EXAMINING CUSTOMER SATISFACTION AND BRAND LOYALTY OF GENERATION Z CUSTOMERS IN OTT MEDIA SERVICES

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ABSTRACT

In today's digital age, there has been an exponential growth in the popularity and demand of over-the-top (OTT) media services. This research aims to identify the antecedents of customer satisfaction leading to brand loyalty in young OTT media consumers. This research's target group is the Indian Generation Z cohort, the most extensive customer base of OTT platforms globally. This research employs a quantitative approach, using a questionnaire survey method. Data is collected from OTT subscribers belonging to the Generation Z cohort from the country's various regions. The antecedents of customer satisfaction analyzed through this research are perceived quality, the perceived value of cost, usefulness, usability, lifestyle congruence, brand identification, and equity. The most significant influence on customer satisfaction factors were perceived usability, overall brand equity, and perceived cost value. Customer satisfaction was also found to have a strong impact on brand loyalty. Primary data was collected from the generation Z cohort in India to test the theoretical model developed through literature review. The study is first of its kind in an emerging economy setup and gives practical insights into the youth population's consumer behavior and preferences. The outcome of this research provides Generation Z's perspective of OTT media consumption behavior. The study also highlights the importance of developing OTT platforms' brand equity, usefulness, and competitive pricing to drive customer satisfaction and brand loyalty.

1. INTRODUCTION

OTT platforms are becoming exceedingly customer-oriented and are constantly innovating to hold the user's attention. By combining this with analytics, platforms can now suggest certain movies and series based on prior content consumption. These platforms are also helping bridge a language barrier by having a wide range of content from all over the world and providing options for audio and subtitles in desired languages. Users can pause and view content whenever they want and return and start at the same point where they left it last. Also, unlike traditional media, the content on streaming services is not restricted by censor boards, demographics, or box office businesses (Gupta and Singharia, 2021). Thanks to improved network coverage across the country and an increase in the number of smartphones available at a reasonable price, the number of Indian customers to the Over-The-Top (OTT) platform is increasing. In response to the increased demand, several media and entertainment companies have either developed their platform or partnered with other OTT platforms to stream their content (Indian Brand Equity Foundation, 2020).

The COVID-19 pandemic, which resulted in a lockdown and compelled people to stay inside their homes, is one of the main reasons for the OTT platform experiencing an increase in the number of subscribers in recent times. As a result, many filmmakers release their new films through OTT platforms. According to IBEF (Indian Brand Equity Foundation, 2020), the Indian OTT market grew 30% from 22.2 million to 29 million paying customers between March and July 2020. The top five metro cities account for 46% of total viewers in July 2020, with tier I cities accounting for another 35%. Over the next decade, India's over-the-top (OTT) video streaming market might develop at a compound annual growth rate (CAGR) of more than 20%, reaching $13 billion–$15 billion, thanks to original content and pricing improvements. According to All

About Screens, a report by international professional services network Deloitte, paid subscribers are expected to grow at a 17% CAGR from 102 million in 2016 to 224 million in 2026. The demand for geo-demographic-based OTT streaming content is increasing, both within India and worldwide, thanks to the large Indian diaspora. In 2021, OTT platforms spent an estimated $665 million on content, with Netflix, Amazon Prime Video, and Hotstar Disney+ expenditure $380 million combined (Jha, 2022).

Customers are willing to pay more for OTT platforms due to convenience and ease of use, and brand loyalty is seen as a need for a company's long-term success and viability (Chaudhuri and Holbrook, 2001). Marketers are working to sustain and build brand loyalty when product differentiation decreases, resulting in a shorter maturity period and increased unpredictability in the product's market. Previous researches have been inconclusive regarding the relationship between brand loyalty and customer-based brand equity, with Aaker (1991) and Keller (1993) suggesting that loyalty is an outcome of brand equity, not a determinant of it.

Previous research has found that product participation and robust product involvement are significant predictors of brand loyalty (Iwasaki and Havitz, 1998). The primary target for this research is Generation Z (GenZ), the newest cohort encompassing 1.8 billion people born between 1995 and 2015. India has the largest GenZ population of 472 million, and Hameed and Mathur (2020) opined that GenZ in India exhibit behaviors and preferences similar to those of their global counterparts. OTT is a new platform in India, and research of its impact on perceived usefulness and ease of use should be done among those who have accepted it. GenZ, having grown up during the technological revolution, relies on technology in every area of their existence, and their digital information practices are significantly high (Davis et al., 2020, Budiman and Dananjoyo, 202; Subramaniam, et al. 2020). Furthermore, when it comes to using information technologies, the Generation Z cohort has extremely distinct behaviors, priorities, and preferences (Dospinescu et al., 2021; Kamble et al., 2021; Podara et al., 2021; Kymäläinen, 2021; Sadana and Sharma, 2021). Therefore, this research aims to identify the important antecedents of customer satisfaction of OTT media services and examine the extent to which the identified antecedents influence customer satisfaction and brand loyalty in the context of GenZ customers.

2.1 Customer Satisfaction

Customer satisfaction is defined as the difference between expected and experienced performance (McQuitty, 2000, Oliver, 1999). It can impact business property, conflict, and profit in both direct and indirect ways (Gomez et al., 2004). There is a distinction between customer happiness and customer satisfaction regarding service experiences due to services' intangibility and perishability (Veloutsou et al., 2015). Hoest and Andersen (2004) opines that customer satisfaction can be transactional (encounter satisfaction) or cumulative (satisfaction over time). This research considers customer satisfaction as a client's overall opinion of a service provider (Levesque and McDougall, 1996).

2.2 Perceived Quality

Perceived quality (Netemeyer et al., 2004) is an individual's appraisal of a particular brand's predominance compared to other brands. It is different from quality, which is the tangible superiority of a product or service over competitors. Consumer satisfaction has been found to be affected by perceived quality, and a high-quality brand perception leads to a high level of satisfaction. Therefore, we propose:

H1: Perceived quality has a significant influence on customer satisfaction.

2.3 Perceived Value of Cost

Perceived value is the link between the worth of benefits obtained and the amount sacrificed to acquire the same use. Netemeyer et al. (2004) defined it as an individual's estimation of the return based on the perceived benefits gained and sacrifices made to obtain the product or service. Research suggests that satisfaction is associated with perceived value, meaning perceived value has a significant impact on satisfaction (Anderson and Mittal, 2000; Theodorakis et al., 2014). McDougall and Levesque (2000) opine that perceived value directly influences customer satisfaction and loyalty. Based on these reviews, we propose the following hypothesis:

H2: Perceived value of cost has a significant influence on customer satisfaction

2.4 Perceived Usefulness

The Technology Acceptance Model (Davis et al., 1989) revealed that perceived usefulness influenced a person's behavioral intentions and attitude through indirect and direct influence. This observation is based on the motivation theory, which argues that if people recognize the importance of activity in helping them achieve their goals, they are more inclined to accept a new product or service. Perceived usefulness is positively related to customer usage and adoption, and online purchases are perceived to be more profitable if customers believe they will improve transaction performance. Alreck et al. (2009) found that online sellers who emphasize time-saving, completing tasks faster, or focusing on just one of these benefits are more likely to attract customers. Additionally, self-efficacy and usefulness are essential perspectives to explain consumer satisfaction. Therefore, we propose:

H3: Perceived usefulness has a significant influence on customer satisfaction.

2.5 Perceived Usability

The presentation of a product on a website is an important aspect of increasing customer satisfaction (Bhat et al., 2021). Researchers have discovered that the usability of a website plays a big role in an online application's success, and that customers form effective links due to web usability (Casalo et al., 2010). OTT platforms should continue to improve the user interface, including the design, impression, and performance. Usability is an important factor that customers perceive as a fundamental characteristic of a good website. Venkatesh and Agarwal (2006) developed a usability model that examines the interaction between content, usability, and marketing. Based on these reviews, we propose the following hypothesis:

H4: Perceived usability has a significant influence on customer satisfaction.

2.6 Lifestyle Congruence

Lifestyle (Solomon, 2010) is the extent to which brand consumption supports an individual's distinctive way of life, as affected by their subjective preferences. Companies should offer products that appeal to the customer's specific tastes, as lifestyle congruence is an important factor determining customer satisfaction. According to Nam et al. (2011), lifestyle congruence is an important factor determining customer satisfaction. Therefore, the following hypothesis is proposed:

H5: Lifestyle congruence has a significant influence on customer satisfaction.

2.7 Brand Identification

Consumer-brand identification is the degree to which the brand represents and enhances the customer's identity, while personal identification occurs when an individual's self-schema overlaps with the schema for a brand (Long and Schiffman, 2000). Brand identity influences consumer loyalty and happiness, and Shirazi et al. (2013) concluded that brand identification affects consumer satisfaction. The emotional attachment, symbolic consumption, and brand loyalty developed by brand recognition can be attributed to a brand when the consumers' expectations are met. Brand identity influences consumer loyalty and happiness (Kim et al., 2001; Gimpel, 2015). Hence, the following hypothesis is proposed:

H6: Brand identification has a significant influence on customer satisfaction.

2.8 Brand Equity

Brand equity is the value addition through customers' association and perception towards a selected product. Brady et al. (2008) opine that brand equity is a broader concept than brand loyalty since it encompasses general familiarity and brand image. Lehmann and Srinivasan (2014) defines brand equity from the customers' perspective as how they perceive, react, and associate with brands and nonbranded products. Brand equity can also be defined as the financial present value of future purchases of a brand. Brands inspire confidence, loyalty, and trust through establishing identities and relationships. Aaker (1992) recognized happiness as a possible outcome of brand equity.

H7: Overall brand equity has a significant influence on customer satisfaction.

2.9 Brand Loyalty

Brand loyalty is a measure of consumer interest in continuing to consume products or services from a brand, and is used to measure brand resonance among customers. Attitudinal loyalty, which captures commitment, trust, and other similar aspects toward a brand, is operationalized as brand loyalty and is more likely to express good feelings about a company and pay higher costs. Research has shown that increased customer satisfaction has a considerable impact on attitudinal and behavioral loyalty, and that good customer satisfaction increases market share and premium pricing (Bowen and Shoemaker, 2003; Back and Parks, 2003). However, few researchers estimate that customer satisfaction does not always imply brand loyalty (Hosseini and Ahmadi Nejad, 2009). As a result, more research into the relationship between consumer satisfaction and brand loyalty is required. Based on these reviews we postulate that:

H8: Customer satisfaction has a significant influence on brand loyalty.

3. METHODOLOGY

3.1 Research Instrument

This research uses a quantitative approach and data is analysed using Partial Least Squares-structural equation modelling (PLS-SEM) method to test the hypotheses. This study's questionnaire included validated items from previous investigations, such as Kataria (2019), Tandon (2015), and Rambocas (2017). Further, the questionnaire was subjected to content validity by experts in consumer behavior and marketing. The questionnaire consists of 35 items measured on a 5-point Likert Scale. Care was taken to include GenZ respondents from various regions across the country to get a comprehensive national representation.

3.2 Sampling

Data was gathered from the GenZ population in various parts of the country who had subscribed for at least one OTT media provider and have been using it for at least a year. If the respondents had multiple OTT subscriptions, they were asked to take the survey based on the most frequently used OTT platform. Over four months, 236 responses were obtained, out of which eight responses had to be omitted from the analysis due to straight-lining and inconsistent responses. Finally, 228 replies met all the criteria and were incorporated in the final analysis. There were 134 male responders (58.8%) and 94 female respondents (41.2%) in total from different regions of India.

3.3 Statistical Analysis

The partial least square structural equation modelling (PLS-SEM) approach was utilised to examine the hypothetical research model using Smart PLS V3.0 (Hair et al., 2016). The PLS method makes no assumptions regarding the data's normality and can be applied to data sets with smaller sample sizes (Aguirre-Urreta and Marakas, 2010). As a result, the PLS method was used for this investigation. The measurement and structural models are the two layers of analysis in the PLS-SEM analysis. The purpose of measurement model analysis is to determine the instrument's validity and reliability. After completing these tests, the structural model is examined to determine the links between the constructs.

3.3.1 Measurement Model Analysis

In measurement model analysis, the survey instrument's validity and reliability are evaluated. Convergent and discriminant validity analyses are used to assess the validity (Chan et al., 2010). The degree to which two or more items measuring the same variable agree is known as convergent validity (Thong, 2001). The average variance extracted (AVE) and outer loading values are used to determine convergent validity. The AVE values of each dimension should be larger than 0.50 (Fornell and Larcker, 1981), and the outer loadings of each construct item should be greater than 0.60 (Lee at al., 2015) to prove convergent validity (Lee at al., 2015). According to the measurement model analysis, all of the constructs' AVE values were in the range of 0.509 to 0.832. All of the constructs' items had outer loading values ranging from 0.689 to 0.933. Both

criteria for assessing the constructs' convergent validity were met, and the model's convergent validity was established. Cronbach's alpha and Composite Reliability were used to evaluate item reliability (CR). Reliability levels greater than 0.60 are considered acceptable. All of the constructs were judged to be sufficiently reliable.

3.3.2 Structural Model Analysis

After the measurement model was validated, the structural model evaluation was carried out to evaluate hypotheses. To determine the adequacy of the suggested model, the R-square value of the structural model was assessed. The PLS-SEM result revealed that 49.1% variance in BLY was explained by the construct SAT, and the constructs OBE, BRI, LSC, PRQ, USB, USF, and PVC explained 62.7% variation in SAT. The hypothesis results are presented in table 1.

Table 1. Hypothesis testing results

	Hypothesised Relationship	Path coefficients (β)	T Statistics	Hypothesis Result
H_1	PRQ -> SAT	0.164	2.781**	Supported
H_2	PVC -> SAT	0.202	3.331**	Supported
H_3	USF -> SAT	0.300	5.797***	Supported
H_4	USB -> SAT	-0.027	0.479	*Not Supported*
H_5	LSC -> SAT	0.130	2.218*	Supported
H_6	BRI -> SAT	0.010	0.186	*Not Supported*
H_7	OBE -> SAT	0.272	3.972***	Supported
H_8	SAT -> BLY	0.688	18.418***	Supported

***$p<0.001$, **$p<0.01$, *$p<0.05$
Note: OBE = overall brand equity, BRI = brand identification, BLY = brand loyalty, SAT = customer satisfaction, LSC = lifestyle congruence, PRQ = perceived quality, USB = perceived usability, USF = perceived usefulness, PVC = perceived value of cost

4. DISCUSSION

The relationship between OBE and SAT has been studied and found statistically significant (Rambocas et al., 2017), thus supporting our research findings. Similarly, as advocated in our study, the influence of PRQ and PVC on SAT has also been reported as significant by earlier researchers (Kataria and Saini, 2019; Hallencreutz and Parmler et al., 2019). A previous study conducted in the Indian context found that young consumers consider OTT content quality an essential factor (Sadana and Sharma, 2021). This observation is in concurrence with our results. The influence of LSC on SAT has been well researched, and the relationship was found to be significant in different contexts (Nam et al., 2011; Kataria and Saini, 2019). Our research findings also supported the association of lifestyle congruence on customer satisfaction. The influence of USF on satisfaction, supported by this research, was also in line with past studies that have examined this relationship (Ha and Stoel, 2009; Alreck et al., 2009). Convenience, a factor closely related to USF, was found to significantly influence young consumers' OTT adoption (Sadana and Sharma, 2021); this result is also in line with the results of this research. Another factor, PVC, was also a significant factor influencing the OTT consumption behavior of youths in earlier studies (Sadana and Sharma, 2021). Previous studies revealed that ease of use, convenience, and monetary value have less influence among millennial consumers of OTT (Walsh & Singh, 2021). But, our research proves that all these factors are significant factors that influence customer satisfaction among Gen Z consumers.

The relationships, BRI → SAT and USB → SAT was not statistically supported in this research. Past researchers who have studied the influence of BRI on SAT have found this relationship to be significant (Kim et al., 2001; Casalo et al., 2010; Pérez and Rodriguez del Bosque, 2015); but there have also been studies that found this relationship to be insignificant (Kataria and Saini, 2019). Brand identification with customers is expected to grow with time. Therefore, the GenZ population, who are most likely to have lesser involvement with any single OTT platform, could be why this relationship was insignificant. Also, procuring OTT services is a low involvement purchase due to the affordability and lower cost involved in the subscriptions. Therefore, the customers' focus here would be more on the functional benefits rather than having an affection towards the brand. While usefulness to customer satisfaction was statistically significant, usability was not. This finding was not in line with past studies which proposed that USB and SAT are related (Nielsen, 2012; Ha and Janda. 2014; Tandon et al., 2015). This result may be because GenZ cohorts are naturally tech-savvy, and they find it easy to use online platforms with much ease compared to other generations.

5. CONCLUSION AND IMPLICATIONS

5.1 Theoretical Implications

This study empirically validates a model for OTT media service brand loyalty based on the predictor variables such as perceived quality, brand identification, perceived cost, perceived usefulness, perceived usability, lifestyle congruence, and overall brand equity. The most important factor determining consumer satisfaction is overall brand equity, followed by perceived usefulness. Perceived quality also has a moderate but significant effect on customer satisfaction, while the perceived value of cost is critical to customer retention and satisfaction. Customer satisfaction was unaffected by brand identification, and customers purchase OTT media services not just out of habit but also because of the brand's practical benefits. This study stands out as a first of its kind in an emerging economy setup that evaluates the OTT media consumption behavior of the GenZ cohort.

5.2 Practical Implications

The OTT business has become highly competitive due to international competitors and the creation of new product categories. To sustain a loyal consumer base, marketers must take the efforts necessary to differentiate the brand from competitors and increase functional utility. Overall brand equity and perceived usefulness have a more significant impact on customer satisfaction than other constructs. Major players are also focusing on releasing new films on their platforms, and the perceived value of cost is a crucial variable in determining brand loyalty. Marketing strategies should be devised based on the utility of the platform to the client and the value for money it provides.

   This research highlights the importance of customer satisfaction for developing brand loyalty for OTT media services. Perceived usefulness of product had the most significant effect on consumer satisfaction in the case of GenZ consumers, while brand equity had the second most significant effect. OTT companies must focus on improving the usability quotient of their platform to enhance customer satisfaction. The perceived value of cost is a significant factor influencing satisfaction, but it ranks below OBE and USF in its effect on SAT. OTT platforms should evaluate the quality of content being delivered through their platform and provide competitive pricing. It is suggested that the OTT companies conduct thorough market research to identify the changing preferences of the target consumers to deliver the content that the customers want.

6. LIMITATIONS AND FUTURE SCOPE

The sample pool is restricted to India, but more data from countries with a significant GenZ cohort population could lead to a more detailed analysis of this generation and their OTT preferences. There is a chance of reverse causality, as different constructs with customer satisfaction were shown to mediate brand loyalty in the study. A more extensive study with a wider range of product categories and qualitative research through interviews and focus group discussions among OTT consumers can provide more insights into customer satisfaction and loyalty behavior of GenZ customers in comparison with other cohorts.

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