

2023 CONSUMER SURVEY RESULTS

# Report

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Use of online  
communications services  
in Germany

*Executive summary*



Bundesnetzagentur

# **Use of online communications services in Germany**

2023 consumer survey results

Executive summary



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## 1. Background

Online communications services have brought about a great deal of change to the telecommunications sector in recent years. It is hard to imagine everyday life without messaging, internet or video calling services. Most recently, video conferencing services have also grown significantly in importance as a result of the pandemic. Overall, the increasing importance of online communications services is leading to lasting changes in the way consumers communicate in both their private and working lives. The popularity of online communications services is also having an impact on the regulated telecommunications markets, for instance on the demand for traditional communications services.

In the view of the Bundesnetzagentur, collecting comprehensive data about the use of online communications services in Germany is therefore very important in order to be able to assess and classify developments and changes across all the telecommunications markets. Consumer surveys can provide valuable insights for this and thus contribute significantly to the performance of regulatory tasks, for instance in the areas of market monitoring, public safety and consumer protection.

At the beginning of 2023, the Bundesnetzagentur therefore conducted a comprehensive, representative survey on the ways and the degree to which online communications services are used in Germany. The survey followed on from the surveys carried out in 2019<sup>1</sup> and 2021<sup>2</sup> 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 2,200 people across Germany took part in the survey (in January 2023).

The survey focused on aspects such as the popularity of online communications services, how often and how the services are used, the functionalities and devices used, and the reasons for using the services. It also covered the use of online communications services for work purposes and took a closer look at the degree to which all electronic communications services are used.

## 2. Key findings

### Popularity of online communications services continues to grow

- Around 90% (2021: 88%) of Germany's population aged 16 and above regularly use online communications services (at least once a month), mainly with smartphones. This means that the basic level of use of these services is comparable to that of traditional services.
- Online communications services continue to be most popular among the younger age groups. Nearly all (96%) 16- to 44-year-olds use these services. There are still differences in use between the age groups, although the differences are becoming smaller. For instance, the proportion of 65- to 74-year olds using the services has increased from 69% in 2019 to 86%.

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<sup>1</sup> See Bundesnetzagentur (2020): Use of OTT communications services in Germany – Report 2020.

<sup>2</sup> See Bundesnetzagentur (2022): Use of online communications services in Germany – 2021 consumer survey results.

### **Meta services have key market position**

- The services of *Meta Platforms Inc.* still have a key market position in Germany, although there has been a decrease in the use of some of the services since 2019.
- The five most frequently used online communications services in Germany have the following shares of use: 92% *WhatsApp* (2021: 93%), 36% *Facebook Messenger* (2021: 39%), 27% *Instagram Direct Messages* (2021: 25%), 20% *Microsoft Teams* (2021: 14%) and 19% *Zoom* (2021: 18%).
- Overall, 75% (2021: 78%) of online communications service users have *WhatsApp* as their "main service".
- Network effects remain a key factor in choosing a main service. For 91% (2021: 93%) of users, the reason why they chose their main service is that it enables them to reach most of their communication partners.

### **Competitive environment is diverse**

- In Germany, numerous online communications services are used each with a relevant share of use. A total of 12 services each have a share of use of more than 10% (*multiple answers possible*).
- Various competitors of the *Meta* group of companies have made further gains since the 2021 survey. Significant growth was recorded in particular for services of *Microsoft*, *Google* and *Apple*: *Microsoft Teams* (up 6 percentage points), *Google Meet* (up 5 percentage points), (*Google*) *Messages* (up 4 percentage points), and (*Apple*) *FaceTime* (up 4 percentage points).
- The increase in the demand for online communications services, and in particular for video calling services, as a result of the Covid-19 pandemic appears to have led to a permanent change in demand among users. Video conferencing services such as *Microsoft Teams*, *Zoom* and *Skype* each consolidated their share of use of around 20%.

### **More than three quarters of users use multiple services in parallel**

- More than three quarters (77%) 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 increase of 4 percentage points compared with the 2021 survey. More than one third (36%) of all users even use four or more services in parallel.
- On average, each user uses 3.2 different online communications services (2021: 3.1).
- The barrier to multi-homing is usually small, especially since service providers do not usually charge for using their services but rely on other forms of financing. The individual features of different services also vary to some extent, which adds incentives for using several services in parallel.

### **Vast majority send text or voice messages daily**

- Generally speaking, 92% (2021: 95%) of online communications service users send text and picture messages; 80% (2021: 84%) of these users do so on a daily basis.
- 66% (2019: 67%) of users send voice messages, and 47% (2019: 49%) of these on a daily basis.
- 58% of users use the video calling feature (2021: 54%) and 56% use the internet telephony feature (2021: 54%), but still mainly on a weekly or monthly basis.
- Video calling users mainly use *WhatsApp* (58%). The video conferencing services *Microsoft Teams* (11%) and (*Apple*) *FaceTime* (8%) follow with distance.

### Online communications services are also very important for business

- The following findings are from a representative company survey commissioned by the Bundesnetzagentur and carried out in 2022/2023.<sup>3</sup>
- Overall, 78% of the companies surveyed recommend the use of certain online communications services or provide these services for use by their employees. The use of online communications services generally increases with the size of the company (in terms of the number of employees). The following services are used most by the companies: *Microsoft Teams* (70%), *WhatsApp* (62%) and *Zoom* (49%).
- 70% of the companies use online communications services for communication within their company (including for meetings and coordinating appointments), 66% for communication with external business partners and 64% for communication with customers.
- The key factor in using online communications services is being able to contact business partners and customers. 87% of the companies can contact business partners and customers better or faster using these services. A wider scope of functionalities compared with traditional forms of communication is also a very important factor for 73% of the companies.

### Use of email services is still very widespread

- In Germany, 88% (2021: 89%) of the population aged 16 and above regularly use email services (at least once a month).
- Email services are generally popular among all age groups. At least 90% of each age group between the ages of 16 and 54 use email. 78% of the age group of 65 and older use email. The number of people not using email is therefore comparatively small in older age groups as well.
- The email services most frequently used by users in Germany are: 38% *Gmail* (2021: 36%), 24% *Web.de* (2021: 24%), 23% *GMX* (2021: 24%), 13% *T-Online* (2021: 13%) and 10% *Outlook.com* (2021: 9%).

### Emails, messaging and mobile calls are preferred in everyday life

- An overall comparison of the use of traditional telecommunications services and email and online communications services shows that users mainly use emails and messaging (via online communications services) for written communication in everyday life. Traditional mobile telephony is the most frequently used form of voice communication.
- Online communications services are especially popular for written communication. 69% of all those surveyed send or receive emails and 59% send or receive text, picture or voice messages via messaging services on a daily basis.
- Traditional telephony is used more frequently than internet telephony via online communications services for everyday voice communication. Of all those surveyed, 52% use their mobiles and 35% their landlines for calls on a daily basis. 25% of those surveyed use online communications services (internet and video calling) for calls on a daily basis.
- Only 18% of all mobile users surveyed said that they could imagine doing without mobile telephony in future.

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<sup>3</sup> See *Bundesnetzagentur* (2023): Digitalisierung und ökologische Nachhaltigkeit in Unternehmen/Feld- und Methodenbericht. The representative survey commissioned by the Bundesnetzagentur was carried out in 2022/2023; 1,014 companies from ten economic sectors in Germany were surveyed about the use of online communications services for work purposes, among other things.

### 3. Summary

The results show that 90% of the population (aged 16 and over) already use online communications services. The level of use of these services is therefore comparable with that of traditional telecommunications services and email services. Online communications services are especially popular among younger users and their use is therefore also a question of age. However, developments in recent years show that they are also becoming increasingly popular among older age groups.

Services of the *Meta* group of companies continue to dominate use. In particular, *WhatsApp* is still by far the most widely and most frequently used service. However, there are also various other services that each focus on different functionalities and have a relevant number of users. Video conferencing services, in particular, have found a permanent place among users in recent years. The importance of online communications services for companies is also continuing to increase, with services being used for various purposes, both for communication within companies and for external communication with business partners and customers.

Since 2021 number-independent interpersonal communications services (NI-ICS) have been subject to parts of the regulatory regime under the Telecommunications Act (TKG), most notably in the areas of market monitoring, public safety and consumer protection. The regulatory requirements include, for instance, a requirement to provide the Bundesnetzagentur with certain usage data for market monitoring purposes.<sup>4</sup>

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<sup>4</sup> At the beginning of 2023, the Bundesnetzagentur issued its first mandatory request for information to the NI-ICS providers with the greatest market relevance in Germany. See *Bundesnetzagentur* (2023): Telecoms Annual Report 2022, page 27 et seq.



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