MAP 2022

Medias :
Attitudes & Perceptions

Study on the consumption patterns of audiovisual media services in the Wallonia-Brussels Federation
Findings, challenges and market trends
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FINDINGS

1. ABOUT THIS STUDY

1. This study "Media: Attitudes and Perceptions" (MAP) is an extension of the first edition published at the end of 2020, and shares its focus on scientific rigour and analytical ambition.

2. The research question of this study remains the same: how is television use changing with the development of new consumption patterns of audiovisual content?

3. "Television" is defined as all audiovisual media services provided by media service providers for the simultaneous viewing of programmes on the basis of a programme schedule.

4. New consumption patterns are understood as being all means of using services offering audiovisual content on demand. These allow the consumption of audiovisual content without the constraints of television (i.e. a fixed schedule and an established programme schedule). Among these video on demand services, a distinction is made between pay video on demand on the one hand and free video on demand on the other.

5. A quantitative survey was conducted in order to provide a set of answers to the research question. It is based on the following three dimensions (or themes):
   - the exposure to technology of households residing in French-speaking Belgium;
   - the audiovisual consumption of individuals;
   - the complementarity and substitutability of different audiovisual consumption patterns.

6. The quantitative survey was carried out by means of a standardised questionnaire distributed over 2021 to a statistically-representative sample of the population of the Wallonia-Brussels Federation aged 15 years and over, consisting of 2,200 respondents. This was to ensure that the data was as robust as the 2020 study (and based on 2019 data) and to allow for relevant analysis and comparison of these results with the first edition.

7. The main results are summarised below in two sections in the form of a conclusion:
   - equipment and consumption data (univariate analysis) (point 2);
   - factors affecting the evolution of consumption and equipment (bivariate analysis) (point 3).

2. EQUIPMENT AND CONSUMPTION DATA

8. This section provides a systematic overview of the main results of the univariate analysis. These were classified according to the three dimensions of the study (recalled in section 5). The following will be systematically presented:
   8.1. A snapshot of the 2021 results;
   8.2. A comparison of the 2019 and 2021 data, which includes the main changes observed between the two editions of the study but which is limited here to those which are statistically significant. The body of the study is (of course) to be referred to for more details concerning other changes which may be insignificant from a statistical standpoint.

   In addition, the presentation of each of the three dimensions will conclude with a summary table of statistically significant developments, thus permitting an easy visualisation of the latter.

2.1. Exposure to technology

9. The following observations can be made regarding exposure to technology:

9.1. The most widespread device is the mobile phone (94.3% of respondents have one) and the television set (93.9%).

9.2. Of the respondents who own a mobile phone for personal use, 84.9% have at least one smartphone, while only 27.5% have at least one mobile phone. Smartphones therefore appear to be much more widespread than mobile phones (dumbphones).

The dominance of smartphones increased between 2019 and 2021. Indeed, the share of people with at least one smartphone (among those who own mobile phones) is up by +5.8%.

9.3. 61% of consumers own a single television set. 46.5% of individuals who have television(s) in their homes have a Smart TV and 17.4% have two or more. Of those individuals who have television(s) at home, 36.2% do not have a television connected to the Internet.

Between 2019 and 2021, the number of households with one Smart TV is increasing, with +5.6%, as are those with two, with +2.4%. The amount who have none has undergone a clear decrease of 9%.

9.4. Distributor set-top boxes (VOO, Telenet, Proximus, Orange, etc.) are by far the most connected devices to television sets, being found in 89.1% of households. This is followed by games consoles in 29.5% of households and DVD/Blu-ray players in 23.9% of households.

Between 2019 and 2021, distributors' set-top boxes consolidate their dominant position among devices connected to TV sets, with an increase of +3%. DVD/Blu-ray players experienced a significant decrease of -8.3%, which moved them into third place behind games consoles.

9.5. The most common combination of devices in households is television(s), computer(s) and mobile phone(s). This is found in the homes of 21.4% of respondents.

9.6. As regards the absence of a television set in the household, 40.4% of respondents explained this by the fact that they never watch television programmes. 22.9% of respondents say they watch programmes via another device (computer, smartphone, etc.) and 21.3% of respondents consider that television prices are too high. For all devices other than television sets, the main reason given for its absence from the household is that it is not required. The second reason is that the device is too expensive (as well as the subscription, for mobile phones).

Between 2019 and 2021, although the ranking of the reasons most often given for not having a television set at home does not change, there is a very clear reduction (-25%) in the number of individuals who say they never watch television programmes: whereas they are 65.4% in 2019, they represent only 40.4% in 2021. There was also an increase (+9.3%)

in the number of respondents who watch television programmes elsewhere than at home (or their student room).

9.7. 90.6% of respondents have an Internet connection at home. Of the respondents who have a connection, 87.9% rate their connection as good (61.6%) or very good (26.3%).

There is a slight increase in the number of households with an internet connection at home between 2019 and 2021 (+2.1%).

9.8. 55.8% of respondents have a level of ownership of connected/connectable devices which can be considered average. 24.6% of respondents have a high level of ownership of this type of device. On the other hand, 13.6% of the respondents have a low level of ownership and 6% have no connected devices at all.

The number of households which do not own this type of device decreases by -2.3% between 2019 and 2021. Households with a large number of connected devices (i.e. a high level of ownership) show an increase of +3.5%.

Dimension	Variable	Modality	Decrease	Increase
Exposure to technology	Media device at home	Smartphone		X
		Smart TV		X
	Devices connected to the TV	Set-top boxes		X
		DVD/Blu-ray	X	
	Reasons for not owning a television set	No TV set due to non-consumption of TV	X	
		No TV set due to TV consumption outside the home		X
	Presence of an Internet connection in the household	Internet connection at home		X
	Ownership of connected/connectable devices per household	Ownership of connected devices		X

Table 1: Summary 2019-2021 of statistically significant changes (Technology exposure)

2.2. Single-device audiovisual consumption

10. The following observations can be made regarding single-device audiovisual consumption:

10.1. Television remains the most popular audiovisual consumption pattern: 72.2% of respondents said they watch it, whether or not in combination with video on demand. Video on demand is also an essential part of audiovisual consumption: 56.8% use it, partly in combination with television. Only 6.3% of respondents stated they do not consume audiovisual content. Among respondents who say they watch video on demand, consumption of free VOD only appears to be much more popular than consumption of pay VOD only. 48.8% of respondents consume free VOD only, as opposed to 13.4% who consume pay VOD only. 37.8% of respondents consume both free and pay VOD.

VOD consumption increases by +3.4% between 2019 and 2021. The share of respondents who do not consume television or video on demand decreased by -2.4%.

10.2. 42.9% of respondents who do not watch television cite the fact that they find the content uninteresting as the main reason for not watching. This is followed by three reasons of roughly equal weighting: preferring to watch the content you want (35.7%), preferring to watch content when you want to (34.6%) and the annoying nature of advertising (33.5%). The most frequently cited reasons for not consuming pay VOD are largely different from those cited for television. The price of the subscription (32.7%) and the a la carte purchase (31.7%) are considered too high. The offer is also often considered to be quite large elsewhere (31%). Only 26.9% of respondents mentioned the fact that the content is not considered interesting, compared to television (42.9%). The explanation for the lack of consumption of free VOD lies firstly in the uninteresting nature of the content, as is the case for television, with 37.9%. This is followed by the existence of an adequate offer elsewhere, an aspect which was already widely emphasised for pay VOD (with 30.4%). The reasons given for not consuming free VOD are concentrated around these two modalities. It therefore appears that the main obstacle to the consumption of television (as well as to that of free VOD) is the interest in the content. In the case of pay VOD, however, the emphasis is on the price (whether the price of the subscription or the price of buying programmes a la carte).

The ranking of the most cited reasons for not consuming pay VOD changes significantly between 2019 and 2021. While the uninteresting nature of the programmes was the main reason in 2019, this reason is much less cited in 2021 (showing a decrease of -8.2%). On the contrary, other reasons are more frequently cited, and become the main reason for not consuming pay VOD: the price of the subscription (+7.9%) and the purchase price per unit (+7.5%). For free VOD, the two reasons most widely given by respondents for not using it remain the same between 2019 and 2021. However, the existence of an adequate enough offer elsewhere is up by +7.2%.

10.3. If we compare the three consumption patterns, we see that television is by far the pattern most used by respondents to keep up to date with current affairs (55.5% for TV, compared with 3.7% for pay VOD and 14.4% for free VOD). It is also the pattern which is consumed most by habit (14.1% for TV, compared with 7.9% for pay VOD and 10.6% for free VOD). Even if all patterns are very often consumed for the purpose of escape and entertainment, pay video on demand is the consumption pattern to which respondents turn in the greatest numbers when they need to relax (64.2% for pay VOD against 49.1% for TV and 49.9% for free VOD). It is also the pattern most often used to spend time with family or friends (32.9% for pay VOD compared to 13.2% for TV and 18.5% for free VOD) and to discuss content with others (3.6% for pay VOD compared to 1.1% for TV and 2.5% for free VOD). Lastly, free video on demand is the most popular consumption pattern, firstly when people are seeking to pass the time or keep themselves occupied (38.4% for free VOD compared with 27.9% for TV and 35.7% for pay VOD) and, on the other hand, when people want to think, understand and learn (22% for free VOD compared with 15.6% for TV and 16.1% for pay VOD).

10.4. When comparing the three consumption patterns, it becomes evident that certain content is more regularly associated with certain patterns. Indeed, it appears that the respondents mainly opt for television for all information content (64.8% for TV compared to 3.3% for pay VOD and 19.4% for free VOD). Television is also chosen mainly for game shows, variety shows and talk shows (15.1% for TV compared with 1.3% for pay VOD and 6.1% for free VOD), as well as information services (weather, traffic, etc.) (5.9% for TV compared with 1.5% for pay VOD and 3.7% for free VOD). Pay VOD is the pattern to which people turn most often to watch films (85.2% for pay VOD, compared with 57.2% for TV and 55.6% for free VOD), series and serials (65.8% for pay VOD, compared with 41.0% for TV and 33.30% for free VOD), even though these types of content are popular for all consumption patterns. Consumers prefer free VOD to watch:

- humorous, quirky and celebrity content (16% for free VOD compared to 3.1% for TV and 6.3% for pay VOD);
- tutorials (10.9% for free VOD against 0.3% for TV and 2% for pay VOD);
- cultural content (film releases and reviews, books, concerts, etc.) (11% for free VOD compared to 4.8% for TV and 5.6% for pay VOD) and
- lifestyle content (decoration, gardening, cooking, etc.) (5.6% for free VOD compared with 4% for TV and 1.9% for pay VOD).

It can also be seen that documentaries are a type of content which is widely consumed both on television (37.6%), on pay VOD (36.7%) and on free VOD (36.1%). Finally, sports programmes are more widely consumed on television (18.2%) and via free VOD (16.5%) than via pay VOD (8.1%).

10.5. The home is the preferred place to watch television: 99.4% of television consumers say they watch television at home. On the other hand, consumption on the move and consumption elsewhere (e.g. at a neighbour's or friend's house, in a café, etc.) are much less widespread (each of these types of consumption concerns only 6.1% of those who watch television). As with television, 99.4% of respondents who consume pay VOD do so at home. On the other hand, 22.3% of pay VOD consumers consume pay VOD on the move - more than 15% more than for television. There are also slightly more respondents (10.9%) who consume pay VOD elsewhere. For free VOD, the proportion of respondents who consume it at home is 96.4% - is slightly lower than for television and pay VOD. Consumption of free VOD on the move concerns 22.7% of its consumers. Finally, 9.9% of respondents who watch free VOD do so elsewhere.

Between 2019 and 2021, we observe decreases of -5% for television, -3.8% for pay VOD and -6.3% for free VOD in terms of viewing outside the home and on the move (e.g. at a neighbour's, a friend's, in a café, etc.).

Consumption of audiovisual content (TV and VOD) at home

11. The following observations can be made concerning single audiovisual consumption at home:

11.1. 25.2% of respondents stated that they had a subscription to special packages or pay TV channels.

Television

11.2. The features and characteristics of television most appreciated by consumers are firstly its technical ease of use (82%). This is followed by the possibility of watching live (74.4%), the availability of a diverse range of formats (65.5%) and, finally, major events such as Eurovision or sporting events (55.2%). The other features and characteristics of the television are appreciated by less than one in two respondents. In particular, there are several features which strongly distinguish television from VOD: the fact of being guided (42.5%), the feeling of having a more limited offer (41.6%) and the fact of watching the content at the same time as everyone else (40.9%). Exclusive features linked to pay services are the aspect least appreciated by TV users (20.7%).

The four most popular TV features remain the same between 2019 and 2021. Technical usability was further anchored in first place, with an increase of +4.9%. The existence of major television events is less appreciated in 2021, with a decrease of -3.8%. Furthermore, the appreciation of the fact of being guided, of not having to choose, rose by +10.6%, while the feeling of having a more limited offer increased by +12.2%. These are two strong characteristics of television, which are linked to the existence of a programme schedule compared to the more abundant but less structured offers of VOD. However, at the same time, the appreciation of the possibility of watching content at the same time as everyone else - which is also a strong feature of television - shows a decline of -4.2%. Finally, exclusive features linked to fee-based services remain fairly stable (+0.9%).

11.3. Watching television at home is a daily activity for the vast majority of respondents who do so. This is the case for 84.2% of respondents. On average, 51.3% of consumers watch television three or more hours a day. If we now turn to the time actually spent watching television, the majority of respondents (56.7%) say they actively watch between one and three hours of television on average per day. 30.4% use it for more than three hours and 12.9% for less than one hour.

Between 2019 and 2021, television viewing at least once a week decreases by -2.9%. In addition, the proportion of respondents who actively watch television for three hours or more increases by +4.4%, while the proportion who watch less than one hour decreases by -4.7%.

11.4. Television consumption is a rather solitary activity. Indeed, 51.4% say they often or always watch television alone. For 44.9% of respondents, watching television is often or all the time done in pairs. Moreover, when consumers watch television with others, 50.2% of them always choose the programme together.

Television viewing alone remains the most widespread and is fairly stable between 2019 and 2021. The most significant development was in the area of viewing in pairs, which increased by +4.3%.

11.5. Almost all consumers (98.4%) watch television on a television set at home. Other device is used by less than one in ten respondents. Of these, the most popular are the smartphone (9.2%) and the laptop (8.6%). As regards devices used for daily television viewing, 84.7% of consumers who use a television set watch television daily. This is also the case for 84.1% of those who use a games console, 82.9% of those who use a smartphone, 81.4% of those who use a desktop computer and 81.2% of those who use a tablet.

Between 2019 and 2021, the device used to watch television at home remains overall fairly stable. There was a 4.6% decrease in the use of laptops. The television set continues to dominate in devices used for daily television viewing, with an increase of +2.8%. The smartphone grew by +11%. While the latter was clearly less prevalent for daily TV consumption than the TV set, desktop computer and tablet in 2019, it becomes as popular as these devices in 2021. Video projectors, on the other hand, recorded a decrease of -3.4%. Compared to 2019, two devices seem to continue to be used less frequently than others for daily TV consumption: the laptop and the video projector.

11.6. The most commonly used feature of television is the ability to pause a programme: 63.3% of respondents use it. Recording a programme while watching another is almost as popular, with 59.1% of respondents doing so. The functionality to start a programme from the beginning is used by 49.2% of respondents. However, 25.7% of respondents do not use any of these features. Of the consumers who do not use these features, 56.6% believe that it is because they do not need them and 34.1% say they do not know how to do so.

The ranking of reasons given for not using TV features when consumed at home is identical between 2019 and 2021. The only change concerns a technical constraint, namely the limitations of the set-top box. These are much less frequently used, with a decrease of -5.8%.

11.7. 67.1% of TV consumers never watch TV on the Internet at home. Just under 6% are regular (i.e. often or all the time) consumers of Internet television. Among Internet TV consumers, 72.7% watch programmes via websites and/or TV channel applications. Distributor applications are used half as much: 36.4% of respondents use them. Video sharing platforms and live social networks are used by 33.8% of respondents. If we now turn our attention to the reasons why some respondents do not watch television on the Internet at home, it turns out that 77.5% feel they do not need to.

Video on demand (pay and free VOD)

11.8. The features and characteristics of pay VOD which are most appreciated by those who use it are first and foremost the feeling of being able to choose the content (92.2%). Next come ease of access to content (91%), having a diverse range of formats (series, films, etc.) (90.4%), the absence of advertising (90.3%), control over the schedule (87.4%) and the feeling of having a wide choice (86%). The features and characteristics of free VOD which are most appreciated by those who consume it are first and foremost the fact that it is free (93.2%). Next comes ease of access to content (89.2%), the feeling of being able to choose content (87.9%), control over the schedule (79.6%) and having a diverse range of formats (79.5%). It can therefore be seen that the characteristics of pay VOD are generally more widely appreciated by consumers than those of free VOD. However, what appeals most - for pay or free VOD - seems to be the freedom of choice and flexibility offered by these new consumption patterns. On the contrary, the more technical aspects of VOD (i.e. the recommendation system and the possibility to download content) are among the least appreciated aspects of VOD.

There are two developments for pay VOD between 2019 and 2021. These are comprised of the exclusive features specific to certain offers - whose level of appreciation increased by +7.1% - and the feeling of having plenty of choice, with an increase of +4.2%. As for free VOD, the changes relate to content proposals likely to appeal to the user (+6.7%), different access for each member of the family (+5.6%), ease of access to content (-6%) and the ability to download content (-5%).

11.9. 43.8% of consumers of pay VOD watch it daily. 39.6% of consumers of free VOD watch it daily. The viewing of pay VOD is therefore a slightly more regular practice than that of free VOD for those who consume it. However, daily viewing of VOD (whether pay or free) remains half as frequent as for television, which is watched daily by 84.2% of its consumers (section 11.3). Among consumers of pay VOD, 74.3% spend on average between one and three hours a day watching it. Among consumers of free VOD, 57.2% spend on average between one and three hours a day watching it. As with television, the majority of respondents who watch VOD do so on average between one and three hours a day (section 11.3).

With regard to the frequency of consumption of pay VOD at home, between 2019 and 2021 we can see that it is daily viewing which is increasing the most, with an increase of +8%. The share of less-regular consumers is decreasing: -4.6% for consumption at least once a month and -4.6% for consumption less than once a month. The average daily duration of consumption of pay TV at home increases: the proportion of respondents who watch less than one hour of pay TV per day decreases by -4.1% while the proportion of respondents who watch three hours or more increases by +4.2%. For free VOD, there was also a decrease in the number of consumers who watch less than one hour per day (-4.2%). With regard to duration, if we compare 2019 and 2021 we see that the longest consumption duration (three hours or more) increases the most for television (+4.4%) and for pay VOD (+4.2%).

11.10. 53.7% of respondents often or always consume pay video on demand alone. Slightly fewer (42.5%) watch it as frequently in pairs. For free VOD as for pay VOD, consumption often or all the time alone is practised by slightly more than one person in two (52.4%). In contrast, regular consumption in pairs is less common. Indeed, this is the case for less than one in four respondents (23.9%). While the proportion of respondents who said that they often or always watch alone is similar for the three consumption patterns, free VOD appears to be the pattern which is least often consumed with others (i.e. three or more people). Concerning the way in which content is chosen when pay VOD is consumed by several people, 51.3% of respondents stated that they always choose the programme in consultation. Finally, 43.5% of free VOD consumers who watch it with others always say they choose the content in consultation. Free video on demand is therefore the pattern in which self-selection is the most common and collaborative selection the least frequent.

11.11. 84.1% of consumers of pay VOD watch it on a television set when they are at home. The most popular device is also the laptop (for 35.2% of individuals) and the smartphone (35%). In 65.8% of cases, consumers of free VOD at home use a television set to watch it. Nearly one in two people (46.5%) watch on a smartphone and one in three (34.2%) watch on a laptop. The dominance of the television set is therefore less marked for pay VOD compared to television viewing, and this is even the case for free VOD. Smartphones and mobile phones, on the other hand, are used much more to watch VOD (whether pay or free) than television.

The period between 2019 and 2021 sees changes in the device used to watch free VOD at home, although the top three favourites remain the same. The majority use of the television set is confirmed and is increasing, with an uptick of +7.8% even if its use remains much less widespread than for watching television and pay VOD. The smartphone remains in second place (+1.5%). Laptop use, on the other hand, is down by 9.2%.

11.12. The top 5 best-known VOD services are almost entirely dominated by the major international players. Among the local players, only distributors such as Proximus, Telenet or VOO stand out:

- YouTube (known by 93.8% of individuals);
- Netflix (91.7%);
- Facebook (91.5%);
- Instagram (82.2%);
- distributors' offers (79.7%).

Disney+ and TikTok, which were not included in the 2019 questionnaire[1], have made impressive inroads: they are now known by 71.2% and 73.6% of respondents respectively.

[1] Disney+ did not yet exist, while TikTok was still little known and used in French-speaking Belgium.

If we then examine the usage rate of the different services (among those who know them), we discover that the five most used VOD services are almost identical to the five best-known services. RTBF Auvio is included in this ranking. It includes:

- Netflix (used by 75.7% of respondents);
- YouTube (74.6%);
- Facebook (71.9%);
- distributors' offers (66.4%);
- RTBF Auvio (56%).

The most popular free and pay VOD services remain largely the same between 2019 and 2021. They are experiencing slight decreases. At the top of the ranking we find YouTube (-2%), Facebook (-2.3%) and Instagram (-2.3%). On the other hand, offers from distributors enter the top 5, with an increase of +3.6%. The rest of the rankings show many notable changes. The gains in awareness are particularly notable for Amazon Prime Video (+8.9%) and Twitch (+8.5%). The five most used services remain the same. However, they do not rank in the same order due to fluctuations: Netflix (+8%), distributors' offers (+5.7%). Similarly, there was a significant increase in usage for Amazon Prime Video (+12.5%).

11.13. 86.3% of pay VOD consumers have monthly subscription(s) to only one or more offers. They opt solely for the purchase or rental of content on demand in only 5% of cases. Finally, 8.7% of consumers use these two means to consume pay VOD.

Between 2019 and 2021, the dominant position of subscription-based pay VOD strengthens, with an increase of +6.1% of consumers opting solely for this type of pay VOD. Conversely, there is a decrease in the number of those who only rent or buy individual content (-5.1%).

Consumption of audiovisual content (TV and VOD) on the move

12. The following observations can be made regarding single audiovisual consumption on the move:

12.1. As a reminder, the consumption of audiovisual content on the move concerns 6.1% of television consumers; 22.3% of pay VOD consumers, and 22.7% of free VOD consumers.

Television

12.2. 80.4% of TV consumers do not feel the need to watch TV on the move. This is by far the most common reason given for not watching television away from home.

12.3. In terms of viewing frequency, only 20.2% of respondents who watch television on the move do so on a daily basis. In contrast to TV viewing habits at home, daily viewing is far from being the most common habit when on the move. The most popular consumption frequencies among mobile TV consumers are quite diverse: 22.3% of respondents watch it at least once a week, 15.4% at least once a month and 27.3% less than once a month. As regards the average daily viewing time per day of consumption, 50.1% of TV consumers on the move watch less than 30 minutes per day. 34.4% of respondents watch it for between 30 minutes and an hour and 15.5% watch it for an hour or more a day on average. The trend here is therefore also reversed in relation to television consumption at home, since the majority of respondents who consume television on the move do so for a short time.

12.4. Among Internet TV consumers, 72.7% use TV channels' websites and applications to watch TV at home. Among TV consumers on the move, 56.9% use TV channel websites and apps to watch TV on the move. The distributors' applications are slightly more popular for watching TV on the Internet on the move (42.9%) than at home (36.4%). This is also the case for live video sharing and social networking platforms - 38.9% on the move versus 33.8% at home.

12.5. 79.8% of respondents who watch television on the move mainly use their smartphone to watch it. The smartphone was the second most used device in the home after the TV, showing its importance in consumption habits.

12.6. The 3G/4G mobile network appears to be slightly more popular than the Wi-Fi network for watching TV on the move: 54% of consumers use it compared to 46% for Wi-Fi.

Video on demand (pay and free)

12.7. 75.3% of consumers of pay VOD and 66.5% of consumers of free VOD say that they do not watch it on the move because they do not need it. This is the most common reason given by a large margin.

12.8. If we compare the figures for VOD with those for television, we observe that it is mainly free VOD on the move which is consumed on a daily basis (27.9% of its consumers), followed by television on the move (20.2% of its consumers) and finally pay VOD on the move (16.1% of its consumers). As regards the most occasional viewing (i.e. less than once a month), television comes first (27.3%), followed by pay VOD (23.6%) and finally free VOD (16.1%).

12.9. On the move, the results obtained for the average daily consumption time of free VOD are almost identical to those obtained for television. In both cases, it mainly concerns short-term consumption (less than 30 minutes): 50.1% for TV on the move and 51.2% for free VOD on the move). Pay VOD, on the other hand, is more often consumed over longer periods of time: 42% watch it for between 30 minutes and one hour, 31.2% watch it for less than 30 minutes and 26.8% watch it for one hour or more.

12.10. 77.7% of consumers of pay TV on the move mainly watch this content on their smartphone. The figures for viewing pay VOD on the move are therefore very similar to those observed for television consumption on the move. The smartphone is even more essential for free VOD consumption on the move. This is the device mainly used by 88.3% of the respondents concerned.

12.11. On the move, just as many pay VOD consumers prefer access via the 3G/4G mobile network (40.5%) as opt to download content onto their device (40.4%). Respondents who watch free VOD on the move have very different preferences regarding the type of access. A clear majority of them (68.3%) opt for the 3G/4G mobile network, 26.5% for a Wi-Fi network and only 5.2% prefer to download content to their device.

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<tr><td rowspan="19">Consumption of audiovisual content (TV and VOD) at home</td><td rowspan="5">Most popular TV features and functions</td><td>Appreciation of technical usability (TV)</td><td></td><td>X</td></tr>
<tr><td>Appreciation of the existence of major television events (TV)</td><td>X</td><td></td></tr>
<tr><td>Appreciation of not having to choose (TV)</td><td></td><td>X</td></tr>
<tr><td>Appreciation of having a more limited offer (TV)</td><td></td><td>X</td></tr>
<tr><td>Enjoyment of watching content at the same time as everyone else (TV)</td><td>X</td><td></td></tr>
<tr><td>Frequency of TV use</td><td>Frequency of TV viewing at least once a week</td><td>X</td><td></td></tr>
<tr><td rowspan="2">Average time spent watching a TV programme</td><td>Average daily TV viewing time three hours or more</td><td></td><td>X</td></tr>
<tr><td>Average daily TV viewing time less than one hour</td><td>X</td><td></td></tr>
<tr><td>Most frequent TV viewing situation</td><td>TV viewing in pairs</td><td></td><td>X</td></tr>
<tr><td rowspan="2">Devices used to watch TV</td><td>Use of a laptop and/or projector to consume TV</td><td>X</td><td></td></tr>
<tr><td>Use of a TV set and/or a smartphone to consume TV</td><td></td><td>X</td></tr>
<tr><td>Reasons given for not using TV features</td><td>Set-top box limitations ("my box doesn't allow it")</td><td>X</td><td></td></tr>
<tr><td rowspan="3">Appreciation of the technical features and the offer of pay and free VOD</td><td>Appreciation of the exclusivity of certain offers and the feeling of having a plenty of choice (pay VOD)</td><td></td><td>X</td></tr>
<tr><td>Appreciation of content likely to be enjoyed and different access for each family member (free VOD)</td><td></td><td>X</td></tr>
<tr><td>Appreciation of the ease of access to content and of being</td><td>X</td><td></td></tr>
</table>

			able to download content (free VOD)		
		Frequency of viewing of pay VOD	Daily viewing frequency (pay VOD)		X
			Frequency of viewing at least once a month and less than once a month (pay VOD)	X	
		Average daily consumption of pay and/or free VOD	Average daily duration three hours or more (pay TV)		X
			Average daily duration less than one hour (pay VOD)	X	
			Average daily duration less than one hour (free VOD)	X	
		Devices used to watch free VOD	Use of TV and smartphone to watch free VOD		X
			Use of a laptop to watch free VOD	X	
		Awareness of pay and free VOD services	Knowledge of YouTube, Facebook and Instagram	X	
			Knowledge of distributors' offers, Amazon Prime Video and Twitch		X
		Use of known pay and free VOD services	Use of Netflix services, distributor offers and Amazon Prime Video		X
		Type of VOD viewed	Consumption of subscription-only VOD		X
			Consumption of pay VOD only by rental or unit purchase	X	

TABLE 2: SUMMARY 2019-2021 OF STATISTICALLY SIGNIFICANT CHANGES (SINGLE AUDIOVISUAL CONSUMPTION)

2.3. Simultaneous audiovisual consumption

13. The following observations can be made regarding simultaneous audiovisual consumption:

13.1. 55.6% of respondents say that they practice a form of simultaneous (multi)media exposure - i.e. using a smartphone, laptop or tablet while watching TV, VOD (pay or free). Of the respondents who practice simultaneous (multi)media exposure, 69.5% do so while watching television. It is the consumption pattern for which simultaneous (multi)media exposure is most widespread, by far.

Simultaneous (multi)media exposure practices increase by +8% between 2019 and 2021. Whereas in the first MAP study a slight minority of respondents stated that they used other devices in parallel with their audiovisual consumption (47.6%), a slight majority (55.6%) now do so.

13.2. As far as television is concerned, 44.8% of respondents reported that they use their smartphone while watching television. 27.4% are engaged in other (i.e. non-media related) activities. Turning to pay VOD, we find that the use of smartphones in parallel with content consumption is slightly higher than for television viewing. Indeed, 48% of respondents use their smartphone while watching pay VOD. On the other hand, doing a non-media related activity while watching pay VOD is less common: this is the case for only 18% of respondents. The use of the smartphone for audiovisual consumption is highest among free VOD consumers. It concerns one in two respondents (50%). On the other hand, the performance of activities other than a media activity during viewing is the lowest, concerning only 15.8% of respondents who watch free VOD.

The main trends observed in terms of activities carried out simultaneously with audiovisual consumption appear relatively similar between 2019 and 2021. Regardless of the consumption pattern under consideration, the use of smartphones was and remains the most widespread activity. This is followed by the absence of simultaneous activity and then by non-media activities. However, it can be observed that:

- regarding activities carried out simultaneously with television viewing:
    - smartphone use while watching television increases by +5.4%;
    - in contrast, simultaneous use of laptops falls by 2.9%;
    - the share of individuals who do nothing else while watching television falls by -5.4%.
- Looking at activities carried out simultaneously with the consumption of pay VOD, we see that there is a clear decrease of -7.8% in the number of consumers who do not perform any activity in parallel with their viewing of pay VOD.
- Activities carried out at the same time as watching free VOD saw a decrease in the number of respondents who do not carry out any activity at the same time as watching it (-5.8%).

13.3. Amongst television consumers who carry out some form of media activity while watching television, the most common activity is surfing on social networks. This is a practice adopted by 66.3% of the respondents concerned. This is followed by 56% of respondents answering emails and messages and 51% of respondents surfing the Internet. Finally, playing games while watching television is an activity of 29.9% of respondents. The same ranking is found with regard to activities carried out simultaneously with the viewing of pay video on demand, with relatively comparable response rates. Surfing on social networks while watching pay VOD is even more popular, encompassing 72.4% of respondents. 58.8% of the respondents answer emails and messages, 48% surf the Internet and 24.9% play games. The ranking and proportions observed are again relatively similar for the activities performed while watching free VOD: surfing social networks (66.6%), answering emails and messages (50.6%), surfing the Internet (50%) and playing games (26.7%).

13.4. While remaining cautious in view of the small number of individuals concerned by these questions, the choices of platforms for the consumption of VOD simultaneously with the viewing of television and free VOD appear relatively similar, with a clear preference being displayed for free platforms. The respondents seem to have less of a preference for one type of platform as regards the consumption of VOD in parallel with the viewing of pay VOD. Indeed, when respondents watch video on demand on their smartphone, computer or tablet at the same time as they watch television, they overwhelmingly watch it on dedicated free platforms such as YouTube or Twitch. This is the case for 94.2% of respondents. Social networks such as Facebook or Instagram and dedicated fee-based platforms such as Netflix or Amazon Prime Video, are less used (by 65% and 60.6% of individuals respectively). When viewing VOD on a second device at the same time as watching pay VOD, the differences in use between the types of platform largely disappear: 71.8% opt for free platforms, 71.3% for fee-based platforms and 59.1% for social networks. Finally, a large majority of the respondents concerned turn to free platforms (95.7%) to consume VOD on a smartphone, computer or tablet while watching free VOD. 69.1% use social networks and 57% use pay platforms.

Dimension	Variable	Modality	Decrease	Increase
Simultaneous audiovisual consumption	Simultaneous or non-simultaneous (multi)media exposure	Simultaneous (multi)media exposure practices		X
	Type of simultaneous activity	Use of the smartphone while watching TV		X
		Simultaneous use of the laptop while watching TV	X	
		No simultaneous activity while watching TV	X	
		No simultaneous activity while viewing pay and free VOD	X	

TABLE 3: SUMMARY 2019-2021 OF STATISTICALLY SIGNIFICANT CHANGES (SIMULTANEOUS AUDIOVISUAL CONSUMPTION)

2.4. Complementarity and substitutability

Complementarity

14. The following observations can be made regarding the complementarity of audiovisual consumption patterns (i.e. the cross-use of different audiovisual consumption patterns):

14.1. In order to assess the complementarity between television and video on demand in consumption practices, we looked at the choice of consumption patterns by distinguishing between individuals who consume only one pattern, both patterns, or none. Television alone is the most frequent choice of respondents, being the choice of 37% among them. The combined consumption of television and video on demand is a close second, accounting for 35.2% of individuals. If we then integrate the distinction between pay and free VOD, we see that after television consumption only, the most consumed combinations are:

- television and free VOD (16.9%);
- the complete trio of television, pay VOD and free VOD (13.4%);
- free VOD only (10.8%).

Between 2019 and 2021, VOD-only consumption increases by +2.5% and "no audiovisual consumption" decreases by -2.4%.

Substitutability

15. The following observations can be made with regard to the substitutability of audiovisual consumption patterns, i.e. the willingness to replace a certain pattern by another:

15.1. 86.4% of respondents probably or definitely do not plan to stop watching television at home. Among those who are considering stopping consumption, only 3.7% believe that they would definitely stop watching television. To explain their desire to stop watching television at home, 48.2% of respondents cite a lack of interest in the content. Next, 37.1% of respondents said that the advertising was annoying and that the subscription price was too high. Finally, consumers who plan to stop watching television mainly turn to free VOD (50.2% of cases) and then to pay VOD (37.8%). A total cessation of audiovisual media consumption is envisaged by 33.9% of respondents, who say they are inclined to stop watching television.

There is no change in the ranking of the most widely considered consumption patterns to replace television between 2019 and 2021: free VOD remains in the lead, ahead of pay VOD and the cessation of audiovisual consumption. Nevertheless, free VOD shows a decrease of -12.7% compared to 2019.

15.2. If the price of a TV subscription were to increase by 10%, 29.3% of consumers say they would definitely or probably cancel their TV subscription, while 64.4% say they would probably or definitely not cancel[2].

Between 2019 and 2021, we see that the general trend continues: a majority of television consumers would not consider cancelling their subscription if the price of the latter increased by 10%. However, it can be seen that the share of respondents who say they would probably not cancel their subscription decreases by -4.7%, while the share of those who would definitely not cancel their subscription increases by +8%. There is therefore a growing degree of certainty that people will not cancel their television subscription if the price of the latter increases.

15.3. Among consumers of pay VOD at home, 77.2% probably or certainly do not plan to stop watching it, while 22.8% state that they plan to (certainly or probably) stop watching it. As with television, we find that a clear majority of respondents do not plan to do without pay VOD. However, the proportion of individuals considering stopping watching pay VOD is nearly 10% higher than the proportion of respondents who plan to do without television (22.8% for pay VOD and 13.6% for television). The most important reason given for considering doing without pay VOD is (by far) that it is too expensive. 59.3% of respondents mention this reason (compared to 37.1% for television). The fact that the content is no longer interesting enough comes in at second place with 23.9%. In contrast, 48.2% of the

[2] 6.3% of respondents are not concerned by this question, as they do not personally have a subscription.

respondents mentioned this for television. Free VOD comes out on top as the preferred alternative patterns in the event of stopping of pay VOD. It would be chosen by 56.3% of the respondents concerned - slightly more than for those seeking to replace television (50.2%). 41.4% of them would turn to television. On the other hand, 19.2% believe that they would no longer consume audiovisual media, whereas this was the case for 33.9% of respondents among those who said they would do without television.

Between 2019 and 2021, the ranking remains the same in terms of the consumption patterns envisaged to replace pay VOD. Nevertheless, there was an increase of +10.3% of respondents who said they would stop consuming audiovisual media.

15.4. If the price of VOD consumption increased by 10%, 34.9% of respondents who use this pattern said they would certainly or probably stop consuming it. 65.1% say they would definitely or probably not cancel their subscription or continue to buy content a la carte. The behaviour of pay VOD consumers in this scenario therefore appears to be very similar to the behaviour which respondents would adopt in the event of a television price increase.

Between 2019 and 2021, the proportion of respondents who consider that an increase in the price of the subscription or purchase of pay VOD would probably have no impact on their consumption of this pattern increases by 13.4%. The share of those who would probably cancel pay TV in this scenario falls by -8.1%. Nevertheless, if we aggregate the response modalities, it appears that the proportion of respondents who would (probably or certainly) not cancel their subscription to pay VOD in the event of a price increase is up by 10% between 2019 and 2021, rising from 55.1% to 65.1% - the proportion of those who would (probably or certainly) cancel their subscription is down by the same amount. The general trend is therefore an increase in the number of respondents who would continue to consume pay VOD if the price of VOD were to increase.

15.5. Among the various reasons for stopping free VOD consumption which were submitted to the respondents, the fact that free VOD was becoming pay was the most widely cited. This would lead 73.3% of consumers to stop watching free VOD. Other reasons given were the availability of more interesting content elsewhere (56.3%), advertising (54.6%) and, finally, the use of personal data (54.3%).

The ranking of the most cited reasons for considering stopping watching free VOD remains relatively similar between 2019 and 2021. The fact that free VOD would become pay VOD is still largely in the lead in 2021, although it sees a decrease of -7.3%.

Dimension	Variable	Modality	Decrease	Increase
Complementarity	Complementarity of consumption patterns	VOD consumption only		X
		Absence of audiovisual consumption	X	
Substitutability	Replacement of TV by another consumption pattern	Replacement of TV by free VOD	X	
	Impact of an increase in TV subscription prices on desire to cancel subscription	Share of respondents who would probably not cancel subscription	X	
		Share of those who would definitely not cancel subscription		X
	Replacement of pay VOD by another consumption pattern	Share of respondents who would stop		X

		consuming audiovisual media		
	Impact of an increase in the price of pay VOD on the willingness to cancel subscription	Share of respondents who consider that an increase in the price of subscription or purchase of pay VOD would probably have no impact on their consumption		X

TABLE 4: SUMMARY 2019-2021 OF STATISTICALLY SIGNIFICANT DEVELOPMENTS (COMPLEMENTARITY AND SUBSTITUTABILITY)

3. FACTORS AFFECTING THE EVOLUTION OF CONSUMPTION AND EQUIPMENT

16. This section summarises the factors which impact on the evolution of consumption and equipment (bivariate analysis). This presentation is based on the analysis in the body of the study of the influence of household income, overall price sensitivity, presence (or absence) of children in the household, age group and gender on:
    - The number of households devices;
    - The choice of consumption pattern (television, pay VOD, free VOD) or the choice of device (television set, smartphone, laptop, etc.);
    - The practice of simultaneous audiovisual consumption;
    - Complementarity of consumption patterns (cross-use of television and/or free VOD and/or pay VOD);
    - Substitutability of consumption patterns (the existence of substitutability and the choice of the patterns consumed to substitute).

17. In this section, the presentation of the data will be organised in two parts:

    17.1. Firstly, the influence of the different factors is discussed (point 3.1). For this purpose:
    - the existence or absence of the association between the independent variable and the dependent variable is mentioned;
    - the level of statistical significance of the association (as determined in the first edition of MAP and this one) is then systematically compared;
    - the trends in this association are described based on statistically significant differences, i.e. under- and over-represented items. It would be interesting to see if these trends are confirmed in future studies.

    17.2. In a second stage, the changes in the level of statistical significance are presented by grouping them into three categories (point 3.2):
    - Confirmation: the level of statistical significance is identical between 2019 and 2021 (e.g., it is highly significant in both 2019 and 2021);
    - Reversal: the level of statistical significance is reversed between 2019 and 2021 (e.g. it was highly significant in 2019 and is found to be insignificant in 2021 or it was insignificant in 2019 and is found to be highly significant in 2021);
    - Strengthening: the level of statistical significance strengthens between 2019 and 2021 (e.g. significant in 2019 and highly significant in 2021).

    This point 3.2 will conclude with a summary table of the changes in the level of significance, for easier viewing.

3.1. Influence of different factors

3.1.1. Influence of household income level

18. In 2021 as in 2019, the average number of different devices available to households depends on the household's monthly net income class. This association was and remains very significant. The average number of different devices present in households increases as the income class increases.

19. In 2021 as in 2019 the choice of consumption pattern depends on the household's monthly net income class. This association was and remains very significant. However, there are some differences in the trends:

    19.1. Whereas in 2019 television consumption does not vary according to income, in 2021 it increases overall with income class - with the exception of individuals with household incomes between €2501 and €3500, who are slightly more likely to consume television than those in the €1501-2500 class.

    19.2. There was a sharp increase in VOD consumption from €2501 of income in 2019. The increase is more regular between the different income groups In 2021.

    19.3. Finally, the lack of consumption of audiovisual media was mainly due to individuals with an income of less than €2501 in 2019. In 2021, it is mainly individuals with a household income of less than €1500 who do not consume television or VOD.

20. In 2021 as in 2019, simultaneous (multi)media exposure depends on the monthly net income class of the household. This association was and remains very significant. It can be observed that simultaneous (multi)media exposure increases when household income increases.

21. In 2021 as in 2019, the type of simultaneous (multi)media exposure depends on the monthly net income class of households. This association was and remains very significant. However, there are differences in the trends observed.

    21.1. In 2019, it was found that simultaneous exposure while watching television was mostly practised by individuals with the highest incomes (over €3500). In 2021, the difference is most marked between individuals with the lowest incomes (less than €1,500) and those in all other income groups, who are proportionally more likely to practice this type of simultaneous exposure.

    21.2. However, the trend is exactly the same in both studies with regard to simultaneous consumption during the viewing of pay VOD: this increases with the level of income, being particularly low among the lowest incomes (less than €1500) and particularly high among the highest incomes (over €3500).

    21.3. In 2021, simultaneous exposure while watching free VOD no longer varies by income class. It would be interesting to confirm this observation through future studies.

22. In 2021 as in 2019, the complementarity of consumption patterns depends on the monthly net income class of households. This association was and remains very significant. The trends in both editions of the study are also similar:
    - complementary consumption of television and video on demand increases with income class;
    - television consumption only decreases with income class;
    - VOD-only consumption does not vary according to income class.

23. While in 2019 the consideration of stopping watching television depended on the household's monthly net income class, this situation appears to be changing in 2021. This association was very significant in 2019, but is not very significant in 2021. The impact of income on the propensity of individuals to do without television therefore seems to be diminishing. It would be interesting to see if this trend is confirmed in future studies.

24. While in 2019 the choice of consumption pattern in the event of television consumption being discontinued depended little on the household's net monthly income class, it appears that this situation changes in 2021. This association is not significant in 2019 and becomes significant in 2021. The consumption pattern which would be chosen in the case of a cessation of television varies more markedly according to the household's net monthly income class.

25. While in 2019 considering stopping watching pay VOD depended on the household's monthly net income class, it appears that this is no longer the case in 2021. This association was very significant in 2019 and is not significant in 2021. It therefore seems that considering stopping consumption of pay VOD is no longer dependent upon income. It would be interesting to see if this trend is confirmed in future studies.

3.1.2. Influence of overall price sensitivity

26. In 2021 as in 2019, the overall price sensitivity of individuals depends on the number of devices present in households. This association was and remains very significant. However, there is a difference in trend between the two studies. In 2019, the average number of household items increased in a linear fashion with the overall price sensitivity of individuals. An increase is also observed in 2021, but the latter is no longer linear, since individuals who do not express an overall sensitivity to price have very slightly more different devices, on average, than those who express a low overall sensitivity to price.

27. In 2021 as in 2019, the complementarity of consumption patterns depends on the overall price sensitivity of individuals. This association was and remains very significant. However, there have been some changes in the trends of this association.

    27.1. In 2019, complementary consumption of TV and VOD increased linearly as the overall price sensitivity level increased. 2021 still sees an increase depending on the level of sensitivity, but this is no longer linear. Moreover, this increase is most noticeable between the no, low and medium sensitivity levels on the one hand and the high sensitivity level on the other.

    27.2. The trend observed in 2019 for TV-only consumption is confirmed in 2021: the more price-sensitive individuals are, the less they consume only TV.

    27.3. Finally, in 2019, VOD-only consumption was found to be more prevalent among individuals with low or medium price sensitivity. In 2021, it focuses more on individuals with medium price sensitivity.

28. In 2021 as in 2019, whether or not people consider stopping watching television depends on their overall price sensitivity. This association was and remains very significant. The trend observed in the first study is confirmed in the second: the substitutability of television increases when the overall price sensitivity of individuals increases. However, while this increase was linear in 2019, this is no longer the case in 2021 - individuals expressing medium price sensitivity are more likely to consider stopping watching television than those with high price sensitivity.

29. In 2021 as in 2019, the substitutability of pay VOD depends on the overall price sensitivity of individuals. This association was and remains very significant. In both studies, the propensity to discontinue pay VOD increases as individuals' overall price sensitivity increases.

3.1.3. Influence of the presence (or absence) of children

30. In 2021 as in 2019, the number of different types of devices present in households depends on the presence (or absence) of children. This association was and remains very significant. In both studies the average number of different devices available to households is higher among households with children.

31. In 2021 as in 2019, the choice of consumption pattern depends on the presence (or absence) of children in the household. This association was and remains very significant. In both studies, VOD consumption is higher in households with children and television consumption is higher in households without children.

32. In 2021 as in 2019, simultaneous (multi)media exposure depends on the presence (or absence) of children in the household. This association was and remains very significant. Both studies show that in households with children, more individuals engage in a (multi)media activity at the same time as watching television and/or video on demand.

33. In 2021 as in 2019, the complementarity of consumption patterns depends on the presence (or absence) of children in a household. This association was and remains very significant. The trends in both studies are also similar:

    33.1. Complementary consumption of television and video on demand is a behaviour more adopted by individuals in a household with children.

    33.2. Individuals in a household with children are also more likely to consume VOD only.

    33.3. In contrast, individuals in households without children are more likely to consume television only.

34. In 2021 as in 2019, the fact that people are considering stopping watching television depends on the presence (or absence) of children in their households. This association was and remains very significant. In both studies, individuals in a household with children reported being more willing to stop watching television than individuals in a household without children.

35. While in 2019 the choice of consumption pattern in the event of television consumption being discontinued depended on the presence (or absence) of children in the household, this no longer appears to be the case in 2021. This association was very significant in 2019 and is not significant in 2021. It therefore seems that the consumption pattern chosen no longer depends on the presence (or absence) of children in the household. It would be interesting to analyse this observation in future studies.

36. A number of variables have been added to this study in relation to MAP 2020, and therefore they cannot be compared. Therefore, their association for the 2021 data is presented below.

37. The main reasons given for watching television depend on the presence (or absence) of children in the household. This association is very significant. People living in households without children are more

likely to mention being aware of current events, while people living in households with children are more likely to mention spending time with family or friends.

38. The main reasons given for watching pay VOD depend on the presence (or absence) of children in the household. This association is very significant. People living in households without children are more likely to cite thinking, understanding and learning as well as escaping, relaxing and being entertained. People living in households with children are more likely to mention spending time with family or friends, but also to consume out of habit.

39. The main reasons given for watching free VOD depend on the presence (or absence) of children in the household. This association is very significant. People living in households without children are more likely to state that they want to keep up to date with current affairs, to think, understand and learn, and to escape, relax and be entertained. People living in households with children are more likely to mention spending time with family or friends, but also consuming out of habit.

40. The main types of content which respondents said they consumed on free VOD depended on the presence (or absence) of children in the household. This association is very significant. Individuals in a household without children who consume free VOD do so more than individuals in a household with children, in order to watch news and other information content, culture-related content and game, variety and talk shows. Individuals in households with children who consume free VOD, on the other hand, are more likely than individuals in households without children to utilise children's content.

3.1.4. Influence of age group

41. In 2021 as in 2019, the choice of consumption pattern depends on the age group. This association was and remains very significant. The trends in both studies are also similar:
    - television consumption increases with age, although somewhat unevenly (15–19-year-olds consuming slightly more television than 20–29-year-olds);
    - VOD consumption decreases with age;
    - the absence of audiovisual consumption varies little according to age group.

42. In 2021 as in 2019, the average daily viewing time for television depends on the age group. This association was and remains very significant. As in 2019, the average daily TV viewing time increases as the age of individuals increases.

43. In 2021 as in 2019, the average daily consumption time for pay TV does not depend on the age group. This association is not significant in 2019 and is also not significant in 2021. In both cases, therefore, it can be concluded that the average time spent per day watching pay video on demand does not vary with age.

44. While in 2019 for free video on demand the average daily consumption time depended on the age group grouped, in 2021 this situation appears to be changing. This association is very significant in 2019, but not very significant in 2021. Here we can advance the hypothesis that free VOD has become so ubiquitous (whether through dedicated platforms, social networks or news websites) that it reaches all age groups and that the impact of age on the time spent watching free VOD is diminishing. It would be interesting to see if this trend is confirmed in future studies.

45. In 2021 as in 2019, it can be seen that the choice of device depends on the grouped age group, whatever the consumption pattern in question (television, pay VOD or free VOD). This association was and remains

very significant. Moreover, the trends observed in 2021 partly confirm what was already observed in 2019:

45.1. Television use increases with age for all consumption patterns. Interestingly, this is a new trend in TV consumption, with very little variation by age in 2019.

45.2. The use of smartphones and laptops decreases significantly with age, whether this concerns watching TV, pay VOD or free VOD.

45.3. Tablet and desktop computer use varies only slightly with age.

46. In 2021 as in 2019, simultaneous (multi)media exposure depends on the age group. This association was and remains very significant. The trend observed in 2021 is moreover largely similar to the one already observed in 2019: the use of other media equipment while consuming audiovisual content decreases as age increases.

47. In 2021 as in 2019 the type of simultaneous exposure depends on the age group. This association was and remains very significant. The trends in both studies are also broadly similar:

47.1. Simultaneous exposure during television viewing increases overall with age. This practice is more frequent from the age of 40, both in 2019 and in 2021.

47.2. Conversely, simultaneous exposure while watching pay VOD decreases with age in both 2019 and 2021. However, in 2019 this practice was found to be higher for all age groups under 40. In 2021, it is only higher for the age groups below 30.

47.3. Finally, simultaneous exposure while watching free VOD decreased with age in both editions of the study. Nevertheless, there is also a difference in the tipping point here. In 2019, this type of simultaneous exposure was higher among those under 30. In 2021, it is highest among those under 40.

48. In 2021 as in 2019 the complementarity of consumption patterns depends on the age group. This association was and remains very significant. The trends observed in both studies are broadly similar:

- consuming only television is a behaviour which increases with age;
- consuming only VOD is, on the other hand, a behaviour which decreases with age, with the exception of 20–29-year-olds (who opt for this option more than 15–19-year-olds);
- complementary consumption of television and VOD is mainly by people under 60.

49. In 2021 as in 2019, the willingness to stop watching television depends on the age group. This association was and remains very significant. The willingness of individuals to stop watching television decreases overall with age (although this decrease was somewhat irregular in 2019). This is much more pronounced among those under 40 than among older people.

50. In 2021 as in 2019, the choice of how to replace television in the event of a break in its use depends on the age group. This association was and remains very significant. The trends observed are partly similar:

50.1. The choice of pay VOD as an alternative to television decreases overall with age. In 2019, this decrease was only observed from the age of 30-39, the age group with the highest proportion of individuals opting for pay TV. In 2019 the peak is constituted by the 20–29-year-olds, after which the age-dependent decline in the choice of pay VOD begins.

50.2. The choice of free VOD as an alternative to television also decreases overall with age. There was one exception to this gradual decline in 2019: 40–49-year-olds opted for free VOD slightly more than 30–39-year-olds. In 2021, the exception to the gradual decrease in the choice of free VOD by age is the 50–59-year-olds.

50.3. In 2019 as in 2021, it is mainly the over-60s who opt to stop watching television altogether. This behaviour decreases significantly among the younger age groups. While the relationship between the cessation of audiovisual consumption and age group is regular in 2021, there was an exception to the rule in 2019 with 15–19-year-olds opting slightly more for this option than 20–29-year-olds.

51. While in 2019 the consideration of stopping watching pay VOD depended on the age group, it appears that this is no longer the case in 2021. This association was significant in 2019 and is no longer significant in 2021. The willingness to stop consuming pay TV therefore no longer seems to be age-dependent. It would be interesting to analyse this observation in future studies.

52. A number of variables have been added to this study in relation to MAP 2020, and therefore they cannot be compared. Therefore, their association for the 2021 data is presented below.

53. The main reasons given for watching television depend on the age groups grouped. This association is very significant. People under 30 watch more television than older people, to pass the time and out of habit. Compared to other age groups, 30–59-year-olds watch more television to reflect, understand and learn, as well as to escape, relax and be entertained. People aged 60 and over mainly watch television to keep up with the news - more so than people under 60.

54. The main reasons given for watching pay VOD depend on the age groups grouped. This association is very significant. Compared to other age groups, people under 30 watch pay VOD more to pass the time and out of habit. Individuals aged 30-59 watch more pay VOD to spend time with family or friends. Fewer people under 30 than those aged 30 and over consume pay TV for escaping, relaxation and entertainment.

55. The main reasons given for watching free VOD depend on the age groups grouped. This association is very significant. More people under 30 watch free VOD to pass the time and out of habit than other groups. The 30–59-year-olds watch more to spend time with family and friends. Compared to older people, people under 30 watch less free VOD to keep up to date with the news.

56. The main types of content which respondents said they watched on free VOD depended on the age groups grouped. This association is very significant. People under 30 consume more reality TV, comedy content and sports content via free VOD compared to other age groups. 30–59-year-olds watch more soap operas, series and children's content on free VOD than other age groups. People aged 60 and over turn more to free VOD to consume information content than younger people.

57. The use of social networks to consume video on demand depends on the age group. This association is very significant. The younger people are, the more they use different social networks to watch VOD. Conversely, the older they are, the less likely they are to use social networks to watch VOD.

3.1.5. Influence of gender

58. In 2021 as in 2019, the choice of consumption pattern depends on gender. This association was and remains very significant. Moreover, the trends which emerge are the same in both studies:
    - more women than men consume television;
    - men are more likely than women to consume VOD;
    - the absence of audiovisual consumption does not vary according to gender.

59. In 2021 as in 2019, the choice of device depends on gender. This association was and remains very significant for all consumption patterns (television, pay VOD or free VOD) - except for pay VOD, for which the association was significant (and not very significant) in 2019.

60. In 2021 as in 2019, simultaneous (multi)media exposure depends on gender. This association was and remains very significant. Using a smartphone, laptop or tablet while consuming audiovisual content is a behaviour more widely adopted by men than by women.

61. In 2021 as in 2019, the type of simultaneous (multi)media exhibition depends on gender. This association is increasing, as it was significant in 2019 and is very significant in 2021. It is evident that the trends are identical in both studies: simultaneous exposure during television viewing is more common for women than for men, while simultaneous exposure during free VOD viewing is more common for men than for women.

62. In 2021 as in 2019, the complementarity of consumption patterns depends on gender. This association was and remains very significant. The same trends can be observed:
    - additional consumption of television and video on demand is mainly by men;
    - consumption of video on demand only is also a behaviour which is more common among men;
    - TV-only consumption, on the other hand, is a behaviour more widely adopted by women.

63. While in 2019 the idea of stopping watching television depended on gender, it appears that this is no longer the case in 2021. This association was very significant in 2019 and is not significant in 2021. In 2021, the willingness of individuals to stop watching television no longer varies according to gender. It would be interesting to analyse this observation in future studies.

64. In 2021 as in 2019, the choice of a replacement pattern for TV depends on gender. This association in increasing, as it was significant in 2019 and becomes very significant in 2021. The observed trends are confirmed:
    - VOD (pay or free VOD) is an option which utilise more than women;
    - stopping the consumption of audiovisual media is a choice which women make more than men.

65. A number of variables have been added to this study in relation to MAP 2020, and therefore they cannot be compared. Therefore, their association for the 2021 data is presented below.

66. The main reasons given for consuming television are not gender-dependent. The association between these reasons and gender is not significant.

67. The main reasons given for consuming pay VOD are not gender-dependent. The association between these reasons and gender is not significant.

68. The main reasons given for consuming free VOD depend on gender. This association is significant. Men consume free VOD in order to reflect, understand and educate themselves, more so than for women. Men watch free VOD out of habit, more so than women.

69. The main types of content that respondents say they consume on free VOD ae gender-dependent. This association is very significant. Women who consume free VOD do so (more than men do) to watch reality TV and lifestyle content. Men who consume free VOD, on the other hand, are more likely than women to watch documentaries and sports.

3.2. Changes in the level of statistical significance

3.2.1. Confirmations

70. When systematically comparing the level of statistical significance of the association between dependent and independent variables, it can be seen that in most of the tests performed the level of statistical significance is identical between 2019 and 2021. The result of the statistical test conducted in 2019 is confirmed in 2021. When analysing these data in the light of the broad dimensions of interest in the study, the following elements are found in 2021 (as in 2019).

71. From the perspective of **exposure to technology**:
    - a very significant association between the number of different devices present in households and the income class of the latter;
    - a highly significant association between the number of devices present in households and the overall price sensitivity of individuals;
    - a very significant association between the number of different devices present in households and the presence (or absence) of children.

72. From the perspective of **single audiovisual consumption:**
    - a highly significant association between the choice of consumption pattern and the monthly net income class of households;
    - a very significant association between the choice of consumption pattern and the presence (or absence) of children in the household;
    - a highly significant association between choice of consumption pattern and the age group;
    - a highly significant association between choice of consumption pattern and gender.

73. From the perspective of **simultaneous audiovisual consumption:**
    - a highly significant association between simultaneous (multi)media exposure and the monthly net household income class;
    - a highly significant association between simultaneous (multi)media exposure and the presence (or absence) of children in the household;
    - a highly significant association between simultaneous (multi)media exposure and age group;
    - a highly significant association between simultaneous (multi)media exposure and gender;
    - a highly significant association between the type of simultaneous (multi)media exposure and the monthly net household income class;
    - a highly significant association between type of simultaneous (multi)media exposure and age group.

74. From the perspective of **complementarity:**

- a very significant association between consumption patterns complementarity and the monthly net household income class;
- a highly significant association between the complementarity of consumption patterns and the overall price sensitivity of individuals;
- a very significant association between the complementarity of consumption patterns and the presence (or absence) of children in a household;
- a very significant association between the complementarity of consumption patterns and age group;
- a very significant association between the complementarity of consumption patterns and gender.

75. From the perspective of the **substitutability of television**:
- a highly significant association between considering stopping watching television and individuals' overall price sensitivity;
- a highly significant association between considering stopping watching television and the presence (or absence) of children in the household;
- a highly significant association between considering stopping watching television and age group;
- a highly significant association between the choice of television replacement pattern and age group.

76. From the perspective of the **substitutability of pay VOD**, there is a highly significant association between considering stopping watching pay VOD and the overall price sensitivity of individuals.

3.2.2. Reversals

77. In a number of cases, the level of statistical significance of the association between dependent and independent variables observed in 2021 is reversed compared to 2019. It will be found that all but one of the reversals concern the analysis of substitutability (understood here as a dimension of interest). The exception is the average consumption time of free video on demand, which falls under the single consumption dimension. These reversals are presented below, classified according to the independent variables.

78. From the perspective of **income class:**
- While in 2019 the association between considering stopping watching TV (TV substitutability) and the household's monthly net income class was very significant, it turns out to be insignificant in 2021;
- While in 2019 the association between the choice of consumption pattern in the event of television consumption being discontinued and the household's net monthly income class was not very significant, it is significant in 2021;
- While in 2019 the association between considering stopping watching pay VOD and monthly net household income was very significant, there is no longer any such association in 2021.

Thus in 2021, income class has less of an impact on the substitutability of television and pay VOD than in 2019. We can therefore see that the impact of income on the fact of considering stopping television consumption seems to be diminishing and that the fact of considering stopping pay VOD consumption no longer depends significantly on income. On the other hand, income class has a greater impact than in 2019 on the choice of consumption pattern in the event of television consumption being discontinued.

The consumption pattern which would be chosen in the case of a cessation of television varies more markedly according to the household's net monthly income class.

79. From the perspective of **age group:**
    - While in 2019 the association between considering stopping watching pay VOD and age group was significant, it is no longer significant in 2021;
    - While the association between average free video on demand consumption time and the age group was very significant in 2019, it becomes insignificant in 2021.

Thus in 2021, the age group has less of an impact than in 2019 on the substitutability of pay VOD and the average consumption time of free video on demand. Therefore on the one hand, the fact of considering stopping consuming pay VOD no longer seems to depend on age. On the other hand, the impact of age on the time spent watching free VOD is diminishing.

80. In terms of the **presence (or absence) of children in the household:**
    - While in 2019 the association between the choice of consumption pattern when stopping television consumption and the presence (or absence) of children in the household was very significant, it is no longer significant in 2021.

Thus, in 2021, the presence (or absence) of children in the household has less of an impact on the choice of consumption pattern if television consumption is stopped. Indeed, the consumption pattern chosen no longer varies according to the presence (or absence) of children in the respondent's household.

81. From the perspective of **gender:**
    - While in 2019 the association between considering stopping watching television and gender was highly significant, it is no longer significant in 2021.

Thus in 2021, gender has less impact on the substitutability of television. Indeed, in 2021 the fact of considering stopping watching television no longer varies significantly according to gender.

3.2.3. Strengthenings

82. Finally, in a few cases, the level of statistical significance of the association between dependent and independent variables observed in 2021 is strengthened compared to 2019. While the result of the statistical test was significant in 2019, it becomes highly significant in 2021.

83. Note that all the strengthenings concern the same independent variable, **gender:**
    - The association between type of simultaneous (multi)media exposure and gender was significant in 2019 and becomes highly significant in 2021;
    - The association between the choice of TV replacement pattern and gender was significant in 2019 and becomes highly significant in 2021;
    - The association between choice of equipment for watching pay VOD and gender was significant in 2019 and becomes very significant in 2021.

Thus in 2021, gender has a greater impact on the choice of equipment for watching pay VOD, the type of simultaneous (multi)media exposure and the choice of TV replacement pattern.

	Income class	Overall price sensitivity	Presence (or absence) of children	Grouped age group	Gender
Number of devices within households	C	C	C		
Choice of consumption pattern	C		C	C	C
Simultaneous (multi)media exposure	C		C	C	C
Type of simultaneous (multi)media exposure	C			C	R
Complementarity of consumption patterns	C	C	C	C	C
TV substitutability	I	C	C	C	I
Choice of TV replacement pattern	I		I	C	R
Substitutability of pay VOD	I	C		I	

TABLE 5: SUMMARY 2019-2021 OF CHANGES IN THE LEVEL OF SIGNIFICANCE

MARKET CHALLENGES AND TRENDS

84. Like the first edition of MAP, the present study responds in particular to an obligation to monitor consumer habits. In 2018, the Conférence des Régulateurs du secteur des Communications électroniques (CRC) required the CSA to regularly monitor "the penetration of OTT [over-the-top] services in the Belgian broadcasting market in order to examine any significant evolution which could influence the competitive structure of the market. "[3] However, in MAP these services can cover linear or on-demand, free or pay consumption patterns.

85. In this last section, we will therefore highlight various findings and challenges.

86. This will be done by considering in turn the main themes underlying the CRC's market analysis decision and comparing them with the corresponding main lessons from MAP:
   - The preponderance of television (see sections 87 et seq.);
   - The use of OTT television (see sections 92 et seq.);
   - The use of OTT video-on-demand (see sections 96 et seq.);
   - Complementarity and substitutability between television and video on demand (see sections 99 et seq.);
   - Consumption habits, a rather generational issue (see sections 107 et seq.)

Television remains the dominant consumption pattern

87. In 2018, the CRC noted the dominant position of conventional television broadcasting services in the media landscape[4].

88. Similarly, the MAP study shows that for 2021 "Television remains the most popular audiovisual consumption pattern: 72.2% of respondents said they watch it, whether or not in combination with video on demand. "[5] This result confirms the 2019 one (72.3% of respondents).[6]

89. The dominance of television is also illustrated by the large number of consumers who watch television only (i.e. not combined with video on demand). Indeed, "Between 2019 and 2021, TV-only consumption remains the most popular option among respondents [at 37%] despite a very slight and statistically insignificant decrease of -1%. "[7]

90. Furthermore, this study shows that in 2021, 98.4% of consumers watch television on a television set, making it the main device for watching television at home[8]. In addition, the television set continues to dominate *daily* television viewing, with an increase of +2.8% between 2019 and 2021 (81.9% in 2019, 84.7% in 2021)[9]. Note that smartphone use is growing by +11% (71.9% in 2019 against 82.9% in 2021)[10].

91. The predominance of television must be somewhat questioned when taking into account the phenomenon of simultaneous exposure. Indeed, it is common to use a smartphone, laptop or tablet

[3] section 182 of the CRC decision of 29 June 2018 concerning the market analysis of television broadcasting in French-speaking regions. It should be noted that the CRC has taken several decisions, each of which concerns other linguistic regions of Belgium.
[4] Reference to the RMB MediaXperience study in section 171 of the CRC decision.
[5] section 211 of the MAP 2022 study. In the following footnotes, a paragraph number refers to this MAP 2022 study (unless otherwise stated).
[6] section 213.
[7] section 485.
[8] section 279.
[9] section 285.
[10] section 285.

while watching TV[11]. Among the respondents who practice simultaneous exposure, 27.4% perform a non-media activity and 44.8% declare using their smartphone while watching television[12] (compared to 39.4% in 2019, i.e. an increase of +5.4% between 2019 and 2021[13]). 66.3% of television consumers who engage in some form of media activity while watching television surf social networks[14].

The use of television on the Internet remains low

92. Based on a 2016 BIPT study, the CRC noted that "Only 1.7% of respondents watch broadcasting services only via a broadband internet connection. "[15]

93. This raises the question of whether there is an Internet connection in the household. In this respect, the MAP study reveals that despite a slight increase in the number of households with an Internet connection at home (+2.1%) between 2019 and 2021,[16] not all households have the possibility of accessing television on the Internet, insofar as only 90.6% of respondents have an Internet connection at home[17], not counting those who consider their connection to be poor (10.5%) or very poor (1.6%)[18].

94. The CRC's finding raises a second question, relating to the ownership of connected or connectable devices by households. In this respect, the MAP study shows that in 2021, 6% of respondents do not have this type of device at all (compared to 8.3% in 2019)[19]. This decrease of -2.3% reflects a higher degree of adoption of these devices[20].

95. In 2021, television consumption on the Internet will remains a minority activity. This is true both at home (since 67.1% of television consumers never watch programmes on the Internet at home[21]) and on the move (6.1% of television consumers watch it on the move[22]).

Video on demand: its use is indispensable, but less so than television; the offers of local players are known and used alongside those of the international giants

96. Before looking at the mechanisms of complementarity and substitutability of the various consumption patterns, it is worth emphasising the indispensable nature of video on demand in audiovisual consumption. Indeed, in 2021 56.8% of the respondents use it, partly in combination with television[23]. This proportion was 53.4% in 2019, so there is an increase of +3.4%[24]. Furthermore, in 2021, 21.5% of people watch video on demand only (compared to 19% in 2019, i.e. an increase of +2.5%)[25].

97. Despite this inevitability, daily viewing of video on demand at home remains less frequent than that of television, which is watched daily by 84.2% of its consumers[26] (compared to 43.8% for pay VOD[27] and

[11] section 437.
[12] section 442.
[13] section 452.
[14] section 461.
[15] section 294 of the CRC Decision of 29 June 2018, op cit.
[16] section 202.
[17] section 200.
[18] section 201.
[19] section 205.
[20] section 206.
[21] section 298.
[22] section 248.
[23] section 211.
[24] section 213.
[25] sections 481 and 486.
[26] section 267.
[27] section 321.

39.6% for free VOD[28]). There is nevertheless an increase of +8% in daily viewing of pay VOD at home over the period 2019 to 2021[29].

98. Finally, it should be noted that local players (such as cable operators and RTBF) offer VOD services which compete with the services of international players (YouTube, Netflix, Facebook, etc.). In 2021, cable operators' offers enter the top 5 in terms of awareness among the general public, with an increase of +3.6% (76.1% in 2019, 79.7% in 2021)[30]. Between 2019 and 2021, the same cable operators' offers and RTBF Auvio remain among the five most popular VOD offers in French-speaking Belgium, although the cable operators' offers increase by 5.7% (60.7% in 2019 and 66.4% in 2021)[31].

Television and video on demand are complementary rather than substitutable

99. According to the CRC in 2018, as noted (section 87 et seq.), television remained dominant. This is confirmed by the observations of the MAP studies of 2020 and 2022 (section 89). However, the CRC's analysis did not rule out the possibility that some consumers watch television in combination with other consumption patterns. The CRC then examined whether there could be either complementarity or substitutability and concluded that: "Linear and non-linear television are complements rather than substitutes, as indicated by the penetration of both and the habits of viewers"[32].

100. First of all, this raises the question of the **complementarity** of consumption patterns.

101. According to the CRC in 2018, "Linear television viewing remains the primary manner of consuming broadcasting offerings. OTT services are mainly purchased in a complementary manner (...)"[33].

102. In this respect, the MAP studies demonstrate such complementarity, which remains a preferred choice for 35.2% (2021) and 34.4% (2019) of consumers[34]. Furthermore, 2021 saw a decrease in the number of people who do not consume audiovisual content, i.e. neither television nor video on demand (6.3% of respondents in 2021, 8.7% in 2019)[35].

103. Then the question of **substitutability** of consumption patterns is raised.

104. According to the CRC, in 2018 "A crucial element in the analysis of OTT services is the willingness of the end-user to switch from conventional television to OTT services. The CSA examined this migration tendency in detail in section 5.3.1 "Substitutability between linear and non-linear television offers." "[36]

105. The MAP studies of 2020 and 2022 seem to confirm a low propensity to substitute one consumption pattern for another. On the one hand, a clear majority of respondents do not plan to do without television or pay TV. On the other hand, a 10% increase in the price of a television or video on demand subscription would for a majority of respondents not lead to cancellation of the subscription. In more detail:

[28] section 320.
[29] section 326.
[30] section 357.
[31] section 359.
[32] sections 164 et seq. of the above-mentioned CRC decision of 29 June 2018.
[33] section 321.
[34] section 485.
[35] section 486.
[36] section 316 of the CRC Decision of 29 June 2018, op cit.

105.1. *Firstly*, between 2019 and 2021 there is no change in the desire of respondents to stop watching television at home: 86.4% of respondents probably or definitely do not plan to stop watching television at home in 2021, compared to 86.3% in 2019[37].

105.2. *Secondly*, in the event of a 10% increase in the price of television subscriptions, "64.4% [of respondents] said they would probably or certainly not cancel their subscription" (section 502). The degree of certainty increases in 2021 compared to 2019 insofar as the number of respondents who would definitely not cancel their subscription increases by +8% (38.7% in 2021 compared to 30.7% in 2019) and the number of respondents who would probably not cancel their subscription decreases by -4.7% (25.7% in 2021 compared to 30.4% in 2019)[38].

105.3. *Thirdly*, between 2019 and 2021 there is no change in the desire of respondents to stop watching pay VOD at home: 77.2% of respondents probably or certainly do not plan to stop watching in 2021, compared to 71.5% in 2019.

105.4. *Fourthly*, between 2019 and 2021, there is an increase of +10% in the number of respondents who would continue to consume pay VOD in the event of a price increase (the proportion of respondents who would probably or certainly not cancel pay VOD rising from 55.1% to 65.1%). [39]

106. This lack of desire for substituting video on demand for television - and vice versa - could be explained by a propensity of consumers to associate certain types of content with certain consumption patterns. Respondents above all choose

106.1. television for all news content (64.8%), for sports programmes (18.2%), for game shows, variety shows and talk shows (15.1%) and for information services (weather, traffic, etc.) (5.9%)[40] ;

106.2. video on demand for films (85.2%) and for series and serials (65.8%)[41] ;

106.3. free video on demand for humorous, unusual and celebrity content (16%), for tutorials (10.9%), for cultural content (film releases and reviews, books, concerts, etc.) (11%) and for lifestyle content (decoration, gardening, cooking, etc.) (5.6%)[42].

Documentaries are the exception, as they are widely consumed both on television (37.6%) and on pay VOD (36.7%) or free VOD (36.1%)[43].

Age still influences consumption habits, but are we seeing any signs of change in the behaviour of younger people?

107. According to the CRC, in 2018 "consumption patterns vary by age group." "The share of online video viewers is highest among the youngest age group, making it the dominant audiovisual media consumption pattern among this segment. Conversely, among older people the dominant consumption pattern remains linear television alone or in addition to online video. However, linear television remains dominant on a global scale. "[44]

[37] section 495.
[38] section 504.
[39] section 513.
[40] section 244.1.
[41] section 244.2.
[42] section 244.3.
[43] section 245.
[44] section 169 of the above-mentioned CRC decision of 29 June 2018.

108. The 2020 and 2022 MAP studies generally corroborate that the older people are, the more television they consume overall[45] and the less video on demand they consume[46]. However, this observation calls for the following nuances.

108.1. In 2021, 15–19-year-olds consume slightly more *television* (53.6%) than 20–29-year-olds (43.4%)[47]. A similar observation was made in 2019 (51.2% for 15–19-year-olds compared to 50.1% for 20–29-year-olds)[48]. It would be interesting to examine in a future study whether this suggests a possible change in the behaviour of the younger generation.

108.2. In 2019, it was observed that the older people were, the more likely they were to consider stopping consumption of video on demand in favour of another consumption pattern. Now, because the association between the two variables is no longer significant, it seems that the willingness to stop consuming pay video on demand no longer depends on age[49]. In these circumstances, it would seem that younger people are no less likely to stop consuming pay TV than their elders.

108.3. For *free video on demand*, it was found in 2019 that the longest average daily consumption time (three hours or more) decreased with age. Between 2019 and 2021, it increases in all age groups - especially among the over-60s (+9.4%)[50]. This association is very significant in 2019 but becomes insignificant in 2021. One explanation could be that free video on demand has become so ubiquitous that it reaches widely across all age groups. In these conditions, it would seem that older people are just as likely as younger people to consume at least three hours of free video on demand daily.

Review and outlook

109. This comparison of observations from the 2018 CRC decision on consumer behaviour (particularly with regard to the consumption of OTT) services, and from the present study shows that there is no fundamental divergence despite certain developments.

110. In the light of the elements highlighted in this section, we believe that it would be useful to repeat (or even perpetuate) a MAP study with both a qualitative and quantitative component.

[45] section 738.
[46] section 739.
[47] section 738.
[48] section 743.
[49] section 984.
[50] section 831.

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