

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 LITERATURE REVIEW**

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17/12/2024

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 transition from linear TV to digital consumption is highlighted in this literature study, which examines the development of the video streaming business in Germany. Local service providers Joyn and RTL+ face competition from global platforms such as Netflix, Amazon Prime, and Disney+. While AVOD gains pace, subscription-based (SVOD) and hybrid models predominate. Among the difficulties include growing competitiveness, monetization issues, and GDPR restrictions. Platform success is driven by tactics like network effects, behavioral pricing, and customer lifetime value (CLV). Sustainable expansion is ensured by the improved adaptability of modular platform design. The results highlight the importance of innovation, content differentiation, and strategic business models in preserving competitiveness in Germany's changing streaming market.

Group Part

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

This work used infrastructure and resources funded by Fundação para a Ciência e a Tecnologia (UID/ECO/00124/2013, UID/ECO/00124/2019 and Social Sciences DataLab, Project 22209), POR Lisboa (LISBOA-01-0145-FEDER-007722 and Social Sciences DataLab, Project 22209) and POR Norte (Social Sciences DataLab, Project 22209).

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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,

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accounting for only 5.4% and 8.4% of the market, respectively (Statista 2024c).

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

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

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

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

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

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

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

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

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

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favourable position, exhibiting negative scores on reputation and individuality. Furthermore, CA revealed that in the German VOD streaming market, consumers identify content type and price as the most critical attributes, with international platforms like Netflix and Amazon Prime Video consistently favoured over local competitors.

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

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

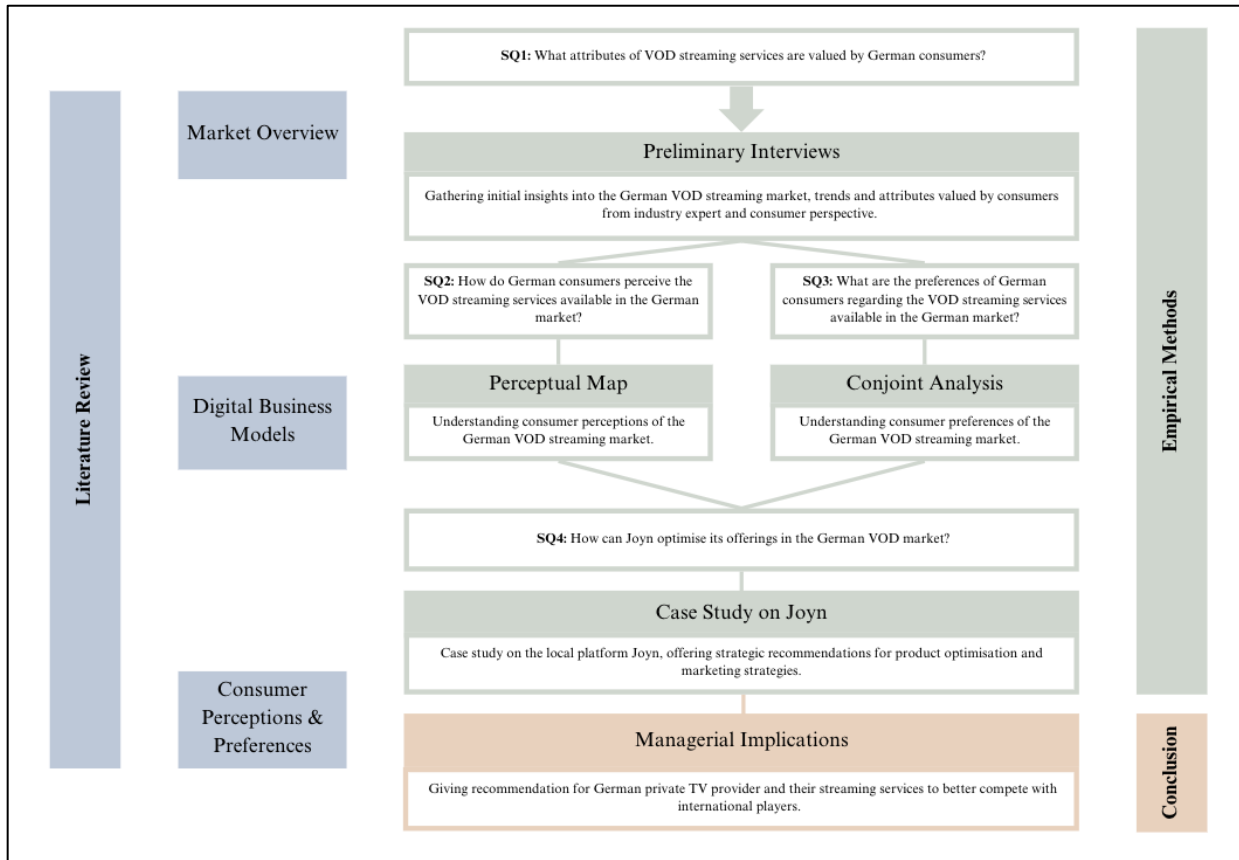


Figure 1: Thesis' Mixed-Method Approach

2. Literature Review

2.1 The German Market

2.1.1 Historical Evolution of the German Television Market

Launching the dual broadcasting system in Germany in the 1980s and 1990s was a significant step in the development process of the television landscape (Humphreys 1999). Such a media-political 'big bang' has redefined competition one more time and created commercial private networks like RTL, ProSieben and Sat.1, which have extended the choice of viewers (Humphreys 1999; Siegert et al. 2015). This change created a more pluralistic and innovative media landscape in Germany (Siegert et al. 2015; Fagerjord and Kueng 2019). Private TV providers prioritizing

viewers and ratings posed a challenge to public television providers such as ARD and ZDF, which base their content on high journalistic standards (Eichler 2023; Siegert et al. 2015).

A shift from linear to digital broadcasting towards the end of 2005 propelled the way into the streaming age (Rauch, Rösch, and Kuchinke 2024). With the transition from linear TV to digital broadcasting and the growth of high-speed internet, viewership in television has changed radically (Fagerjord and Kueng 2019; see Appendix 1). These changes led to a rising demand for VOD services (Rauch, Rösch, and Kuchinke 2024; Fagerjord and Kueng 2019; Lotz, Eklund, and Soroka 2022). The VOD streaming services that originated in the United States of America have altered global media consumption (Lotz, Eklund, and Soroka 2022). These platforms are geared toward young audiences, who are the mainstay of on-demand viewing that displaces linear video consumption (Sahoo 2024). The move to on-demand streaming has heightened the demand for quality, flexibility, and increased control over media consumption (Rauch, Rösch, and Kuchinke 2024; Fagerjord and Kueng 2019). The improved picture and sound quality enabled TV providers to develop new and better offerings (Rauch, Rösch, and Kuchinke 2024; Fagerjord and Kueng 2019; Urbanek 2023). As such, the combination of shifting expectations on the part of viewers, the rise of broadband internet, and the proliferation of digital devices created the conditions at the arrival of VOD streaming services such as Netflix and Amazon Prime Video (Fagerjord and Kueng 2019). Corporations like ARD and ZDF increased their investments in developing a media library of the public broadcaster (Public Media Alliance 2021). This move is aimed to balance the demand for a traditional public service against those of a rapidly digitizing media landscape (Public Media Alliance 2021). In 2024, furthering this strategy was a joint open-source initiative to develop a shared streaming network to enhance collaboration among public broadcasters, thus increasing operation efficiency in competition with global competitors (ZDF 2024). The two corresponding private streaming platforms of German private TV providers are Joyn and RTL+ (Statista, 2024c).

RTL+ specializes in presenting reality shows while Joyn focuses on live TV and local series (ProSiebenSat.1 Media SE 2024b; RTL Group 2024). Joyn and RTL+ are in fierce competition with the international players (Statista 2024c). Netflix has focused on producing original and high-quality content by itself (Jaworski 2021). The company invested about \$17 billion in 2024 in new content (Stoll 2024). The German Netflix Original series *Dark* can be considered as one of its high-quality series (Netflix 2016). Despite the high costs that arise for Netflix with this strategy, the image of high quality as a streaming provider is valuable for Netflix (Westberg 2024; Rahe, Buschow and Schlütz 2021). Disney+ has various film franchises, which fits in with its strategy of being a family content provider (Zhang 2023a). The Marvel and Star Wars franchises are particularly noteworthy here (Zhang 2023a). Disney+ is relying on the familiarity of these franchises and the nostalgia of consumers (Soares et al. 2022). However, this strong profiling also harbours the risk that consumers with conflicting interests will not use Disney+ (Soares et al. 2022; Zhang 2023b). On the other hand, Amazon Prime Video offers streaming bundled with its Prime membership (streaming service and prime shipping), which, in Germany, has wildly succeeded (Statista 2024c; Rahe, Buschow, and Schlütz 2021). It extends other offerings beyond streaming, which results in attracting a larger number of subscriptions (Rahe, Buschow, and Schlütz 2021).

Analysing the German VOD streaming market more comprehensively, Netflix regained its leading position in market share with 20.9% in Q1, 2024. Amazon Prime Video stands at 18.7% and Disney+ follows at 17.3% (Statista 2024c; see Appendix 2). With Joyn and RTL+, local players increased their stakes to 8.4% and 5.4%, respectively (Statista 2024c; see Appendix 2).

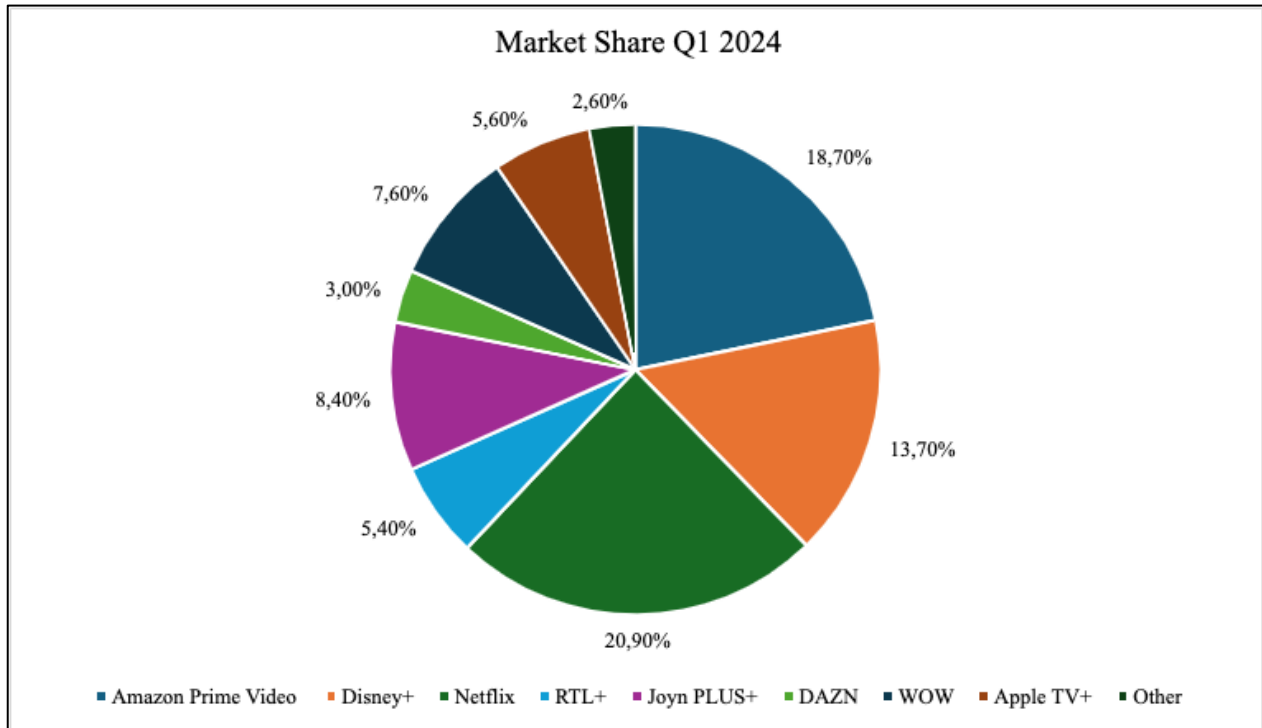


Figure 2: Market Share of SVOD Platforms in Germany for New Subscriptions Q1 2024 based on Statista 2024c

2.1.2 Rise of Digital Consumption in Germany

The growth of the Subscription Video-on-Demand (SVOD) market in Germany is at the top of the current development (Statista 2024e). Here, the total number of subscriptions per household overcame 3 in early 2023 (Statista 2024e; see Appendix 3-4). Consequently, the SVOD service subscriptions have risen to 41.8 million in Germany (Statista 2024e; see Appendix 3). The analysis shows that 22.7 million households in Germany had at least one streaming account by the end of 2023 (Statista 2024e; see Appendix 3-4). The number of subscriptions rose continuously in the last 5 years up to the end of 2023 (Statista 2024a; Statista 2024e; see Appendix 4-5).

A Nielsen report shows that 77% of German users used VOD services every week in 2024, replacing linear providers at the top (Nielsen 2024a). This was particularly evident among younger users, with 92% of 18-34-year-olds using VOD services weekly (Nielsen 2024a). Streaming services are often habitual, so users can break active routines (Camilleri and Falzon 2020). Younger

users, especially, watch many episodes through binge-watching (Steiner and Xu 2018; Panda and Pandey 2017). Binge-watching refers to watching several series episodes simultaneously (Steiner and Xu 2018; Panda and Pandey 2017). It is often considered a mechanism of engaging oneself in relaxation, social acculturation, and a sense of completion, but it is also regarded as escapism and cultural engagement (Steiner and Xu 2018; Panda and Pandey 2017).

2.1.3 Challenges to Linear TV

VOD streaming confronts linear television, conventional in style, which has long existed under the formula of a curiously associated structure of regular programming with fixed broadcast times (Fagerjord and Kueng 2019).

In the last few years, linear TV has been crippled by the growing disinterest of audiences in linear viewing (Hennig-Thurau, Ravid, and Sorenson 2021; see Appendix 7, 8 and 9). Traditionally, linear TV had been characterized by a certain rigidity (Hennig-Thurau, Ravid and Sorenson 2021). Viewers needed to watch programmes at a definite time (Hennig-Thurau, Ravid, and Sorenson 2021). The relative ease with which on-demand streaming services permit the audience to view content weakens traditional dependencies on linear television viewing (Hennig-Thurau, Ravid, and Sorenson 2021). A survey conducted by Kantar on behalf of Zattoo in 2023 revealed that 47% of German respondents use catch-up services from VOD streaming services to watch programmes they have missed (Zattoo 2023).

While VOD services can offer customised content, linear TV providers have the difficulty of adapting the content shown to the respective age groups (Hennig-Thurau, Ravid, and Sorenson 2021). The situation is additionally complicated by increased consideration of diverse international content that streaming services provide to many more options concerning various viewer tastes (Rahe, Buschow, and Schlütz 2021). Steep declines in scheduled viewership have led to losses in advertising revenue for linear TV, a traditionally key revenue source for commercial players

(Statista 2024f). A 2021 report from PwC finds more German viewers positively inclined toward targeted advertising on streaming platforms (PWC 2021). These bear testimony to the shaping up of the evolving effectiveness of personalised advertising in the digital realm and accentuate the tough competition faced by linear television for advertising (PWC 2021).

Unlike broadcast companies, streaming services largely run ad-free or incorporate targeted advertising, leaving them free of shortcomings like traditional TV with generalized advertisement (Schauerte, Feiereisen and Malter 2020). Thus, traditional broadcasters should hastily improvise or change their business models towards the distribution of revenue, advertising, and others (Schauerte, Feiereisen and Malter 2020).

Linear broadcasters in Germany undertook a range of adaptations to promote these changes (Schauerte, Feiereisen and Malter 2020). A critical approach was building own VOD streaming platforms and offering on-demand viewing to compete with SVOD giants (Schauerte, Feiereisen and Malter 2020). Despite these challenges, such platforms have become vital to retaining audiences, especially to those, who are increasingly inclined to consume content digitally (Schauerte, Feiereisen and Malter 2020).

A recent report filed by Ampere Analysis in 2023 indicates audiences for live sports in Germany are incrementally leaning toward VOD streaming (Liversedge 2023, see Appendix 9-10). For example, the quarter-finals match of the UEFA Champions League between Bayern Munich and Manchester City became the most-watched match on Amazon Prime Video, with 4 million households viewing this match (Liversedge 2023). This was nearly a quarter of all the subscriber base present in Germany (Liversedge 2023; Statista 2024c). The general trend goes towards people being fascinated by streaming because only 28% of all German sports fans still prefer linear television for watching sports, while 39% of users prefer VOD streaming services (Liversedge 2023, see Appendix 11). Therefore, growth toward wider adoption of streaming platforms to reach

live sports audiences is encroaching, potentially challenging the traditional dominance of linear TV in this area (Liversedge 2023).

Another trend is the multiplatform approach, where TV providers offer their content on different platforms such as social media, YouTube and dedicated apps (Stollfuß 2019, Appendix 11). By distributing clips, teasers and entire episodes across digital and social platforms, TV providers try to remain visible and relevant in an increasingly fragmented media landscape, especially for younger viewers who are more active on social media (Stollfuß 2019). An example for this is the establishment of the network *Funk* by ZDF and ARD in 2016 (Stollfuß 2019). Although multi-platform helps attracting the attention and targeting the mind of younger audiences in the so-called fragmented media environment, it puts immense burdens on broadcasters (Stollfuß 2019). Among other critiques, Stollfuß posits that to adapt traditional TV formats to the fluid and turning algorithm complexion of social media, broadcasters must make considerable structural, operational, and strategic modifications (Stollfuß 2019).

2.2. Emerging Digital Business Models and Subscriptions in the VOD Streaming Market

2.2.1 Digital Business Models in the Streaming Industry

There are several monetisation models in the VOD streaming industry. The following paragraphs describe several digital business models such as subscription video-on-demand (SVOD), ad-supported video-on-demand (AVOD), a combination of either (hybrid), including a freemium version and classic freemium model.

Subscription Video on Demand (SVOD). The SVOD model involves a business model wherein the operator can generate an income stream from the subscription price for the unrestricted use of content self-owned by the operator (Kübler, Seifert, and Kandziora 2023). This model's value proposition is based on providing exclusive and high-quality content, which enables differentiation in the saturated digital market (Kübler, Seifert, and Kandziora 2023). These

platforms predominantly focus on ad-free streaming to boost the user experience while meeting their preferences for uninterrupted entertainment and pleasure (De Matos and Ferreira 2020).

Due to the predictable nature of subscription revenues, SVOD platforms can attain long-term financial stability and soundly avoid the negative consequences of annual market fluctuations on their business plans and resource allocations (Kübler, Seifert, and Kandziora 2023). A dilemma is preventing subscriber churn due to poor content or the subscriber's perceived lack of value-added features (De Matos, Mamadehussene, and Ferreira 2023). Keeping a substantial library that meets or exceeds user expectations is of utmost importance in churn reduction (De Matos and Ferreira 2020; De Matos, Mamadehussene, and Ferreira 2023). It goes a long way in keeping up a library of new and exclusive content, as it helps differentiate platform offerings and creates unique value content for the user (De Matos et al. 2020; De Matos, Mamadehussene, and Ferreira 2023).

Retention strategies have included, among other things, experience and behaviour designed to provide opportunities for subscribers through hyper-personalised recommendations using feedback loops based on data and algorithms that provide each unique subscriber with tailored content searches (Lubos, Felfering, and Tautschnig 2023; De Matos, Mamadehussene, and Ferreira 2023). In addition, psychological factors like endowment effects lead subscribers to become emotionally attached to their tailored libraries or watchlists, thus establishing their concurrent long-term loyalty through reduced proneness to forgo specific deliverables (De Matos and Ferreira 2020; Zhang and Zhang 2022).

The binge-watching model, which encourages users to consume several episodes or movies in one seated session, is another mechanism to safeguard effective retention and churn reduction operations (De Matos and Ferreira 2020). This works because the associated habit formation ensures platform loyalty, by keeping the users watching (De Matos and Ferreira 2020).

Pricing strategies are also crucial for appeal and retention (Kübler, Seifert, and Kandziora 2023). For instance, tiered subscriptions based on features or content packages are directed toward different price points for different segments of consumers while offering a very premium or higher-value-level option for higher-paying consumers (Kweon and Kweon 2021). Flexible alternating pricing may also provide options around the blended-family or group plans, capturing markets for community aspects that perpetuate platform loyalty toward the end of the subscription likelihood itself (Kweon and Kweon 2021). However, the rising price has begun to appeal to many subscribers who might have migrated to similar providers which offered free non-profit content, creating a tug between value and affordability (Kübler, Seifert, and Kandziora 2023; Kweon and Kweon 2021).

Advertising-based Video on Demand (AVOD). The AVOD model is made to incorporate interconnections or network effects whereby a more extensive user base adds value to the advertisers' platform (McKenzie, Crosby, Collings 2024; Budzinski and Lindstädt-Dreusicke 2018). This allows content to be available for users, whereas revenue for the platform comes through targeted advertisements (Tang and Wei 2023; McKenzie, Crosby, Collings 2024; Budzinski and Lindstädt-Dreusicke 2018). Such platforms create an intentional value network where users and advertisers are integrated into the flow of interdependence, thereby increasing platform value (Chalaby 2024). By efficiently tailoring advertising content to different target groups through data-driven approaches, maximum relevancy and, hence, the effectiveness of ads could be reached (Tang and Wei 2023).

However, there are also user experience challenges (Tang and Wei 2023). There is such a tendency where too many ads might incur low user satisfaction and, therefore, churn (Tang and Wei 2023). These two low tensions require learning to balance advertising volume and placement to allow some room for acceptance by prospects (Chalaby 2024; McKenzie, Crosby, Collings 2024). Hence, platforms must work on sales strategies where advertising is positioned and

distributes all interruptions while payments can maximise revenue generation (McKenzie, Crosby, Collings 2024).

There are also regulatory problems—data protection laws like the GDPR (General Data Protection Regulation) limit personalised advertisements based on user data (Dewitte and Ausloos 2021). An AVOD model creates a complex balance between maximising network effects and minimising use barriers (Budzinski and Lindstädt-Dreusicke 2018). Platforms which can thus create value that fits the needs of users and advertisers are the ones that can survive in hostile but highly dynamic digital markets (Chalaby 2024).

Hybrid Models. Hybrid business models offer multiple revenue streams by combining traditional and innovative approaches to address both existing and new market segments (Pólkowski, Dutta, and Savulescu 2017). A central element is the revenue model, which is based on the diversification of revenue sources, such as through the integration subscription-based and ad-free based platforms (Pólkowski, Dutta, and Savulescu 2017). Companies can also generate additional revenue through paid add-ons or premium services (Pólkowski, Dutta, and Savulescu 2017). Nonetheless, hybrid models present challenges, particularly about advertising volumes and the resulting user experiences (Tang and Wei 2023). A too-timely recurrence of an advertising break can affect user satisfaction and possibly result in subscription churn (Tang and Wei 2023). Therefore, it is necessary to achieve a careful balance between the financial incentives arising from advertising and an enjoyable user experience (Telkman 2023). In addition, hybrid models typically require complex technical infrastructures to ensure the seamless integration of ad-financed and subscription-based services (Pólkowski, Dutta, and Savulescu 2017; Telkman 2023). Content must be mastered, and data analysed to provide fine-tuned recommendations and relevant advertising without compromising data privacy (Telkman 2023).

In conclusion, hybrid models exploit an exciting opportunity well-suited to targeting diverse user segments while enabling sustainable monetisation (Pólkowski, Dutta, and Savulescu 2017; Tang and Wei 2023). Their success would, however, imply careful strategic decisions and the requisite allocations of technology to facilitate a balance of user satisfaction and revenue generation (Pólkowski, Dutta, and Savulescu 2017; Telkman 2023).

Freemium models. The freemium model offers the possibility to differentiate between free offers in the freemium version and the paid offers in the pay version, with the strategic goal of increasing the conversion rate (Wagner, Benlian, and Hess 2014). This differentiation thus raises the perceived value of the premium tier and triggers users to pay for further benefits (Wagner, Benlian, and Hess 2014). Effective differentiation also intuitively includes creating high exclusivity and other enhanced attributes, such as better content or ad-free streaming, to project maximum perceived added value (Martins and Rodrigues 2024). The offers at various times create urgency among users to make faster decisions for changes (Rietveld 2018; Rietveld and Schilling 2021). These are modelled in a freemium environment with social influences such as referral programmes, enhancing user interaction and their perception of the platform's value through network effects (Rietveld 2018; Rietveld and Schilling 2021).

Freemium comes with advantages, yet there are several impediments to reckon with (Koch and Benlian 2017). There is narrow crossover to paid services, which imposes a huge reliance on the quality and perceived added value of the company's premium offerings (Koch and Benlian 2017). This accentuates the determinants towards the effective strategic design of Freemium models to maximise user retention and revenues (Wagner, Benlian, and Hess 2014; Koch and Benlian 2017).

2.2.2 Threats to Digital Business Models

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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

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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).

2.2.3 Insights into Digital Subscriptions

Behavioural Economics

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

Customer Lifetime Value

According to Blattberg, Malthouse, and Neslin (2009), customer lifetime value (CLV) is an indispensable metric for assessing the relationship with a customer (Blattberg, Malthouse, and

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

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

Value Co-Creation in Digital Subscriptions

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

The feedback from sharing and interacting with content creates a win-win situation for users and platform providers (Ranjan and Read 2016). This allows more efficient algorithms to be

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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).

2.3. 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

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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, 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

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fulfilling social identity and activation functions, namely identification and prestige, which are essential for the development of brand affinity (Rahe, Buschow, and Schlütz 2021). In particular, younger German consumers consider Netflix as a 'lifestyle brand' that aligns with their identity and social expression needs (Rahe, Buschow, and Schlütz 2021, 53). Meanwhile, Amazon Prime Video is often seen as a secondary add-on to Amazon's broader e-commerce services (Wayne 2018). In addition, Netflix's strategy of promoting binge-watching encourages consumers to habitual use patterns (Rahe, Buschow, and Schlütz 2021; Snider 2016; Wenzel, Mahle, and Pätzmann. 2016). This strongly increases brand loyalty among both global and German viewers by meeting and encouraging their desire to watch multiple episodes or series in one sitting (Rahe, Buschow, and Schlütz 2021; Snider 2016; Wenzel, Mahle, and Pätzmann 2016). In terms of prestige, Netflix is perceived as the pioneer among VOD streamers and primarily conveys notions of 'quality TV' and a high-end entertainment experience (Rahe, Buschow, and Schlütz. 2021, 53; Schlütz et al., 2018; Wenzel, Mahle, and Pätzmann 2016). Therefore, Rahe, Buschow, and Schlütz (2021) identified brand perception at the core of driving German consumers' loyalty and satisfaction. In highly competitive markets with new entrants, like the German market, established brands with strong and distinct brand perceptions appear to have a stronger competitive position (Rahe, Buschow, and Schlütz 2021). According to Rahe, Buschow and Schlütz (2021), Netflix is an unquestioned leader in aligning with brand expectations within the German market. Other studies confirm Netflix as an industry benchmark in brand perception while indicating a great gap in the perception of private TV providers (Hennig-Thurau and Houston 2019; Telkmann 2023). Building a distinctive brand identity remains the greatest challenge for private TV providers in the VOD streaming industry as they seek a unique selling point for their platforms while differentiating between linear and on-demand offerings (Telkmann 2021).

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

Moreover, Lee et al. (2018) highlight that platforms that are easy to navigate see higher adoption rates. This finding is supported by earlier studies (Lessiter et al. 2001; Bautista, Lin, and Theng 2016). Periaiya and Nandukrishna (2023) also stress the importance of a seamless, user-friendly interface, noting that it significantly contributes to user satisfaction and retention. The convenience offered by video streaming services, such as on-demand access, the option to resume from where you left off, and the ability to watch something later, was especially valuable to time-constrained Indian consumers (Periaiya and Nandukrishna 2023). Interactive features, such as rating and reviewing content, downloading, and sharing on social media, can also drive VOD subscriptions (Kumar et al. 2025). Lee et al. (2018) further suggest that social influences such as peer recommendations and trends over social media may also be key in streaming adoption.

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

Furthermore, content relevance and variety are essential for consumer satisfaction (Wu et al. 2024). Globally, platforms with diverse, regularly updated libraries that cater to varying tastes attract and retain users more effectively (Wu et al. 2024; Yoon and Kim 2023). A rich selection of diverse content and new releases act as pull factors (Yoon and Kim 2023). Thus, platforms offering diverse but individually tailored content are better positioned to meet user preferences and improve user retention (Periaiya and Nandukrishna 2023). The integration of customisable profiles, watchlists, and preferences fosters a sense of ownership and connection, making users feel the platform aligns with their needs and increasing its perceived value (Wu et al. 2024). Additionally, AI-powered algorithms further enhance personalisation through recommendations, which increase user engagement, loyalty and subsequently the likelihood of subscription commitment in a long-term perspective (Gregory et al. 2021). Moreover, Sharma and Kakkar (2019) found in their CA of the Indian streaming market, that Indian consumers have a strong preference for live and sports content, which indicates demand for real-time, engaging exclusive content. Yoon and Kim (2023) also observed that exclusive content can draw users to a platform. This is supported by studies focusing on younger Indian consumers, where 71% of students answered that they choose platforms based on unique offerings (Mavale and Singh 2020). Content origin, however, leads to differing findings in the Indian market. While Nagaraj, Singh, and Yasa (2021) researched that global content is requested by Indian users, Kumar et al. (2025) highlighted a preference for regional content.

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

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

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

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

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

In terms of demographics, age-related differences in streaming engagement are evident, with younger German users showing significantly more interest and preferences for VOD services than older ones (Gutzeit, Dorsch, and Stock 2021). This difference is likely due to significant differences in internet and technology affinity (Gutzeit, Dorsch, and Stock 2021). Notably, younger consumers tend to use a wider range of streaming services, while older consumers use Netflix and Amazon Prime Video less frequently but have a stronger preference for TV media libraries (Gutzeit, Dorsch, and Stock 2021). No notable differences are identified in streaming interests between genders (Gutzeit, Dorsch, and Stock 2021). These findings, therefore, confirm the conclusion reached by Lee et al. (2018) that while age significantly influences media adoption, gender does not.

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

3. Consumer Perceptions

3.1 Theoretical Framework

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

Perceptual Mapping is a well-known and frequently used technique marketing managers employ to gain insights into the fundamental cognitive dimensions consumers use in the evaluation of products and how products are positioned in relation to these dimensions (Hauser and Koppelman 1979). They can be used for several marketing applications such as ‘new product design, advertising, retail location’ (Hauser and 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).

3.2 Selection of Attributes and Platforms

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

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

Throughout this thesis, the VOD streaming services Netflix, Amazon Prime Video, Disney+, RTL+ and Joyn will be analysed. These platforms were frequently mentioned throughout the consumer interviews as being familiar and used among respondents. The inclusion of Netflix, Amazon Prime Video and Disney+ is further supported by market figures. In 2022, Amazon Prime Video was the preferred streaming service for Germans (61%), followed by Netflix (55.6%; W&V 2022). Disney+ has rapidly increased its subscription numbers by capitalizing on its high brand recognition and reputation for producing high-quality content, making it a relevant platform to include in the analysis (Sunnebo 2023). The selection of Joyn and RTL+ was further based on the thesis' primary goal, which is to provide actionable recommendations for local platforms to enhance their competitive position against international competitors. There is still potential for growth, as evidenced by low usage rates of both RTL+ (6.7%) and Joyn (4.2%; W&V 2022; see Appendix 33). 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

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academic literature: *Brand Personality Model*, *Media Brand Trust Model* and the *Function-oriented Media Brand Model*.

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

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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.

4. Consumer Preferences

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

4.1 Conjoint Analysis Methodology

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

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

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

4.1.1 Survey Instrument

Eight attributes with varying levels that have an impact on the German VOD streaming market were identified for the CA (see Appendix 47). 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

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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

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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 48, 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 49).

In addition to collecting attribute-based data, pertinent participant information was gathered in the analysis of the German VOD streaming market (see Appendix 50). To ensure all collected data was derived from respondents that incorporated the market studied, we asked participants if they were from or lived in Germany and if they were familiar with or had used VOD streaming platforms. The respondent was screened out if the response was negative to any of these parameters. The collected data included age, gender, occupation, frequency of VOD streaming usage, average session duration, and monthly spending. Collecting these demographic variables is essential for effectively segmenting and interpreting consumer preferences in this market, as noted in previous research (Cleveland, Papadopoulos, and Laroche 2011).

4.1.2 Data Collection and Process

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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 51). In the concluding phases of the analysis, the consolidated data and visualizations were exported to Excel for extended analysis, including the computation of averages to enhance the interpretation of the study's findings.

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

5. A Case Study on Joyn

5.1 Understanding Joyn

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

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

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

5.2 Methodology

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

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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 73). 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 73). 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 74 and 75). After these questions, the survey ended for them. The third part and main body of the survey then focused on the people who are currently using or did use Joyn in the past (see Questionnaire; Appendix 72). 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.

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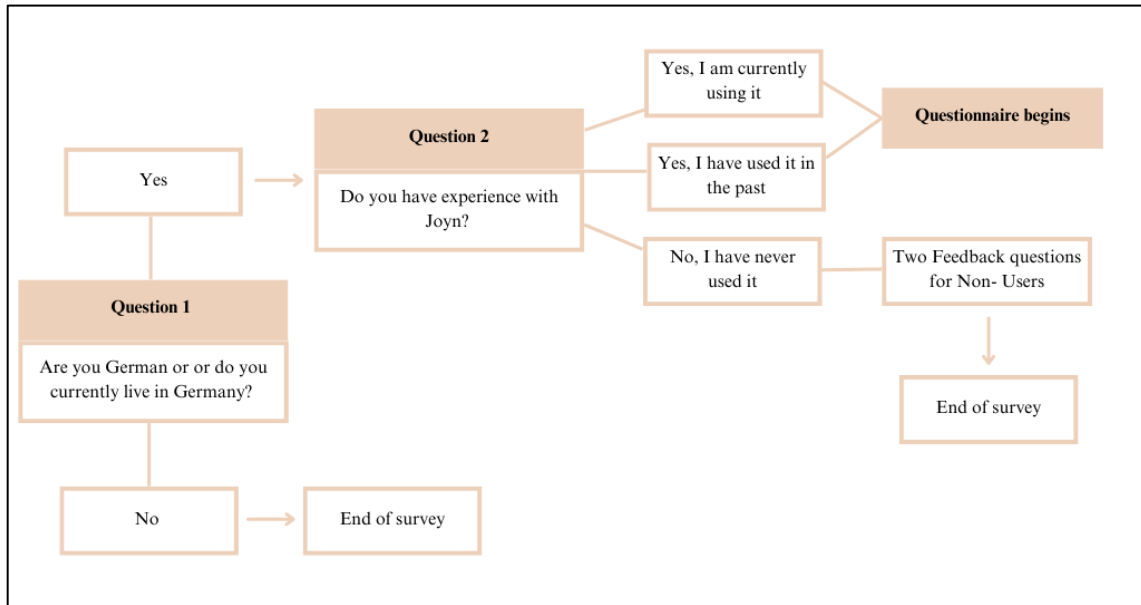


Figure 3: Case Study Survey Procedure

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 76).

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

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hours (38%), and only 4% exceeding five hours. Monthly spending on streaming services varied, with 26% spending 0 € to 5 €, 15% spending 6 € to 10 €, 14% spending 16 € to 20 €, and 20% spending 21 € to 25 €. A smaller percentage of respondents reported higher spending, with 10% spending 26 € to 30 € and 12% spending more than 30 € (see Appendix 77).

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

6. Conclusion

6.1 Consumer Perception Discussion

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

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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

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

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

6.2 Consumer Preferences Discussion

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

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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.

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

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

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

6.3 Demographic and Behaviour Discussion

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

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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 several times a week) content type is preferred over price, for less frequent users (weekly or rarely) price gains importance.

6.4 Summary

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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

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

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

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

6.5 Managerial Implications

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

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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

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

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

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

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

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

6.6 Limitations and Implications for Future Research

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

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

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

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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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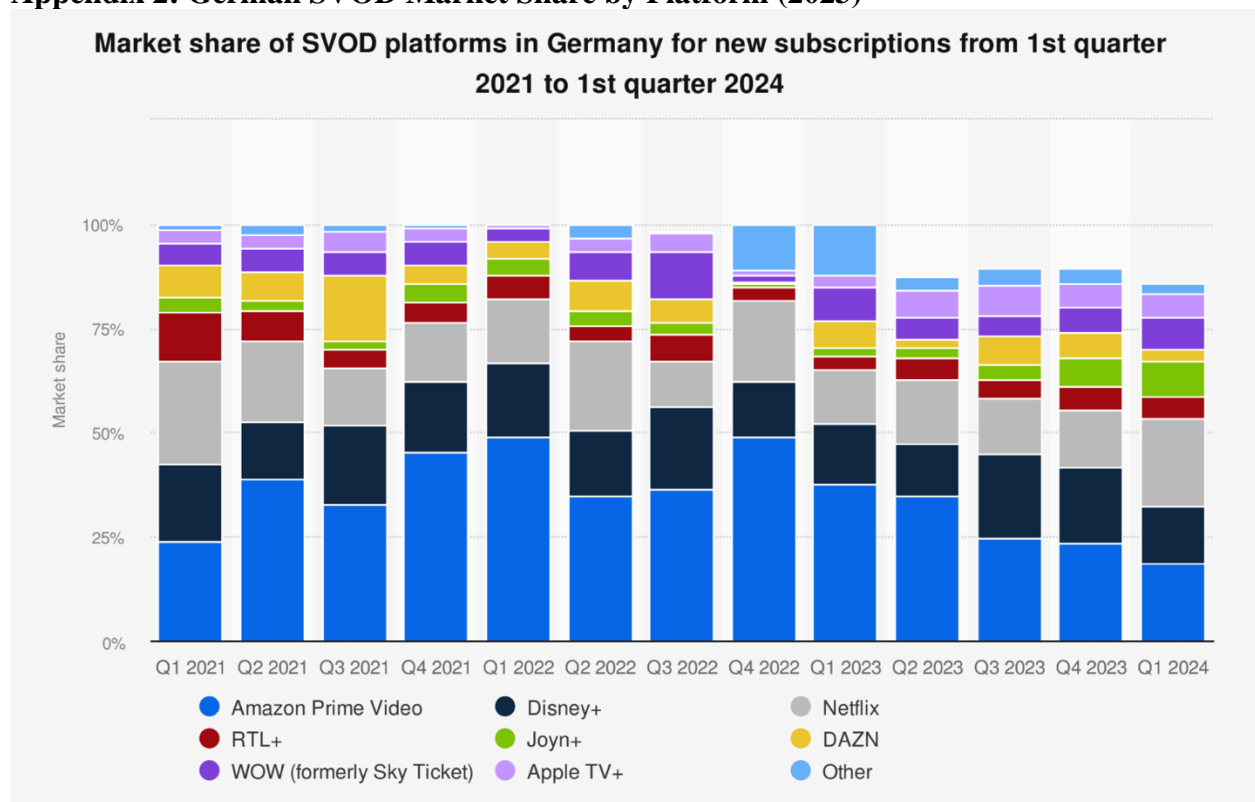
Appendices

Appendix 1: Development of Streaming Platforms in Germany (2010–2024)

Year	Event	Significance
2014	Netflix enters Germany	Introduced SVOD model
2015	Amazon Prime Video launches in Germany	Bundled streaming with e-commerce
2020	Disney+ launches in Germany	Increased competition in SVOD
2024	ARD and ZDF open-source initiative	Strengthened local collaboration

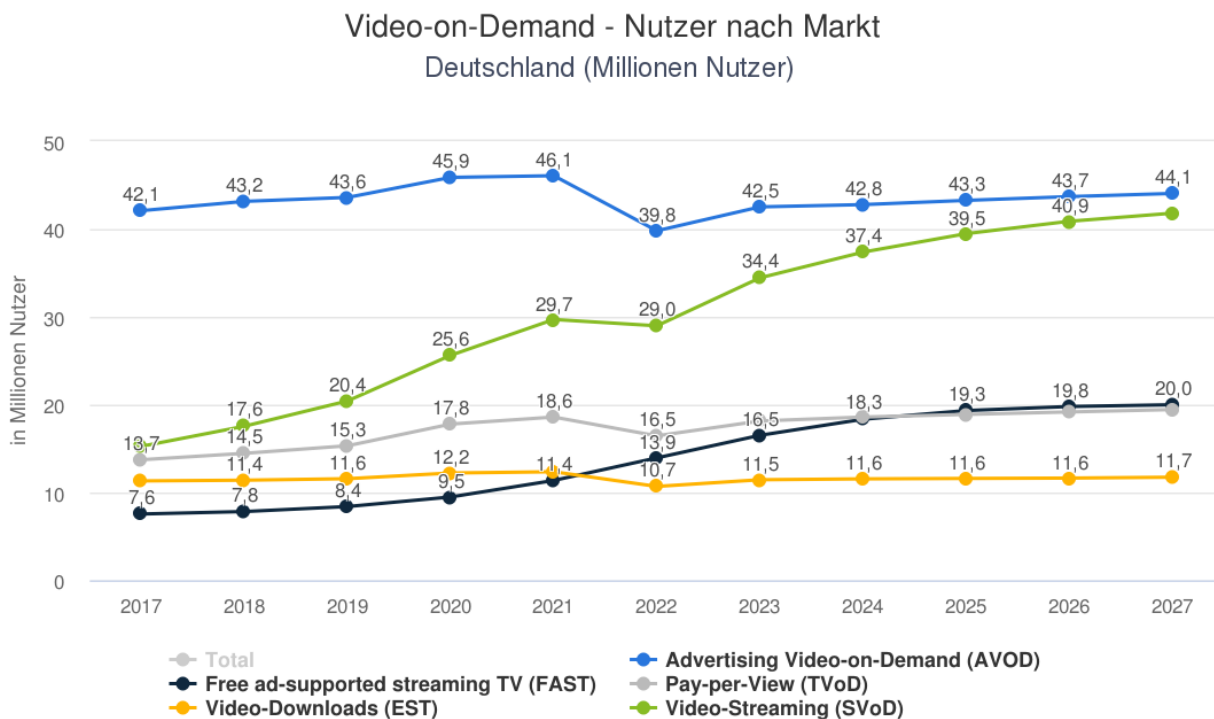
Source: Fagerjord, A., & Kueng, L. (2019). Mapping the core actors and flows in streaming video services. Journal of Media Business Studies, 16(3), 166–181.

Appendix 2: German SVOD Market Share by Platform (2023)



Source: Statista 2023c

Appendix 3: Growth in SVOD Subscriptions in Germany



Quelle: Statista Market Insights

statista

Source: Statista 2024e

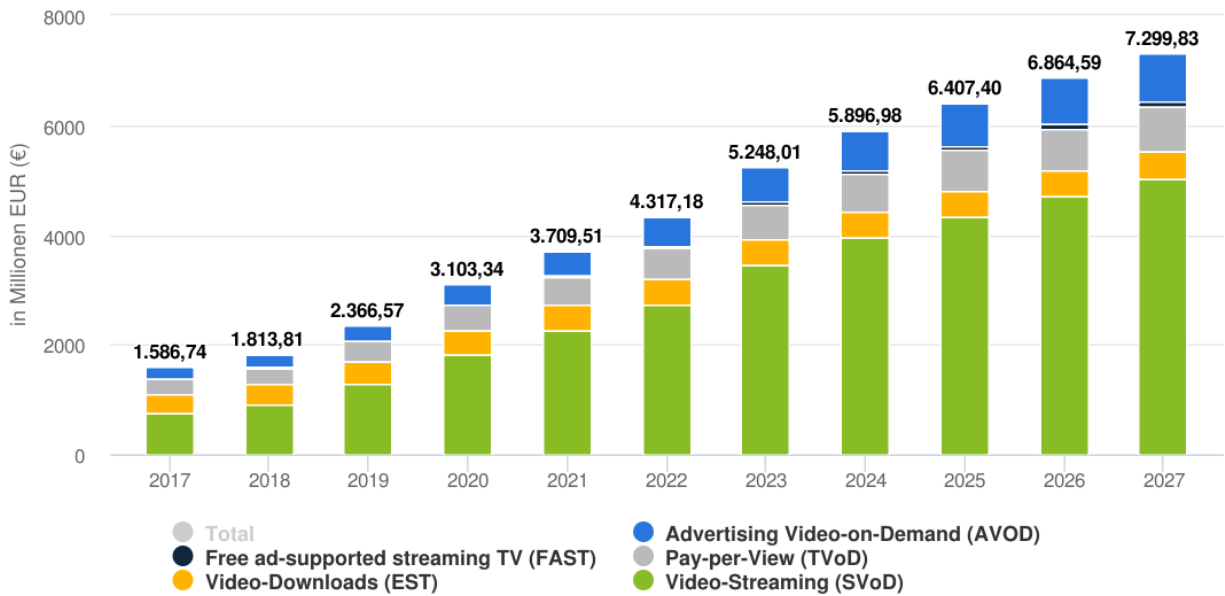
Appendix 4: German Audience Preferences for International Content

Year	Household Penetration Rate (%)	Average SVOD Subscriptions per Household
Q1 2023	45%	3.1
2021	43%	2.7
2020	40%	2.4
2019	35%	1.8

Source: Sunnebo, J. 2023

Appendix 5: German Audience Preferences for International Content

Video-on-Demand - Umsatz nach Markt
Deutschland (Millionen EUR (€))



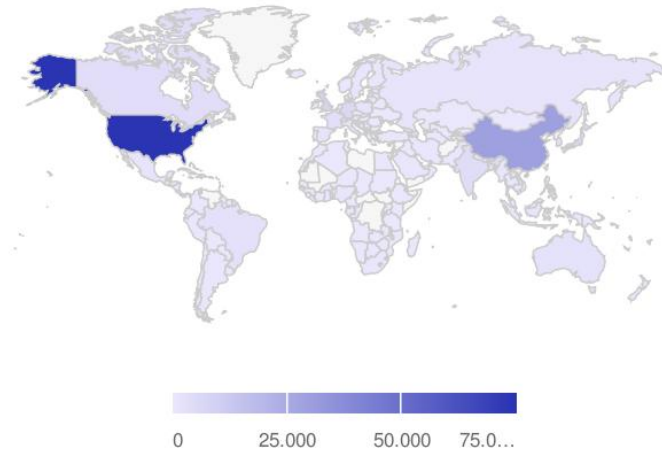
Quelle: Statista Market Insights

statista

Source: Statista 2024e

Appendix 6: German Audience Preferences for International Content

Video-on-Demand - Umsatzvergleich Deutschland (Millionen EUR (€))



Quelle: Statista Market Insights © Natural Earth

statista

Source: Statista 2024e

Appendix 7: German Audience Preferences for International Content

Content Preference	Percentage of Streamers (%)	Source
International programming	54%	Mintel (2023)
Localised German content	38%	Mintel (2023)
No preference	8%	Mintel (2023)

Source: Mintel 2023

Appendix 8: Decline in Total TV Viewing Time in Germany (2015-2023)

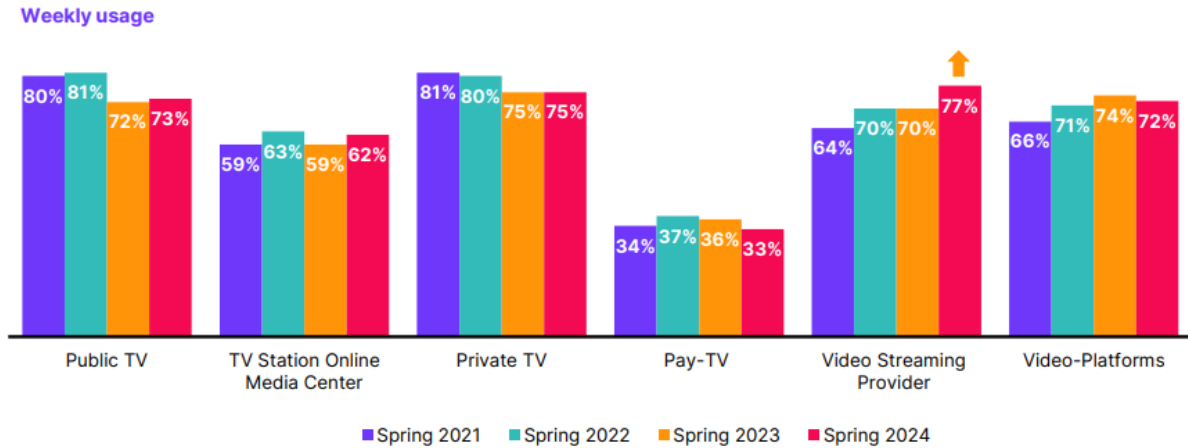
Year	Average Daily TV Viewing Time (Minutes)	Decline from Previous Year (%)
2015	223	-
2018	217	2,76 %
2020	220	-
2023	182	20,88 %

Source: Statista 2024f

Appendix 9: Decline in Linear TV Viewership Among Younger Demographics (18-34 years)

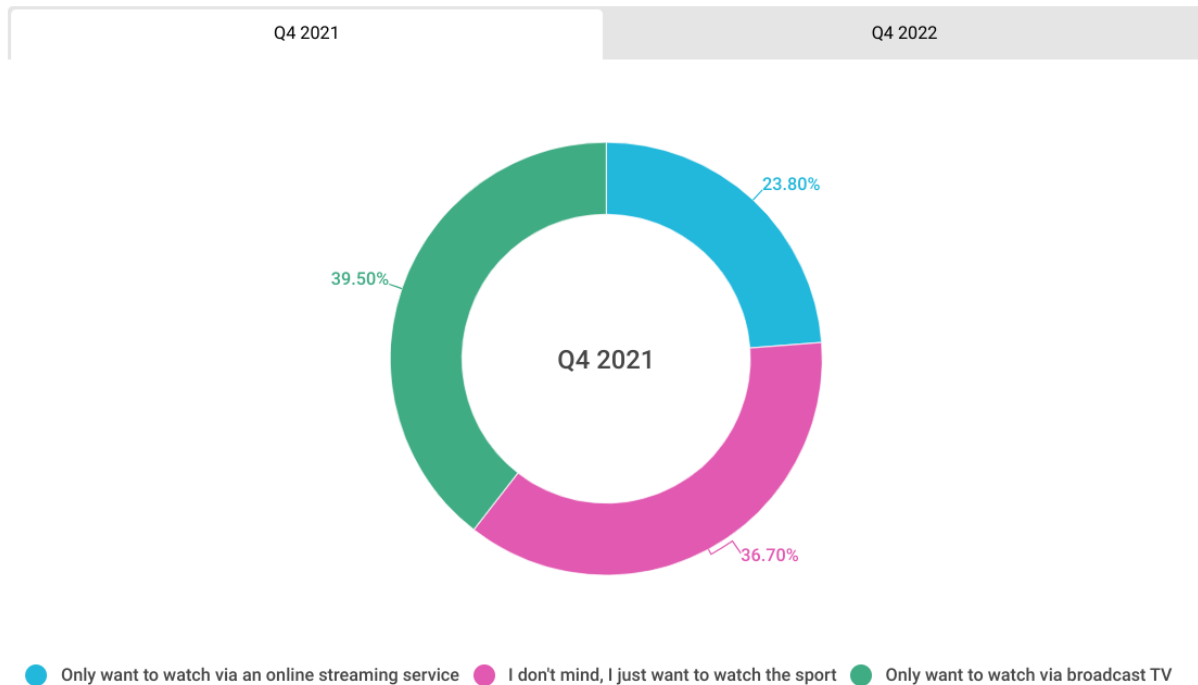
Video streaming tops weekly use for the first time

For the first time, weekly usage of video streaming provider shows higher usage rates than linear TV channels. Private TV usage remains the same as last year.



Source: Nielsen 2024a

Appendix 10: Popularity of Live Sports Events on Linear TV



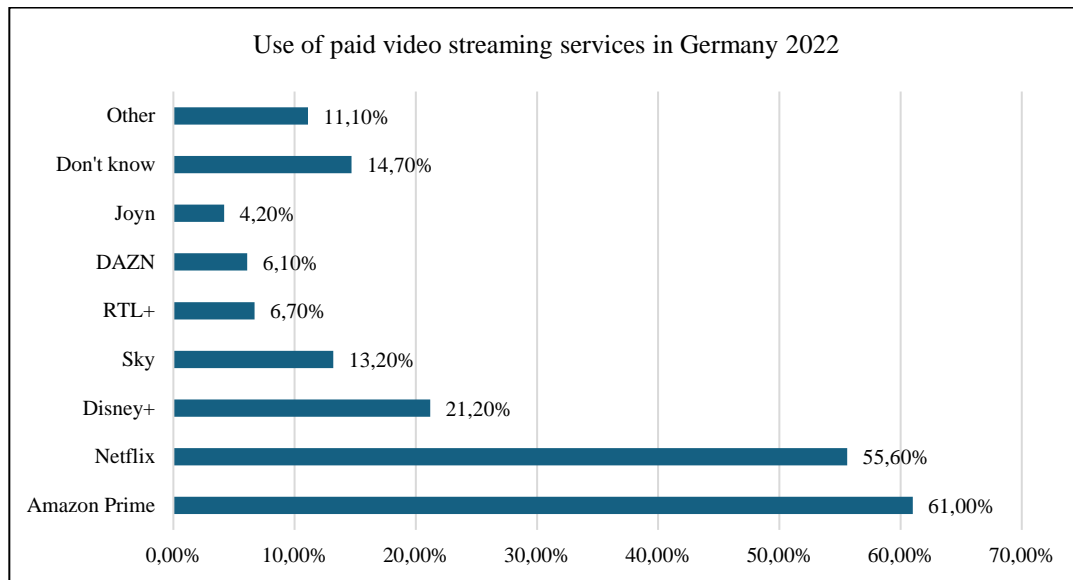
Source: Liversedge 023)

Appendix 11: Revenue Diversification Strategies for Linear Broadcasters

Revenue Source	Example	Broadcaster Implementation
Pay-Per-View Services	Bundesliga Highlights	Sky Deutschland
Ad-Supported Streaming	RTL+ Ad-Supported Tier	RTL Group
Subscription Models	ARD/ZDF media libraries	Public Broadcasters
Digital Platform Partnerships	Amazon Channels Collaboration	ProSiebenSat.1

Source: Urbanek, J. (2023). Germany video streaming report 2023: Viewing habits and streaming trends. Mintel Reports

Appendix 12: 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 13: 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)	<input type="checkbox"/> Netflix <input type="checkbox"/> Amazon Prime Video <input type="checkbox"/> Disney+ <input type="checkbox"/> Joyn <input type="checkbox"/> 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?	<input type="radio"/> Under 18 <input type="radio"/> 18-24 <input type="radio"/> 25-34 <input type="radio"/> 35-44 <input type="radio"/> 45-54 <input type="radio"/> 55-64 <input type="radio"/> Over 65
By what gender do you identify?	<input type="radio"/> Female <input type="radio"/> Male <input type="radio"/> Non-binary <input type="radio"/> Prefer not to say
What is your current occupation?	<input type="radio"/> Student <input type="radio"/> Student (with working job or intern) <input type="radio"/> Young professional (1-5 years of experience) <input type="radio"/> Professional (6-10 years of experience) <input type="radio"/> Senior professional (plus 10 years of experience) <input type="radio"/> Retired from work <input type="radio"/> Other
How often do you use video-on-demand streaming platforms?	<input type="radio"/> Daily <input type="radio"/> Several times a week <input type="radio"/> Weekly <input type="radio"/> A few times a month <input type="radio"/> Rarely
How many hours do you typically spend streaming in one sitting?	<input type="radio"/> Less than 1 hour

	<input type="radio"/> 1-2 hours <input type="radio"/> 3-4 hours <input type="radio"/> 5+ hours
How much money do you spend per month for video-on-demand streaming platforms?	<input type="radio"/> 0€ - 5€ <input type="radio"/> 6€ - 10€ <input type="radio"/> 11€ - 15€ <input type="radio"/> 16€ - 20€ <input type="radio"/> 21€ - 25€ <input type="radio"/> 26€ - 30€ <input type="radio"/> More than 30€

Appendix 14: Attributes and Levels Overview

Product attributes	Levels (i.e., what the attributes can be like)
Brand <small>This attribute represents the brand name, SKU, or pricing tier.</small>	Netflix Amazon Prime Video Disney+ RTL+ Joyn
Content type <small>This attribute is a feature of the product.</small>	Movies & Series Movies & Series, Documentaries Movies & Series, Sports livestreaming Movies & Series, Reality TV Movies & Series, Documentaries, Sports livestreaming, Reality TV
Content origin <small>This attribute is a feature of the product.</small>	Local (German) International Local & International
Name for reporting: User interface User interface (see descriptions below) <small>This attribute is a feature of the product.</small>	Basic Intermediate Advanced
Personalization / Recommendations <small>This attribute is a feature of the product.</small>	Content-based filtering system Collaborative filtering system Hybrid system
Content exclusivity <small>This attribute is a feature of the product.</small>	No exclusive content Some exclusive content High amount of exclusive content
Advertisements <small>This attribute is a feature of the product.</small>	Ad-based service Ad-free service
Monthly fee <small>This attribute is a price paid by customers.</small>	Free (Ads & Limited content) 6.99€ 8.99€ 13.99€

Source: Conjoint.ly

Appendix 15: Brand and Level Combinations

Levels	Netflix	Amazon Prime Video	Disney+	RTL*	Joyn
Content type					
Animated & Series	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Animated & Series	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Animation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Animated & Series, Sports, Animation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Animated & Series, Reality TV	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Animated & Series, Documentaries, Sports, Animation, Reality TV	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Content origin					
Local (Germany)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
International	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Local (International)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User interface					
Basic	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Intermediate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Advanced	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Display/controls / Recommendations					
Content-based filtering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Collaborative filtering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Content-based filtering, Collaborative filtering	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Content-based filtering, Collaborative filtering, Personalized	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Content restrictions					
No restrictions content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Some restrictions content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
All restrictions content	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Advertising					
Ad-free service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ad-free service	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Monetization					
Free (Ads & Limited content)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ad-free	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ad-free	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Ad-free	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Source: Conjoint.ly

Appendix 16: 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 17: 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 18: Report Tabs Conjoint.ly

Insights	Time series	Crosstab	Simulations	Pivot tables	TURF analysis	Segmentation	Weights
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Source: Conjoint.ly

Appendix 19: 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 20: 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%
<i>Do you have experience with Joyn?</i>		
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 21: 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 22: 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 23: 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%

<i>Age</i>		
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%

<i>Occupation status</i>		
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 24: 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%

<i>Average viewing time (per sitting)</i>		
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 25: 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 26: 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 27: 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 28: 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 29: 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 30: 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 31: 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 32: 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 33: 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 34: 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 35: 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 36: 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 37: 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 38: 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 39: 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: Utilization of Artificial Intelligence (AI)

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

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