12	100%

Question 10	Frequency	Percent
<i>Is there anything about current streaming services that frustrates you? (Open-ended)</i>		
Dropout during live	1	8%
Paying several providers	1	8%

Commercials in the middle of movies	1	8%
Too much advertisement	1	8%
RTL	1	8%
(Blank)	7	59%
Total	12	100%

Source: Author calculations.

Appendix 13: Transcript Interview Student 1

Personal interview for Persona 1, conducted on 15. September 2024

Interviewer:

Alright let's get started. I'd first like to know which streaming services you know. Just list everything you can think of.

Student 1:

Well, I know Amazon Prime, Netflix, Disney Plus, RTL Plus, Joyn, Wow from Sky and then all the media libraries from the TV channels, i.e. ARD, Mediathek, ZDF Mediathek Arte, HR Mediathek.

Interviewer:

That's quite a few. And which of these streaming services do you use yourself?

Student 1:

I use Wow for the Bundesliga, and otherwise Disney Plus and when I have it Amazon Prime and Netflix and occasionally Joyn.

Interviewer:

And could you describe a bit of your typical video streaming habits?

Student 1:

Okay, so I actually have to say that I don't stream that often anymore. Only when I really have time or when I can do something on the side. For example, cooking, hanging up the washing or something like that.

In principle, I first watch out of boredom and then I just go straight to Netflix or Amazon Prime or something and see if there's anything that immediately catches my eye on the homepage and that I really want to watch or if I've been recommended something that interests me and then I watch it, but I have to say that's a maximum of 20 minutes - but not every day. But that's simply because of what's on offer, because I'm not that interested at the moment.

To be honest, I'd rather watch something shorter on YouTube at the moment, like 10-15 minute videos.

Interviewer:

That's understandable! And when you do have a bit more time, what content do you prefer?

Student 1:

My favourite thing to watch is films or series that have a bit of a historical reference, so they're also about something historical or based on true events but that are at the same time trending e.g. Peaky Blinders. And then I also like to watch the classics, i.e. well-known films or those that are on trend.

Interviewer:

And for you, are there features or characteristics that set one platform apart from the other? And where you say I use one platform more than the other because of these characteristics, or perhaps I like them better?

Student 1:

Well in principle of course first of all the offer and otherwise I think it's stupid when films or series are behind another paywall and you have to pay extra, like with Amazon Prime for example. It always looks like you can watch everything on offer and then in the end you still have to pay. I think that's stupid.

Interviewer:

Can we infer that you like subscription models where you pay a conscience price and then you can access everything better?

Student 1:

Yes. I think Netflix, for example, is good in that respect.

Interviewer:

Understandable. I wanted to ask again; you mentioned at the beginning that you don't stream that much anymore. I'm assuming it used to be different. Why do you think your streaming behaviour has changed?

Student 1:

That's primarily due to the offer. I would say that if there was a series or something that I was really interested in, then I would go back to streaming services and simply use more streaming services. But at the moment, there's nothing that makes me say I absolutely have to watch it. Of course, that's also because I've already watched a lot of things and there's not much new stuff coming out, and when there is, I don't think it's good.

Interviewer:

All right. You've already mentioned that the content image bit is important to you. What other product characteristics and features are important to you?

Student 1:

Well, I definitely think the price is important alongside the content. Above all, that the price-performance ratio is right. I like services that offer monthly subscriptions. And what I also think is good is when the platform knows me and my preferences and suggests what might interest me based on that. In other words, a personalised view. Otherwise, I have to say that I'm still young enough to be able to check how a platform is structured, so layout isn't that important to me, for example. To summarise, content and price are the most important things for me. After that, personalisation would be the next nice-to-have.

Interviewer:

And how important is streaming quality to you? Do you feel there are big differences?

Student 1:

Well, the fact that I don't watch on the TV, which now somehow has 70 inches, but always actually on my iPad or on my Mac, the screen isn't that big anyway. That's why I don't really care about the quality as long as I get a sharp picture.

Interviewer:

And how important are technical features to you, so advanced features like offline views or, that you can stream on multiple devices at the same time that or that you can even share the account?

Student 1:

Those are cool factors. So watching offline is cool. Personally, I don't really need it that much, unless I'm going on holiday. But I think I can count on one hand how often I need this feature. It's definitely cool, but not crucially important. And with regard to account sharing, I have to say that I think it's good. For example, I share my Netflix, Disney and Sky Wow accounts with my family and I'm very happy that I don't have to pay for them myself. That's really important. I actually only pay for Amazon Prime myself, but I've currently cancelled it because I don't use it. The good thing about Amazon Prime is that it's relatively cheap for students and you also have benefits like free shipping and express delivery when you buy products on the Amazon website. I would seriously consider not having one if I had to get them all myself, both because of the price and because the offer doesn't justify the price for me at the moment.

Interviewer:

OK, absolutely understandable. Are there any functions or features that you would still like to see?

Student 1:

I'll have to think about that for a minute. Of course, I would prefer a platform that combines everything, where I can watch live football and TV, but also have the latest series and films.

Interviewer:

All right. Finally, I have some questions about your demographic data. Could you tell me your age please?

Student 1:

21.

Interviewer:

And your gender?

Student 1:

Male.

Interviewer:

And your current occupation?

Student 1:

Student.

Interviewer:

All right, that's about it! Thank you very much for your answers!

Appendix 14: Transcript Interview Student 2

Personal interview for Persona 1, conducted on 16. September 2024

Interviewer:

Alright, then I will start the recording now. First of all, which streaming services are you familiar with?

Student 2:

Netflix, Amazon Prime Video, Disney+, Paramount+, RTL Plus, Joyn, Apple TV

Interviewer:

Which streaming services do you currently use?

Student 2:

Netflix, Amazon Prime Video, RTL Plus. I used to have Joyn but cancelled the subscription. And I also use Sky when I am at my parents' home.

Interviewer:

Can you describe your typical video streaming habits e.g. how often you watch and what types of content you prefer?

Student 2:

To be honest, I stream a lot. Almost every day or every second day. When I watch, I also watch a few hours. For example, when I watch series, I watch 2-3 episodes in one streaming session. I also watch reality TV the day it comes out or the day after. Movies not that often, more series and reality TV.

Interviewer:

What kind of series do you watch?

Student 2:

Right now, I watch OC California. So, in general, I like more those love, intrigues and drama contents.

Interviewer:

Are there specific features or qualities that differentiate one video streaming platform from another in your opinion?

Student 2:

Yes, the content of course. The type of content which is on the platform. Also, availability – I hate if I start a series, and the first two seasons are available to stream, and the rest has to be purchased. Also, new releases I would say. I like when a platform releases new series on a regular basis. But content is the most important factor to me.

Interviewer:

Have you noticed any recent changes in your personal streaming behaviour or content preferences?

Student 2:

Yeah. I used to watch all those new series on Netflix and then my boyfriend complained that I only watch trashy Netflix productions and therefore, I started to watch some older series and more classical movies and old blockbusters. That's the only thing I noticed.

Interviewer:

Because you mentioned your boyfriend and that he had an impact on your streaming behaviour, would you say that you prefer or more often stream on your own? Is it a social activity for you?

Student 2:

It depends on the situation. I like to watch it alone when I am already in bed in the evening, but I also like to watch with my mother when I am at my parents' home because we like the same type of series. With my boyfriend it is a bit more complicated because we have very different content preferences. However, most of the time, either alone or with my mother or when it comes to reality TV I like to watch with my friends.

Interviewer:

What specific product attributes (e.g., content quality, platform design, ease of use) do you value most in video streaming services?

Student 2:

I like the function to download something and watch it on the go, e.g. on a flight or on the train. Price is also an important factor. Since I am a student, I cannot afford to pay a huge amount on subscriptions. What frustrated me was that RTL Plus increased their prices. I used to pay €7.99 and now they increased it to €10.99 but I kept this subscription plan because I wanted to have the download function, and I love the contents of RTL Plus that other streaming services don't have such as all the German reality TV shows. Therefore, I stick to them.

Interviewer:

Correct me if I am wrong, so for you price is very connected to content offerings, what you want to pay really depends on content offering and features like download options?

Student 2:

Yes, exactly.

Interviewer:

Can you think of something that is important to you when it comes to different platforms?

Student 2:

Yes, also the international known TV shows such as Gossip Girl and so on. The famous TV shows.

Interviewer:

If I understand you correctly, you also value content variety. For you, as I understood, it is important to have national reality tv offers but at the same time you also value international products.

Student 2:

Yes, content variety sums it up well.

Interviewer:

How does the frequency of new content releases influence your loyalty to a video streaming platform? Would you switch if there was a new show somewhere else or add it to your subscriptions or cancel another one?

Student 2:

I almost have a subscription for every streaming service since I share accounts with my parents. However, if one platform has a series that I can only watch on that platform, I would be open to subscribe to that platform. For example, I used to do it for Joyn. At that time, they were the only ones showing all seasons of “The 100” or they had all seasons of Grey’s anatomy, which my mother liked so I subscribed to Joyn, but I wouldn’t sacrifice another platform. First, I would add it on top and test and see if I like it and if I prefer this platform over the other, I’d maybe switch and cancel the subscription to another platform.

Interviewer:

Before you’ve mentioned that you share accounts with your parents. How important is it for you to be able share accounts e.g. as Netflix does it and how important is the streaming on multiple devices to you?

Interviewer:

Both is important to me. As for shareability, I am really frustrated for example that Netflix no longer allows to share accounts if you live at different locations. Last semester, I couldn’t watch Netflix in Portugal anymore even though we are still a family or household. As for the other one, multiple devices is also important. If I stream in the living room, I use the smart TV or if I’m in bed I watch on my phone or my iPad. Here, I also like the function when the devices are seamlessly connected, and I can continue to watch from where I stopped with the other device.

Interviewer:

Great. How important are features like personalised playlists or recommendations to you?

Student 2:

It’s a nice to have. I like when Netflix recommends movies or series to me because they often meet my taste, but I can only think of Netflix in terms of personalisation. I don’t remember how other platforms do it.

Interviewer:

How do different subscription options (e.g., monthly vs. yearly, ad-supported vs. premium) impact your decision to subscribe to or stay with a video streaming service?

Student 2:

In terms of sport, it doesn’t really affect my streaming behaviour because I think I would pay anything to watch the sports but in terms of movies or tv show streaming it really impacts my behaviour as I don’t want to spend more than 10€ a month for a premium platform. For tv shows and movies, I only go for monthly subscriptions as I switch my subscription type from month to month and I only subscribe if I watch a series I like. For sports, I do yearly subscriptions and there I don’t care that much about the price.

Interviewer:

Because you just mentioned it, I was wondering in general if it is important to binge watch something and watch it in a whole or could you wait such as Netflix does it with Emily in Paris, so they bring out couple of episodes. Do you like that feature?

Student 2:

No, there is nothing I hate more than waiting for a second part. I prefer if the platform publishes the series in a whole. I mean I look forward to the second part but honestly, I am more annoyed from it because I prefer to binge-watch it.

Interviewer:

Now I would like to dive into more technical features. Let’s start with streaming quality. How does streaming quality like 4K, HD and smooth performance impact your satisfaction and loyalty to a video streaming platform.

Student 2:

An intuitive interface is important to me, streaming quality is less important, because I usually stream with my iPad or laptop. Content is definitely more important.

Interviewer:

How does the design of a platform affect your experience with streaming services?

Student 2:

I like it when platforms are user-friendly, and you have those sections divided into movies, series or genres.

Interviewer:

Last but not least, if you need to rank the five most important features, which ones would that be and in which order?

Student 2:

I don't know. Everything is important to me. Content and content variety is probably first. Second is price. What I totally forgot to mention before is also an ad-free experience. I hate ads and now Prime Video implemented ads during all their series. They should rather show it before or after the movie or avoid it completely. After that, is account shareability and maybe then multiple devices streaming.

Interviewer:

OK great. Now I need your demographic data. What is your age?

Student 2:

24

Interviewer:

What is your gender?

Student 2:

Female

Interviewer:

What is your current profession?

Student 2:

I am a student with a working student job.

Interviewer:

Ok, perfect. Thank you very much for this insightful interview. Talk to you soon.

Student 2:

Of course, bye bye.

Appendix 15: Transcript Interview Student 3

Personal interview for Persona 1, conducted on 17. September 2024

Interviewer:

Which streaming services are you familiar with?

Student 3:

Netflix, Amazon Prime, Disney+, Apple TV, Sky Go.

Interviewer:

Are you also familiar with streaming services from traditional TV channels such as Joyn or RTL Plus?

Student 3:

Yes, both of them. Also, with the ARD and ZDF Mediathek.

Interviewer:

Which streaming services do you currently use?

Student 3:

Amazon Prime. Also, football streaming, DAZN, Sky Go. Sometimes RTL+. Sometimes Disney.

Interviewer:

Do you have subscriptions for all these streaming services?

Student 3:

DAZN, Sky Go, Amazon Prime and then I use for the other platforms the subscriptions from my family.

Interviewer:

Can you describe your typical video streaming habits e.g. how often you watch and what types of content you prefer?

Student 3:

Twice or three times a week for sports streaming. For movies, twice a month. And sometimes reality TV.

Interviewer:

Are there specific features or qualities that differentiate one video streaming platform from another in your opinion?

Student 3:

The content. For example, with sports, some streaming services have different content rights, so I watch the ones, that have the interesting sport events.

Interviewer:

Are there any other features that differentiates one from another?

Student 3:

I just care about the content. But it is also nice, if it is available on an app on Smart TV.

Interviewer:

Have you noticed any recent changes in your streaming behaviour or content preferences?

Student 3:

I watch less movies and TV shows but not sports.

Interviewer:

Is there a reason behind it?

Student 3:

The streaming services like Netflix and Amazon Prime lack of quality movies. Back in the days, they had more nice movies and their new productions I don't like that much. Also, because my priorities shifted towards other things. If I don't watch sports, I prefer to watch YouTube videos.

Interviewer:

What specific product attributes (e.g., content quality, platform design, ease of use) do you value most in video streaming services?

Student 3:

Content quality. My preferred content should be available. I don't look for new content that much.

Interviewer:

What are your TOP 3?

Student 3:

I just care about the content and maybe streaming quality. If it is a live event, it should be fluent.

Interviewer:

What types of content (e.g., series, movies, sports, documentaries) are most important to you when choosing a video streaming platform?

Student 3:

First sports, second tv shows or series. Maybe I watch 2 tv shows or series a year, third movies.

Interviewer:

Do you value original content (produced by the platform) more than licensed content, and how does that affect your choice of platform?

Student 3:

No, I don't care. I just care about licensed content. It doesn't affect me.

Interviewer:

Have you noticed any changes in the types of content you prefer, such as local productions vs. international blockbusters or specific genres?

Student 3:

Streaming services as Netflix more often produce their own content and because I feel like it lacks quality my streaming behaviour declined in the last two years.

Interviewer:

How does the frequency of new content releases (e.g., new shows, exclusive content) influence your loyalty to a video streaming platform?

Student 3:

It influences my loyalty, but I don't really care about really new productions. I think they should introduce new movies and series in terms that they change their selection. But I don't care that much about new productions.

Interviewer:

How do different subscription options (e.g., monthly vs. yearly, ad-supported vs. premium) impact your decision to subscribe to or stay with a video streaming service?

Student 3:

In terms of sport, it doesn't really affect my streaming behaviour because I think I would pay anything to watch the sports but in terms of movies or tv show streaming it really impacts my behaviour as I don't want to spend more than 10€ a month for a premium platform. For tv shows and movies, I only go for monthly subscriptions as I switch my subscription type from month to month and I only subscribe if I watch a series I like. For sports, I do yearly subscriptions and there I don't care that much about the price.

Interviewer:

How do you feel about ads?

Student 3:

I don't want to have ads; I only do premium subscriptions.

Interviewer:

How important are features like personalised playlists or recommendations to you?

Student 3:

I like the recommendation feature.

Interviewer:

How does streaming quality (4K, HD), buffering, or smooth performance impact your satisfaction and loyalty to a video streaming platform?

Student 3:

It really influences my satisfaction, but in terms of sports streaming it doesn't affect my loyalty because it is the only option I have to watch my preferred sports.

Interviewer:

How important are advanced features like offline viewing, streaming on multiple devices, or downloading for later?

Student 3:

Same again. For movie and video streaming yes, but for sports streaming not as I only watch live.

Interviewer:

Do these options affect which video streaming platforms you choose?

Student 3:

No.

Interviewer:

How does the design of the platform (ease of navigation, search functions) and the quality of content recommendations affect your experience with video streaming services?

Student 3:

It affects my experience. If it is better structured and there are better recommendations, it takes less time to find a good movie.

Interviewer:

How significant is it for you to be able to stream content across multiple devices (smartphone, tablet, smart TV)?

Student 3:

That's really important to me. If I find myself in different situations, I always want to have my subscriptions where I am. But it doesn't affect my choice for a streaming platform.

Interviewer:

How important are social features like watch parties, sharing recommendations, or live chat in enhancing your experience with a video streaming service?

Student 3:

I care 0%.

Interviewer:

Do reviews and ratings influence what you watch?

Student 3:

Yes, but more external ratings. For example, Netflix and Amazon Prime has this Imdb ranking included. I rather trust these rankings than rankings from streaming platforms.

Interviewer:

Now I need to ask you quickly about your demographic data. What is your age?

Student 3:

24

Interviewer:

What is your gender?

Student 3:

Male.

Interviewer:

What is your current occupation?

Student 3:

I am a working student.

Interviewer:

That was my last question. Thank you for participating and sharing your insights with me. Have a nice day.

Student 3:

You're welcome. I wish you a nice day too.

Appendix 16: Transcript Interview Professional 1

Personal interview for Persona 2, conducted on 16. September 2024

Interviewer:

Great, let's start with something simple. Can you name all the streaming services that come to mind, the ones you know of?

Professional 1:

Okay, so I know Netflix, Amazon Prime, Joyn, RTL Plus. That's about it for now. Oh, and I also know Disney Plus.

Interviewer:

Which of these do you use personally?

Professional 1:

Mainly just Netflix. I rarely ever use Prime.

Interviewer:

Can you tell me why you primarily use Netflix, especially since you mentioned that you don't use many other services? Why specifically Netflix?

Professional 1:

I think it comes down to two things. First, I feel like Netflix is the most established streaming provider, and I think that plays a big role in why I started using it. It's just something everyone knows about. And second, I like Netflix because it has the best selection for me. Often, when friends recommend series to me, I end up finding them on Netflix.

Interviewer:

Okay, and how would you describe your streaming behaviour or habits? Could you reflect on and describe them?

Professional 1:

Sure. I'd say I probably stream about two hours per week on average, but that's mainly because I work a lot. When I do have time, I either stream to relax after a long day or because something was recommended to me. I'd also say I tend to watch Netflix alone rather than with friends because, for me, it's more of a personal leisure activity.

Interviewer:

Absolutely. When you stream, what kind of content do you prefer? Are you more of a binge-watcher when you find a series you like?

Professional 1:

Yes, I'd say I tend to watch more series, especially ones I've already seen before. So, the risk of binge-watching is lower right now. But during my student days, it was different. I used to binge-watch mini-series in a single sitting quite often.

Interviewer:

Interesting! Since you mentioned that you stream to relax, are there specific genres or types of content that help you relax better?

Professional 1:

I'd say I watch a lot of feel-good content, like romances or comedies.

Interviewer:

That makes sense. And now, you're in a transitional phase from being a student to working full-time. How has this change affected your streaming habits? How would you describe the shift in your streaming behaviour?

Professional 1:

I definitely stream less now because of work, and I tend to rewatch things I already know, since I don't have the time to get into something new and risk falling into a binge-watching cycle. Other than that, the genres I watch haven't changed much.

Interviewer:

Did you stream more with friends when you were a student, or were you always someone who preferred to stream alone?

Professional 1:

Even back then, I mostly streamed alone. That doesn't mean I never watched with friends, but generally, it's an activity I do on my own when I have some free time.

Interviewer:

Got it! What are some product features that are important to you when it comes to streaming services?

Professional 1:

I really like the option to download movies and series. That's super important for me, especially for long train rides. I also appreciate personalised content recommendations that align with what I've already watched.

Interviewer:

How important is the price to you?

Professional 1:

Content is definitely more important to me, but because I don't use streaming services a lot, the price does matter too. I should admit, though, that I'm currently using my brother's membership. But I'd say I'd be willing to pay around €15 per month, given how little I actually use it. Anything more wouldn't make sense for me.

Interviewer:

That makes sense. What's your opinion on subscription models where you pay less but have to deal with ads? Or do you prefer paying more to watch uninterrupted content? Another example would be Amazon Prime, where there are different membership tiers, but some movies are still behind an additional paywall. Do things like that bother you, or do you not care?

Professional 1:

I do find that annoying. It's one of the reasons I like Netflix so much—no ads and no additional restrictions. Netflix has a good balance: lots of content I enjoy without annoying interruptions.

Interviewer:

Absolutely. Have you ever considered getting another subscription or switching services, or do you feel Netflix meets all your needs?

Professional 1:

I don't see the need to switch right now, though I have done it before. For example, two years ago, I got an RTL Plus trial for a documentary I wanted to see. I make subscription decisions based on specific content. If something I really want to see is on another service, I'll consider subscribing temporarily, but I don't see myself moving away from Netflix at the moment.

Interviewer:

Interesting! A question about streaming quality: Can you describe the devices you use and how important resolution is to you when you stream?

Professional 1:

Sure, I mostly stream on my laptop or iPad. Today, I watched Netflix on my phone while on a train, and I realised that streaming quality matters more to me on a smart TV or laptop. On my phone, it's not as important since it's such a small screen and more of a temporary solution.

Interviewer:

Understood. And how important is account shareability, like being able to share your account with others and stream on different devices?

Professional 1:

It's not that important to me because I think that feature is reflected in the price. So personally, I'm not too concerned about it.

Interviewer:

Perfect. Lastly, I just have a few demographic questions. First, how old are you?

Professional 1:

25.

Interviewer:

And what gender do you identify with?

Professional 1:

Female.

Interviewer:

And what is your current occupation?

Professional 1:

I'm working in management consulting.

Interviewer:

Great! That's all for now. Thank you so much for your time. I'll stop the recording here.

Appendix 17: Transcript Interview Professional 2

Personal interview for Persona 2, conducted on 17. September 2024

Interviewer:

Okay, great. Then I would first of all ask you to simply list which streaming services you know, what comes to mind spontaneously.

Professional 2:

OK, so I know Joyn, RTL plus, then of course the ARD and ZDF Mediathek - although I don't know exactly whether you consider that to be video streaming... Then of course the classics like HBO plus, Sky, Netflix, Amazon Prime and Disney plus. And then... what else do you have? Youtube?

Interviewer:

And which of the streaming providers I just mentioned do you use yourself?

Professional 2:

Netflix and Disney Plus - so I'm a rent nomad there. And then sometimes Amazon Prime. The ARD and ZDF Mediathek from time to time and now Joyn for the first time in ages.

Interviewer:

Okay, cool and can you describe a bit more of your typical viewing behaviour now? So just how often, how you watch, i.e. alone or with friends, what content you prefer - something like that.

Professional 2:

That has definitely changed since I started working. During Covid and when I was still living in Göttingen, I used RTL plus a lot with my friends for trash TV. We always met up and watched it together. But that was also down to the programmes. Otherwise, it depends: Sometimes, when I'm cleaning or tidying up, for example, I watch a series in the meantime, but I'm more of a 20-minute series fan. When I'm committed to watching series for hours on end, I usually do it with my boyfriend.

But otherwise, when a new season of a series I like comes out, such as Emily in Paris, I always watch it straight away and then actually always watch it alone. However, as I live with my boyfriend, we also watch some things together - often light fare. But what I also like to do is watch something via the ARD Mediathek, for example.

News or sometimes documentaries. I also watch a lot of things with my boyfriend, but less with friends since I've been working.

When I was a student, I used to meet up with friends quite regularly to watch something like The Bachelor or a series - but now I use my time with friends differently.

Interviewer:

Mhm absolutely. And is there a platform that you somehow favour, and can you say why or what perhaps distinguishes the platform from others? So do you notice differences between different providers?

Professional 2:

Absolutely, I think Netflix has a great selection of series that you know and also some really good in-house productions. Recently I was also very pleasantly surprised by the ZDF Mediathek when it comes to documentaries. Apart from that, I don't think Amazon Prime is that good in terms of handling and user-friendliness, because you're often misled a bit as to what's included in Prime and what isn't, and then a lot of things are behind a paywall. I don't find that very convincing. I think Disney plus is quite cool for some things, but they also have a lot of things that I don't necessarily watch - a lot of sitcoms, which aren't always my cup of tea. That's why I would say that my favourite is actually Netflix and I'm not a YouTube person at all, for example, there's far too much choice for me.

Interviewer:

How important are personalised recommendations to you? Do you find that helpful or do you honestly say it never really matches my preferences?

Professional 2:

Yes, it's interesting to see what's being suggested now. But I had to give up my account, which I shared with people who don't live in my household, because of the new Netflix rules. This means all my painstakingly built-up Netflix history has been deleted and now I have to start from scratch. At the moment, I sometimes wonder what Netflix is thinking. So far, I've watched things like 'Emily in Paris' and 'Bridgerton', but I'm not a total fan of girly and love series, but currently I only ever get that played out and I think that's crass and I don't really like it at the moment.

Interviewer:

You've now just mentioned on your own that you've sort of shared an account. How important is the function of being able to share a profile with several people? And how do you feel about that now with Netflix? Was there a point where you thought about cancelling your subscription because you were somehow annoyed that Netflix has now changed this, and you have to pay more?

Professional 2:

With Netflix, I said I'd get it if I paid for it myself. With Disney Plus, I use my boyfriend's account and that's such a nice-to-have, but I wouldn't have got it again myself now.

What bothers me much more, and where I'm really prepared to pay a bit more money, is the viewing experience without adverts. I also have a direct example of this. On Sunday we watched 'Who's my favourite show?' via Joyn - but without an account and we had so many adverts that we simply

said it wasn't fun. In that respect, I think you're already very spoilt by the streaming platforms, because I think that's how it used to be on TV. But yes, with Netflix it really is the case that I say it's definitely worth paying more. Of course I was annoyed for a moment, but it's also okay for me because now I can decide for myself whether I want to keep it or cancel it and not get stuck with someone else. And of course, it's also really cool if you can watch on your big screen at home and not just on your laptop or iPad.

Interviewer:

Absolutely. How important is it to you to be able to stream on multiple devices?

Professional 2:

That's super important to me. Because when I'm sitting on the sofa, I always watch on the big screen, but when I'm lying in bed, I watch on my iPad or laptop and when I'm travelling, for example. What I also find super practical is that you can download things on your iPad, just like on your mobile phone. And because I'm travelling a lot by train at the moment, it's still very cool to be able to watch series and films.

Interviewer:

Are there any other product features that you can think of that are important in a streaming provider? Or what are the 3 most important ones that you might be asked to choose my provider based on?

Professional 2:

Well, first of all the selection of course, what's available. For me, it has to be a good mix of well-known series and classics, but also something new. So not just my own creations, but also classics. And also, a good mix of local and international content.

With Netflix, I currently particularly like the German productions or 'Maxton Hall' on Prime. But I also like to watch series in their actual language, regardless of whether they are in English or German. I'm open to that.

One feature that I also find important, or that sometimes helps me, are the suggestions and recommendations.

Interviewer:

You mean personalisation?

Professional 2:

Personalisation exactly, that the algorithm works well. And then it's also really important to me that no adverts are shown. If Netflix were to introduce adverts now, I'd be straight out.

Interviewer:

OK and the price is then also rather secondary?

Professional 2:

Mhm yes, so of course, if somehow Netflix doesn't say €30 per month, I'll have to think about it again. Although I would probably do it anyway. But I've never got DAZN, for example, because it's just too expensive for me personally to use it maybe once every six months to watch football.

Interviewer:

Can you think of anything else you like or anything that bothers you?

Professional 2:

Ahh yes. I recently realised that I find the way I log in to Amazon Prime, for example, very convenient, so if you want to log in on a new device, you just have to scan a QR code and don't have to somehow find your email address and password. Ah and one platform where everything is available would be great. These days you need to have so many abonnements which is annoying.

Interviewer:

Good point! I haven't even heard that one yet.

Professional 2:

I don't think the user experience is unimportant either. I find small details like access to a new device really cool and pleasant. Or, for example, that the next episode is played straight away.

Interviewer:

Good point. Then I would just like to know how old you are.

Professional 2:

28.

Interviewer:

And what gender do you identify as?

Professional 2:

Female.

Interviewer:

And your current profession?

Professional 2:

Digital Marketing Manager

Interviewer:
OK perfect.

Appendix 18: Transcript Interview Professional 3

Personal interview for Persona 2, conducted on 19. September 2024

Interviewer:
Okay so let's start with my first question: Which streaming platforms are you aware of?

Professional 3:
Netflix, Amazon Prime, DAZN also, there is also a program called Waipu,TV where you can stream German TV, which I think is from Amazon, then there is also Sky Go – but I think that is it.

Interviewer:
And which of these streaming platforms do you use?

Professional 3:
Everyone I mentioned, so Netflix in any case, we have Amazon Prime in the family, Sky Go for sport and as I don't have a TV connection myself, I sometimes use Waipu TV when I watch German TV. Oh. But it's not true, I don't use Join.

Interviewer:
Could you describe your typical video streaming habits, such as how often you watch videos and what types of content you prefer?

Professional 3:
Oh well, live sport is definitely number 1, I think, and otherwise it's actually more films, documentaries or series.

Interviewer:
In your opinion, are there certain features or characteristics that distinguish one video streaming platform from another?

Professional 3:
Yes, so you notice, for example, with DAZN to Sky, DAZN is very much streaming-based, and everything works much faster there are much fewer adverts and everything works much faster there are much fewer adverts you don't have to watch 2 minutes of adverts before it starts. It all works much easier and faster with Netflix, just like with Amazon Prime if you have a subscription there. Nevertheless, it has been the case for almost half a year now that Amazon Prime still has adverts, which is really very annoying, so I would say how big a difference there is between adverts and the easy functionality of the programmes.

Interviewer:
Have you noticed any changes in your streaming behaviour or content preferences recently?

Professional 3:
No.

Interviewer:
Okay all right now let's move on to the second part which specific product features, for example quality of content design of the platform user-friendliness, are most important to you in video streaming services?

Professional 3:
So, design isn't that important, it's more the user-friendliness that I've just mentioned. For example, that DAZN is super, super easy to use, and you're not disturbed by too many adverts.
And yes, simply the options that you have within the streaming platforms, partly that you can pause a film and see who exactly the actor is in the scene, which Amazon Prime has, for example, Netflix doesn't have or the chance to record something. I think the technical background of each streaming platform is very important and the user-friendliness is also very important, because it's easy to get to your destination in just two clicks

Interviewer:
Thank you for the answer and is there a certain type of content for example series film sport, documentary where this is most important to you on a streaming platform?

Professional 3:
That would be sport because it's usually live and of course, especially when you're close to an important event, you want to be on time and get straight to the programme. With Sky, for example, it's very stupid because you have to watch two and a half minutes of adverts before you get to the programme. Because it should really be just two clicks from logging in to starting the stream. It actually works very well with Netflix and Prime, but I would say that these are all platforms that focus more on films and documentary series. But yes, I'm actually more interested in the sporting events because they're live.

Interviewer:

all right thank you and do you place more value on original content produced by a platform such as an original Netflix series or on licensed content and how does this affect your choice of platform?

Professional 3:

In the current time, all platforms have self-produced series and films as well as licensed ones. That's why I think it's clearly a matter of taste whether something is perhaps from Netflix Originals and whether you like it or not - I don't want to make a difference whether it's a platform that only offers one or the other. I don't think that plays a role for me at the moment.

Interviewer:

Yes, all right thanks and how do different subscription options affect them for example monthly yearly adverts premium to stay on a video streaming platforms or subscribe?

Professional 3:

The price certainly makes a big difference at the end of the day. But since they're actually all very big platforms that you don't test, you usually take out an annual subscription because it's always cheaper - annual subscription instead of monthly - if you share it with your family or friends - if you have a chance of getting a family account or something, that makes a difference, but you can't really tell the difference because many streaming platforms have it that way.

Interviewer:

Yes, and perhaps one last question: how important are social functions such as watch parties, recommendations and live chats for you?

Professional 3:

Maybe I haven't seen this function yet, but so far, I've very rarely seen this option that gives you the chance to watch something with your partner or friends at the same time. Or to chat about the film at the same time, I think that already exists, but I don't know it myself, but for me it would actually be a crucial point, or I think it's a great function, especially when you're not together and have the chance to watch something together with friends or family, I think that would be great if it existed

Interviewer:

Do they influence ratings or reviews to watch something specific?

Professional 3:

Not really, so I have to say if I see something has only 1 out of 5 stars, then I'd rather watch it again, but too often I've seen that the rating was great and then it wasn't to my taste at all. But also, the other way round when there were very bad ratings, and it was a good film after all. It is of course indicative but not decisive.

Interviewer:

All right, then thank you for this interview, maybe a few demographic data at the end, how old are you?

Professional 3:

26 years old.

Interviewer:

How do you identify your gender?

Professional 3:

Male.

Interviewer:

What is your current occupation?

Professional 3:

Sales Manager

Interviewer:

Thank you so much, for taking the time for this interview.

Appendix 19: Transcript Interview Senior Professional 1

Personal interview for Persona 3, conducted on 18. September 2024

Interviewer:

Firstly, I'd like to know which streaming services do you know? So, what comes to mind off the top of your head.

Senior Professional 1:

Yes, I actually only know Netflix, Amazon Prime and Joyn, because I currently get a lot of adverts for them. But I only really use Netflix.

Interviewer:

OK great, because that would have been my second question, which of the aforementioned streaming services do you use yourself? Since you only use Netflix, can you say why Netflix - so what are the reasons for this?

Senior Professional 1:

Basically, firstly because I can decide for myself when to watch something and have freedom in that respect and because Netflix doesn't have long ad breaks.

Interviewer:

And what sets Netflix apart from other platforms for you?

Senior Professional 1:

I don't use any other streaming services. In addition to Netflix, I still watch traditional television, i.e. ARD & ZDF or sometimes RTL and ProSieben. That's why Netflix is different for me in that I can watch it on the go. Because of my job, I travel a lot to other countries and Netflix can be received stress-free via WLAN in the hotels there. Actually, I have to add that I also use the ARD or ZDF Mediatheks.

Interviewer:

Understandable. You've just mentioned that you like to stream while travelling. How else would you describe your typical streaming habits?

Senior Professional 1:

Well basically I actually watch with my husband, mainly at the weekend, often on Sunday afternoons. We always get recommendations from Netflix's 'Top 10' or from friends. We like to watch documentaries or biographies of athletes. We also like to watch crime series. We're often tempted by what's hot at the moment or we watch real blockbusters like Blacklist, which keeps us busy for 5 months. And yes, I mainly watch alone when I'm travelling and have layovers. I often have an 8-9 hour time difference and then I watch short series or films at night on my iPad.

Interviewer:

And how big is the danger of you falling into binge watching or are you very disciplined about it? Binge watching is when you watch several episodes of a series in a row, for example, because you can't stop.

Senior Professional 1:

I don't really have that at all, I can always stop, I don't have to watch all night now. I watch in a disciplined way; in the time slot I have available. If I say I have 2 hours and then I only watch the 2 hours.

Interviewer:

All right and have you somehow noticed a change in your streaming behaviour over the last few years?
Has the content you prefer perhaps changed or are you streaming more?

Senior Professional 1:

Yes, well, of course I have to say that corona was a time when I was at home a lot, so I streamed more. Apart from that, my life is relatively full, so I don't have much time. I don't watch anything at all during the day when I'm at home, and we watch the odd thing in the evening if we can't find anything on TV or if the schedule is such that we only start at 9 and want to watch something for another hour. I'd say we watch Netflix every two weeks, I don't know, maybe once a film and otherwise a series more regularly - and that has actually remained constant.

Interviewer:

All right and basically, what product features are important to you when it comes to streaming providers?

Senior Professional 1:

Well, the price is definitely important to me, but compared to what else we have, so DAZN and Sky, I feel the price of Netflix is very fair. I find DAZN and Sky disproportionately expensive, and of course it's not what I want to watch. I'm not interested in the Bundesliga, so the price isn't worth it to me. Netflix is different for me. I use it regularly and therefore feel that the price is justified and reasonable. Especially in comparison to other providers like DAZN and Sky.

Interviewer:

And how important is the streaming quality to you?

Senior Professional 1:

Well, at home I watch via the TV. We have a very large one, which means the TV experience is extremely enjoyable there and I watch on my iPad when I'm travelling because I find it comfortable to have it on my stomach when I'm lying in bed and because I can't or don't want to use the TV in the hotel when I'm travelling.

Interviewer:

And since you're also travelling a lot, how important is the function of being able to download series in advance, for example, so that you can watch them, if necessary, even if you don't have internet? Do you use this function or not at all?

Senior Professional 1:

Yes, I find that very practical. But I actually always have WLAN in the hotels and so I never actually use the function.

Interviewer:

Okay and then again about the user interface: how important is easy navigation on the site to you? How important is a content recommendation to you?

Senior Professional 1:

Yes, I think it's good. What I find really great about Netflix is that you can watch a trailer almost anywhere, which is meaningful for me, because I don't feel like starting a film and saying oh I don't think that's anything after 10 minutes, but I watch the trailer beforehand for almost everything I watch. And then I also use Netflix's categorisation. If I think I'd like to watch something romantic today, or a documentary, then I go straight to the genre and let Netflix suggest something.

Interviewer:

Ok great! Can you think of anything else you would like to say at the end, what else is important to you about streaming providers or what else you have noticed? Has Netflix changed anything that you think is good or bad?

Senior Professional 1:

I'll have to think about that for a moment. Nothing has changed for me - no, I can't think of anything off the top of my head.

Interviewer:

That could be the case. Then I would just like to finish with a few of your demographic questions. Firstly, how old are you?

Senior Professional 1:

59.

Interviewer:

What gender are you?

Senior Professional 1:

Female.

Interviewer:

And what is your current profession?

Senior Professional 1:

I'm a flight attendant.

Interviewer:

Okay, great! That's actually it already, then I'll stop the recording here for a moment.

Appendix 20: Transcript Interview Senior Professional 2

Personal interview for Persona 3, conducted on 21. September 2024

Interviewer:

Which streaming services are you familiar with?

Senior Professional 2:

Sky, Netflix, Amazon, DAZN, Disney, Paramount, Apple, Wow also from Sky. That's it.

Interviewer:

Are you also familiar with streaming services from German traditional TV channels?

Senior Professional 2:

I only know the media libraries. From ARD and ZDF which I also watch. They basically stream their programme too.

Interviewer:

Do you also know Joyn and RTL plus?

Senior Professional 2:

Yes, because that's what my daughter has subscribed. I've watched them from time to time but the only reason I watch them is so that I can watch HD television. I'm not really interested in the content. It's just that you can watch football, which is then broadcasted and that you can see it in better quality. But I would never subscribe to a streaming service from a private television channel like ProSieben, Sat 1 or RTL.

Interviewer:

Why? Can you give reasons for this?

Senior Professional 2:

Because the content is too bad to use these services and there are too few occasions to use them.

Interviewer:

What would be occasions for you?

Senior Professional 2:

Occasions would be an international football match, which is then shown on RTL or Sat 1 or something like that or football and then I take the accounts from my daughter.

Interviewer:

OK, you already know a lot of streaming services, but you also mentioned that you only use Joyn and RTL+ through your daughter. Which other streaming services do you currently use regularly?

Senior Professional 2:

Yes, if you count Sky, then Sky. DAZN, Netflix and, to a lesser extent, Amazon.

Interviewer:

Can you describe your typical video streaming habits e.g. how often you watch and what types of content you prefer?

Senior Professional 2:

Good question. I watch several times a week, but I wouldn't say daily. That's 50/50 that I watch linear TV, ARD or ZDF, or if there's nothing running, I mainly watch Netflix or current movies or documentaries on Sky. That's my interest. Or sporting events.

Interviewer:

What kind of genres do you like to watch?

Senior Professional 2:

Thrillers and action movies. That's what I primarily watch and documentaries about espionage or historical stuff, something like that or true crime.

Interviewer:

OK. Are there specific features or qualities that differentiate one video streaming platform from another in your opinion?

Senior Professional 2:

Yes, with Netflix it is the case that the subscription actually contains all the content that is available and that you can watch. A distinction is perhaps made between better resolution and poorer resolution. It's different with Amazon, where some content is subject to a fee, just like with Sky, so you have a certain amount of programme, movies, series and sport, but you have to pay for the rest. For example, what's included in Amazon Prime and what's outside of it and then, just like with Sky, you either have to pay €5 to rent a movie depending on how recent the film is or if you actually want to buy the film, depending on how new it is, it can cost €18.00, but I don't actually do that, I'd rather wait a bit.

Interviewer:

In other words, does it mean that you like platforms that you pay, and you have access to all content better?

Senior Professional 2:

Yes.

Interviewer:

Are there any other features that differentiates one from another?

Senior Professional 2:

Well, Netflix is the mother of all streaming services, so I would say that everyone who streams has Netflix in any case and any other platform you add on top. In terms of the user interface, they've all copied Netflix, for example Sky now looks just like Netflix.

Interviewer:

Have you noticed any recent changes in your streaming behaviour or content preferences?

Senior Professional 2:

Not really yet, I spend, let's say, a lot of money on streaming, but I don't actually use it that much, but as I'm quite annoyed by what I'm offered on German television, I'd actually like to switch more in the near future, i.e. from linear to streaming.

Interviewer:

What are you missing with the TV channels? What do the streaming services have that you're missing?

Senior Professional 2:

I'd rather watch something else, than talk shows on TV. So, at certain times on linear television, you have blocks of programme that interest me, for example on Tuesday on ZDF there's a documentary on Wednesday and on Thursday there's actually a crime or thriller on ARD, which I watch. But if the programme doesn't interest me, I'm more likely to pick up a book or use a streaming service.

Interviewer:

But you were only talking about the public channels until now right, so what about channels like ProSieben, Sat 1 and RTL, what are you missing there that you say I will use Joyn or RTL Plus?

Senior Professional 2:

So, all the movies or series that RTL or ProSieben or Sat 1 show, I can just as well watch them somewhere else. They can only show movies in poorer quality on television, and I can find them on Netflix or Amazon anyway and watch them there at any time and without commercial breaks and better quality. I haven't watched movies on these 3 private channels for a long time because the commercial breaks are too long for me. But all the movies that I could watch there, unless it's perhaps an in-house production, I can also find on Netflix. I'm also not the typical reality TV viewer

and that's the main programme of these channels, more or less. For example, on ProSieben linear, the show where two men fly around the world or Saturday evening shows or the summer house of the stars, that's what they offer. But I 'm not the target group for ProSieben, Sat1 or RTL, because I'm simply not interested in that content and therefore also not for their streaming services.

Interviewer:

What specific product attributes (e.g., content quality, platform design, ease of use) do you value most in video streaming services?

Senior Professional 2:

Up-to-date content. But then also that it's available for a long time and doesn't constantly disappear again. Then perhaps recommendations of content and also a ranking of what you watch, what others watch, as is the case with Netflix's ranking, I think that also distinguishes it from Amazon, which doesn't necessarily have such a ranking or recommendations.

Interviewer:

What about price?

Senior Professional 2:

Yes, the price with Amazon is more like, how should I put it, a waste product from Prime. I had already subscribed to Netflix in the USA in 2014, i.e. with an American account, because I was interested in it at the time and I kept it that way and Prime was a waste product because I order quite a lot from Amazon and then it started at 5.99 or so or 6.99 and then I thought okay, you can take that, so it wasn't such a conscious decision, it was more about this fast delivery of articles. But it's also more expensive now. And they also include advertisements now because they probably can't quite cope with the costs anymore.

Interviewer:

So price, is it important to you or not?

Senior Professional 2:

No not really, it's more about content and usability.

Interviewer:

What types of content (e.g., series, movies, sports, documentaries) are most important to you when choosing a video streaming platform?

Senior Professional 2:

For movies, action and thriller mostly Netflix. The same applies to series. So in-house productions, whether they are German or whatever, but it also should be action and thrillers and also documentaries. These apply to the standard streaming services. DAZN is something completely different.

Interviewer:

Do you value original content (produced by the platform) more than licensed content, and how does that affect your choice of platform?

Senior Professional 2:

Yes, that's difficult. You can also find German productions or ARD and ZDF productions, which ultimately end up on Netflix. I don't actually think that's so good, so I place more value on in-house productions, because I've already had the other content, and I don't necessarily need from ARD and ZDF. Or maybe you remember these Sky productions like Babylon Berlin or something like that, I think you can find something like that there too, because of course that's perhaps an advantage if you really want to watch it, because they might not be available on ARD and ZDF in the media libraries, because they're only available temporarily.

Interviewer:

How does the frequency of new content releases (e.g., new shows, exclusive content) influence your loyalty to a video streaming platform?

Senior Professional 2:

I'm actually very loyal, for example I made the Netflix account in 2014. If there was nothing more, I'd switch, but it's always being replenished. There isn't that much different content to be able to add so much more. The production time for a series of 10 episodes is also very long and if you binged it then the content is basically gone in one day. In other words, if all the content is available in one go, then you consume it and then you're frustrated because it doesn't go any further.

Interviewer:

But are you someone who likes it when a new season of a series is divided into two parts and the first part of the season is released and then a month later the second part is released, or do you want to have the complete season in one go?

Senior Professional 2:

Yes, of course you'd rather have all of them in one go, but then it's directly gone. For example, my wife and I used to watch True Detective with Jodie Foster on Sky, a Sky production or HBO actually and Sky only really released it on Mondays, and we started right at the beginning, so they weren't all available yet, and then we really waited for it on Mondays, longing to be able to watch it and see how it went. That keeps the tension high.

Interviewer:

You just mentioned that you watch with your wife. Are you more likely to watch in company or do you prefer to watch alone?

Senior Professional 2:

Well, my wife, my daughter and I don't necessarily have a consensus on what we want to watch. Then I often go and watch something else than the two of them. However, it depends. On weekend we sometimes watch all together.

Interviewer:

How do different subscription options (e.g., monthly vs. yearly, ad-supported vs. premium) impact your decision to subscribe to or stay with a video streaming service?

Senior Professional 2:

With some video streaming services, you don't even have the option to choose. I don't know how it is, but with Sky there's always one or two commercials in front of it, so I couldn't buy it without ads. And I think it's the same with Amazon, so of course I'd rather pay €2 - €3 more and not have any advertising.

Interviewer:

How does streaming quality (4K, HD), buffering, or smooth performance impact your satisfaction and loyalty to a video streaming platform?

Senior Professional 2:

You've seen that I do pay attention to the quality. But I think there aren't any video services where this doesn't work at all, so it probably doesn't have that much of an impact or influence on a decision. Well, as for Netflix, I don't have the maximum quality which is UHD, but left it with HD, if I'm not mistaken, and I think you could go one level higher, but I haven't done that now because I think it's fine the way it is. With DAZN there are more frequent disruptions, but maybe that's also technically due to the fact that a lot of viewers suddenly watch it for an hour and a half or so and it declines again. With the streaming services, it's more spread across the day.

Interviewer:

How important are advanced features like offline viewing, streaming on multiple devices, or downloading for later?

Senior Professional 2:

No, so that's not a reason for me to buy it, because I don't use so much data volume on my cell phone that I would download anything offline beforehand. For me, watching offline would only be of interest if I went somewhere where I didn't have a connection, but that's not the case at the moment.

Interviewer:

What about streaming on multiple devices?

Senior Professional 2:

Yes, we're not such high-performance streamers. I should have the option to watch it on my laptop and tablet and if I'm limited to that, then I also throw off my cell phone, so if I have a problem with the number, then I focus it on TV and laptop, where it's bigger. But in general, it is not an exclusion criterion, if a platform doesn't allow to register multiple devices.

Interviewer:

How does the design of the platform (ease of navigation, search functions) and the quality of content recommendations affect your experience with video streaming services?

Senior Professional 2:

I don't see that many differences, so they're all the same more or less - Sky, Paramount, Netflix - they all look the same. They have a bar on the left where you can scroll through, and then the films are actually displayed in groups, depending on how big the screen is. What's important to me, and this only relates to Sky, because all other platforms are available on all televisions and on all laptops. Only for Sky there's an app only for an LG TV and for a Samsung TV, if you deviate from that, then you don't have this app.

Interviewer:

How important are social features like watch parties, sharing recommendations, or live chat in enhancing your experience with a video streaming service?

Senior Professional 2:

That's not important for me.

Interviewer:

Do reviews and ratings influence what you watch?

Senior Professional 2:

When I go through the platform and if I don't find anything right away or I'm unsure whether I should watch the movie, then I read the first row of comments in the rating to see if it's worth it and I also look at the stars. You probably know that sometimes, you have movies from different countries that you often don't know. For example, I once watched a Polish crime movie and I watched it because the ratings were good because usually movies from, for example, Finland, Russia or Poland are less present in Germany.

Interviewer:

So that was my last question. Would you like to add anything else?

Senior Professional 2:

No.

Interviewer:

Then I would quickly need your demographic data. What is your age?

Senior Professional 2:

61.

Interviewer:

What is your gender?

Senior Professional 2:

Male.

Interviewer:

What is your current occupation?

Senior Professional 2:

I am a project engineer.

Interviewer:

Thank you for your participation and insights and have a great day. Bye Bye.

Senior Professional 2:

Thank you, for you too. Bye.

Appendix 21: Transcript Interview Senior Professional 3

Personal interview for Persona 3, conducted on 20. September 2024

Interviewer:

Ok great, let's get started. Which Streaming platforms are you aware of?

Senior Professional 3:

So of course, the most important service I know is Netflix. The others that I know are, for example, Amazon Prime, Sky, Disney+, and as far as I know there are also some private TV channels here in Germany that have probably started streaming very late.

Interviewer:

And which of these are you currently using?

Senior Professional 3:

I only use Netflix at the moment, to be fair I did try Disney and Amazon Prime for a few months, but I didn't like them very much. That's why we cancelled those again and now only use Netflix regularly.

Interviewer:

Can you describe a bit about your video streaming behaviour, i.e. how often you watch videos and what kind of content?

Senior Professional 3:

I'm working fewer hours now since I'll be retiring soon, so I have more time now for streaming - in the past I didn't have so much time, for example last year I only had time to watch a film at the weekend. That's why it depends a lot on the consumers and how much time they have or which social circles these people come from. So I have a lot of time now and that's why I now use Netflix to watch films, although I have to say in brackets that there are also a lot of international films, which is something that we don't have here in Germany, for example, with the private and state broadcasters, and Netflix is like that, that you have a lot of options here in terms of themes and there are so many directions, so you can watch the films, for example, I like to watch science fiction films myself on the other state television channels, so I only have 2 and 3 opportunities a month to watch a lot of films, but on Netflix, for example, I can watch a lot of science fiction films. Yes, I have this luxury with Netflix and Netflix does it very intelligently by of course also offering these foreign films and there are short films and feature films, which I'm all very interested in.

Interviewer:

Thanks for that. Are there also certain features or characteristics that you think distinguish a video streaming platform from others, so we've already talked about Netflix and how it differs from other platforms. Do you have any more ideas?

Senior Professional 3:

I can't differentiate or compare it with many others because I haven't used the option of watching something with Amazon and Disney, so that means Netflix not only gives people in Germany a variety of choice, but worldwide it gives its consumers the opportunity to watch a variety of things. Films, series, documentaries, so really a variety of things that people can watch, which is why Netflix is much more successful than the others. That's the variety that Netflix currently has on offer.

Interviewer:

Have you noticed any differences in your streaming behaviour recently? So, anything that you particularly liked or didn't like?

Senior Professional 3:

What I don't like at the moment are these new settings on Netflix where you can't watch anything seamlessly. I understand that you have to earn money too, but confirming the account every time is very, very tedious for us, especially for the older generation, and I think they will lose a lot of customers as a result.

Interviewer:

Thank you. And what specific characteristics, such as quality, user-friendliness or the range of content, are most important to you when it comes to video streaming platforms?

Senior Professional 3:

Ease of use. As I said, especially older people who are not entirely familiar with these tools. User-friendliness is the be-all and end-all. Netflix has got that very well because they've made it very simple. Which is not the case with Amazon and Disney and of course they copy Netflix. But Netflix makes it very, very easy.

Interviewer:

And do you place more value on original content that was produced by Netflix, for example, or on feature films that were also shown in the cinema?

Senior Professional 3:

So basically, I prefer both. But the danger of course with Netflix-produced films is that Netflix can also form an opinion politically. So they can deliberately brainwash the products they produce, and I see that very often. So let's say I see a great danger of a propaganda machine coming into effect. Which is not so dangerous now but could be in the near future.

Interviewer:

How does the frequency of the release of new content or series influence their loyalty to streaming platforms?

Senior Professional 3:

Already a lot. If there were too many repetitions, my interest would also wane. The fact that there are always new things and I'm always presented with new opportunities naturally influences me to keep coming back. So that's important for me

Interviewer:

And does streaming quality have the same effect on their loyalty?

Senior Professional 3:

Yes, of course. It must not be delayed. In this day and age, even a fraction of a second is too much. These transitions have to work. If it takes too long, people will switch. It's happened to me a few times with other streaming platforms, so I've switched and ended up back at Netflix.

Interviewer:

And how does this affect the subscription options for you? So, would they be more likely to stay longer if there were more attractive options for them?

Senior Professional 3:

Yes, that is of course a key question. Tastes are different, consumers are different. It always depends, as I said, on how much purchasing power people have, what country people live in.

I would say that time will tell, but I say that as someone who has worked in sales for decades.

If we talk about Netflix, for example, they have become successful and they have become the strongest with their various subscription options. It's the same with different phone providers,

They're still competing against big phone providers. I'm not a fan of all these different packages. I would rather be a fan of one general price. And the different packages confuse people. But that's my opinion.

Interviewer:

Thank you so much. Lastly a few demographic questions. How old are you?

Senior Professional 3:

I am 63 years old.

Interviewer:

How do you identify your gender?

Senior Professional 3:

Male

Interviewer:

What is your current occupation?

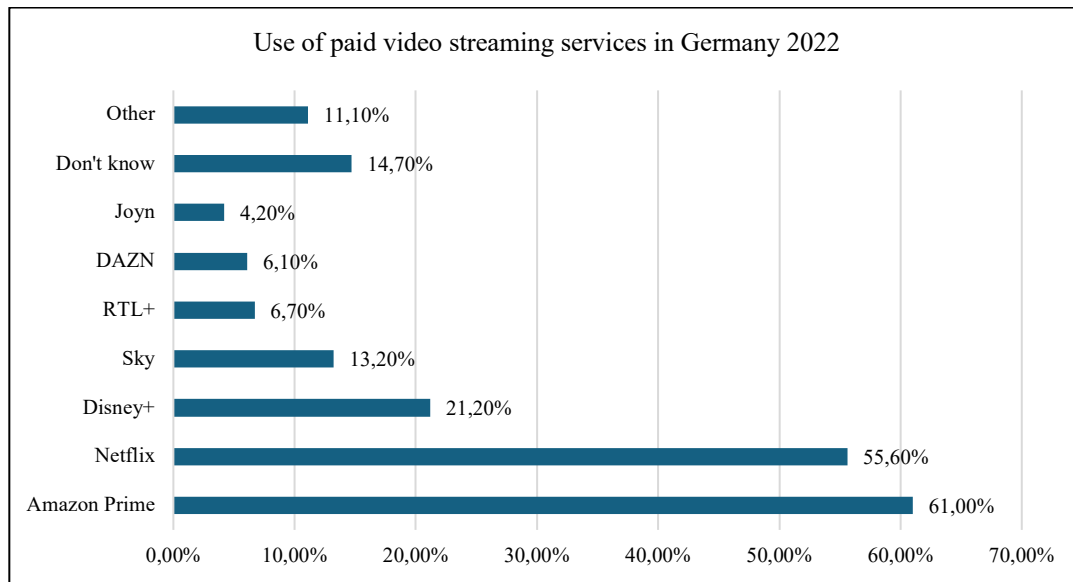
Senior Professional 3:

I am a sales manager

Interviewer:

Thank you so much for taking the time to have the interview today.

Appendix 22: Use of Paid VOD Services in Germany (2022)



Source: W&V.2022. "Which of these paid streaming services do you use?" Statista. June 22, 2022.

<https://www.statista.com/statistics/1385089/paid-video-streaming-services-use-germany/>.

Appendix 23: Questions from the Consumer Perception Survey

Dear Participant,

Thank you for taking the time to participate in this survey. This survey is part of a master's thesis written by five students at Nova School of Business and Economics. The purpose of this study is to understand consumer perceptions of video-on-demand streaming services in the German market.

All answers will remain anonymous and all information you provide will be used for research purposes only. It will take approximately 5-7 minutes to complete.

If you have any questions or concerns regarding this study, please contact 57503@novasbe.pt

P. S: This survey contains credits to get free survey responses at SurveySwap.io

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

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

	☐ 1-2 hours ☐ 3-4 hours ☐ 5+ hours
How much money do you spend per month for video-on-demand streaming platforms?	☐ 0€ - 5€ ☐ 6€ - 10€ ☐ 11€ - 15€ ☐ 16€ - 20€ ☐ 21€ - 25€ ☐ 26€ - 30€ ☐ More than 30€

Appendix 24: Attributes and Levels Overview

Product attributes	Levels (i.e., what the attributes can be like)
Brand This attribute represents the brand name, SKU, or pricing tier. ⓘ	Netflix Amazon Prime Video Disney+ RTL+ Joyn
Content type This attribute is a feature of the product. ⓘ	Movies & Series Movies & Series, Documentaries Movies & Series, Sports livestreaming Movies & Series, Reality TV Movies & Series, Documentaries, Sports livestreaming, Reality TV
Content origin This attribute is a feature of the product. ⓘ	Local (German) International Local & International
Name for reporting User interface User interface (see descriptions below) This attribute is a feature of the product. ⓘ	Basic Intermediate Advanced
Personalization / Recommendations This attribute is a feature of the product. ⓘ	Content-based filtering system Collaborative filtering system Hybrid system
Content exclusivity This attribute is a feature of the product. ⓘ	No exclusive content Some exclusive content High amount of exclusive content
Advertisements This attribute is a feature of the product. ⓘ	Ad-based service Ad-free service
Monthly fee This attribute is a price paid by customers. ⓘ	Free (Ads & Limited content) 6.99€ 9.99€ 13.99€

Source: Conjoint.ly

Appendix 25: Brand and Level Combinations

Levels	Netflix	Amazon Prime Video	Disney+	RTL+	Joyn
Content type					
Animated & Series	☒	☒	☒	☒	☒
Animated & Series	☒	☒	☒	☒	☒
Animated & Series, Sports	☒	☒	☒	☒	☒
Animated & Series, Reality TV	☒	☒	☒	☒	☒
Animated & Series, Documentaries, Sports, Reality TV	☒	☒	☒	☒	☒
Content origin					
Local (German)	☒	☒	☒	☒	☒
International	☒	☒	☒	☒	☒
Local & International	☒	☒	☒	☒	☒
User interface					
Basic	☒	☒	☒	☒	☒
Intermediate	☒	☒	☒	☒	☒
Advanced	☒	☒	☒	☒	☒
Display options / Presentation					
Content-based streaming	☒	☒	☒	☒	☒
Content-based streaming custom	☒	☒	☒	☒	☒
Fixed custom	☒	☒	☒	☒	☒
Content restrictions					
No available content	☒	☒	☒	☒	☒
Some available content	☒	☒	☒	☒	☒
High amount of available content	☒	☒	☒	☒	☒
Advertisements					
Ad-free service	☒	☒	☒	☒	☒
Ad-free service	☒	☒	☒	☒	☒
Monthly fee					
Free (Ads & Limited content)	☒	☒	☒	☒	☒
4.99€	☒	☒	☒	☒	☒
9.99€	☒	☒	☒	☒	☒
13.99€	☒	☒	☒	☒	☒

Source: Conjoint.ly

Appendix 26: Prohibited Level Combinations

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).

Ad-free service

will not show with

Free (Ads & Limited content)

Source: Conjoint.ly

Appendix 27: Additional Questions

Have you used or are you aware of video streaming platforms (i.e. Netflix, Amazon Prime, Disney+, Joyn, or RTL)?

Are you German or reside in Germany?

What is your age?

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

By what gender do you identify?

Female	Male	Non-binary
Prefer not to say		

What is your current occupation?

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

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

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

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

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

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

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

Source: Conjoint.ly

Appendix 28: Report Tabs Conjoint.ly

Insights	Time series	Crosstab	Simulations	Pivot tables	TURF analysis	Segmentation	Weights
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Source: Conjoint.ly

Appendix 29: Questionnaire Joyn and the Future of Digital Entertainment

Description:

Welcome to our survey!

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

Difference between Joyn & Joyn PLUS+

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

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

Questions:

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

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

Open question

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

Scale 1-5

- 1 being Very Unsatisfied
- 5 being Very Satisfied

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

Multiple selections possible:

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

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

Open Question

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

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

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

Open Question

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

Open Question

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

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

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

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

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

Open Question

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

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

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

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

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

Scale 1 to 5

- 1 being Very Poor Value
- 5 being Excellent Value

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

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

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

Scale 1 to 5

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

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

Open question

Demographic Questions

20. **What is your age?**

- Under 18
- 18-24
- 25-34

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

22. By what gender do you identify?

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

23. What is your current occupation?

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

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

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

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

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

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

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

Appendix 30: Pre-Screening Questions

Variable	Frequency	Percent
<i>Are you German or do you currently live in Germany?</i>		
Yes	98	95%
No	5	5%
Total	103	100%

Do you have experience with Joyn?

Yes, I have used it in the past	23	23%
---------------------------------	----	-----

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

Source: Author calculations.

Appendix 31: Reasons for not using Joyn (non-users)

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

Source: Author calculations.

Appendix 32: Motivations to use Joyn (non-users)

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

Source: Author calculations.

Appendix 33: Demographic profiles of the respondents

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

Age

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

Occupation status

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

*Source: Author calculations.***Appendix 34: Behavioural profiles of the respondents**

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

Average viewing time (per sitting)

Less than 1 hour	0	0%
1-2 hours	46	58%

3-4 hours	31	38%
5+ hours	3	4%
Total	80	100%

Monthly spend

0€ - 5€	21	26%
6€ - 10€	12	15%
11€ - 15€	2	3%
16€ - 20€	11	14%
21€ - 25€	16	20%
26€ - 30€	8	10%
More than 30€	10	12%
Total	80	100%

Source: Author calculations.

Appendix 35: Perceptions of what Joyn does better than other streaming services

Variable	Frequency	Percent
<i>What do you think Joyn does better than other streaming services?</i>		
Free Accessibility	2	3%
Free Accessibility, Exclusive Originals, Live TV Integration, Frequent collaborations with trending personalities, Featuring trending topics	1	1%
Free Accessibility, Live TV Integration	6	8%
International content; Exclusive Originals	1	1%
International content, Exclusive Originals, Live TV Integration	1	1%
International Content, User Interface, Free Accessibility, Live TV Integration	1	1%
Live TV Integration	9	1%
Local Content, Exclusive Originals	1	11%
Local Content, Free Accessibility, Exclusive Originals	12	1%
Local Content, Free Accessibility, Exclusive Originals, Live TV Integration	1	15%
Local Content, Free Accessibility, Exclusive Originals, Live TV Integration, Multi Device Streaming	6	8%
Local Content, Live TV Integration	6	8%
Depends on the show	4	5%
Pricing Options, Free Accessibility, Live TV Integration, Less advertisement	1	1%
User Interface, Free Accessibility	1	1%
None stand out	12	15%

Nothing filled	15	19%
Total	80	100%

Source: Author calculations.

Appendix 36: Reasons for using Joyn (Current & past users)

Variable	Frequency	Percent
<i>What is or was your main reason for using Joyn?</i>		
I only use it for one show at the moment	4	5%
It has local or regional content I enjoy, It has specific shows or movies I like	15	19%
It has specific shows or movies I like	25	31%
It has specific shows or movies I like, It offers a good variety of content in my preferred genres	1	1%
It has specific shows or movies I like, Using Account of my daughter	1	1%
It offers free content	15	19%
It offers free content; It has local or regional content I enjoy; It has specific shows or movies I like	10	13%
It offers free content, It has local or regional content I enjoy, It has specific shows or movies I like	3	4%
It offers free content, It has specific shows or movies I like, It offers a good variety of content in my preferred genres	5	6%
It offers free content, It has specific shows or movies I like; Quick and easy cancellation	1	1%
Total	80	100%

Source: Author calculations.

Appendix 37: Content that attracted to use Joyn

Variable	Frequency	Percent
<i>What kind of content attracted you to start using Joyn? (Please give specific titles, e.g. "Jerks")</i>		
Germany's Next Topmodel	16	15%
Jerks	10	9%
Trash TV / Reality TV in general	10	9%
Promi Big Brother	9	8%
Joko und Klaas	8	7%
The Taste	7	7%
Big Brother	5	5%
Grey's Anatomy	5	5%
Keeping Up with the Kardashians	4	4%
Late Night Berlin	3	3%

Live TV	3	3%
Legacies	2	2%
Wer stiehlt mir die Show?	2	2%
Das große Backen	2	2%
Rosins Restaurant	2	2%
The Voice of Germany	2	2%
Slumdog Milionaire	1	1%
NFL	1	1%
Amore unter Palmen	1	1%
Liebe hinter Gittern	1	1%
Schlag den Star	1	1%
Achtung Abzocke	1	1%
Beauty and the Nerd	1	1%
HIP	1	1%
Forsthaus Rampensau	1	1%
Intimate	1	1%
KEKs	1	1%
Das große Promi Büßen	1	1%
Mask Off	1	1%
Galileo	1	1%
Check Check	1	1%
Der Upir	1	1%
Restaurant and cook programmes	1	1%
Total	107	100%

Source: Author calculations.

Appendix 38: Perceptions of what content is missing on Joyn

Variable	Frequency	Percent
<i>What type of content do you feel is missing or underrepresented on Joyn?</i>		
I am satisfied with their content types	16	20%
More shows or educational content	5	6%
More international content	17	21%
More movies	21	26%
More reality TV	15	19%
More current seasons of series	2	3%
Unique own productions	4	5%

Total	80	100%
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Source: Author calculations.

Appendix 39: Improvement suggestions for Joyn's reliability

Variable	Frequency	Percent
<i>Which of the following would improve your experience with Joyn's reliability?</i>		
Better selection of movies or Series	7	9%
Faster load times	8	10%
Faster load times, Fewer streaming interruptions	10	13%
Faster load times, Fewer streaming interruptions; Improved video quality	4	5%
Fewer streaming interruptions	16	20%
Fewer streaming interruptions, Improved video quality; Better customer service when issues arise	9	11%
I am satisfied with Joyn's reliability	20	25%
Own productions like "Netflix Originals"	4	5%
Less advertisement	1	1%
Nothing filled	1	1%
Total	80	100%

Source: Author calculations.

Appendix 40: Joyn's paid tier

Variable	Frequency	Percent
<i>What would make Joyn's paid tier (Joyn plus) more appealing to you?</i>		
Better Device Support, Enhanced Download Capabilities	1	1%
Enhanced Download Capabilities, Early Access to New Releases	1	1%
Fewer Ads	19	24%
Fewer Ads, Early Access to New Releases	13	16%
Fewer Ads, Higher Quality streaming	1	1%
Fewer Ads, Higher Quality streaming, Early Access to New Releases	1	1%
Fewer Ads, Higher Quality streaming, Enhanced Download Capabilities, Family or Group Plans, Early Access to New Releases	1	1%
Fewer Ads, Higher Quality streaming, Enhanced		
Download Capabilities, Loyalty Rewards	8	10%
More exclusive content, Fewer Ads, Live Sports and Events	23	29%
More exclusive content, Fewer Ads, Early Access to New Releases	9	11%
More exclusive content, Fewer Ads, Early Access to New Releases, Loyalty Rewards	1	1%

More exclusive content, Fewer Ads, Higher Quality Streaming	1	1%
More exclusive content, Fewer Ads, Live Sports and Events, Early Access to New Releases	1	1%
Total	80	100%

Source: Author calculations.

Appendix 41: Perceptions about commercials or ads on Joyn

Variable	Frequency	Percent
<i>How do you feel about the commercials or ads on Joyn?</i>		
I don't mind the ads because the content is worth it	3	4%
I have Joyn PLUS+ without ads	1	1%
They are too frequent	49	61%
They are too frequent, They are well balanced and don't interrupt too much	1	1%
They are well balanced and don't interrupt too much	26	33%
Total	80	100%

Source: Author calculations.

Appendix 42: Joyn's Shortcomings

Variable	Frequency	Percent
<i>Where do you think it falls short? Are there any specific features on other streaming platforms that you would like to see implemented on Joyn? Please describe.</i>		
Too celebrity-focused	1	1%
Expand content	17	21%
No specific issues	10	13%
Reduce advertisements	7	9%
Add documentaries and niche content	18	23%
Improve user experience	3	4%
Improve recommendations	1	1%
Improve content availability	2	3%
Add interactive features	6	8%
General dissatisfaction	5	6%
Enable Downloads	10	13%
Total	80	100%

Source: Author calculations.

Appendix 43: Importance of social interaction features

Variable	Frequency	Percent
<i>How Important are social interaction features such as commenting, live chats, and watch parties to you when using a streaming service like JOYN?</i>		
1 (not very important)	17	21%
2	11	14%
3	16	20%
4	23	29%
5 (very important)	13	16%
Total	80	100%

Appendix 44: Overall satisfaction with Joyn (Current & past users)

Variable	Frequency	Percent
<i>On a scale from 1 to 5, where 1 is 'very unsatisfied' and 5 is 'very satisfied,' how would you rate your overall satisfaction with Joyn?</i>		
1 (Very unsatisfied)	0	0%
2	14	18%
3	32	40%
4	29	36%
5 (Very satisfied)	5	6%
Total	80	100%

Source: Author calculations.

Appendix 45: Value for money

Variable	Frequency	Percent
<i>How do you consider the cost of Joyn compared to other services and how do you perceive the value for money?</i>		
1 (very poor value)	1	1%
2	11	14%
3	31	39%
4	27	34%
5 (excellent value)	10	12%
Total	80	100%

Source: Author calculations.

Appendix 46: Willingness to pay

Variable	Frequency	Percent
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How much are you willing to pay for Joyn?

Nothing, I would only use the free version	41	21%
6,99	31	14%
9,99	9	20%
Total	80	100%

Source: Author calculations.

Appendix 47: Future Expectations

Variable	Frequency	Percent
<i>What are your expectations from Joyn in the future? What key changes or improvements would make you more likely to continue using Joyn?</i>		
Improve competitiveness	1	1%
Better content	28	35%
Improve reality TV	7	9%
Reduce advertisements	15	19%
Neutral or unclear feedback	6	8%
Invest in original productions	3	4%
Positive Feedback	1	1%
Negative Feedback	2	3%
Improve App Functionality	4	5%
Expand international content	9	11%
Merge with other platforms	2	3%
Improve Market presence	1	1%
General improvement	1	1%
Total	80	100%

Source: Author calculations.

Appendix 48: Perception of Joyn's Uniqueness

Variable	Frequency	Percent
<i>Do you think Joyn is unique? Please specify:</i>		
Joyn is generally perceived as not unique	24	30%
It is similar to other competitors	10	13%
The free accessibility is unique	9	11%
Joyn is generally perceived as unique	7	9%
It offers unique series	5	6%
There are more unique competitors	4	5%
The content is not unique	4	5%

Neutral	4	5%
The local content is unique	4	5%
It is not unique, except for some shows	3	4%
It is boring	2	3%
The trash tv offerings are unique	2	3%
The Live TV integration is unique	1	1%
The user interface is unique	1	1%
Total	80	100%

Source: Author calculations.

Appendix 49: Perception of Joyn's Entertainment

Variable	Frequency	Percent
<i>Do you think Joyn is entertaining? Please specify:</i>		
Some shows are entertaining, but not the platform overall	15	19%
Joyn is generally perceived as entertaining	17	21%
Neutral or unclear feedback	2	3%
Joyn is only entertaining for specific demographics or focus groups	1	1%
Joyn's trash TV offerings are entertaining	12	15%
Joyn's content is okay but mediocre	4	5%
Joyn is not entertaining	29	36%
Total	80	100%

Source: Author calculations.

Disclaimer: Utilisation of Artificial Intelligence (AI)

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

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