



Press release

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Bundesnetzagentur publishes results of consumer survey on online communications services

Jochen Homann: "WhatsApp still at the top, but competitors catching up"

The Bundesnetzagentur has today published the results of a consumer survey on the use of online communications services in Germany.

"The significance of online communications services like WhatsApp, Skype and Signal has continued to increase over the past two years. This overall positive development has benefited the competitors of the Meta group of companies in particular. While we have noticed a slight decrease with WhatsApp and co, nearly all the other services have increased their share of use," said Jochen Homann, Bundesnetzagentur President. "The further increase in the use of several services in parallel fits into this picture. Nearly three quarters of all users now practise multi-homing."

Smaller providers gain shares of use

The results of the representative consumer survey show that around 88% (2019: 83%) of those surveyed regularly use online communications services. This means that online communications services and traditional telecommunications services are now similarly widespread.

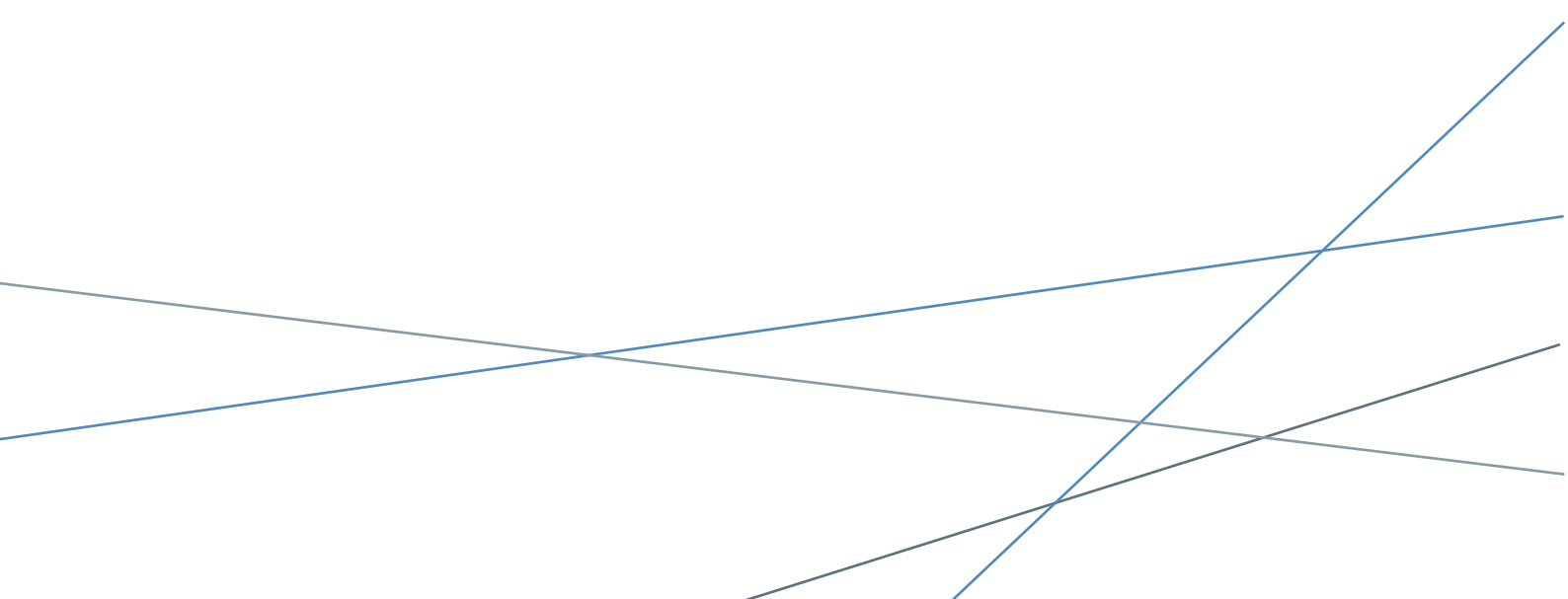
The most popular online communications services in Germany have the following shares of use: 93% WhatsApp (2019: 96%), 39% Facebook Messenger (2019: 42%), 25% Instagram Direct Messages (2019: 30%), 20% Skype/Skype for Business (2019: 18%), and 18% Zoom (2019: no data).

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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, the Bundesnetzagentur has identified losses in the relative shares of use compared with the survey in 2019. By contrast, 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%).

Even stronger growth in shares was achieved by the video calling services Zoom and Microsoft Teams, with shares of 18% and 14% respectively. These two services played no visible role for consumers in the 2019 survey. The rapid increase in the importance of these services is mainly due to the pandemic and the changes in demand for video calling.

In addition, 73% of the users of online communications services (2019: 65%) use at least two different services in parallel and therefore practise what is known as multi-homing. On average, a user uses three different services. Multi-homing is therefore increasingly becoming standard practice.

The users of online communications services still tend to be hesitant about the possibility of communication across providers (known as interoperability). For instance, 60% of the users surveyed definitely do not want to be contacted by users of other services.



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Importance of traditional telephony services still high

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 they had communicated more often since then.

Consumers particularly see traditional telecommunications services to be of high importance. For example, the use of traditional voice calls is still more popular than voice and video calls via online communications services. Of all those surveyed, 52% use their mobiles on a daily basis for calls and 39% use their landlines. By contrast, only 22% use online communications services on a daily basis for calls.

Mobile telephony, above all, is still very popular among those surveyed. A total of 80% of all mobile users surveyed stated that they could not imagine doing without mobile telephony in future.

Online communications services have also benefited greatly from the general increase in communications volumes. In total, 45% of the users of these services stated that they communicated more often using an online communications service because of the pandemic. There was a considerable increase in particular in the use of video calling.

Background to the consumer survey

The results presented in the report are based on a representative consumer survey conducted in cooperation with INFO GmbH in August 2021. A total of 2,141 people (aged 16 and above) across Germany took part in the survey. The survey follows on from the one carried out in 2019.



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Unlike traditional telecommunications services such as telephony and SMS, online communications services are provided via the open internet. They enable people to communicate with each other using voice and video calls, text, voice and image messages, group chats, etc.

The new version of the German Telecommunications Act (TKG) of December 2021 includes what are known as number-independent interpersonal telecommunications services such as messaging, internet and video calling in parts of the regulatory regime. The findings of the consumer survey are therefore highly relevant for the Bundesnetzagentur's activities, for instance in the fields of market monitoring and consumer protection.

The Bundesnetzagentur's report (in German) has been published online at www.bundesnetzagentur.de/online-kommunikation.

The Bundesnetzagentur is an authority under the responsibility of the Federal Ministry for Economic Affairs and Energy. Its core tasks include supervising the energy, telecommunications, postal and railway markets.

As part of its mandate, the Bundesnetzagentur ensures that as many undertakings as possible can use the infrastructure in these sectors so that consumers benefit from competition and favourable prices.

The authority employs over 2,900 people at its headquarters in Bonn and Mainz and its 46 regional offices.