[BE] Second edition of CSA study on audiovisual consumption in French-speaking Belgium

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On 17 November 2022, the Belgian *Conseil supérieur de l'audiovisuel* (regulatory authority for the audiovisual sector of the French-speaking Community of Belgium – CSA) published the results of its second study entitled *Médias: Attitudes et Perceptions* (Media: Attitudes and Perceptions – MAP). Like the first edition published in 2020 (based on 2019 data), the study analyses how the emergence of new forms of audiovisual consumption is changing television usage. It updates the data previously collected and draws comparisons with the results of the previous study. In a context of increased competition between television and video on demand (VOD) in the audiovisual market, the study highlights a series of trends that reflect changing consumer behaviour and clarifies a number of popular misconceptions. The full study is available in French on a dedicated website, where an English translation of its key findings is also available.

The authors of the MAP study focused on scientific and analytical rigour. The study is based on a quantitative survey carried out by means of a standardised questionnaire completed by a representative sample of 2,200 people aged 15 and over in French-speaking Belgium. The aim was to ensure the data was as robust as the 2020 study and allow for relevant analysis.

Like the first edition, in order to define how the consumption of audiovisual content is changing, the 2022 MAP study focuses on three main themes.

The first, exposure to technology, looks at the different devices that are owned by households that can be used to watch audiovisual content (television sets, video projectors, computers, mobile phones, tablets, games consoles, virtual reality headsets). The most widespread device is the mobile phone (94.3% of respondents have one) and the television set (93.9%). The dominance of smartphones increased between 2019 and 2021. Indeed, the share of people with at least one smartphone (among those who own mobile phones) is up by 5.8%. Between 2019 and 2021, distributors' set-top boxes consolidated their dominant position among devices connected to TV sets, with an increase of 3%. DVD/Blu-ray players experienced a significant decrease of 8.3%, which moved them into third place behind games consoles. There was a slight increase in the number of households with an Internet connection between 2019 and 2021 (+2.1%).

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The second theme is individual audiovisual consumption, which is divided into three types: television, pay VOD and free VOD. For each of these, there are two forms of consumption: single-device consumption, i.e. one type of audiovisual consumption at a time, and simultaneous consumption, where audiovisual consumption is combined with another activity (media or otherwise) at the same time. Contrary to the popular misconception that television is being replaced by video on demand, the MAP study for 2021 shows that, as in 2019, television remains the most popular type of consumption, since 72.2% of respondents said they watched it, whether in combination with VOD or not. Nevertheless, television's dominance does not mean VOD is not an essential form of audiovisual consumption. Indeed, in 2021, 56.8% of respondents used it, partly in combination with television (3.4% higher than in 2019). Another misconception corrected by the study concerns the increase in Internet-based TV viewing (e.g. television viewed on websites and/or dedicated TV channel applications): in 2021, this remained a minority activity, both at home and on the move: 67.1% of television viewers never watch TV on the Internet at home and only 6.1% do so on the move.

The third and final theme of the study concerns the complementarity and substitutability of the different types of audiovisual consumption. The idea is to find out whether there is any complementarity between the types of audiovisual consumption or whether one is being replaced by another. The results of the 2022 MAP study suggest that the general trend of complementarity between television and VOD observed in the 2020 edition has continued. While television remains the most popular choice, its combined consumption with VOD is widespread among French-speaking Belgians. The MAP studies show that combined consumption was enjoyed by 35.2% (2021) and 34.4% (2019) of consumers. However, in 2021, 37% of respondents said they only watched television, whereas 21.5% only watched VOD. Meanwhile, 2021 saw a decrease in the number of people who do not consume audiovisual content, i.e. neither television nor VOD (6.3% of respondents in 2021, 2.4% less than in 2019).

The study also looks in detail at the factors that are influencing the evolution of TV consumption and equipment, concluding with various findings that will provide a valuable basis for public debate on these issues.

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