CSA study on audiovisual consumption in French-speaking Belgium

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On 15 December 2020, the Belgian Conseil supérieur de l'audiovisuel (regulatory authority for the audiovisual sector of the French-speaking Community of Belgium – CSA) published a new study entitled *Médias: Attitudes et Perceptions* (*Media: Attitudes and Perceptions* – MAP). The study analyses the different ways in which audiovisual media services are used in French-speaking Belgium. More specifically, it aims to discover how the emergence of new forms of audiovisual consumption is changing television usage. It is the first study of this magnitude to be conducted in the French-speaking part of the country.

The authors of the MAP study adopted a highly rigorous approach to their research methods and analysis. Their methodology is based on two complementary components: the first is a standardised questionnaire completed by a representative sample of 2 200 people aged over 15 from Belgium's French-speaking population, which aims to gather data about the participants' behaviours and attitudes; the second element is based on the results of semi-structured interviews with 16 women and 14 men aged between 15 and 76, chosen with the help of a selection matrix. This part of the study is designed to identify the reasons behind the participants' consumption choices and the values and representations attached to them.

Each of the two components covers three main themes. Firstly, the study aims to determine the number of different devices in each household: 93.5% of the respondents said they had at least one television set in their household, while 93.3% had at least one mobile telephone. Desktop computers have largely been replaced by laptops. The most common household combination was one TV set, one computer and one mobile phone. It was found that 88.5% of households in French-speaking Belgium have an Internet connection. The interviews showed that linear television services are mainly used on television sets, paid video on demand is watched on a multitude of devices and free video on demand is primarily consumed on television sets and computers.

The second theme is audiovisual consumption. Linear television remains very popular and is watched by 72.3% of the respondents (some in combination with video on demand), 81.6% of whom said they watched television at home every day. This figure is much higher than for paid video on demand, which is only used

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by 35.8% of respondents on a daily basis, and free video on demand (37.7%). Only 5% of the respondents watch television while travelling (either exclusively or in combination with viewing at home or elsewhere). However, 21.9% watch paid video on demand while travelling (20.3% watch free video on demand). The study also examines in detail the simultaneous use of multiple devices to watch audiovisual media services. Simultaneous use is more common with television (34.7%) than either free (22.3%) or paid (13.1%) video-on-demand services. Meanwhile, the individual interviews show that the entertainment and recreational functions of television and video on demand (paid or free) are highly appreciated. On the other hand, video on demand is not generally used for information or educational purposes, whereas this is a popular function of television. Those questioned were also asked about the pros and cons of the different forms of consumption. Regarding television, they liked the diversity of content, the ease of choice and the family focus, but they also noted the pervasiveness of advertising. They thought that paid video on demand provided access to interesting content and was characterised by the absence of advertising and the ability to control viewing times, but they also considered that it could be addictive. Free video on demand offered alternative sources of information, with viewer recommendations playing a prominent role, but omnipresent advertising was considered a major drawback.

Finally, the third theme concerns the complementarity and substitutability of the different types of audiovisual consumption. The questionnaire results show that the different types of audiovisual consumption are complementary rather than substitutable: 86.3% of the respondents do not intend to stop watching television (71.5% for paid video on demand). The interview-based part of the study, meanwhile, suggests that people for whom television is the primary means of regular consumption believe it is irreplaceable in its linear form or as a video-on-demand service provided by traditional television channels. However, people whose primary means of regular consumption is a form of video-on-demand (paid or free) are prepared to switch to the other type of video-on-demand service.

The study also focuses in detail on the factors affecting changes to consumption patterns and viewing equipment. It looks at the impact of the health crisis linked to the COVID-19 pandemic. It also suggests standard user profiles and concludes by listing some of the major topics for public debate raised by the research carried out, including the affirmation of local platforms vis-à-vis large international platforms, the regulation of social networks, and the fight against discrimination and illegal services.

Étude « Médias : Attitudes et Perceptions 2020 »

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