Study on the consumption modes of audiovisual media services in the Wallonia-Brussels Federation

- Conclusions -

With the support of the Wallonia-Brussels Federation

I. ANSWER TO THE RESEARCH QUESTION

A. INTRODUCTION

1. This study was structured around the following research question: "How is television viewing changing with the development of new modes of consumption of audio-visual content?"

2. In the following pages, we seek to answer this question, recalling beforehand the methodological measures implemented for data collection.

3. *Television* was considered in this study as all audio-visual media services provided by media service providers for the simultaneous viewing of programmes based on a programme schedule.

4. *New modes of consumption* have been defined as all the means allowing a given consumer to use services offering audio-visual content on demand, by freeing themselves from the constraints of television, i.e. audio-visual content:
   - At a fixed time,
   - According to a predefined programme schedule.

5. To answer this research question, two components – quantitative and qualitative – were deployed in this study, each of them based on a precise methodological measure.

   5.1. The **quantitative component** of the survey consisted of administering a standardised questionnaire to a theoretical sample of 2,000 individuals (sample obtained from 2,200 individuals) representative of the population aged 15 and above residing in French-speaking Belgium. This component seeks to quantitatively define the change in *attitudes* towards the consumption of audio-visual content.

   5.2. The **qualitative component** was based on semi-structured interviews with 30 respondents (16 women and 14 men aged between 15 and 76) chosen for their representativeness based on a selection matrix. This was established according to the socio-demographic variables which turned out to be the most insightful for audio-visual consumption at the end of the multivariate statistical analysis, in this case: gender, age, professional situation and family situation. The qualitative component seeks to understand how and why such content, device or mode of consumption is preferred (or not preferred) by the person. It thus examines the *perceptions* of consumers.

6. The following three dimensions (or themes) underlie each of these two methodological components:
   - volume of different devices available to French-speaking Belgian households;
   - audio-visual consumption, which can be on both a single-user as well as simultaneous basis;
   - complementarity and substitutability of the different audio-visual modes of consumption.

7. The results of the quantitative and qualitative components have provided a set of answers to the question "How is television viewing changing with the development of new modes of consumption of audio-visual content?" These answers are presented below by theme.

B. ATTITUDES: RESULTS OF THE QUANTITATIVE ANALYSIS

Data of consumption and devices

a. Household devices

8. With regard to household devices, the following observations can be made.
   8.1. The television and mobile phone are the most common devices in Belgian households located in the French-speaking region and in the bilingual region of Brussels-Capital: 93.5% of respondents declared that they have at least one television in the household and 93.3% of them have at least one personal mobile phone.
   8.2. Among the respondents with at least one television, 54.8% have at least one television connected to the Internet. Smart TVs are therefore predominantly found among respondents with at least one television.
   8.3. Among the respondents who own at least one mobile phone, 26% declared having a GSM-based phone, while 63.9% declared having a smartphone.
   8.4. Desktop computers are largely replaced by laptops. Other devices such as tablets or game consoles are less common but are not too far behind.
   8.5. Set-top boxes of various distributors (VOO, Telenet, Proximus, Orange, etc.) are the devices most connected to televisions in households with a television. In fact, the set-top boxes are connected to the television in 86.1% of cases. 32.2% have a connected DVD/Blue Ray player and 28.5% have a connected games console.
   8.6. The choice of whether or not to connect a device is primarily based on the needs of the household. Price is the second determining factor, except in the case of televisions where the second reason given is having another device to consume favourite TV programmes (computer, smartphone, tablet, etc.).
   8.7. It should be noted that the preferred combination for households is a television, a computer and a mobile phone, although there are a number of households that add a tablet or a tablet and a games console to that.
   8.8. 77.2% of households have a medium or high level of ownership of smart/connectable devices. 14.4% of households a low ownership of smart devices. 8.3% of them do not have a smart device at all.
   8.9. Finally, 88.5% of Belgian households located in the French-speaking region and in the bilingual region of Brussels-Capital have an Internet connection. Among the respondents who have a connection, 88.5% rated their Internet connection as good or very good. Only 11.5% say it is poor or very poor.

b. Single-user audio-visual consumption

General observations

9. In terms of single-user audio-visual consumption, the following observations can be made.
   9.1. Television remains the most popular audio-visual mode of consumption in Belgian households located in the French-speaking region and in the bilingual region of Brussels-Capital: 72.3% of respondents say they watch television (whether or not combined with VOD), 53.4% of respondents consume video on demand (partly in combination with television) and 8.7% of respondents say they never watch television or video on demand.
   9.2. Respondents who say they only watch television are the highest in number (38%), followed by those who say they watch television and VOD (34%). Finally, 19% of respondents say they only consume VOD.
   9.3. Watching television is done mainly at home (99% of respondents), or even in a close environment – at a neighbour's, a friend's, etc. – (11%), but not on the move (5%). Watching VOD is also done mainly at home (98.7% of respondents for paid VOD and

96.3% for free VOD), but also on the move (21.9% of respondents for paid VOD and 20.3% for free VOD) and in this case, more than television.

Consumption at home

10. In terms of single-user audio-visual consumption at home, the following observations can be made.

10.1. The majority of households choose to consume either television or VOD depending on their interest in the content offered on one or the other mode. If a person does not use a given mode of consumption at home, it is primarily because they have no interest in it. The second reason for not using a given mode of consumption varies according to this mode: those who do not watch television say that it is impossible to decide when to watch their programme and to decide what content to watch. For those who do not watch video on demand, the second reason for doing so is that they have sufficient options elsewhere.

10.2. For 81.6% of consumers, the vast majority, watching television at home is a daily practice.

10.3. Television consumption is generally done on a television set (for 98.5% of respondents).

10.4. It remains in use for a period, mostly, of more than three hours. In fact, 49.7% of respondents say that the television is in use at home, for an average of more than three hours a day. On the other hand, 56.4% of consumers watch television – i.e. actively watch a programme – between one and three hours a day on average.

10.5. The use of television on the Internet at home concerns only 31.5% of consumers, if we add those who do it rarely, occasionally, often and all the time.

10.6. The consumption of paid video on demand is a daily practice for 35.8% of respondents and that of free video on demand for 37.7%. These percentages turn out to be far below the figures achieved by television (which is a daily practice for 81.6% of respondents).

10.7. VOD is generally consumed for a period of one to three hours per day on average when respondents watch it. However, there is a difference between paid and free VOD. Respondents who consume VOD over a period of 1 to 3 hours are more in number when it comes to paid VOD (74.4% of respondents for paid VOD vs. 54.6% for free VOD). Conversely, respondents who consume VOD for a short period of less than 1 hour are more in number when it comes to free VOD (37.1% of respondents for free VOD vs. 13.4% for paid VOD).

10.8. VOD is generally consumed on television sets, laptops and smartphones. Televisions are widely used for the consumption of paid or free video on demand. However, that is more likely for consumption of paid VOD (81.8% of paid VOD consumers) than free VOD (58% of free VOD consumers). After television sets, respondents cite smartphones and laptops. However, the smartphone takes second place for free VOD consumption (it is cited by 45% of free VOD consumers) while it is the laptop for paid VOD consumption (it is cited by 36.5% of paid VOD consumers).

10.9. The video on demand services best known to VOD consumers (whether they are paid or free and whether the main purpose of the service, a dissociable part or an essential feature of the service is the provision of video on demand) are the international giants YouTube (known to 95.8% of respondents), Facebook (93.8%), Netflix (93%), Instagram (84.5%), Snapchat (77.1%) and Twitter (74.6%). The services offered by Proximus, Scarlet, VOO, Telenet and Orange are cited by 76.1% of respondents, while RTBF Auvio was cited by 71.1%. It is clear that the VOD services best known to VOD consumers are also the most used: the top trio of best-known services, i.e. YouTube, Facebook and Netflix, corresponds exactly to that of the services most used to watch videos on demand.

Consumption on the move

11. In terms of single-user audio-visual consumption on the move, the following observations can be made.

    11.1. Among all respondents who watch television, only 5% of them do so, on the move (exclusively or in combination with watching it at home or elsewhere). On the other hand, 21.9% of respondents watch paid VOD and 20.3% watch free VOD on the move. VOD is therefore consumed more frequently on the move than television.

    11.2. The main reason given by those who watch television for not watching while on the move is – by far – not feeling the need to do so (80%). The same reason is given by paid VOD consumers for not watching it on the move: not feeling the need is cited by 70.6% of respondents, followed by data consumption (22%) and battery consumption (19.5%).

    11.3. 47.7% of people who say they watch television on the move do so within an interval that ranges from daily to at least once a week. Consumption is generally carried out for a period of less than 30 minutes per day on average, generally on the websites and applications of television broadcasters.

    11.4. For a relative majority of respondents, watching paid or free VOD on the move is an activity that takes place every day to at least once a week. In fact, 48.7% of people who say they watch paid video on demand on the move do so within an interval ranging from daily to at least once a week; this is the case of 64.5% of those who claim to consume free VOD. It is thus clear that free VOD is consumed more often in this frequency range than paid VOD.

    11.5. The viewing time for paid VOD on the move is longer than the time spent watching TV on the move. On the other hand, the viewing time of free VOD on the move is very similar to that of television on the move: it is observed that a majority of people say they watch less than 30 minutes per day when they consume it, for both free VOD on the move (54.8%) and television on the move (55.3%).

    11.6. The main device used to watch audio-visual content on the move is the smartphone. It is used by 77.8% of people who watch paid VOD on the go and by up to 90.4% of those who watch free VOD.

    11.7. Depending on the mode of consumption chosen, respondents will prefer to use 3G/4G or downloading: for paid VOD, respondents mostly prefer downloading (44.6%); for free VOD, they prefer 3G/4G (62.2%). To watch television on the go, consumers prefer to connect to a 3G/4G mobile phone network (55.7%) or to a WiFi network (44.3%).

c. Simultaneous audio-visual consumption

12. With regard to simultaneous audio-visual consumption, the following observations can be made.

    12.1. Simultaneous (multi)media consumption refers to the use of a smartphone, laptop or tablet while consuming television, paid video on demand or free video on demand. Simultaneous consumption also includes the performance of activities other than those devoted to audio-visual consumption. A distinction is thus made between simultaneous (multi)media consumption and the performance of other activities simultaneously with media consumption.

    12.2. 47.6% of respondents perform a (multi)media activity simultaneously with their consumption of television, paid or free VOD at home.

    12.3. Performance of (multi)media activities simultaneously is more frequent while watching television (34.7%), than free VOD (22.3%) and paid VOD (13.1%). We would thus be faced with listening more "attentively" to content that we have searched for, selected and, especially, paid for.

12.4. When we look at the types of activities (media or other) carried out simultaneously with audio-visual consumption – using your smartphone, tablet or laptop, or carrying out another activity – it is observed that the smartphone is the medium most used simultaneously with consumption of television and VOD. 39.4% of respondents use it while consuming television, 47.1% while watching free VOD at home and 43.7% while consuming paid VOD. The use of smartphones is therefore higher when consuming VOD than when watching television. The difference between television and VOD could be explained by the respective profile of their consumers, in particular their age and/or their level of familiarity with technology. In addition, the difference between paid and free VOD could be explained by the fact that we are theoretically more attentive to content that we have paid to watch than to free content.

12.5. Finally, whether we are talking about television or VOD (free or paid), the most frequent tasks performed simultaneously with this consumption are the same, in this case: 1) surfing on social media ;2) surfing the Internet;3) playing a game; 4) working. However, the proportions differ depending on the media consumed.

d. Complementarity of the consumption modes

13. As regards the complementarity of audio-visual modes of consumption, the following observations can be made.

13.1. Single-user consumption of audio-visual content available at a given time according to a fixed programme schedule (television) is the majority mode of consumption. The cross-consumption[1] of this mode of consumption, with single-user consumption of audio-visual content accessible when respondents so wish (video on demand) comes second.

13.2. Thus, 38% of respondents said they only consume audio-visual content available at a given time according to a fixed programme schedule (television). On the other hand, only 19% of them consume only audio-visual content that is available when they want (video on demand). The cross-consumption of these two modes of consumption is practiced by 34.4% of respondents.

13.3. The respondents' preferred cross-consumption is television and free VOD with 16.7% of respondents. A total of 12.6% combine the three modes of consumption (television, paid VOD and free VOD).

13.4. Among VOD consumers, 50.6% are satisfied with free VOD, 13.7% with paid VOD and 35.7% with both.

e. Substitutability of the modes of consumption

14. With regard to the substitutability of audio-visual modes of consumption, the following observations can be made.

14.1. Regarding the substitutability of the modes of consumption, it is interesting to note that a very large majority of respondents (86.3%) certainly or probably do not plan to stop watching television. Likewise, a very large majority of respondents (71.5%) certainly or probably do not plan to stop watching paid video on demand.

14.2. The main reason cited by those who probably or certainly plan to stop watching television is the lack of interest in its content (56.8%). The inconvenience of advertising comes in at second position (33.7%) and the price of television subscription comes in at third position (31.8%).

[1] That is to say that we use different modes of consumption but we do not necessarily consume them simultaneously.

14.3. It appears that those who are ready to stop watching television are turning more to free video on demand. In fact, 62.9% would turn to free video on demand and 38% would turn to paid video on demand.

14.4. If we look at the impact of increased television prices, it is observed that the majority of television consumers (61.1%) certainly or probably do not plan to unsubscribe from television services.

14.5. As regards VOD, we see that the main reason cited by those who probably or certainly plan to stop watching paid video on demand is the excessively high subscription price (64.7%). The second reason is the availability of sufficient options elsewhere (25.2%).

14.6. It appears that 60.4% of those who are ready to stop watching paid video on demand would switch to free video on demand.

14.7. If we now look at the impact of an increase in the consumption price of video on demand on the willingness to unsubscribe from the latter or to no longer purchase content on demand, it is observed that a majority of consumers (55%) certainly or probably would not consider unsubscribing.

Factors impacting the changes in consumption and devices

15. The research has also highlighted the impact of several (independent) variables on the use of television and new modes of consumption. These data provide details on the factors that impact the changes in consumption and devices.

16. More specifically, we analysed the impact of gender, age group, family situation, household income, overall price sensitivity (i.e. sensitivity to the price of devices – television, computer, smartphone – or services – the price of the television subscription for example), the level of ownership of smart devices and the respondent's familiarity with technology on:

- The number of devices in the household;
- The choice of consumption mode (television, paid VOD, free VOD) or the choice of device (television, smartphone, laptop, etc.);
- The practice of simultaneous audio-visual consumption and the type of simultaneous activity (e.g. using the smartphone, tablet, computer, etc. while consuming television or VOD);
- The complementarity of consumption modes (cross-use of television and/or free VOD and/or paid VOD);
- The substitutability of consumption modes (the existence of substitutability and the choice of the mode consumed to substitute).

17. Statistical Chi-square tests designed by Pearson, on the one hand, and Fisher, on the other, highlighted statistically significant associations between variables. The main associations are summarised below; they are structured by independent variables (those that have an impact):

a. Impact of household income level

18. The number of different devices depends on the income of the household considered: the higher the household income, the more different devices this household has.

19. A person's choice of consumption mode is impacted by their household income: the higher the household income, the more the respondent watches video on demand. However, the same observation is not made for television because the assumption that the higher the household income, the less the respondent watches television is invalidated.

20. Whether or not the respondent chooses simultaneous audio-visual consumption depends on the income level: the higher the respondent's income level, the more they simultaneously use different media devices for simultaneous audio-visual consumption. On the other hand, the link between the income level and the type of simultaneous exposure is only marginally significant.

21. The complementarity of consumption modes depends on the income of the household considered: the higher the income of the household considered, the more the consumer will tend to consume in a complementary manner. In addition, symmetrically, the lower the income of the household considered, the more the consumer will tend to consume only television. For VOD only, however, the trend is less clear-cut.

22. The higher the household income, the less inclined the consumer is to stop watching paid VOD and replace it with another mode of consumption.

b. Impact of overall price sensitivity

23. The number of different devices depends on the overall price sensitivity of the respondent of the household considered. However, the relationship between these variables is not as expected since, on the contrary, it is in the households whose respondents have expressed the highest overall price sensitivity that the highest number of different devices is found on average: the higher the respondent's overall price sensitivity, the more different devices the household has.

24. As the overall price sensitivity increases, so does the cross-use of consumption modes. The relationship between these variables is not as expected since it is observed that consumers of television and VOD (paid and/or free) are more in number among those who have average or high price sensitivity than among those with low or no price sensitivity.

25. Finally, the substitutability of consumption modes depends on the overall price sensitivity: the higher a person's overall price sensitivity, the more likely they are to stop watching television/paid VOD and substitute it for another mode of consumption of audio-visual content.

c. Impact of family situation

26. The number of devices is impacted by a person's family situation, more precisely by the composition of their family and the presence and age of children.
    - 26.1. In fact, it is observed that the higher the number of people in a household, the higher the number of devices.
    - 26.2. The presence of children or young people in the household also impacts the number of different devices, but in a non-linear manner. If there are children in the household, the number of devices is greater.
    - 26.3. In addition, it appears that the older the children or young people (up to 18 years), the more devices there are.

27. Audio-visual consumption is impacted by the family situation: the consumption of VOD is greater in households where there are children than where there are none, and the consumption of television is higher in households where there are no children than in households where there are some.

28. Simultaneous audio-visual consumption depends on the person’s family composition. People living alone or as a couple but without children are proportionally more “attentive” to the television programmes and are more likely to carry out no other activity simultaneously with television

consumption. Regarding the type of simultaneous activity: the use of the smartphone simultaneously with watching television is higher among people whose households have children than among those whose household does not have children.

29. The complementarity of consumption modes depends on the family composition: the complementarity of a person's consumption modes is higher in households where there are children than where there are none.

d. Impact of age group

30. A person's choice of consumption mode is impacted by their age group. In fact, it is observed that television consumption increases with age group, even if inconsistently, and that VOD consumption decreases with age group. Moreover, the average daily duration and frequency of television consumption increase with the age group and the average daily duration and frequency of consumption of video on demand decrease with the age group even through in a slightly inconsistent manner.

31. The choice of device used (television, smartphone, laptop or desktop, tablet, etc.) for each of the different consumption modes is impacted by the age group.
    31.1. The younger we are, the more we use – other than the television set which is very popular with all generations – a personal device (with the exception of the tablet in the 15-19 age group). The older we are, the more we limit ourselves to using a collective device i.e. the television.
    31.2. Other collective devices such as video projectors and desktop computers are not very popular among those over 50. The television set is used across the board by all generations to watch television at home. As for the smartphone: the older the age, the less the smartphone is used to consume both television and video on demand at home. For those under 30, its use even surpasses the television for viewing free video on demand at home.

32. The age group of consumers impacts simultaneous (multi)media consumption: the younger we are, the more we simultaneously use different media for audio-visual consumption and, conversely, the older we are, the less we simultaneously use different media for audio-visual consumption. When people watch simultaneously: the older they are, the more they do so in parallel with television consumption and the younger they are, the more they do so in parallel with VOD, especially free VOD.

33. The age group of consumers impacts the type of activity carried out simultaneously with television and VOD consumption. The use of the smartphone in parallel with watching television and VOD decreases with the age group: the more age increases, the more its use decreases.

34. There is a relationship between the substitutability of consumption modes and the age group of consumers. In fact:
    34.1. The younger we are, the more likely we are to stop watching television and substitute it for another mode of consumption of audio-visual content;
    34.2. The older we are, the less likely we are to stop watching television and substitute it for another mode of consumption of audio-visual content;
    34.3. The younger we are, the less likely we are to stop watching VOD and substitute it for another mode of consumption of audio-visual content;
    34.4. The older we are, the more likely we are to stop watching VOD and substitute it for another mode of consumption of audio-visual content;

e. Impact of gender

35. Gender impacts the choice of consumption mode: women are more likely to watch television than men. They are also proportionately less likely to watch video on demand in general than men.

36. A complementary analysis has highlighted that consumption is gendered but not for all age groups:
    a. There is a difference in consumption of both television and video on demand among those aged 60 and above: men consume proportionately more video on demand while women consume proportionately more television.
    b. Between the ages of 30 and 60, a difference in behaviour between the genders is also observed, but it only relates to the consumption of video on demand: men consume it proportionately more than women.
    c. These differences in consumption disappear within 30 years.

    However, there is only a very slight difference between the respective exposure of women and men to paid video on demand and free video on demand.

37. Gender impacts the choice of device used to consume television and free VOD at home: in general, men tend to use their personal device more than women. This trend can also be observed for collective devices[2], with the exception of the television set for watching television (which is used in an equivalent proportion by men and women).

38. A complementary analysis highlighted that for watching television at home, the choice of device will also depend, other than the gender, on whether or not the household has one or more children.

39. Gender impacts the type of activity carried out simultaneously with television consumption. In fact, not only do women use less (multi)media in parallel with television consumption, but they are also proportionately more likely than men to carry out another (non-media) activity while watching television.

40. A complementary analysis highlighted the impact of age and family situation on these differences in simultaneous activities by gender:
    a. Gender differences in the type of activity performed simultaneously with television consumption appear beyond the age of 30 and are not seen for those under 30. Gender differences are greatest among those over 60.
    b. There is a correlation between the gender of the respondent and the type of activity carried out simultaneously with television consumption in households with children and in couples with children.
    c. Finally, there is also a link between the age of the children within the couple and the type of simultaneous activity, for both men and women. However, this is not as expected since, the older the age of the children, the more "other activities" increase compared to "media" activities among mothers, whereas one could expect that these other activities (e.g. domestic or parenting) are higher for mothers of young children.

41. Gender impacts the substitutability of television (existence of substitutability): women are proportionately slightly more likely than men to not stop watching television.

42. In addition, gender impacts the choice of modes consumed to substitute television: women are proportionately slightly more likely than men to not stop watching television and more likely than men to consider consuming no audio-visual media once the television is switched off. Men are

2 "Collective device" refers to a device that generally allows viewing by several people, such as television, video projector and desktop computer (see scientific report).

proportionately more likely than women to consider consuming paid or free VOD if the television is switched off.

f. Impact of the level of ownership of smart/connectable devices

43. The level of ownership of smart/connectable devices in a household impacts the choice of consumption modes: the television consumption of the respondents decreases with the level of ownership of smart devices within their household, up to a certain threshold (in fact, the decrease is not completely linear). In addition, the more smart/connectable devices respondents have in their household, the more video on demand they consume and the less smart/connectable devices respondents have, the less video on demand they consume.

44. The level of ownership of smart devices influences the type of activity carried out simultaneously with the consumption of television, paid VOD and free VOD.

45. Finally, the level of ownership of smart/connectable devices in a household impacts the complementarity of consumption modes: the more consumers have a high ownership of Internet-ready smart/connectable devices in their household, the more they will tend to consume in a complementary manner. The lower the level of ownership of Internet-ready smart/connectable devices in the household, the less likely consumers are to consume in a complementary manner.

g. Impact of familiarity – subjective and/or objective – with technology

46. A distinction should be made between subjective familiarity with technology (that which the respondent gives themselves) and objective familiarity (that which is objectified using criteria measuring their competence).

47. The number of household devices is impacted by the respondent's subjective and objective familiarity with technology: the more familiar the respondent is with technology, the more variety of devices the household has.

48. The choice of consumption mode is impacted by objective and subjective familiarity with technology. However, some nuances must be identified:
    a. The higher the subjective familiarity with technology, the more the choice will be for consumption of video on demand and the lower the subjective familiarity, the more the choice will be for television consumption.
    b. On the other hand, when it comes to objective familiarity with technology: individuals who have high objective familiarity with technology are more likely to consume VOD than those with lower familiarity, along with television.

49. Simultaneous audio-visual consumption is impacted by objective and subjective familiarity with technology. However, some nuances must be identified:
    a. The higher the subjective familiarity with technology, the more the respondent will tend to simultaneously use different multimedia devices for audio-visual consumption. This is true regardless of the mode of audio-visual consumption: television, free VOD and paid VOD.
    b. On the other hand, the higher the objective familiarity with technology, the more the respondent will tend to use multimedia devices in parallel with their consumption of television and free VOD, but not paid VOD.

50. Finally, the complementarity of consumption modes is impacted by the respondent's objective and subjective familiarity with technology. The higher the respondent's objective and subjective familiarity with technology, the more they will tend to consume in a complementary manner.

C. PERCEPTIONS: RESULTS OF THE QUANTITATIVE ANALYSIS

51. The qualitative component was intended to provide insights into the changes in consumption modes. The aim was to examine the habits and practices, as well as the perceptions and representations linked to the consumption of television, paid video on demand (VOD) and free video on demand in order to understand how and why such a mode is preferred. Thus, the meaning that individuals give to their practices has been explored.

Providers, type of content and individual/joint consumption

52. The perceptions of the respondents regarding the different consumption modes are primarily based on the identity of the different providers of audio-visual content consumed. It seems that consumers, consciously or not, make a distinction between audio-visual content according to their source, in other words according to the provider. It is thus possible build a typology, based on the perceptions of respondents, to highlight the source of the content provided to users, i.e. the providers of this content.

- **Television** is made available by providers of linear audio-visual media services (in common parlance, these are providers of the "historic television channels", i.e. those that have been established for many years, in many cases before the advent of the Internet);
- Videos on demand (paid or free), the content of which is made available to the public on the initiative of the historic television channels, hereinafter also referred to – *brevitatis causa* – as **videos on demand native to television**. They can be paid or free but, in the remainder of this analysis, will be essentially considered as free. The recordings and *replay*, which were considered as television in the quantitative analysis, will here be considered similar to videos on demand native to television, because this corresponds to the perception of the respondents;
- Videos on demand (paid or free), the content of which is made available to the public by sources other than historic television channels and which are broadcasted mainly through dedicated online platforms and shared between users through social media, hereinafter also referred to – *brevitatis causa* – as **videos on demand native to Internet**. They can be paid or free but, in the remainder of this analysis, will be essentially considered as free;
- **Paid videos on demand** accessible via dedicated streaming platforms or by download and finally
- **Videos obtained illegally**.

53. Following on from the question of the source of content, the perceptions of the respondents also indicate a dichotomy between **"television content"** and **"non-television content"**.

54. It is thus possible to determine the dominance of one or the other in the consumption of a given individual.

55. Finally, it is observed that the respondents opt for **individual or joint consumption** of audio-visual content. There are three categories:
    - individual television consumption;
    - joint consumption of television and video on demand;
    - individual consumption of video on demand.

Perceptions of respondents and typology of audio-visual consumption:

56. The crossing of the three parameters explained above (providers, type of content and individual/joint consumption) made it possible to establish six mutually exclusive audio-visual profiles at the end of the qualitative analysis.

a. GROUP A) Exclusive consumption of live television:

57. Group A concerns a small group of users who consume audio-visual media exclusively in the form of live television. All have Internet access and some use social media on their smartphones, without, however, using them to watch specific audio-visual content. Due to lack of time, interest or technical knowledge, these users do not use video on demand. Their television consumption is traditional with live viewing of programmes on the television set.

b. GROUP B) Consumption of live television and free video on demand native to television:

58. Like group A, group B is characterised by the fact that its users exclusively watch audio-visual content made available to the public by the providers of historic linear audio-visual media services on television channels. However, group B differs from group A in terms of its consumption, in addition to television, of free video on demand native to television. For these respondents, video on demand is considered as a modern extension of the services offered by "historic television channels", which allows them to overcome the constraints of imposed schedules and programmes inherent in television.

c. GROUP C) Consumption of live television, free video on demand native to television, and paid and/or illegal video on demand on an occasional basis:

59. In terms of audio-visual content consumption practices, group C resembles group B in its consumption of videos on demand perceived as an extension of the features of conventional television. Unlike groups A and B, users of group C use at least one mode of consumption of audio-visual content other than television and videos on demand native to television. Some users have access to a paid platform (e.g. Netflix) and others occasionally watch content obtained illegally.

d. GROUP D) Exclusive consumption of video on demand programmes, with a dominance of free video on demand native to television:

60. Group D is a minority model in our sample but it is particularly interesting in that it is made up of users who have chosen to do without linear television and television sets, but not without the content made available to the public by providers of historic linear audio-visual media services. Their main mode of consumption of audio-visual content is free video on demand offered by providers of historic linear audio-visual media services (which they access on tablets and computers), followed by access to the offer of providers other than those of linear audio-visual media services. Unlike group C, following audio-visual content is more of a solo activity. Control over the choice of programmes is therefore more important.

e. GROUP E) Consumption of television and free video on demand native to television in a family setting; consumption of paid video on demand individually, with a preference for the latter consumption mode:

61. Group E is made up of young users who present the broadest panorama of audio-visual content consumption modes. Members of this group who live with their parents testify to the social and ritualised aspect of television consumption. Television sets in the living room make it possible to gather around it for television news before, during or after meals, or to watch a film or a series together. This activity has a positive vibe according to these users for its social and sharing aspect. Nonetheless, paid video on demand is unanimously the mode which, in this model, is the most successful. All group E users use Netflix as their primary source of audio-visual content. They access it on various devices that are personally owned by them (e.g. smartphone, computer). This content is generally viewed individually, in a private living space such as the bedroom.

f. GROUP F) Exclusive consumption of video on demand, with a preference for paid and/or illegal video on demand, and the use of free video on demand native to television in a targeted manner

62. Members of group F prefer video on demand made available to the public by sources other than the providers of historic linear audio-visual media services (i.e. providers of paid video on demand, which is native to Internet or illegal or a combination of both). Group F members differ from group E members because they are more likely to use paid video on demand services other than Netflix and make more frequent use of illegal downloading and illegal streaming. Moreover, members of group F select audio-visual content differently from that observed in groups B and C. In fact, while groups B and C are characterised by a primary reference to live television for choosing a programme (the search for on-demand content comes later, when the choice remains unsatisfied), in group F, on the contrary, it is the search for content and choice that takes precedence. The content made available online by historic linear audio-visual media services is one more possibility among the endless options on the Internet.

63. For each of the different content sources – or content providers – distinguished above, we identified consumption habits and practices, on the one hand, and perceptions and representations, on the other.

Habits and practices: a variety of uses

64. The qualitative analysis relating to consumption habits and practices highlights that while the respondents have a **preferred source of content** as we have just seen above – television, free VOD native to television or native to Internet, paid VOD or even VOD obtained illegally – these different sources are not mutually exclusive.

65. Thus, for a large majority of respondents, consumption modes **are not mutually exclusive**. A **variety of uses** of media consumption modes is observed. These are part of a kind of continuum, where one moves from one to the other according to different **contextual** parameters, in this case:

- *1. The objective that we want to give our consumption*: to pass the time, to have something in the background, to complement various tasks, to be informed, to have fun, to learn languages, to binge-watch a series, etc.
- *2. The content we want to watch*: information, entertainment (e.g. reality TV), series, films, documentaries, "alternative" sources of information, short formats such as film reviews, funny video clips or tutorials, etc.
- *3. Consuming content alone, as a couple, or in a group dynamic (with family, friends, etc.).* While consuming alone implies autonomy in the choice of audio-visual content, consuming as a couple or in a group implies negotiation and compromise. The configuration type therefore has an impact on the consumption mode chosen and the practice of simultaneous consumption.
- *4. The willingness to be attentive to the content and to follow it keenly or to watch it in a more or less distracted manner and/or passively*.
- *5. The intention to proactively search for content or the willingness to take "what you get", without having to choose.*

- *6. Being at home or on the move.*
- *7. Devices available at the time of consumption.*
- *8. Finally, the time of day.*

66. For the majority of respondents, consumption modes are therefore in the form of combinations according to these different contextual parameters. The fact remains that the respondents generally have a preferred source – a primary mode of consumption – which is linked to various socio-demographic variables: gender, age, familiarity with technology, etc. Generational differences can thus be observed in terms of preferred sources and the organisation of consumption modes.

Zapping between complementary modes of consumption:

67. While the uses of consumption modes are diversified and come in forms of combinations, it is also because these consumption modes are described as complementary. Each of them would respond more adequately to the different parameters listed above:

- ***1. The objective that we want to give our consumption:*** according to the respondents, television seems to better meet the objective of being informed, relaxing, having something in the background or complementing various tasks; whereas paid VOD is better suited to the objective of learning languages, binge-watching a series or even "thinking about the world" while watching a documentary. Finally, free VOD native to Internet is more frequently mentioned to "pass the time", especially when on the move or in the background during other activities. Some also use it at work, such as teachers who sometimes look for specific content intended for pupils or students.

- ***2. The content you want to watch:*** the content most frequently associated with television or video on demand native to television is information-based (the news more specifically) and entertainment-based (e.g. reality TV and variety shows). Paid VOD is most often associated with films, series and documentaries. Catalogues of children's content are also mentioned. Illegally obtained VOD is also associated with the consumption of films and series. Finally, free VOD native to the Internet mainly relates to the consumption of short formats: film reviews, funny video clips, tutorials, etc. Some see it as a source of "alternative information".

- ***3. Consuming content alone, as a couple, or in a group dynamic (with family, friends, etc.).*** The dimension of sharing and "being together" is strongly associated with television consumption, especially among the youngest. Their television consumption is primarily based on the desire to spend time with the family, while the content consumed is not always decisive (young people can also engage in media activities simultaneously with this television consumption). Paid VOD can also be part of this dimension of sharing and this collective approach. Paid VOD can thus be consumed as a couple (with or without children) or among friends – who sometimes share the same account. It thus appears as a main consumption mode or as a substitution mode when the on-the-shelf content is not deemed satisfactory. For the youngest, paid VOD appears to be a means of becoming more independent in their consumption vis-à-vis the television programmes most often chosen by parents. However, free VOD is not part of this collective dimension. Most often, its consumption is individual: the consumer watches this audio-visual content alone, but they may also share it. Free VOD may be watched as a couple or collectively. In this case, it is most often free VOD native to television (catch up content).

- ***4. The willingness to be attentive to the content and to follow it keenly or to watch it in a more or less distracted manner and/or passively.*** Consumers opt for a viewing/listening attitude that can be either attentive or distracted. According to the respondents, certain content is more conducive to entertainment, does not require much or any thought and can be watched or listened to simultaneously with other activities (series or films already seen, variety shows, "light" content, etc.). Other content requires more attention, may be intended for purposes other than mere entertainment and is not suitable to be viewed at the same time as other activities or content (e.g. news, series or films to be explored or in a foreign language, art films, etc.). These criteria of taste are based on a combination of preferences (aesthetic, intellectual, etc.) specific to each individual. Some content was also included simultaneously in both categories.

- ***5. The intention to proactively search for content or the willingness to take "what you get", without having to choose.*** Content that meets user expectations and requirements will be sought proactively. It appears in the analysis of the interviews that certain consumption modes lend themselves better than others to a proactive search for content. Thus, some of the respondents are turning more to paid VOD in order to choose content that meets their own interests. Respondents use a series of criteria to make their choices, such as catalogue options, word of mouth, film and series reviews. However, paid VOD content is also regularly selected from the recommendations of the platform concerned, which *de facto* limits the dimension of choice. Other respondents, generally older, choose programmes using the features offered by set-top boxes: they record the television programmes that interest them to build their own "catalogue" and better control their respective consumption. The consumption of VOD native to television is also part of this dynamic of searching for content that one would like to watch or rewatch. Television consumed from the library (and not recorded or watched as catch up), for its part, offers content according to a predefined programme schedule. Consumers can thus go with the flow without having to choose a programme from the plethora of existing options. This "non-choice" dimension is also appreciated by many respondents. Consumption of free VOD is also regularly associated with the idea of taking what you get, without having to choose. In fact, on the one hand, free VOD is frequently consumed from social media. Some users speak of "zoning" on social media and consuming the videos on it without having really chosen their content, based on the feeds. On the other hand, free VOD users talk about recommendations from video sharing platforms or even automatic linking of videos, two elements that limit the process of actively searching for content.

- ***6. Being at home or on the move.*** Television is mainly consumed at home. In fact, television is hardly viewed on the move. It is associated with the television set in a living room. VOD is also mostly consumed at home, but also on the move. On the move, paid VOD users prefer downloading the content beforehand on a computer and watching it while on the move on a tablet or computer. Users also consume free short VODs native to Internet on the move. They use WiFi or 3G/4G. However, many users claim that they do not have enough mobile data to watch this content on the move.

- ***7. Devices available at the time of consumption.*** What determines the device is above all the type of activity in which the user engages, for example:
    - Sharing as a couple, family or with friends (Smart TV, projector);
    - Viewing on the move (tablet, phone);
    - Viewing during a household chore (computer, tablet);
    - Viewing in the bedroom (computer, phone).

  However, it should be noted that, among older audiences, every device seems to be more heavily used for a specific function (e.g. the computer for e-mails, the tablet for catch-up TV like "Auvio", the television set for television, the radio for music).

- ***8. Finally, the time of day.*** Native Internet VODs are watched on the mobile phone in the morning or evening and as soon as you wake up or before going to bed. They are also viewed on the move or at work for some users who have an adequate data plan. Native Internet videos are played in the background, viewed between two activities (e.g. checking e-mails) or simultaneously with other activities on a computer. Paid VOD is mainly consumed in the evening. It is sometimes consumed during the day, especially on weekends. However, the consumption objectives will not necessarily be the same: audio-visual consumption during the day will be intended, for example, for staying informed (e.g. documentaries) while in the evening, people are more interested in relaxing and wish to take their mind off the daily routine (e.g. fictions). Finally, television is more widely consumed in the evening in a relaxed or comfortable setting; but it can also be consumed during the day. "Watching if there is something on TV" is a ritual that is part of the daily selection process for those who are used to watching a programme in the evening. During the day, the ease of accessing programmes that help pass the time while doing household chores is appreciated. In addition, television is consumed by some as a positive routine that gives rhythm to the week: they have habits associated with the programmes watched and organise their routine in part around these daily or weekly schedules. Finally, in the case of parents of young children, television is an activity hub for the little ones during the day (cartoons and variety shows) and an occasion for the couple in the evening.

68. While they have a preferred source of content, the respondents nevertheless **combine** consumption modes that appear to be complementary from the point of view of all the parameters that we have just seen. **A form of "multimedia zapping"** is therefore being set up between these different consumption modes, as well as between content on the same platform or even between different platforms or applications, not all of which are necessarily linked to audio-visual content (gaming, media, social networks, etc.).

Therefore, the audio-visual landscape of the same individual can, for example, be made up of Netflix for main daily use (relaxation in the evening after work, watching series), ARTE for documentaries, Auvio for news, YouTube on the metro, and illegal downloads for movie nights. The diversification of practices is made possible by the centralisation of this content on the Internet and made easily accessible through applications and platforms facilitating selection.

Representations of consumption modes: positive and negative points

69. As for representations relating to content, we noted the positive and negative points that the respondents associate with them, as declared by them spontaneously. We see the ambivalence of the representations associated with television. In fact, everyone refers to positive elements (first and foremost the diversity of content, ease of choice, family sharing, etc.) or, on the contrary, negative elements (constant advertising, dependence on the schedule, etc.). Television, whether it is used or not, is the element around which the entire discourse revolves. The association of consumption with tropes such as addiction has also been pointed out among heavy television consumers. Likewise, paid video on demand also evoked mixed opinions. It is primarily known for its access to interesting content, the absence of advertising and control of the viewing experience; but it can also be addictive. Some users may refuse to pay for content that is otherwise "free" or perceived to be "free". Paid video on demand is available on a multitude of devices. Finally, free video on demand is also the subject of mixed reviews. Its strength, above all, is the choice and flexibility it offers. The constant advertising is the main negative aspect cited; some also appreciate the possibility of being able to block these advertisements. Free video on demand is distinguished from paid video on demand by access to alternative information and the role of recommendations. The preferred device for accessing it is primarily the television and computer.

	Television		**Paid VOD**		**Free VOD (native to television & native to the Internet)**	
	Cited as a positive element	Cited as negative element	Cited as a positive element	Cited as negative element	Cited as a positive element	Cited as negative element
Diversity of content, channels	Yes	Yes (lack of diversity; lack	Yes (interesting	Yes (catalogue	Yes (volume, diversity, more	Yes (frustration

and genres offered		of programmes in the original version)	content; multiple language versions; diversity of genres)	may be exhausted; not enough language versions)	interesting content; multiple language versions)	of not finding content)
Sense of control (either easy to choose or not, or with constraints or not)	Yes (thanks to the programme schedule)	Yes (schedule seen as a time constraint)	Yes (choice of viewing rhythm; easy access on several devices)		Yes (flexibility and better control over consumption; ease of use; possibility of catch-up and binge-watching)	
Family sharing	Yes		Yes (cartoons and children's programmes)			
Content quality	Yes	Yes		Yes (repetitive narrative plots)		
Democratisation of access to knowledge and culture	Yes					Yes (lack of educational and cultural content)
Reliability of information	Yes	Yes			Yes (Access to alternative sources of information or to public service information)	
Features of set-top boxes	Yes					
Presence function (passiveness) / proactivity	Yes (fill a void)	Yes (passiveness)	Yes (content suitable for simultaneous activities)		Yes (proactivity in the selection)	
Cost/price	Yes (seems affordable to some)	Yes (cited by only one respondent)	Yes (affordable and possibility to share the user account)	Yes (some do not want to pay for an offer that would be available without paying elsewhere)		
Community programmes and the link to Francophone culture	Yes					
Advertising		Yes (seen as constant)	Yes (no advertising)		Yes (no advertising or tools to limit its nuisance)	Yes
Addictive and time-consuming nature		Yes		Yes		Yes
Recommendations					Yes (algorithmic recommendation)	

TABLE 1: POSITIVE AND NEGATIVE CONNOTATIONS OF CONSUMPTION MODES SPONTANEOUSLY DECLARED BY THE RESPONDENTS

II. STANDARD PROFILES

A. PRESENTATION PLAN

70. In the following pages, we will present a selection of fifteen standard profiles that give an overview of as many audio-visual media consumption habits among the general public in the Wallonia-Brussels Federation.

71. These are typical consumer profiles. These standard profiles were established on the basis of the statistically representative sample obtained in the quantitative component of the study. They reflect a certain number of attitudes and behaviours that have been described in the said component (for the methodology, see §§ 74 et seq.).

72. These standard profiles were then refined with the main elements from the interviews conducted in the qualitative component. This approach aims to detail the perceptions that generally underlie the behaviour of the respondents, as revealed by the interviews (for the methodology, see §§ 81 et seq.).

73. The selection of fifteen standard profiles reflects the desire to be able to present a sufficiently wide range of situations.

B. METHODOLOGY

Standard profiles based on the lessons learned from the quantitative component

74. Consumer archetypes appear when all the over-represented modalities of the variables whose association is statistically significant are aggregated in the same profile. Each of the standard profiles is illustrated by a table of characteristics (or key views). Each of these tables makes it possible to aggregate the most significant results of a large set of cross-analyses.

75. It is a question of defining a central variable (dependent variable) of which one wishes to characterise several categories. It is then a question of indicating on which other (independent) variables of the study the characteristic elements must be identified.

76. For each of the standard profiles, a table presents the characteristics that appear to be <u>significant</u> in terms of:

- Exposure to technology;
- Frequency of consumption of:
  - Television,
  - Paid video on demand,
  - Free video on demand;
- Simultaneous (multi)media activities;
- Complementary use (or not) of the different modes of consumption;
- Substitutability (or not) of television.

77. For each of the following <u>variables</u>:

- Gender;

- Age group;
- Socio-professional status;
- Family situation;
- Children in the household;
- Qualification level;
- Income class;
- Price sensitivity;
- Subjective familiarity with technology;
- Objective familiarity with technology;
- Impact of the recommendation;
- Impact of social norms;
- Internet connection at home[3];
- Ownership of smart devices.

78. The boxes in the tables of characteristics only show the over-represented modalities[4] (where the minimum number is 5), when the association between variables is statistically significant. The significance threshold for a characteristic to be considered specific is set at p = 0.05. An empty box means that no particular profile emerges on this variable.

79. Let us take an example. Imagine that the chi-square calculation highlights the following statistically significant associations:
    - gender and daily television consumption: we see that women are over-represented in daily television consumption;
    - age and daily television consumption: we see that people over 40 are over-represented in daily television consumption.

The archetypal daily television consumer will therefore be a woman over 40. A summary of all the available information is thus prepared.

80. The standard profiles do not claim to be exhaustive. In the remainder of this text, only certain aspects – the most salient and relevant – of the tables of characteristics considered will be developed. In other words, the standard profiles considered below correspond to the most significant results of a large set of cross-analyses.

Standard profiles based on the lessons learned from the qualitative component

81. In order to complete the standard profiles as archetypes of behaviours, a summary of the main perceptions expressed by the respondents who participated in the qualitative component of the study was added.

82. For this purpose, we used the perceptions expressed by the people surveyed, whose main characteristics corresponded to the archetype. The main characteristics taken into account for this exercise are gender, age and family situation.

[3] Except with regard to exposure to technology for these last two variables since these are themselves dependent on the devices available in households.
[4] Significance threshold lower than 5%.

C. STANDARD PROFILES

Exposure to technology

	Groupe 1 : Pas d'équipement ou téléviseur seul	Groupe 2 : Téléviseur combiné à un unique autre équipement	Groupe 3 : Plusieurs équipements dont le téléviseur	Groupe 4 : plusieurs équipements mais pas de téléviseur
Genre	Femmes de plus de 60 ans, hommes de plus de 70 ans	Femmes de plus de 60 ans, hommes de plus de 70 ans	Pas de distinction de genre	Pas de distinction de genre
Classe d'âge			15-19 ans, 40-49 ans	20-29
Statut socio-professionnel	(Pré)retraités	(Pré)retraité	Actifs et étudiants	Beaucoup d'étudiants
Situation familiale	Seul.e sans enfants	Seul.e sans enfants	Chez ses parents, en couple avec enfants	En colocation, seul.e sans enfants
Enfants dans le ménage	Non	Non	Oui, de tous les âges	Non
Niveau de diplôme	Bas	Bas	Haut	Haut
Classe de revenu	Moins de 1500€	Moins de 1500€	Plus de 2500€	
Sensibilité au prix	Pas de sensibilité au prix déclarée	Pas de sensibilité au prix déclarée	Moyenne à forte	Faible
Familiarité subjectiveà la technologie	Basse	Basse	Elevée	Elevée
Familiarité objectiveà la technologie	Très faible	Très faible	Moyenne	
Influence de la recommandation	Pas ou peu	Pas ou peu	Forte	Forte
Influence des normes sociales	Pas ou peu	Pas ou peu	Moyenne à forte	Moyenne

TABLE2: STANDARD PROFILES IN TERMS OF EXPOSURE TO TECHNOLOGY

a. Who owns several devices but no television?

Standard profile

83. The person who has more than one device at home but no television is a man or a woman between the ages of 20 and 29. He or she is more of a student and lives either in a shared apartment or alone but without children. They have a high level of qualification and a high level of familiarity with technology (subjective familiarity). This standard profile shows only low overall price sensitivity (i.e. sensitivity to the price of devices – television, computer, smartphone – or services – the price of the television subscription, for example.). On the other hand, they are highly sensitive to the recommendation of others: they will seek information from third parties or through other means before purchasing a device or subscribing to a service. In addition, they feel it is important to align their choices with those of others and/or to have their choices approved by others, since the impact of social norms is considered medium.

General perceptions

84. People who took part in the qualitative interviews and who combine several of the characteristics specific to this profile associate television with a linear consumption mode, which they consider time-consuming and addictive, as well as with linear programming considered mediocre. They have consciously abandoned this consumption mode while acquiring the ability to consume audio-visual content via the Internet and on the computer, since the emergence of video-on-demand platforms. Thus, their choice not to own a television set is based on the desire to optimise their audio-visual consumption by selecting the content that interests them. For the people surveyed who correspond to this profile, the computer appears sufficient in terms of quality and viewing comfort, including for the longest formats. These people will occasionally use the smartphone for their audio-visual consumption, but rather in the case of short formats, from social networks and video sharing platforms, and in particular on the move.

b. Who has several devices including the television?

Standard profile

85. The person who has several devices at home including a television set is a man or a woman in various age groups: mostly 15-19 years and 40-49 years. This person is either a student or professionally active and lives either with their parents or in a couple with children. They have a high level of qualification and a high level of familiarity with technology (subjective familiarity). When this level of familiarity is objectively evaluated using criteria measuring one's ability (objective familiarity), it turns out to be average. This standard profile lives in a household with a net monthly income of more than 2,500 euros and yet shows a medium to high overall price sensitivity (i.e. a sensitivity to the price of devices – television, computer, smartphone – or services – the price of television subscription for example). They are also highly sensitive to the recommendation of others: they will seek information from third parties or through other means before purchasing a device or subscribing to a service. They feel it is important to align their choices with those of others and/or to have their choices approved by others, since the impact of social norms is considered medium to high.

General perceptions

86. The perceptions about audio-visual consumption and devices expressed by participants who correspond to this profile differ according to their age group. People corresponding to this profile who are between 15 and 19 years of age and live with their parents associate the television set with family consumption; they therefore mainly use devices than the television set, mainly the smartphone and the computer, in order to consume independently, i.e. without having to adapt to schedules and areas of interest of other family members. Conversely, for people in the sample who are between 40 and 49 years of age and who correspond to this profile, the television set remains the preferred medium, including in the case of video on demand consumption. The computer or the tablet is used in more specific circumstances such as travel or in case of disagreement over the choice of programme within the couple. The smartphone is used occasionally, mainly outside the home, for short-term audio-visual consumption because of the low level of viewing comfort associated with it.

c. Who owns just a television set or no devices?

Standard profile

87. A person who does not own any devices or who owns just a television set is more likely to be a woman over 60 or a man over 70. They are (pre)retired and live alone without children. Their level of education is not very high. Their household net monthly income is low (less than 1,500 euros per month), but they do not display overall price sensitivity (i.e. sensitivity to the price of devices – television set, computer, smartphone) – or services – the price of television subscription for example). This person has a low level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it turns out to be very low. A person who does not have any devices or who owns just a television set attaches little or no importance to aligning their choices with those of others and/or having their choices approved by others. Quite logically, they are not very sensitive to the recommendations of others: they hardly seek information from third parties or through other means before buying devices or subscribing to a service.

General perceptions

88. The people who took part in the qualitative component survey and correspond to this profile own just a television set but do not consume exclusively in a linear manner. They also use the functions offered by the set-top box to better control their respective consumption (recordings, pauses). Their audio-visual consumption habits revolve around the television set and television content.

Frequency of consumption of the different modes

Télévision	Groupe 1 : Tous les jours	Groupe 2 : Minimum une fois par semaine	Groupe 3 : Minimum une fois par mois	Groupe 4 : Moins d'une fois par mois
Genre	Femmes	Pas de distinction de genre	Pas de distinction de genre	Pas de distinction de genre
Classe d'âge	Plus e 40 ans	15-39 ans	15-29 ans	20-29 ans
Statut socio-professionnel	(Pré)retraités, inactifs	Actifs, étudiants	Etudiants	Etudiants
Situation familiale	Seul.e avec ou sans enfants	Chez ses parents	Chez ses parents	
Enfants dans le ménage		Oui	Oui, jeunes adultes	
Niveau de diplôme	Moyen	Haut		
Classe de revenu	Moins de 1500€			
Sensibilité au prix	Pas de sensibilité au prix déclarée	Moyenne		Moyenne
Familiarité subjectiveà la technologie	Basse	Elevée	Elevée	
Familiarité objectiveà la technologie	Très faible	Grande		Moyenne
Influence de la recommandation	Faible	Forte	Moyenne	Forte
Influence des normes sociales				
Connexion internet au domicile	Absente			
Détention d'appareils connectés	Pas ou peu	Moyenne		

VODP	Groupe 1 : Tous les jours	Groupe 2 : Minimum une fois par semaine	Groupe 3 : Minimum une fois par mois	Groupe 4 : Moins d'une fois par mois
Genre	Pas de distinction de genre		Femmes de 40-60 ans	Pas de distinction de genre
Classe d'âge	15-29 ans		Plus de 70 ans	50-70 ans
Statut socio-professionnel	Etudiants		(Pré)retraité	(Pré)retraité
Situation familiale	Chez ses parents		Seul.e sans enfants	En couple avec enfants
Enfants dans le ménage			Non	
Niveau de diplôme	Moyen et bas			Haut
Classe de revenu	Moins de 1500€		Moins de 1500€	
Sensibilité au prix			Forte	
Familiarité subjectiveà la technologie		Moyen	Basse	Grande
Familiarité objectiveà la technologie	Très faible à faible			
Influence de la recommandation				
Influence des normes sociales				
Connexion internet au domicile				
Détention d'appareils connectés			Faible	

VODG	Groupe 1 : Tous les jours	Groupe 2 : Minimum une fois par semaine	Groupe 3 : Minimum une fois par mois	Groupe 4 : Moins d'une fois par mois
Genre	Pas de distinction de genre		Femmes de 40-49 ans et hommes de 60-69 ans	Femmes
Classe d'âge	15-29 ans			50-70 ans
Statut socio-professionnel	Etudiants	Actifs		(Pré)retraités
Situation familiale	Chez ses parents	En couple sans enfants	En couple avec enfants	
Enfants dans le ménage	Oui, jeunes adultes	Non	Oui	
Niveau de diplôme	Bas, moyen	Haut	Haut	
Classe de revenu	Moins de 1500€		Plus de 3500€	
Sensibilité au prix				
Familiarité subjectiveà la technologie			Grande	Moyen
Familiarité objectiveà la technologie				
Influence de la recommandation		Forte		
Influence des normes sociales	Forte			
Connexion internet au domicile		De (très) bonne qualité		
Détention d'appareils connectés				

TABLE3: STANDARD PROFILES IN TERMS OF CONSUMPTION FREQUENCY

d. Who consumes television every day?

Standard profile

89. The standard profile of the person who consumes television every day is a woman, over 40, inactive or (pre-)retired. Her level of qualification is medium. She lives alone with or without children. Her net monthly income is low (less than 1,500 euros per month), but she does not display overall price sensitivity (i.e. sensitivity to the price of devices – television set, computer, smartphone – or services – the price of the television subscription for example). This person has a low level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it turns out to be very low. She has few, if any, smart devices and she does not have a home Internet connection. Quite logically, they are not very sensitive to the recommendations of others: they hardly seek information from third parties or through other means before buying devices or subscribing to a service.

General perceptions

90. The participants in the qualitative survey who correspond to this profile regularly leave the television on in the background, to accompany other daily tasks, particularly domestic tasks. These participants consider television as the ideal consumption mode for this practice, which aims to provide a presence or even motivation for all daily activities. In fact, they tend to consider that television does not always involve a high level of attention, unlike video on demand, which requires, according to them, making special time and lingering on the selection of content. They perceive linear television programming as well as the passive dimension of selection as positive characteristics of television. The respondents who correspond to this profile are also satisfied with the content on offer, and consider it diversified.

e. Who consumes television at least once a week?

Standard profile

91. The standard profile of the person who consumes television at least once a week is, on the other hand, not gendered and more diverse. This is a man or a woman, aged 15 to 39, who is either a student or professionally active. In all cases, this person lives with their parents and has a high level of education. This person has a high level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it is also fairly high. This person lives in a household with a medium level of ownership of smart devices and has a medium level of overall price sensitivity (i.e. sensitivity to the price of equipment – television set, computer, smartphone – or services – the price of television subscription for example). On the other hand, this standard profile is also highly sensitive to the recommendations of others: it obtains information from third parties or through other means before purchasing a device or subscribing to a service.

General perceptions

92. Among the participants in the qualitative survey, people who meet several characteristics specific to this profile consume video on demand in addition to their television consumption. They consume television more often collectively than alone.

Perceptions differ depending on whether the respondent lives with their parents or not. Thus, for the participants who live with their parents and correspond to this consumption profile, the television set is shared. This implies that the choice of content is generally left to adults; therefore, their television consumption is based above all on the desire to spend time with their family, while the content is not decisive. They therefore frequently opt for other consumption modes in order to access content that they like and/or that they have not been able to watch 'from the library' on the television. On the other hand, the consumption of people corresponding to this profile and who no longer live with their parents depends directly on the programming. Thus, although these people may initially turn to television in order to access audio-visual content, they will not hesitate to opt for another consumption mode, in particular paid video on demand catalogues, for exclusive series that are currently being viewed or recommended.

f. Who consumes paid or free VOD every day?

Standard profile

93. The standard profiles of daily paid and free video-on-demand consumers are almost similar. In fact, whether we are talking about paid or free VOD, these standard profiles are not gendered: consumption

is carried out by a man or a woman. In addition, this person is more of a student under the age of 30 (15-29 years) who lives with their parents. Their level of qualification is medium or low. The net monthly income of the household in which this person lives is low (less than 1,500 euros per month).

94. In the standard profile of the free VOD consumer, there is a strong impact of social norms: this person therefore attaches importance to aligning their choices with those of others and/or having their choices approved by others.

General perceptions

95. The people who participated in the qualitative survey and correspond to this profile are looking for certain autonomy in their audio-visual consumption, since television is often shared within the family and associated with collective (family) consumption. They mainly consume video on demand in the evening, alone, on the computer or smartphone. In addition to their interest in the wide range of content offered in video on demand, including exclusive content, these people justify their preference by the proactive nature of the selection of content on demand which promotes better control of their consumption, both in terms of family influence and the times and features offered by video players (pause, rewind, automatic play). Like daily television consumers, people who fall into this profile sometimes consume video on demand while performing other activities at the same time.

g. Who consumes paid or free VOD at least once a week?

Standard profile

96. People who consume paid or free video on demand at least once a week find it more difficult to fit into a standard profile. Consumption of VOD at this frequency is in fact not particularly tied to a particular gender or age. It can be said that the consumption of free VOD at least once a week is more likely to be consumed by working people with a high level of education and as a couple without children. It should also be noted that these people turn out to be highly sensitive to the recommendations of others: they tend to obtain information from third parties or through other means before purchasing a device or subscribing to a service.

General perceptions

The people surveyed during the qualitative component and who correspond to this profile do not all supplement their consumption of video on demand with linear television consumption. Among these people, those who only consume videos on demand state that they have no routine related to their audio-visual consumption. The latter varies according to the releases on various VOD catalogues and the various recommendations (social and/or algorithmic). Their consumption of video on demand is therefore not daily although it remains frequent. Conversely, other people corresponding to the profile described above consume video on demand as a substitute for linear programming, as an alternative in the event of disagreement on the choice of content, or even, when consumption takes place outside the home, when travelling or in waiting rooms, and aims to relieve boredom. Their consumption of free and paid video on demand therefore depends on several factors including linear supply and the circumstances of consumption.

Simultaneity of activities

	Groupe 1 : Exposition multmédia simultanée	Groupe 2 : Pas d'exposition multimédia simultanée
Genre	Hommes	Femmes
Classe d'âge	15-50 ans	Plus de 50 ans
Statut socio-professionnel	Actifs, étudiants	(Pré)retraité
Situation familiale	Chez ses parents, en couple avec enfants	Seul.e sans enfants, en couple sans enfants
Enfants dans le ménage	Oui, de tous âges	Non
Niveau de diplôme	Bas	Bas
Classe de revenu	Plus de 2500€	Moins de 1500€
Sensibilité au prix	Oui et non	Pas de sensibilité au prix déclarée
Familiarité subjectiveà la technologie	Elevée	Basse
Familiarité objectiveà la technologie	Moyen, grande	Très faible, faible
Influence de la recommandation	Oui	Pas ou peu
Influence des normes sociales	Moyenne à forte	Pas ou peu
Connexion internet au domicile	De (très) bonne qualité	Absente
Détention d'appareils connectés	Moyenne à forte	Pas ou peu

TABLE4: STANDARD PROFILES IN TERMS OF SIMULTANEITY OF ACTIVITIES

h. Who practices simultaneous (multi)media activities?

Standard profile

97. Simultaneous (multi)media consumption consists of the use of a smartphone, laptop or tablet while consuming television, paid VOD or free VOD. The standard profile of the person who practices this type of activity is a male, aged between 15 and 50 and who lives either in a couple with children or with his parents. He is professionally active or a student. He lives in a household where there are children and whose net monthly income level is over 2,500 euros. This person has a high level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it is medium to high. This person lives in a household with medium or high level of smart devices – their level of ownership of smart devices is medium or high – and they rate the quality of their Internet connection as being of (very) good quality. It will also be noted that this person attaches importance to aligning his choices with those of others and/or to having his choices approved by others, since the impact of social norms is considered medium to high. Finally, this profile that practices simultaneous (multi) media activities is rather sensitive to the recommendations of others: he tends to obtain information from third parties or through other means before buying a device or subscribing to a service.

General perceptions

98. The people who answered the qualitative component survey and correspond to this profile practice (multi)media activities for lack of interest in the content, but also by reflex, in the case of use of the smartphone and, more particularly, viewing of social media feeds. These people are sometimes led to consume content that is of little or no interest to them in the context of collective consumption: the programme must be adapted to the preferences of all people. This is the case for children (adolescents) who must adapt to their parents' choices, and for parents who watch youth or family content with their young children, or couples who make compromises.

Complementarity of the consumption modes

	Groupe 1 : Consommateurs de télévision uniquement	Groupe 2 : Consommateurs de télévision et de VOD	Groupe 3 : Consommateurs de VOD de manière globale	Groupe 4 : Consommateurs de VODP uniquement	Groupe 5 : Consommateurs de VODG uniquement
Genre	Femmes	Hommes	Hommes	Pas de distiction de genre	Hommes
Classe d'âge	Plus de 50 ans	Jusqu'à 50 ans	Moins de 40 ans	20-40 ans	15-39 ans
Statut socio-professionnel	(Pré)retraités	Actifs et inactifs	Etudiants	Etudiants	Etudiants
Situation familiale	Seul.e ou en couple sans enfants	Chez ses parents, En couple avec enfants	Chez ses parents, en colocation	Chez ses parents, seul.e avec enfants	Chez ses parents, en colocation
Enfants dans le ménage	Non	Oui, de tous âges	Oui, jeunes enfants ou jeunes adultes	Oui, adolescents	Oui, jeunes enfants ou jeunes adultes
Niveau de diplôme		Haut			
Classe de revenu	Moins de 1500€	Plus de 2500€			Moins de 1500€
Sensibilité au prix	Pas de sensibilité au prix déclarée	Moyenne à forte	Faible à moyenne	Faible à moyenne	
Familiarité subjectiveà la technologie	Basse	Elevée	Elevée	Elevée	Elevée
Familiarité objectiveà la technologie	Très faible à moyenne	Moyenne à grande			
Influence de la recommandation	Pas ou peu	Forte	Forte		Forte
Influence des normes sociales	Pas ou peu	Moyenne	Forte		Forte
Connexion internet au domicile	Absente	De (très) bonne qualité	De (très) bonne qualité		
Détention d'appareils connectés	Pas ou peu	Moyenne à forte	Moyenne		Moyenne

TABLE5: STANDARD PROFILES IN TERMS OF COMPLEMENTARY CONSUMPTION MODES

i. Who consumes only television?

Standard profile

99. The standard profile of the person who consumes only television is a woman, over 50, (pre-)retired. She lives alone or in a couple but without children. Their household net monthly income is low (less than 1,500 euros per month), but they do not display overall price sensitivity (i.e. sensitivity to the price of devices – television set, computer, smartphone) – or services – the price of television subscription for example). This person has a low level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it turns out to be medium to (very) low. She has few, if any, smart devices and she does not have a home Internet connection. A person who consumes only television does not attach or attaches little importance to aligning their choices with those of others and/or having their choices approved by others. Moreover, they are not very sensitive to the recommendations of others: they hardly seek information from third parties or through other means before buying devices or subscribing to a service.

General perceptions

100. Respondents to the qualitative component who correspond to this profile testify to well-established consumption habits (routine television programmes and television in the background to accompany daily activities) from which they derive satisfaction. Television, which they associate with the television set, is perceived as an ideal source of entertainment – easy to use, with a diversified offer – in particular for evening parties. Conversely, they consider that video on demand is too complex to use, in view of their skills and their confidence in the use of equipment other than the television set (associated with linear television) and the Internet. Moreover, this person associates the consumption of video on demand with individual consumption which requires more concentration and attention. However, these people like to leave the television on in the background, while carrying out household chores, and, if necessary, will prefer to consume as a couple than alone.

j. Who consumes television and video on demand in a complementary manner?

Standard profile

101. The standard profile of a person who consumes television and video on demand in a complementary manner is a male, aged between 15 and 50 years, with a high level of education. His professional situation is varied, since he is either active or inactive. He lives as a couple with children and, for the

young ones, with his parents. From a financial point of view, the household income of this person is more than 2,500 euros per month. However, this person shows medium to high overall price sensitivity (i.e. sensitivity to the price of devices – television, computer, smartphone – or services – the price of television subscription, for example). This profile has a high level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it is medium to high. This person lives in a household with medium or high level of smart devices – their level of ownership of smart devices is medium or high – and they rate the quality of their Internet connection as being of (very) good quality. It will also be noted that this person attaches importance to aligning his choices with those of others and/or to having his choices approved by others, since the impact of social norms is considered medium. Finally, this profile is highly sensitive to the recommendation of others: they will seek information from third parties or through other means before purchasing a device or subscribing to a service.

General perceptions

102. During the interviews of the qualitative component, the people who correspond to this profile underlined family influence on their television consumption (in terms of schedule and content) which results in additional consumption of video on demand in order to satisfy their personal expectations and tastes. In fact, video on demand is the best independent mode of consumption, regardless of the age of the respondent who corresponds to this profile, since it allows them to watch content without complying with the tastes and frequency of consumption of others. Conversely, television will be perceived as more suited to collective and negotiated consumption. These people also consume content on demand in the event that linear programming is deemed unsatisfactory. In addition, the surveyed people who correspond to this profile appreciate the interoperability of the various applications and the features offered by the video players of the video on demand platforms (pause, rewind), which make it possible to better manage their consumption and encourage simultaneous activities.

k. Who consumes only paid video on demand?

Standard profile

103. The exclusive consumption of paid video on demand is not particularly gendered: it could be a man or a woman. This man or woman is in the 20-40 age group. He or she is a student living with their parents or alone with children. This profile has a low to medium level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it is high.

General perceptions

104. Respondents who correspond to this profile wish to better control their audio-visual consumption, and that of their children where necessary, by being proactive in the selection of the content consumed. Nevertheless, their consumption remains very frequent, if not daily, and not even close to that of television viewed in the background to accompany other, often domestic, tasks. Not very interested in television entertainment content, these people mainly seek out and consume fiction. They appreciate the simplicity, choice and exclusivity, as well as the features, especially linguistic, offered by paid video on demand platforms.

l. Who consumes only free video on demand?

Standard profile

105. The exclusive consumption of free videos on demand is, for its part, more the work of a male, aged between 15 and 39, a student and living either with his parents or in a shared apartment. This profile has a high level of familiarity with technology (subjective familiarity). In addition, he feels it is important to align his choices with those of others and/or to have his choices approved by others, since the impact of social norms is considered high. This profile is highly sensitive to the recommendations of others: they will seek information from third parties or through other means before purchasing a device or subscribing to a service. He lives in a household that has an average level of ownership of smart devices but a low net monthly income level (less than 1,500 euros).

General perceptions

106. Among the people who took part in the qualitative component survey, three correspond to this profile. They say they appreciate the diversity of the content available, the proactivity of the selection as well as the possibility of better controlling their consumption. The possibility of blocking advertisements is also considered to be a real advantage, including in the case of the consumption of television content on video on demand platforms. Moreover, these people are reluctant to pay for content that is freely and easily accessible elsewhere. Among the three people who correspond to this profile, one of them seeks to better control his budget and says he is satisfied with the content available on YouTube, social media, as well as on the sites of providers of audio-visual media services. But the two other participants who correspond to this profile say they are “in principle” against paying and both associate free video on demand with streaming and illegal downloading platforms, which they consume on a regular basis. Therefore, free video on demand is sufficient to access the television content that interests them, and to consume the exclusive content of paid platforms.

Substitutability of the consumption modes

	Groupe 1 : Pas d'arrêt de la télévision	Groupe 2 : Remplacement de la télévision par la VODP	Groupe 3 : Remplacement de la télévision par la VODG	Groupe 4 : Arrêt de la consommation audiovisuelle
Genre	Femmes	Pas de distinction de genre	Pas de distinction de genre	Femmes
Classe d'âge	Plus de 70 ans	20-39 ans	15-30 ans	60-69 ans
Statut socio-professionnel	(Pré)retraité	Actifs	Etudiants	(Pré)retraité
Situation familiale	Seul.e sans enfants	Jeunes enfants	Chez ses parents, en colocation	En couple sans enfants
Enfants dans le ménage	Non			Non
Niveau de diplôme	Bas ou moyen	Haut	Haut	Haut
Classe de revenu		Plus de 3500€	Plus de 3500€	
Sensibilité au prix	Pas de sensibilité déclarée	Moyenne	Moyenne à forte	Moyenne
Familiarité subjectiveà la technologie		Elevée	Elevée	Basse
Familiarité objectiveà la technologie		Moyenne	Grande	
Influence de la recommandation	Pas ou peu			
Influence des normes sociales				
Connexion internet au domicile			Connexion qu'ils considèrent comme de mauvaise qualité	
Détention d'appareils connectés	Non	Forte	Moyenne	Faible

TABLE6: STANDARD PROFILES IN TERMS OF SUBSTITUTABILITY OF CONSUMPTION MODES

m. Who does not plan to stop watching television?

Standard profile

107. The standard profile of the person who does not plan to stop watching television is very similar to that of exclusive television consumers: in this case, it is a woman over 70, (pre-)retired. She lives alone without children and her level of education is low or medium. She does not display overall price sensitivity (i.e. sensitivity to the price of equipment – television set, computer, smartphone – or services – the price of television subscription, for example) and is hardly or not very sensitive to the recommendations of

others: she does not seek information from third parties or through other means before purchasing a device or subscribing to a service. She does not have any smart devices in her household.

General perceptions

108. The people surveyed for the qualitative component and who correspond to this profile have integrated television into their daily routine and cannot imagine doing without it, in particular for entertainment or relaxation. Although they are not always attentive to the flow of content, the presence of television also seems essential to them to support daily activities and especially evenings. In addition to the fact that they enjoy certain television content that they follow on a regular basis, their preference is also justified by the consumer spirit that these people associate with television. In fact, they consider that television makes it possible to maintain a social and/or family bond, unlike video on demand associated with more individual and isolated consumption. In addition, for these people, linear programming is not an inconvenience or a potential waste of time, but a means of entertainment that is easy to access and use.

n. Who plans to replace television with paid video on demand?

Standard profile

109. The standard profile of the person who plans to replace television with paid video on demand is not gendered: it is a man or a woman. This profile falls within the 20-39 age group, has a high level of qualification and is professionally active. They live in a household with young children and a higher net monthly income (over 3,500 euros). However, this person shows medium overall price sensitivity (i.e. sensitivity to the price of devices – television, computer, smartphone – or services – the price of television subscription, for example). A person who would turn to paid video on demand has a high level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it is medium. Finally, they live in a household where the level of ownership of smart devices is high.

General perceptions

110. The people who took part in the qualitative survey and who correspond to this profile show little interest in television content. Therefore, the idea of finding them for free on video on demand does not seem very interesting. In addition, they believe that the choice of content available in paid video on demand is greater and better suited to their expectations, in particular with regard to fiction content that they particularly appreciate. These people have become accustomed to directly searching for content on popular paid video on demand platforms and primarily consume the exclusives produced by them. These people believe that the cost of paid video on demand is reasonable in view of the content offered and unlimited availability, and the technical quality of the stream. They also underline the ease of use of paid platforms and the perceived security (protection of personal data and limitation of the risk of computer viruses), as well as the absence of advertising. In addition, people who correspond to this profile say they prefer the flexibility and control of consumption allowed by paid video on demand platforms and their features. They consider that this mode promotes reasoned audio-visual consumption (their own or that of their children) and makes it possible to limit the addictive aspect.

o. Who plans to replace television with free video on demand?

Standard profile

111. The standard profile of the person who plans to replace television with free video on demand is not gendered: it is a man or a woman. This profile covers somewhat younger age groups: 15 to 30 years of

age. This person, who would turn to free video on demand, is more of a student and lives either with their parents or in a shared apartment. Their level of education is high as well as the level of net monthly income of the household in which they live (more than 3,500 euros). However, this person shows medium to high overall price sensitivity (i.e. sensitivity to the price of devices – television, computer, smartphone – or services – the price of television subscription, for example). Also note that this person has a high level of familiarity with technology (subjective familiarity) and when this level of familiarity is objectively evaluated using criteria measuring their competence (objective familiarity), it is also high. Finally, a person who plans to replace television with free video on demand lives in a household with an average level of ownership of smart devices and judges the quality of their Internet connection to be poor.

General perceptions

112. The people who took part in the survey and corresponds to this profile are not big fans of linear programming, which they consider redundant if not uninteresting. Television is therefore essentially seen as a waste of time. In addition, these people are keen to optimise their consumption and their time by limiting themselves to content that they deem really interesting. They also appreciate the content offered by free platforms including user-generated content, such as tutorials and funny clips, not available in the library. They therefore consider that the free offer is a good compromise since it allows access to audio-visual content (including television) previously selected while limiting their expenses in this regard, more by principle than by necessity.

III. FINDINGS, ISSUES AND RECOMMENDATIONS

113. This part deals with a selection of public policy issues, examined in the light of the main lessons of the MAP study, both in its quantitative and qualitative components.

114. It first intends to contextualise the aforementioned issues, by referring to the "facts noted in the study". Then, recommendations will be formulated in the form of as many concrete public actions as possible.

115. Six themes were selected because of their importance for public debate, according to those responsible for this study. They are as follows:
   - The assertion of local platforms (see §§ 116 et seq.);
   - The regulation of social networks (see §§ 120 et seq.);
   - The cultural exception and *"discoverability"* (see §§ 126 et seq.);
   - Equality and the fight against discrimination, including bridging the digital divide and media education (see §§ 139 et seq.);
   - Illegal offers (see §§ 155 et seq.);
   - Market analysis of the Conference of Regulators of the Electronic Communications Sector (see §§ 159 et seq.).

A. ASSERTION OF LOCAL PLATFORMS

Contextualisation

116. In recent years, we have seen an increase in television and radio channel players as well as streaming services (paid or free for the user). These are often referred to as platforms or intermediaries. However, traditionally, this role of intermediary between content providers and consumers has been played by "service distributors", such as cable operators or satellite or terrestrial broadcasters. Now, Over The Top (OTT) platforms and services must also be considered as intermediaries. However, not all are in the same situation from a competitive point of view.

117. The MAP study showed that the general public had good knowledge and made significant use of a certain number of platforms (see §§ 404 et seq. as well as § 1921). It also showed a perception of some as the extension of television, while others are perceived as *sui generis* instances (see in particular § 1770). Although television remains a safe bet for consumers (81.6% of consumers, i.e. an overwhelming majority of them, watch television at home on a daily basis (see § 357), albeit with variations according to age (see hypothesis 7) and, subject to the clarifications made above, gender (see hypothesis 6), these platforms are now part of people's habits (see §§ 336 et seq.) and perceptions (see §§ 1932 et seq.). It can be concluded that platforms now occupy a significant place in the value chain of audio-visual media.

118. On this last point, the MAP study intends to contribute to research, including that of the private sector. The consumption habits that are the subject of the study constitute essential information, particularly for the private sector. Combined with other work (Information Society Barometer, BIPT reports, etc.), this study already includes a lot of useful information for knowledge development and research and development (R&D), two pillars of the innovation system. However, as we have seen in the context of the health crisis linked to the Covid-19 pandemic, very high capacity electronic communications networks "play a crucial role (...) by allowing remote work and schooling, access to health care, and personal communication and entertainment."[5] Therefore, in order for our country and our regions to

[5] Recital 1 of Commission Recommendation (EU) 2020/1307 of 18 September 2020 on a common Union toolbox for reducing the cost of deploying very high capacity networks and ensuring timely and investment-friendly access to 5G radio spectrum, to foster

benefit from all the advantages of these strategic very high capacity networks, it is important that the operators of these networks – which are local companies – continue to innovate. It is needless to say how strategically important innovation by the various local players is.

119. The different platforms are currently subject to different rules, in particular due to the fact that they may very well have their headquarters abroad and therefore fall under sometimes more lax legislation. This state of affairs must call for a reaction. One of the possibilities for action is through legislation (preferably at the European level), in order to create the conditions for a level playing field between all the players. At the level of the Wallonia-Brussels Federation, it could be recommended to stipulate, in the audio-visual laws, a consistent regime applicable to intermediaries. Another course of action is to accentuate the differentiation of the services offered. This can undoubtedly be done essentially through the content (see also in this regard the cultural aspects in §§ 126 et seq.). Local platforms can also seek to strengthen their visibility by integrating into the environment or the interface set up by cable operators (e.g. RTL Play, see § 128) or even manufacturers of smart televisions (e.g. ARTE). It can also be promoted by innovation.

Recommendations:

- Promote innovation by local players, possibly through joint actions, in compliance with competition law;

- Encourage regulatory initiatives at the European level, in particular through the harmonisation of regulations applicable to platforms and intermediaries;

- Develop a modern, adequate and proportionate legal system, common to all intermediaries, at the level of the Wallonia-Brussels Federation. This system should ensure equal treatment and transparency;

- Raise public awareness of the value of the services offered by local players;

- Deliberate on the development strategy of local players and brands already known and appreciated by the public;

- Strengthen cooperation initiatives between local stakeholders (companies, administrations, etc.).

B. REGULATION OF SOCIAL NETWORKS

Contextualisation

120. Among the intermediaries in the distribution of audio-visual content, social networks have sought for several years to promote the sharing of this type of content in the interactions between their users. The general public has thus been placed at the heart of this ecosystem by being both consumer and producer of content, particularly audio-visual content.

121. The MAP study showed that surfing on social media (Facebook, Instagram, Twitter, etc.) was a task carried out in particular while watching television, paid VOD and/or free VOD (see § 998). The general public does not hesitate, at the same time as it uses one of these consumption modes, to surf on these social networks and even to consume audio-visual content there (see § 999). Regardless of the age group, surfing on social networks is one of the reasons most regularly given to explain the use of

connectivity in support of economic recovery from the COVID-19 crisis in the Union, *Official Journal of the European Union* L 305 of 21 September 2020, p. 33.

smartphones, computers and tablets simultaneously with television and VOD consumption (see §§ 1096 and 1102).

122. Therefore, measures should be taken to protect consumers in general and minors in particular[6]. In fact, the proliferation of content has facilitated the emergence of diversity of formats as well as points of view, which are not always well-meaning. It is possible for malicious individuals to turn these services into an outlet for hatred against a particular person or group of people. Therefore, the extensive use of these online content platforms by consumers may expose them to hate speech or other illegal content[7].

123. The MAP study also showed that consumption habits linked to information have, for some, evolved towards new sources. For example, the passage devoted to the impact of the Covid-19 pandemic has shown that some respondents will consume more linear television news programmes, when others will space out their consumption and/or find alternative sources of information on the Internet (see § 1812). However, access to information via television programmes – and public service channels – is frequently associated with reliability and quality (see §§ 1889 and 1908), although some people feel a sense of distrust towards news channels and general-interest television news (see § 1900).

124. The new possibilities offered by these networks have changed the market. Now, it is possible to collect considerable personal data allowing precise targeting of consumers. In fact, while they are generally free, social networks use the behavioural data collected, process them and are able to offer advertisers or other players effective solutions to reach their target. The public is not always aware of this: their consent may not be fully informed. Through the use of algorithms, in particular, social networks manage to promote the distribution of content in a way that can be viral. This can result in some abuse, such as the use by some of these networks as a tool of influence to manipulate public opinion (see the textbook case of the Cambridge Analytica scandal in 2018).

125. Data collection can also lead to the dissemination of false information (whether or not to manipulate public opinion). Some people are looking for alternative sources of information on social media as well as certain video sharing platforms. This raises the question of their accountability, particularly with regard to the reliability and quality of the information[8].

Recommendations:

- Impose certain obligations on online content sharing platforms in order to fight against the propagation of illegal content on their platforms, including a duty of collaboration with the CSA;

- Strengthen cooperation between public authorities in order to examine the uses of personal data by users on social networks in particular and on the Internet in general and to alert the general public to the dangers of exposing personal data to everyone;

- Strengthen European and national cooperation in order to fight against disinformation.

---

[6] This is evidenced by the mechanisms provided, in favour of minors, by Directive 2018/1808[6] amending the Media Services Directive of 2010[6]: this shows that platforms (in this case video sharing platforms, a category to which certain social networks can potentially belong) can be regulated.

[7] See on this point the "CSA Guidance Note on the fight against certain forms of illegal content on the Internet, in particular hate speech" https://www.csa.be/wp-content/uploads/2020/02 /Note-dorientation-contenus-illicites_f%C3%A9vrier-2020.pdf.

[8] See on this point ERGA, "Report on disinformation: Assessment of the implementation of the Code of Practice », https://erga-online.eu/wp-content/uploads/2020/05/ERGA-2019-report-published-2020-LQ.pdf.

C. CULTURAL EXCEPTION AND "DISCOVERABILITY"

Cultural exception

Contextualisation

126. Given the evolution of consumer behaviour and changing demand, the supply is also adapting. But faced with – powerful – international players, we see operators unite to try to maintain their position, assert or even impose themselves: refer in recent months to the announcements of the launch of a Flemish Netflix (*Streamz*), the free platform TV5Monde Plus, etc.

Auvio, RTL Play, TV5 Monde Plus, Arte (AVoD[9])

127. Launched on 13 April 2016, the "RTBF Auvio" offer was originally designed as a player, a single website where the public could find all the audio-visual RTBF content (podcasts of radio programmes, replay of television programmes, live radio and television programmes). It has evolved into a platform where other content is available: exclusive content produced by RTBF for the web and content from other service providers. On this last point, RTBF has in fact concluded agreements with Sonuma (RTBF archives), ARTE (2018), then AB3 and ABXPLORE (September 2019) and TV5 Monde (February 2020). Auvio has also been available since 11 July 2017 as an application for Android and iOS smartphones and tablets. Paid content from Sooner has also been available since 2020.

128. RTL Belgium launched its platform RTL Play in March 2018. On this platform, it offers programmes from its own linear channels RTL-TVI, Club RTL, Plug RTL, Bel RTL, Radio Contact and Mint. Some television programmes and all radio channels are broadcast live. RTL Belgium has announced that its application RTL Play should be available from spring 2021 on the "boxes" of VOO and Proximus.

129. TV5 Monde Plus is an on-demand offer from the international French-speaking channel financed by advertising. Announced at the Summit of Francophone Heads of State held in Yerevan in October 2018, this initiative is intended as a way of "increasing the influence of Francophonie", in the words of Yves Bigot, CEO of TV5 Monde[10]. The content is nevertheless also partially available on platforms developed by partner channels, such as RTBF Auvio in the Wallonia-Brussels Federation.

130. The Franco-German provider ARTE offers an on-demand offer on its own application, its website and its YouTube channel[11]. As for TV5 Monde Plus, ARTE content is also available on RTBF Auvio.

131. Thus, it must be understood that to complement their offer, providers of on-demand platforms intend to make a large amount of content accessible, including from third-party providers.

Netflix, Amazon Prime Video, Apple TV, Disney+ (SVOD[12])

---

[9] Advertising Video on Demand or free video on demand financed by advertising.

[10] LALOUX, Philippe, "TV5MondePlus, the platform that wants to "increase the influence of Francophonie", in Le Soir, 9 September 2020, p.8.

[11] ROUSSEL, Virginie, "La rentrée sur Arte, pour « nourrir en beauté l'imaginaire »", in La Libre Belgique, 1 September 2020, p. 45: *"On YouTube, Arte has nearly twenty channels that allow it to reach a younger audience. Discussions underway concern the possible presence of programs on Salto, the streaming platform which brings together the groups France Télévisions, TF1 and M6. "But there is no plan to become a shareholder in Salto," specifies Bruno Patino. We are mainly focused on developing our free Arte.tv offer. Non-linear today accounts for around 40% of the total audience for early evening documentaries."*

[12] *Subscription Video on Demand*

132. The most popular SVOD platforms in French-speaking Belgium are Netflix, Amazon Prime Video, Apple TV, Disney + and Sooner. Others are emerging or more specialised, such as Evil Penguin TV for broadcasting classical music concert recordings.

133. The study shows good knowledge (see §§ 404) and significant use (see §§ 406) of a certain number of brands. These are both local and global brands: YouTube, Facebook and Netflix sit alongside the respective offers of audio-visual media service distributors Proximus, VOO, Telenet and Orange, as well as RTBF Auvio or the daily newspaper sites.

134. Certain international players have a completely new strike force, with an infinite variety of content intended to satisfy the needs of the general public as well as of interested groups or specialists. Given this observation, what can local or regional players do? In particular, how to respond to the domination of the English language and Anglo-Saxon culture? In addition to the initiatives that have just been listed in §§ 127 et seq., it is necessary to cite examples of cooperation observed in a national or regional context such as the case of the Flemish Netflix Streamz which is an initiative of the cable operator Telenet and the audio-visual group DPG Media (provider of VTM) to which the public service VRT will contribute. Another example: in Germany, there is also a gradual merger between the media libraries of ARD and ZDF (the two public channels). On 20 October 2020, the Salto platform, which brings together public and private audio-visual groups, was launched in France. It would have been generally considered, a few years ago, like mixing oil with vinegar.

Recommendations:

- Strengthening of local brands vis-à-vis the public;

- Strengthening of the audio-visual offer, audio-visual production and co-production; reflection on the advisability of a more aggressive and visible international positioning, perhaps in certain fields of activity (animated films, documentary films);

- Reflection on the possible cannibalisation of the various initiatives of local players (providers, operators, etc.);

- In line with the previous proposal, consideration of the possibility of a paid streaming offer for the distribution of local channels (in particular) such as Stievie (Flanders), Joyn (Germany)[13], Salto (France);

- Cooperation with the Higher Council for Culture, in matters of digital development in the various cultural policies of the Wallonia-Brussels Federation[14].

Capacity to encourage discovery of content or "*discoverability*"

Contextualisation

135. Recent years have seen a significant development in the place of algorithms in access to audio-visual content on the Internet. In fact, the major platforms offer consumers suggestions for content thanks to search algorithms or personalised recommendation. But this trend is also observed among traditional

[13] Seehttps://www.chip.de/news/Schon-Mitte-2019-ProSiebenSat.1-will-grosse-Streaming-Offensive-starten_154045408.html, accessed on 25 November 2020. Joyn is a platform created by the private companies ProSieben Sat1 and Discovery. The (public) channels of ARD and ZDF, in particular, are also available on it.

[14] Article 19, § 2, paragraph 1, 10, of the Decree of 28 March 2019 on the new cultural governance, *Belgian Official Gazette* of 30 April 2019, p. 42033.

players in the value chain such as [15]operators who now offer set-top boxes also allowing users to be referenced and suggest content based on their consumption habits.

136. The MAP study has shown that some of the features and characteristics most appreciated when watching TV at home include in particular the diversified offer of formats with series, films, etc. and to a lesser extent the fact of not having to choose content oneself and being guided by the choices made by TV channel programmers (see § 356). Thus, certain consumers watch television as a means of discovering content towards which they would not turn (see § 1888). The study also showed that the time constraint can be considered by the general public as positive as it allows to create meeting points around certain programmes and facilitates the selection and discovery of new content (see § 1888). It is interesting to note in this regard that Netflix, although it is a paid VOD service, launched a test phase in November 2020 for a new linear distribution channel for certain programs, called Netflix Direct. This test aims to offer users a continuously available channel with content that they do not have to choose[16].

137. The MAP study also showed that some of the most popular features and characteristics when watching paid video on demand at home include the feeling of being able to choose the content to watch, the fact of having a diverse range of formats including series, films, etc. and being offered content that is likely to interest them (see § 388). Likewise, it has been shown that the features and characteristics most appreciated when watching free video on demand at home include the feeling of being able to choose the content watched, being in control of the temporality, and the fact of having a diversified offer of formats including series, films, etc. (see § 389).

138. This state of affairs raises questions about the ability to arouse the general public's interest in audio-visual content, which Quebecers refer to as "discoverability", regardless of the consumption mode used. In fact, as the perceptions of the consumption modes of French-speaking Belgians revealed by the study showed, consumers recognise both advantages and disadvantages in using both television and VOD (paid and/or free), in terms of discovering original content, which they were not actively seeking. It is therefore necessary to ask whether the idea that a particular mode of audio-visual consumption would allow the general public to better discover content is actually true. Doesn't the "*discoverability*" of content rather result from the complementarity of consumption modes? In this case, does it make sense to limit the debate on the "*discoverability*" of content – particularly public interest content – to a question of obligations to be imposed on video on demand providers, as a counterpart to the must-carry obligations previously imposed on cable operators? In fact, the process of searching for and selection of content seems to take shape, nowadays, by a search for content between the different consumption modes rather than within the same consumption mode.

Recommendation:

Reflection on the various issues linked to "discoverability", in particular by comparing the global strategies of the major players in the entire value chain, which focus on the actual consumption habits of the general public.

---

[15] This term is understood in the sense of the legal definition taken from Article 1, 15°, of the decree on audiovisual media services, coordinated the 26 March 2009, i.e."*any corporation that makes one or more audiovisual media services available to the public in any way whatsoever and in particular by terrestrial hertzian means, by satellite or by means of a cable distribution network. The service offer may include services provided by the corporation itself and services provided by third parties with whom it has contractual relations; Any legal entity that constitutes a service offer by establishing contractual relations with other distributors is also considered to be a distributor of services*". Concretely, this refers to cable operators, whether or not they own their cable network.

[16] "*In France, where traditional TV consumption is very popular, many viewers like the idea of programming that avoids having to choose what to watch. This is why we are testing a new viewing option in France: Direct. Whether you are looking for inspiration, or discovering Netflix for the first time, you can sit back and relax without having to choose a particular title and be surprised by the diversity of the Netflix catalogue.*" See https://about.netflix.com/fr/news/direct-new-feature-tested-in-france, accessed on 25 November 2020.

D. EQUALITY AND THE FIGHT AGAINST DISCRIMINATION

Reducing the digital divide

Contextualisation

139. A common understanding of the term "digital divide" covers inequalities in access to information and communication technologies and in their use[17]. These inequalities are due, for example, to economic (costs) factors, technological (lack of coverage) factors or the incapacity of users (illectronism). The current context of the health crisis due to the Covid-19 pandemic has shown the importance of access to digital technology for the general public.

140. The MAP study provides indicators and figures that contribute to reflection on this digital divide. The following data can be presented:

- ***Ownership of smart devices (what is present in the household)***: 93.5% of respondents declared that they have at least one television in the household and 93.3% of them have at least one personal mobile phone. Among the respondents who own at least one mobile phone, 26% declared having a GSM-based phone, while 63.9% declared having a smartphone. 78.6% of households have a computer and 40.8% have a tablet. The game console is available in 34.8% of households and the video projector in 5.7% (see §§ 194 and 199).
- ***The level of ownership of smart devices***: 77.2% of households have a medium or high level of ownership of smart/connectable devices. 14.4% of households a low ownership of smart devices. 8.3% of them do not have a smart device at all. We note that 22.7% of households (slightly more than 1 in 5) have little or no ownership of smart devices (see §§ 223).
- ***The presence of an Internet connection / Internet coverage:*** 88.5% of Belgian households located in the French-speaking region and in the bilingual region of Brussels-Capital have an Internet connection. As a result, 11.5% of households (or a little more than 1 in 10) do not have an Internet connection (see §§ 224).
- **The quality of the Internet connection**: Among the respondents who have a connection, 88.5% rated their Internet connection as good or very good. 11.5% declare it to be of poor or very poor quality, which can impact the use made of digital tools (see §§ 225).
- **Digital competence and knowledge**: The analysis of familiarity with technology objectively evaluated using criteria measuring the competence of respondents shows that 43.2% of respondents (i.e. more than 4 out of 10) have a low level of objective familiarity with technology (see §§ 175).

141. Other data can contribute to reflection on the digital divide:

141.1. The market analysis of the Conference of Regulators of the Electronic Communications Sector of 2018[18] indicates that the sum of households living in the "white" and "grey"[19] areas represents 6.2 % of total households. If we look at Statbel's data, Internet availability in

[17] OECD, "Understanding the Digital Divide", Paris, 2001, https://www.oecd.org/sti/1888451.pdf, accessed on 30 November 2020.
[18] § 1522 of the CRC decision of 29 June 2018 on the analysis of the broadband and television broadcasting markets, https://www.ibpt.be/consommateurs/publication/decision-du-29-juin-2018-analyse-des-marches-du-haut-debit-et-de-la-radiodiffusion-televisuelle, accessed on 30 November 2020.
[19] "White" zones are those not covered by an NGA infrastructure (New Generation Access networks). "Grey" areas are those covered by a single NGA infrastructure. See § 1519 of the CRC decision of 29 June 2018 on the analysis of the aforementioned broadband and television broadcasting markets. See also the BIPT atlas, https://www.bipt-data.be/fr/projects/atlas/landline .

households in Belgium is estimated at 90% (10% of households without an Internet connection)[20].

141.2. The Generation 2020 survey of the Higher Council for Media Education of the French-speaking Community[21] notes that the digital divide is not a phenomenon confined to the oldest population classes, due to the fact that they do not have "access to tools".[22] In fact, young people would also be affected, for other reasons: they would have access to the Internet through their smartphone, but lack the knowledge and competence necessary for real life (higher education, employment, administrative procedures etc.).

142. The various aforementioned indicators are also likely to be combined to reinforce digital inequalities. In fact, it is not because we have an Internet connection that we have a smart device, nor because we have knowledge and familiarity with technology.

143. These different data invite reflection, on the one hand, on strategies for reducing digital inequalities and, on the other hand, on digital transition projects that are truly inclusive. Projects that focus on the digital transition in access to knowledge and information in particular must include a reflection on the most vulnerable groups who do not benefit from the same digital potential. It would therefore be advisable to include a reflection on equal opportunities in the implementation of public policies and projects related to digital transition.

Recommendations:

- Development of education programmes or awareness campaigns relating to the use of messaging services and search engines, also aimed at adult audiences (fight against illectronism);

- Execution of cooperation projects between the Educational Digital Service (general education administration of the FWB), the CSEM, the CSA, the Digital Agency (Walloon Region); partners such as Agoria or Forem or Actiris could also be approached;

- Support for the deployment of fixed and wireless connectivity; this must help to enable the provision of quality services at affordable prices.

- Include a reflection on equal opportunities in the implementation of public policies and projects related to digital transition.

Equality in terms of gender, age and income

Contextualisation

144. The MAP study highlighted the impact of various socio-demographic variables on the choice of consumption modes, the choice of devices or even the substitutability of consumption modes. Gender, age and income level, in particular, are particularly influential variables. They are the source of inequalities in the use of digital devices and new modes of media consumption.

[20] https://statbel.fgov.be/fr/nouvelles/isolement-numerique-pres-dun-quart-des-personnes-seules-nont-pas-acces-internet-la-maison, accessed on 30 November 2020.
[21] Higher Council for Media Education, *#Generation 2020. Young people and digital practices*, Brussels, 2020. This is a survey on the digital uses and practices of children and adolescents in the Wallonia-Brussels Federation, available at https://www.generation2020.be/.
[22] VANNESTE, Bérénice, "Young people and screens: a variety of devices, a decline in basic computer skills, Critical interpretation of the #Génération2020 survey (1/5)", https://www.generation2020.be/article/jeunesetecrans/, accessed on 30 November 2020.

144.1. Gender:

- Gender impacts the choice of consumption mode: women are more likely to watch television than men. They are also proportionately less likely to watch video on demand in general than men. A complementary analysis nevertheless highlighted that consumption is gendered but not for all age groups. It is more apparent for the higher age groups (see §§ 477 et seq.).
- Gender impacts the choice of device used to consume television and free VOD at home: in general, men tend to use their personal device (smartphones, tablets, computers, etc.) more than women. This trend can also be observed for collective devices[23], with the exception of the television set for watching television (see §§ 948 et seq.).
- Gender impacts the substitutability of television: women are proportionately slightly more likely than men to not stop watching television. In addition, gender influences the choice of modes consumed to replace television (see §§ 1392 et seq.).

144.2. Age:

- A person's choice of consumption mode is impacted by their age group. In fact, it is observed that television consumption increases with age group, even if inconsistently, and that VOD consumption decreases with age group (see §§ 520 et seq.).
- The choice of device used (television, smartphone, laptop or desktop, tablet, etc.) for each of the different consumption modes is impacted by the age group. The younger we are, the more we use – other than the television set which is very popular with all generations – a personal device (with the exception of the tablet in the 15-19 age group). The older we are, the more we limit ourselves to using a collective device i.e. the television (see §§ 894 et seq.).
- There is a relationship between the substitutability of consumption modes and the age group of consumers. In fact: the younger we are, the more likely we are to stop watching television and substitute it for another mode of consumption of audio-visual content; the older we are, the less likely we are to stop watching television and substitute it for another mode of consumption of audio-visual content; (see §§ 1422 et seq.).

144.3. Income:

- The number of different devices depends on the income of the household considered: the higher the household income, the more different devices this household has (see §§ 243).
- A person's choice of consumption mode is also impacted by their household income: the higher the household income, the more the respondent watches video on demand. However, the same observation is not made for television because the assumption that the higher the household income, the less the respondent watches television is invalidated (see §§ 535).
- The higher the household income, the less inclined the consumer is to stop watching paid VOD and replace it with another mode of consumption (see §§ 1449 et seq.).

145. Moreover, these different criteria are intertwined in relation to new consumption modes. In fact, it was highlighted that the standard profile of the person who does not plan to stop watching television is a woman over 70 years old, (pre-)retired, living alone without children and with a low or medium level of qualification (see §§ 107 et seq.).

146. Finally, it is noted that the relationship with new modes of media consumption and digital equipment is part of social and gender inequalities. Their appropriation by the users differs according to their gender, age or income level.

---

[23] "Collective device" refers to a device that generally allows viewing by several people, such as television, video projector and desktop computer (see scientific report).

147. The findings of the MAP study are corroborated and extended by other data:

147.1. Statbel data highlight the impact of family situation, income level, socio-economic situation, age and level of education on the availability of an Internet connection within the household. For example, it states that "*one in five households (20%) has a net monthly income of less than €1,500. 27% of them say they do not have an Internet connection at home. The percentage is 31% in Wallonia. This is five times more than households with incomes above €1,500*"[24].

147.2. Concerning the question of gender, the scientific literature has highlighted the gendered uses of new technologies. In 2003, Josiane Jouët showed the place of gender in the designs of communication technologies as well as in the modes of appropriation of these technologies[25]. Socialisation of (little) girls with technology is an important issue. In fact, as Marie Bergström and Dominique Pasquier point out, "*Many studies have shown considerable differences in socialisation with technology in early childhood, which then help to develop in women a loss of confidence in their capabilities*"[26]. They speak of a "*stereotype of integration with technology in the male universe*"[27]. Thus, digital uses are part of gender relations, which are above all power relations.

148. The appropriation of new consumption modes of media and digital devices by users therefore differs according to their gender, age or income level. It can be hypothesised that this appropriation reproduces inequalities that exist elsewhere in society just as much as it reinforces them.

149. These findings should be studied further. In this regard, several avenues could be explored: some relate to research, others relate to public policy initiatives. They are explained in the recommendations below.

Recommendations:

- Strengthen the disciplinary crossroads between studies on digital uses and gender studies. Include the gender dimension in all research, within the Wallonia-Brussels Federation, on media consumption and digital uses.

- Analyse, from an intersectional perspective, the cumulative or cross-cutting impact of gender, age, income level, etc. on digital inequalities.

- While most of the work on digital uses and media consumption focuses on the younger generations, focus on the habits, practices and representations of seniors. How do they fit into their personal biographical experiences and trajectories? Can there be nuances in the analysis of generational differences?

- Collect statistics on new modes of media consumption and digital uses, broken down by sex, age, income, etc. to establish public policies adapted to social reality.

- Tackle inequalities in the use and appropriation of technology from childhood/schooling, by deconstructing gender stereotypes associated with the world of technology and by focusing on the socialisation of (little) girls with technology. Open the field of possibilities within the framework of educational guidance.

---

24 https://statbel.fgov.be/fr/nouvelles/isolement-numerique-pres-dun-quart-des-personnes-seules-nont-pas-acces-internet-la-maison, accessed on 30 November 2020.

25 JOUËT, Josiane, "Communication technologies and gender", in Réseaux, 4 (120), 2003, pp. 53-86.

26 BERGSTRÖM, Marie, PASQUIER, Dominique, "Genre & Internet. Sous les imaginaires, les usages ordinaires », in *RESET*, no. 8 | 2019, p. 3, URL : http://journals.openedition.org/reset/1329, accessed on 30 November 2020.

27 Ibidem.

- Include a reflection on equal opportunities (in terms of gender, age, income, etc.) in the implementation of public policies and projects related to digital transition.

Media education

Contextualisation

150. Changes in the media landscape and changes in media consumption raise questions about the appropriation of new consumption modes and their content by young audiences.

151. Thus, we observe that the media landscape is changing. This is marked by the introduction of cross-border players and an explosion in the options they offer. At the macro level, this change has contributed to the multiplication of broadcasting sources. The supremacy of traditional audio-visual media in the creation and distribution of content has been called into question by the entry of new players into the market. From the giants of the Internet (Google, Apple, Facebook, Netflix, etc.) to consumers, all of them, to varying degrees, produce and distribute content.

152. The MAP study showed that the top trio of video on demand services most used by VOD consumers (having previously claimed to know them) is made up of YouTube (77.1%), Facebook (70.6%) and Netflix (67.7%) (see §§ 406). In addition, the study highlighted that:

- 51.2% of 15-19 year-olds and 50.1% of 20-29 year-olds respond affirmatively to the question "do you watch television?" (see §§ 505);
- 85.2% of 15-19 year-olds and 82.7% of 20-29 year-olds respond affirmatively to the question "do you watch VOD?" (see §§ 505);
- The smartphone is used by 65.3% of 15-19 year-olds and 56.1% of 20-29 year-olds to watch free on-demand videos at home (see §§ 893.3).
- 55.8% of students indicate practicing a (multi)media activity simultaneously with their exposure to television, 34.1% simultaneously with watching paid VOD and 66.4% simultaneously with watching free VOD (see §§ 1017).

153. Other studies provide additional information on the relationship of young audiences with technologies, particularly those of school age. Thus, as highlighted by the CSEM Génération2020 survey mentioned above, French-speaking Belgian children and adolescents use different devices (television, tablet, game console, laptop, desktop computer) to consume, depending on multiple factors. The survey highlights that 67% of primary school students use a tablet, 52% a smartphone, 29% a laptop and 21% a desktop computer[28]. In secondary school, 94% use smartphones, 61% use laptops, 41% use tablets and 21% use desktop computers[29]. This study thus shows a use of smart devices which is widespread, for some of them, but not generalised. In addition, we note that the most widespread device – at least the secondary level – the smartphone, is not the tool most related to use for work/education purposes.

154. These different data thus show that use of smart devices is widespread for various activities, but not generalised. In addition, it is observed that younger generations are confronted from start to finish with this abundance of options without necessarily having the fundamental keys to understanding the content offered to them. This raises questions in terms of media education.

Recommendations:

- Development of education programmes or awareness campaigns relating to the use of digital tools for understanding and managing them (protection of privacy, information management, critical distance,

[28] Higher Council for Media Education, *#Generation 2020. Young people and digital practices*, Brussels, 2020, p. 14.
[29] Ibidem, p. 18.

desire for multiple sources, indications of disinformation in apparently journalistic content, etc.) (see above the issue on the regulation of social networks, §§ 120 et seq.);

- Strengthening of awareness-raising campaigns relating to "digital socialisation" (management of emotional life online and cyber-harassment, hate speech, cyber-reputation, etc.); in particular the measures already adopted to prevent and deal with harassment and cyber-harassment in schools [30] (see also the issue on the regulation of social networks, §§ 120 et seq.);

- Execution of cooperation projects between the CSA, the CSEM and the Wallonia-Brussels Federation relating to awareness campaigns for families and schools, in particular based on the digital expertise of the youngest;

- Concerted approach at the international level, international cooperation (possibly by linguistic zone).

E. ILLEGAL OFFERS

Contextualisation

155. In recent years, we have seen a problematic development of offers on the Internet offering audio-visual content obtained illegally. These are accessible on illegal streaming platforms, illegal download sites or even through illegal IPTV offers[31]. This trend is worrying because the general public finds itself in an unlawful situation due to the consumption of audio-visual content obtained illegally, but also because the creators, distributors and providers of content see their properties misappropriated in order to enrich networks that could be described as criminal networks.

156. The passage "Further analysis on illegal video on demand: practices, performances and devices" (see §§ 1991 et seq.) showed that a number of "typical" audio-visual consumer groups make use of illegal video on demand and in particular of illegal streaming platforms and illegal downloads. It was seen that illegal video on demand is viewed by the general public as a form of free video on demand and that illegality is not seen as an obstacle. Although this source of access to content is not a preferred source, it occupies a decisive and complementary place in consumption habits. In addition, it is shown that French-speaking Belgians are ready to turn to the options provided by legal paid platforms, thus underlining a possible drop in illegal consumption with the growth of legal platforms.

157. This state of affairs must call for action in order to ensure good competition and allow for a fair market. The consumption habits of French-speaking Belgians revealed by the study constitute essential information for the players in the private and public sector wishing to tackle this problem. The idea that this type of consumption is marginal and that most of the general public do not realise that they are using an illegal service is called into question. As a result, measures should be taken to limit this illegal practice which infringes copyright and contributes to the creation of unfair competition which could have considerable financial consequences for the industries concerned.

158. However, the measures that should be taken must meet the characteristics of the target audience. In fact, some are fully aware of the illegality of their consumption, while others are not aware of the illegal

[30] See http://www.enseignement.be/index.php?page=0&navi=3613, accessed on 29 September 2020.
[31] IPTV is a medium of communication, a neutral technology. IPTV makes it possible to consume live, deferred television or video on demand. Instead of being provided by satellite or cable, TV can indeed be provided via the Internet. By itself, IPTV is not considered illegal. These are television services provided using a suite of protocols. It is used by legitimate platforms like Netflix, Amazon Prime, Proximus etc. IPTV is illegal when you are in the presence of resellers who have not acquired the broadcasting rights of the channels and who decide to distribute this audiovisual content illegally. Resellers successfully hack the signal of one or more channels to make them available to users. Resellers use various methods for hacking.

nature of certain offers. For the former, no moral communication or argument can be effective. However, for the latter, awareness and information can be a means of action. Likewise, if we look at the willingness to pay of certain individuals noted in the study, it can be seen that a proportion of these individuals do not want to pay anything but that another says they are ready to pay for a legal offer. For the former, no moral communication or argument can be effective but for the latter, a reflection on the offer and its price would allow private players to meet the expectations of consumers.

Recommendations:

- Awareness actions for the general public;

- Initiate a reflection on the development of adapted audio-visual offers;

- Ensure good competition and allow for a fair market. This can happen, in particular, by strengthening cooperation between private and public players affected by the problem, on the model of the round tables organised in 2019 by the CSA. The latter brought together all the stakeholders in French-speaking Belgium (providers, distributors, SGAM[32], SACD[33], SPF Economie, SPF Finances, regulators or the BEA[34]) for various meetings (round tables). The objective was to identify, in collaboration, possible courses of action to overcome the challenges.

F. CRC MARKET ANALYSIS

Contextualisation

159. The following table compares the main passages of the decision of the Conference of Regulators of the Electronic Communications Sector (CRC) of 29 June 2018 concerning the analysis of the television broadcasting market in the French-speaking region relating to the themes, on the one hand, and this study. This comparison aims to determine whether consumer behaviour with regard to over-the-top (OTT) services changed between 2018 and 2020 and, more generally, whether or not the conclusions reached then correspond to those of this study (see in particular § 25).

Theme		Quote from the CRC decision	Reference in the CRC decision	Quote from the MAP study	Reference in the MAP study
Predominance of television	1	"Dominant position of conventional television broadcasting services in the media landscape"	Reference to the MediaXperience study of the RMB in § 171 of the CRC decision	"366. First, we see in Table 71 that 72.3% of respondents say they watch television, whether or not in combination with VOD. To this extent, television thus remains very popular with French-speaking Belgians. (...)"	§ 366
Use of OTT television	2	"As has already been pointed out, the 2016 BIPT market study showed that one in three respondents watches television via the Internet (e.g. deredactie.be, rtbf.be, YouTube). Only 1.7% of those surveyed watch broadcasting services over a	§ 294	See developments devoted to free video on demand native to television. "415. In conclusion, among all respondents who watch television, only 5% of them do so on the move (exclusively or in combination with watching it at home or elsewhere). On the other	§§ 1951 et seq. §§ 414-415

[32] General Audiovisual and Media Service of the Wallonia-Brussels Federation.
[33] Société des Auteurs et Compositeurs Dramatiques.
[34] Belgian Entertainment Association.

Theme		Quote from the CRC decision	Reference in the CRC decision	Quote from the MAP study	Reference in the MAP study
		broadband Internet connection."		hand, 99% of them sometimes watch television at home (exclusively or in combination with watching elsewhere or on the move). To this extent, watching television on the move is a very rare practice." "420. 77.5% of people who say they watch television on the move do so through Internet sites or dedicated applications of TV channel broadcasters. In addition, the applications of operators (Proximus TV, Yelo Play by Telenet, VOOmotion, Orange TV) are used by 44.9% of those who watch television on the move (see Table 118)."	§ 420
Use of OTT services	3	"We can conclude that OTT services (linear or not, free or paid) constitute either a complement to conventional television offers (such as deferred viewing and certain forms of video on demand), or a fragmented content offer (such as free web TV or video on demand subscriptions)."	§ 305	"1215. Regarding the substitutability of the modes of consumption, it is interesting to note that a very large majority of respondents certainly or probably do not plan to stop watching television." "1218. Regarding the substitutability of the modes of consumption, it is interesting to note that a very large majority of respondents certainly or probably do not plan to stop watching video on demand."	§ 1215 and § 1218
Age groups	4	"Consumption habits vary according to age groups" "The share of people watching video online is predominant among the youngest, making it the dominant mode of consumption of audio-visual media in this segment. Conversely, among the elderly, the dominant mode of consumption remains linear television exclusively or in addition to online video. However, linear television remains predominant on an overall scale."	§ 169	"520. To conclude, we can confirm the hypothesis that a person's choice of consumption mode is influenced by their age group. In fact, it is observed that television consumption increases with age group, even if inconsistently, and that VOD consumption decreases with age group. 521. The hypothesis that the frequency of audio-visual consumption is impacted by the age group is also confirmed: the frequency of television consumption at home increases with the age group. Conversely, the frequency of consumption of video on demand at home decreases with age group. 522. On the other hand, the hypothesis that the average daily duration of audio-visual consumption is impacted by the age group is only partially confirmed: there is a statistically	Hypothesis 7 (Impact of the age group on audio-visual consumption), especially §§ 520 et seq.

Theme		Quote from the CRC decision	Reference in the CRC decision	Quote from the MAP study	Reference in the MAP study
				very significant association between the age group and the average daily duration of consumption of television and free VOD, but not paid VOD. It should be noted that the average daily duration of television consumption increases with the age group and that there are slightly more large consumers of free VOD (3 hours or more per day) among those under 30 than among the other age groups."	
	5	"A few market players note that the use of OTT television is significantly more popular with younger generations. The CSA has already recognised this trend in its draft decision. However, complementary use is also observed for these generations (31.9%), for which online videos are admittedly more watched than in other age groups, as shown in the figure below. It is further apparent from this figure that the categories "Exclusive traditional TV" and "Combination of online videos and traditional TV" remain the main categories when the different age categories are considered together."	§ 323	"1009. The hypothesis that the younger we are, the more we simultaneously use different media for audio-visual consumption and, conversely, the older we are, the less we simultaneously use different media for audio-visual consumption is confirmed. 1010. Conversely, the existence of a link between the age group and the type of simultaneous exposure is confirmed but the hypothesis formulated must be reconsidered. In fact, the older the respondents, the less likely they are to simultaneously use different media for audio-visual consumption. On the other hand, when the respondents consume simultaneously: the older they are, the more they do so in parallel with television consumption and the younger they are, the more they do so in parallel with VOD, especially free VOD. Also, the hypothesis that the younger we are, the more we simultaneously consume while watching television and conversely the older we are, the less we simultaneously consume in parallel with television is invalidated."	Hypothesis 25 (Impact of the age group on simultaneous (multi)media consumption), especially §§ 1009 and 1010
	6	"It should also be noted that the age groups where viewing of online videos is dominant (mainly 15-19 year-olds and 20-29 year-olds) only represent around 20% of the population. It should further be noted that it is not necessarily the representatives of these age groups who make the decisions in the household regarding the purchase of broadcasting services. This	§ 324	"894. The hypothesis that age has a significant impact on the choice of device used, whether in the case of paid or free television or video on demand, is confirmed. 895. But we must add nuances to this observation: 895.1. The younger we are, the more we use – other than the television set which is very popular with all generations – a personal device (with the	Hypothesis 22 (Impact of age group on the choice of device), especially §§ 894 and 895

Theme		Quote from the CRC decision	Reference in the CRC decision	Quote from the MAP study	Reference in the MAP study
		purchasing decision is more in the middle and upper age groups, for which conventional television remains a dominant factor in the consumption of broadcasting services."		exception of the tablet in the 15-19 age group); 895.2. The older we are, the more we limit ourselves to using a collective device i.e. the television. Other collective devices such as video projectors and desktop computers are not very popular among those over 50."	
Complementarity / substitutability	7	"Linear and non-linear television are more of a complement than a substitute, as indicated by the penetration of both and the habits of viewers"	§§ 164 et seq.	"1213. Single-user consumption of audio-visual content available at a given time according to a fixed programme schedule (television) is the majority mode of consumption. The cross-consumption of this mode of consumption, with single-user consumption of audio-visual content accessible when respondents so wish (video on demand) comes second." "**Erreur ! Source du renvoi introuvable.**.. Regarding the substitutability of the modes of consumption, it is interesting to note that a very large majority of respondents (86.3%) certainly or probably do not plan to stop watching television. Likewise, a very large majority of respondents (71.5%) certainly or probably do not plan to stop watching paid video on demand" "14.4.. If we look at the impact of increased television prices, it is observed that the majority of television consumers (61.1%) certainly or probably do not plan to unsubscribe from television services."	§§ 1213 and 14
	8	"A crucial element in the analysis of OTT services is the readiness of the end user to switch from conventional television to OTT services. The CSA examined in detail this willingness to migrate in section 5.3.1 "Substitutability between linear television offers and non-linear television offers"."	§ 316	"14.2 The main reason cited by those who probably or certainly plan to stop watching television is the lack of interest in its content (56.8%). The inconvenience of advertising comes in at second position (33.7%) and the price of television subscription comes in at third position (31.8%)." "14.5. As regards VOD, we see that the main reason cited by those who probably or certainly plan to stop watching paid video on demand is the excessively high subscription price (64.7%). The second reason is the	

Theme		Quote from the CRC decision	Reference in the CRC decision	Quote from the MAP study	Reference in the MAP study
				availability of sufficient options elsewhere (25.2%)." "14.6. It appears that 60.4% of those who are ready to stop watching paid video on demand would switch to free video on demand." "14.7. If we now look at the impact of an increase in the consumption price of video on demand on the willingness to unsubscribe from the latter or to no longer purchase content on demand, it is observed that a majority of consumers (55%) certainly or probably would not consider unsubscribing."	
	9	"An important indication of the limited willingness of users to migrate to OTT services is the fact that the number of customers of conventional television services (i.e. IPTV and cable television) increased during the previous regulatory period, with a relatively high penetration rate and despite several price increases for IPTV and cable offers. This shows that the evolution of OTT services is not taking place as a replacement for conventional television services but in a manner that complements them. If the two were to replace each other, the number of customers for conventional television offers should decrease."	§ 319	*(no specific data on market shares by operator, which does not relate to the attitudes and perceptions studied here)*	
	10	"Linear television viewing remains the main way to consume broadcasting services. OTT services are mainly purchased on a complementary basis, as shown in the table below from the Digimeter 2017 report. It can be seen that linear viewing remains the main way (56.6%) of watching television on a daily basis. The CSA notes that the total use of these different forms of television consumption is more than 100%, which indicates the complementary nature of the various forms of	§ 321	"336. First, we see in Table 71 that 72.3% of respondents say they watch television, whether or not in combination with VOD. To this extent, television thus remains very popular with French-speaking Belgians. 53.4% of respondents consume video on demand, partly in combination with television. 8.7% of respondents say they never watch television or video on demand." "337. Among the respondents, 38% watch only television, 19% watch only video on demand and 34.4% combine the two modes of consumption of audio-visual	

Theme		Quote from the CRC decision	Reference in the CRC decision	Quote from the MAP study	Reference in the MAP study
		consumption of audio-visual content."		content (see Table 72). We can infer from this that multiple consumption modes can coexist."	
	11	"However, in order to properly assess the degree of customer willingness to migrate, it is necessary to rely on the actual behaviour of end users. The literature recommends measuring price sensitivity on the basis of "revealed preferences" and not on the basis of mere "stated preferences". "Stated" preferences are simply based on the responses of respondents. To calculate "revealed" preferences (as in the context of the work of Analyys and Tera), respondents were questioned in particular about the name of their operator, as well as the characteristics of their offer. The price elasticity estimate was then carried out by means of an econometric analysis using this information. This method, known as "revealed preferences", is considered to be the most rigorous scientific method for the evaluation of price elasticities, unlike that by stated preferences, which tends to overestimate elasticity. We must therefore consider that the percentage of 25% of users stating that they would only watch television over the Internet in the event of a 10% tariff increase is inappropriate for assessing their willingness to migrate to OTT services."	§ 341	*(no specific data on the "revealed preferences" of the respondents,)*	

TABLE 7: CONSIDERATION OF CONSUMPTION BEHAVIOUR IN THE 2018 CRC DECISION AND COMPARISON WITH THE LESSONS OF THE MAP 2020 STUDY

It is clear from this comparison of the observations resulting, on the one hand, from the 2018 CRC decision on consumer behaviour, particularly with regard to the consumption of OTT services and, on the other hand, from this study, that there is no fundamental divergence. Consequently, there has been no significant change in the penetration of OTT services on the Belgian broadcasting market since 2018, which is likely to influence the competitive structure of the market.