Use of online communications services in Germany
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Executive summary
Bundesnetzagentur für Elektrizität, Gas, Telekommunikation, Post und Eisenbahnen

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1 Background

Online communications services have brought about a great deal of change to the telecommunications sector in recent years. The change is centred around messaging, internet and video calling services, which – unlike traditional telecommunications services such as telephony and Short Message Service (SMS) – are provided only via the internet and thus also referred to as ‘Over the Top’ (OTT) services. The increasing importance of online communications services has an impact on the regulated telecoms markets. In the view of the Bundesnetzagentur, collecting valid data about the use of online communications services in Germany is an important building block for assessing and classifying such changes. Consumer surveys can provide valuable insights for this purpose and thus contribute significantly to the performance of regulatory tasks, for instance in the areas of market monitoring and market analysis procedures, consumer protection and public safety.

In mid-2021 the Bundesnetzagentur conducted a comprehensive, representative survey on the ways and the degree to which online communications services are used in Germany. The survey follows on from the one carried out in 20191 and was performed in cooperation with INFO GmbH, a Berlin-based market and opinion research institute. A mixed mode approach with a combination of online and telephone data collection was chosen for the survey; the consumers surveyed were German residents aged 16 and over. A total of 2,141 people across Germany took part in the survey (in August 2021).

The aim of the survey was to obtain comprehensive empirical information about actual use of online communications services in Germany. Information was gathered about the distribution and use of online communications services in Germany, in particular the frequency of use, the functions and mobile devices used, and the reasons for using or not using online communications services. Video calling and email services were included in the survey for the first time. A closer examination of the competitive relationship between online communications services and traditional telecommunications services was also conducted. One focus of the survey was on changes in communication patterns, especially with regard to how much online communications services are used, the trend in communications volume and the effects of the Covid-19 pandemic.

2 Key findings

1. Popularity of online communications services continues to grow
   - Around 88% (2019: 83%) of Germany’s population aged 16 and above regularly use online communications services (at least once a month), mainly with smartphones.
   - Online communications services are most popular among the younger generation. Nearly all (99%) 16- to 34-year-olds use these services, compared with just over half (53%) of over-75s.

2. WhatsApp is the dominant service
   - The five most frequently used services in Germany have the following shares of use: 93% WhatsApp (2019: 96%), 39% Facebook Messenger (2019: 42%), 25% Instagram Direct Messages (2019: 30%), 20% Skype/Skype for Business (2019: 18%) and 18% Zoom (2019: no data).

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These figures show that the services of Meta Platforms Inc. (formerly known as Facebook) still have a strong market position. However, all three services are losing in the relative shares of use compared with the 2019 survey.

Overall 78% (2019: 85%) of online communications service users have WhatsApp as their “main service”.

3. Smaller service providers gain shares of use
   - Several competitors of the Meta group of companies have made gains since the 2019 survey. Significant growth was recorded for the messaging services Signal, up 9 percentage points (to 13%), Discord, up 8 percentage points (to 8%) and Telegram, up 6 percentage points (to 16%).
   - Video calling services Zoom (18%) and Microsoft Teams (14%) registered even stronger growth rates. Neither of the two services played a visible role for consumers in the 2019 survey.

4. Multi-homing is becoming standard practice
   - Nearly three quarters (73%) of the users of online communications services use at least two different services in parallel and therefore practise what is known as multi-homing. That is an 8 percentage point increase compared with the 2019 survey.
   - The barrier to multi-homing is small since online communications services are often offered free of charge. The individual features of different services also vary to some extent, which adds incentives for broader use.
   - On average, a user uses 3.1 different online communications services.

5. Network effects remain of paramount importance
   - For 93% (2019: same) of users, the reason why they chose their main service is that it enables them to reach most of their communication partners.
   - Network effects thus remain a key factor in choosing a main service. This means there is keen interest in being able to reach as many users as possible via that service.
   - Simple or intuitive use of a service is highly relevant for 86% (2019: 85%) of online communications service users.

6. Favourite feature: sending text and picture messages
   - 95% (2019: same) of users use online communications services to send text and picture messages; 84% (2019: 81%) of these users do so on a daily basis.
   - 67% (2019: 65%) of users send voice messages, and 49% (2019: 45%) of these on a daily basis.
   - 54% of users use the internet telephony feature (2019: 48%) and 54% use the video calling feature (2019: 40%), but mainly on a weekly or monthly basis, even though daily use also increased.

7. Consumers hesitant about interoperability
   - Users of online communications services show no clear preference for or against the creation of possibilities for communicating across services (referred to as interoperability).
   - 60% of users definitely do not want to be contacted by users of other services. Furthermore, 51% do not think being able to send messages to users of other online communications services is necessary.
   - 84% of users turn to traditional telecommunications services such as telephony or SMS instead if they cannot reach a user.
— The possible introduction of obligatory interoperability for these services gives rise to a complex debate that could have implications for competition and innovation and also for data protection and data security. Ultimately all related effects need to be weighed up against each other and considered together to avoid unintended consequences.²

8. Widespread use of email services
— In Germany 89% of the population aged 16 and above regularly uses email services (at least once a month).
— Email use also correlates to age. More than 90% of each age group between the ages of 16 and 54 use email. Email use for the age group of 65 and older drops to 78%.
— The email services most frequently used by users in Germany are: 36% Gmail (Google Mail), 24% GMX, 24% Web.de, 13% T-Online and 9% Outlook.com.

9. Importance of traditional telephony services still high
— Traditional telephony is still far more popular than internet telephony from an online communications service. Of all those surveyed, 52% use their mobiles on a daily basis for calls and 39% use their landlines. Only 22% of those surveyed use internet and video calling on a daily basis.
— Thus mobile telephony still plays a particularly important role for survey respondents. Accordingly, 80% of all mobile users surveyed stated that they also could not imagine doing without mobile telephony in future.
— Online communications services for textual communication are by contrast especially popular. 68% of all surveyed send or receive emails daily, while 61% use messaging services for sending and receiving pictures, voice messages and text messages. Only 16% of those surveyed use SMS on a daily basis.

10. Increase in communications volumes as a result of the Covid-19 pandemic
— Since March 2020 and the introduction of the first measures to contain Covid-19, the use of communications services has increased noticeably overall. Of all those surveyed, 39% stated that since then they use communications services more often, 58% with about the same frequency and only 2% use them less often.
— The use of online communications services in particular has increased significantly. In total, 45% of the users of these services indicate that they communicate more often using them because of the pandemic. 30% of the surveyed email users make more frequent use of this service. The same is true for 29% of mobile telephony users and for 19% of fixed telephony users. Only 8% of SMS users indicate that they use SMS more since the beginning of the pandemic.
— Overall, internet-based video calling benefited especially from market dynamics and changes in consumer behaviour resulting from the pandemic. More than half (51%) of those who use this specific feature stated that they use it more frequently because of the pandemic.

² See, for example, Bundesnetzagentur (2021): Interoperability between messaging services – an overview of potential and challenges.
3 Summary

The results of the consumer survey show that around 88% of Germany’s population use online communications services such as WhatsApp or Skype. This means that online communications services are now used about as widely as traditional telecommunications and email services. Traditional telecommunications services nevertheless continue to play an important role for consumers. In particular, traditional telephony is still far more popular than internet telephony via online communications services. However, internet-based communications services are especially popular for textual communication. Furthermore, communication behaviour has changed noticeably since the beginning of the pandemic. Mobile communications in traditional services and video calling in online communications services have benefited in particular from market dynamics and changes in consumer behaviour resulting from the pandemic.

The implementation of the European Electronic Communications Code through the revision of the German Telecommunications Act (TKG), which entered into force on 1 December 2021, makes certain online communications services such as messaging, internet and video calling subject to parts of the regulatory regime, taking into account their technical and economic aspects. Number-independent interpersonal telecommunications services, particularly in the areas of consumer protection, public safety and data protection (see the Telecommunications Telemedia Data Protection Act / TTDSG) are included with the aim of creating fair competitive conditions (level playing field) between internet-based and traditional telecommunications services.