

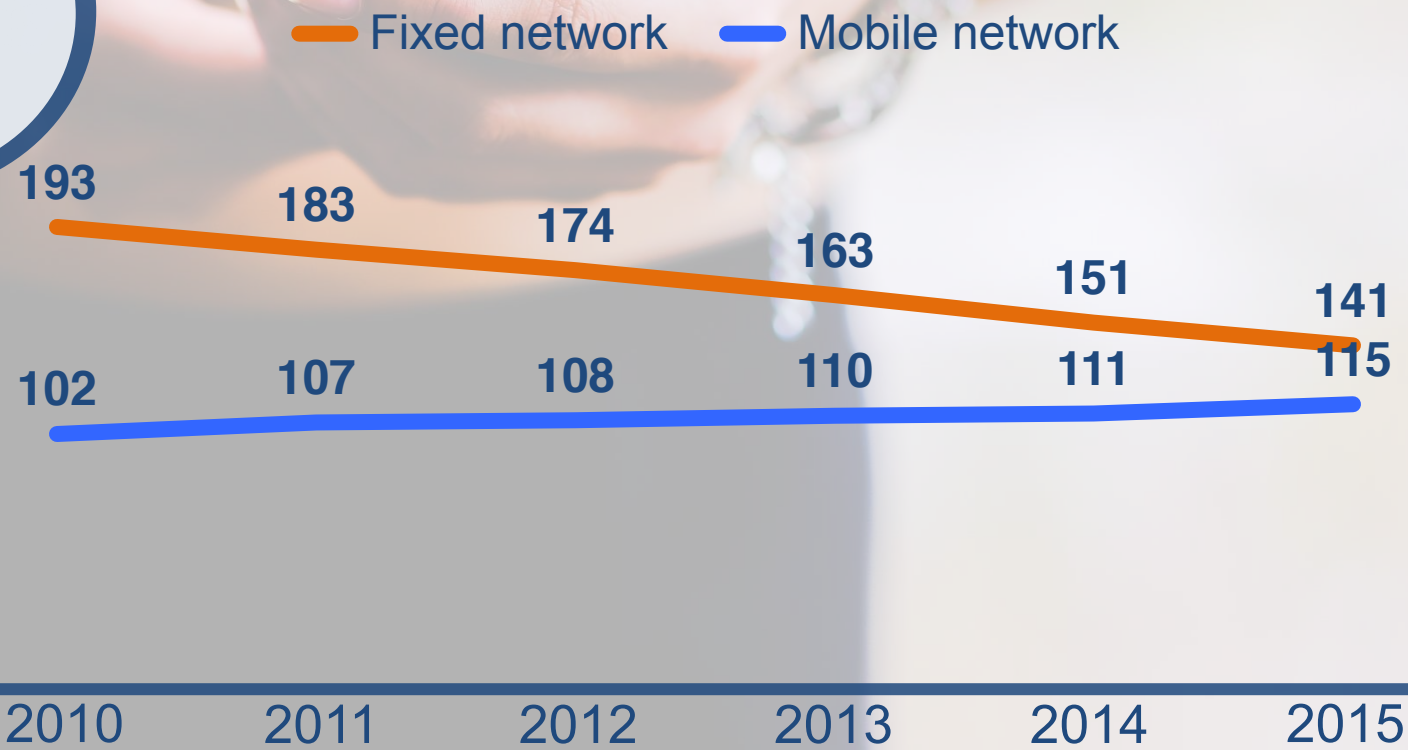


Presentation at CEPS 29th June 2016

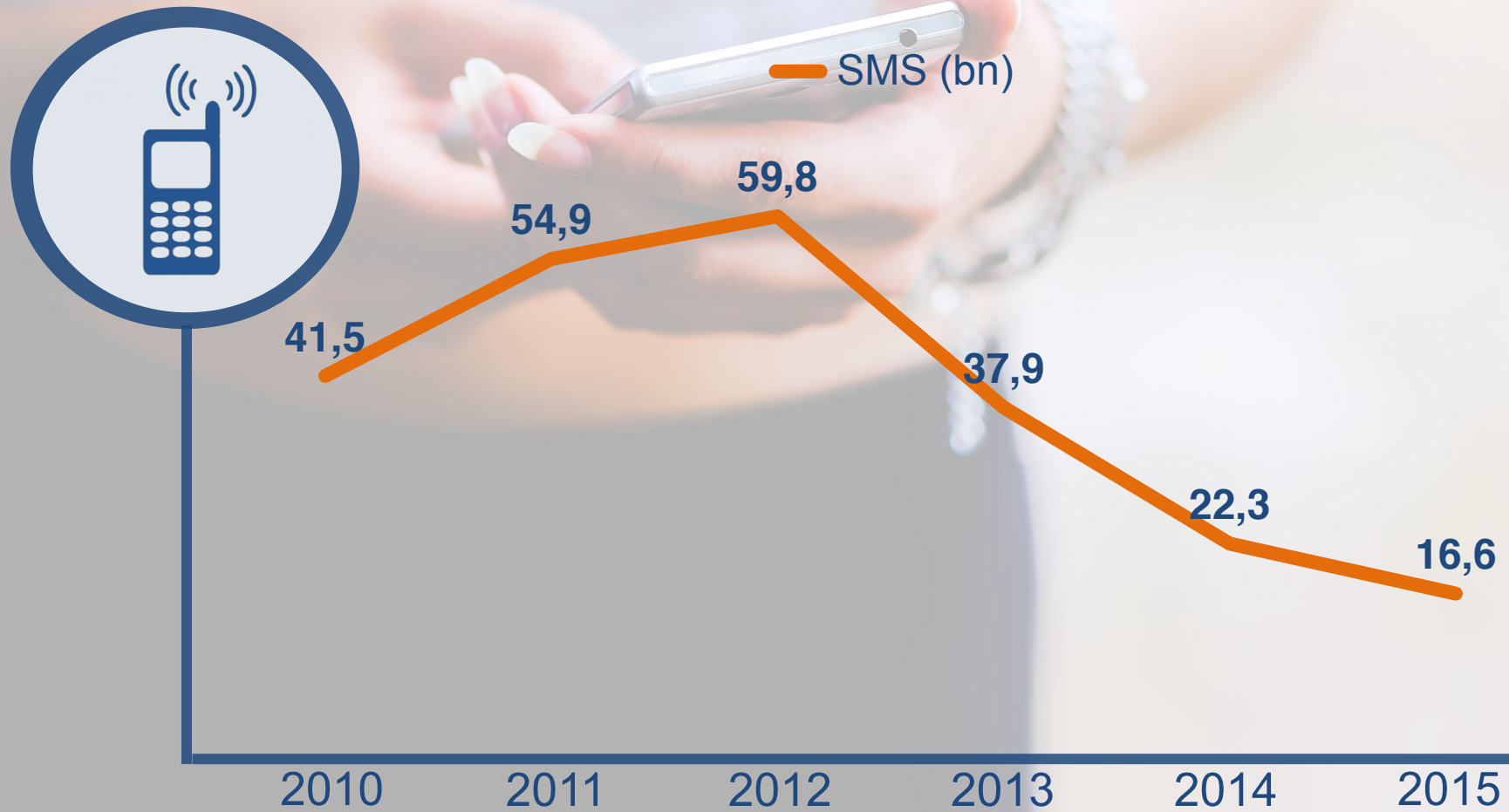
OTT Services and Consumers' Communication Behaviour in Germany

Dr. René Arnold
Dr. Anna Schneider

What's Up? What's Down?



What's Up? What's Down?



SMS messages sent in Germany (in billion). Source: BNetzA (2016).

What's Up? What's Down?



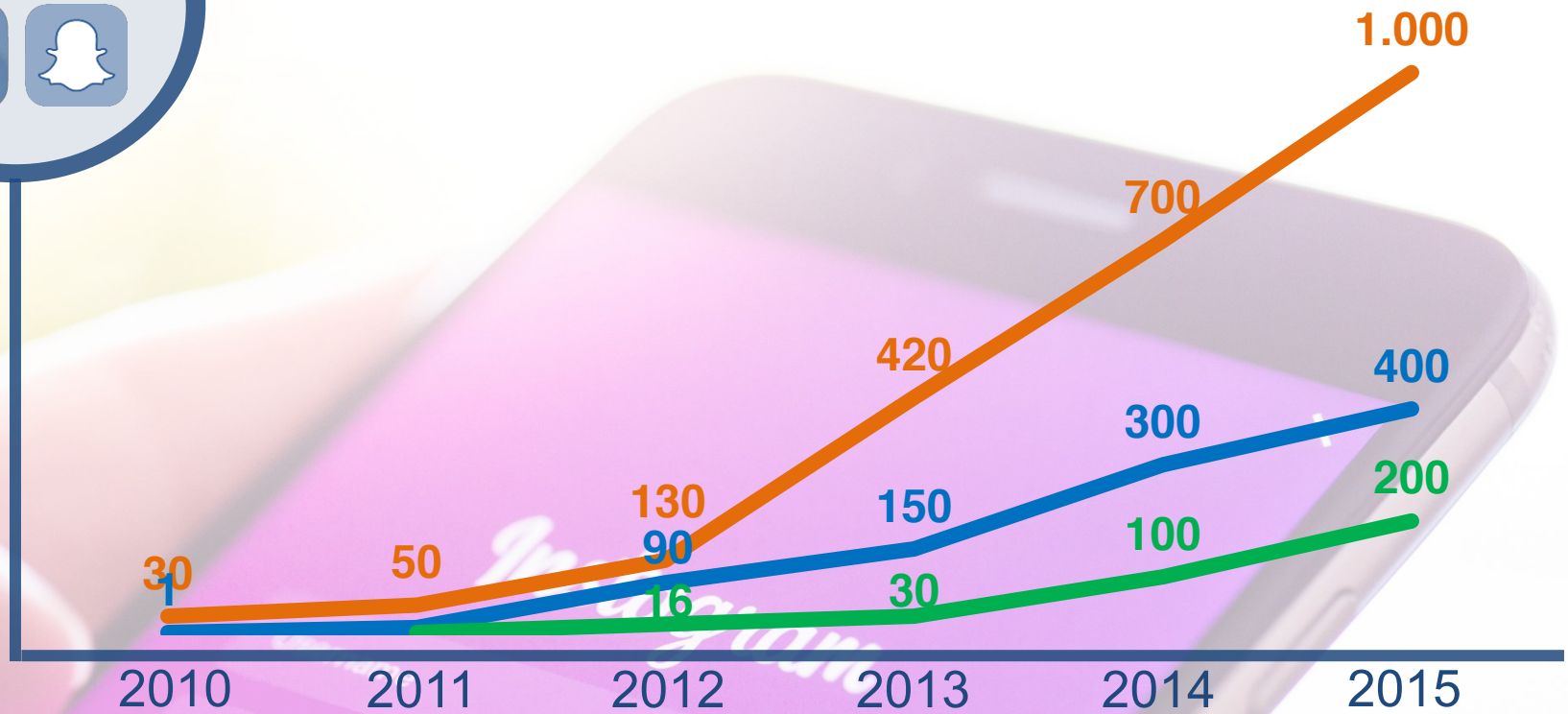
- Data volume broadband - fixed
- Data volume - mobile



What's Up? What's Down?



WhatsApp Instagram Snapchat



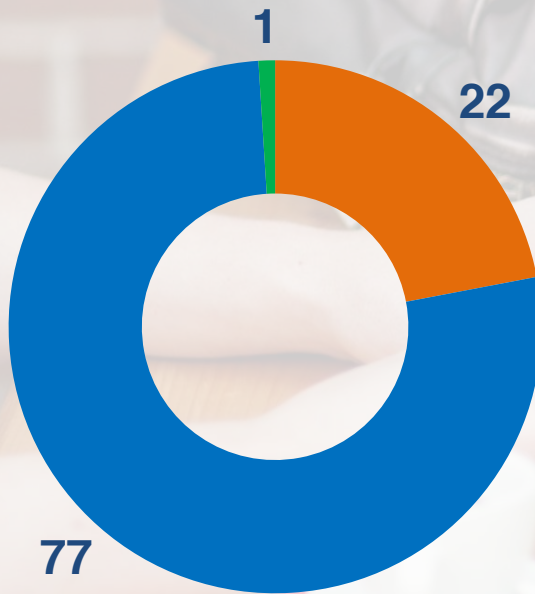
WhatsApp: MAU (m) worldwide. Source: Press releases, Business Intelligence (2014), TNW (2016).

Instagram: MAU (m) worldwide; 2010 and 2011 registered users. Source: Business Insider (2014); Mashable (2013); Statista (2014); 5 AdWeek (2015).

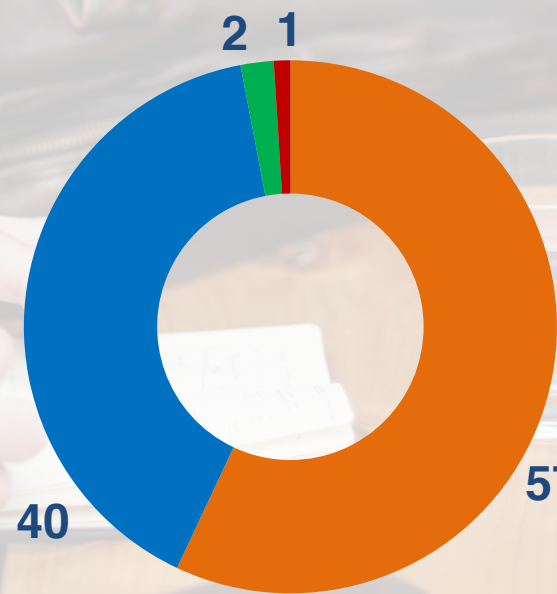
Snapchat: MAU (m) worldwide; 2011 and 2012 MAU of picaboo. Source: Business Insider (2014); Techweez (2014); CIO (2015), Press releases.

Who uses what?

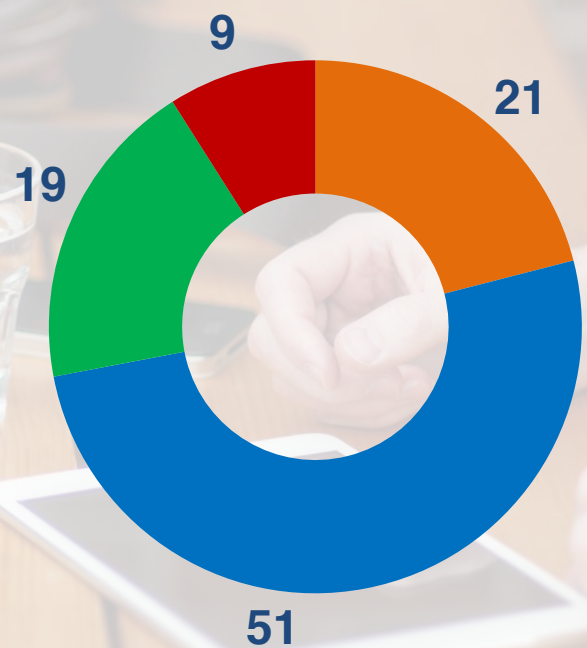
...across all communication situations



...to phone someone

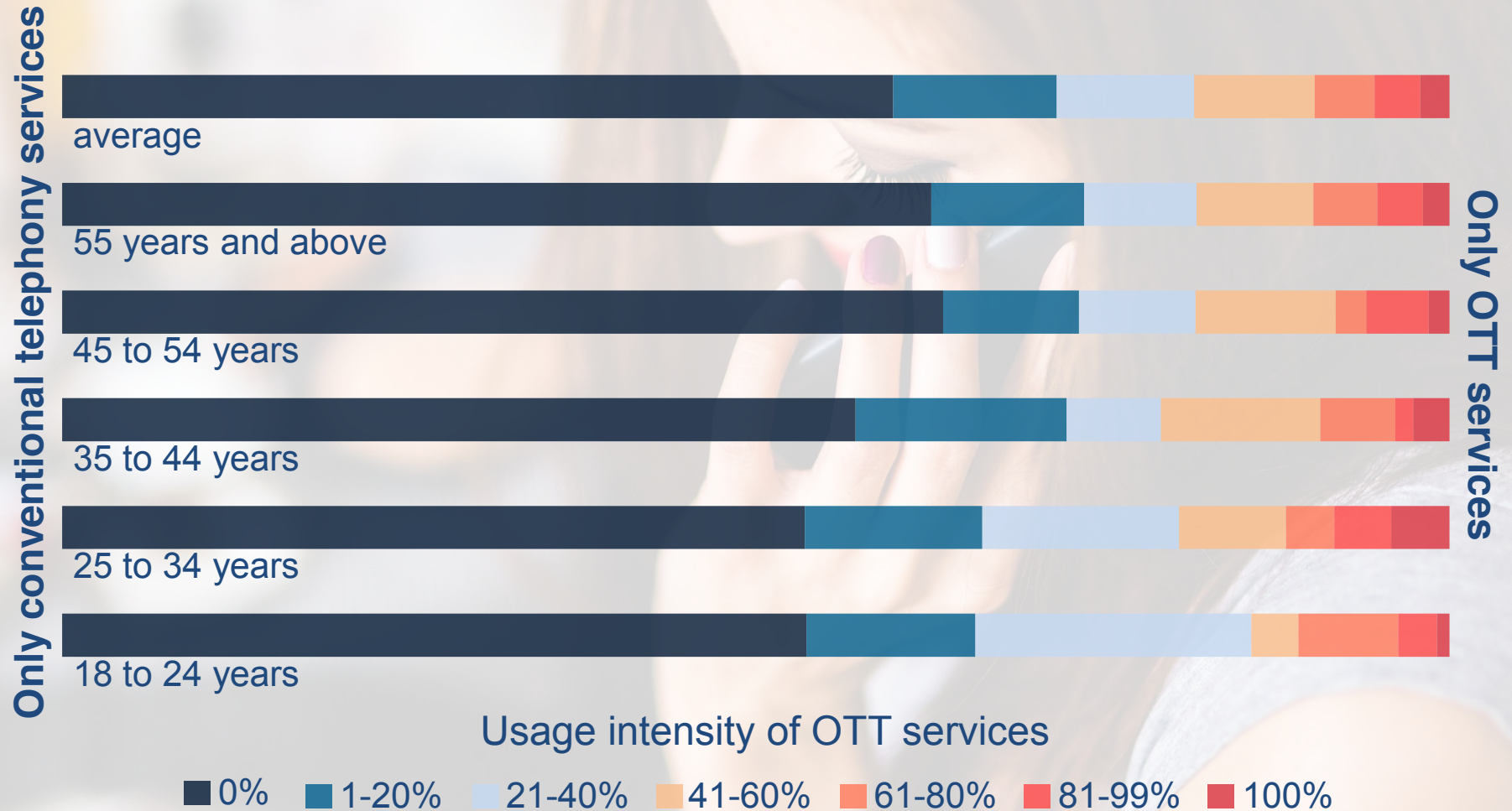


...to text someone

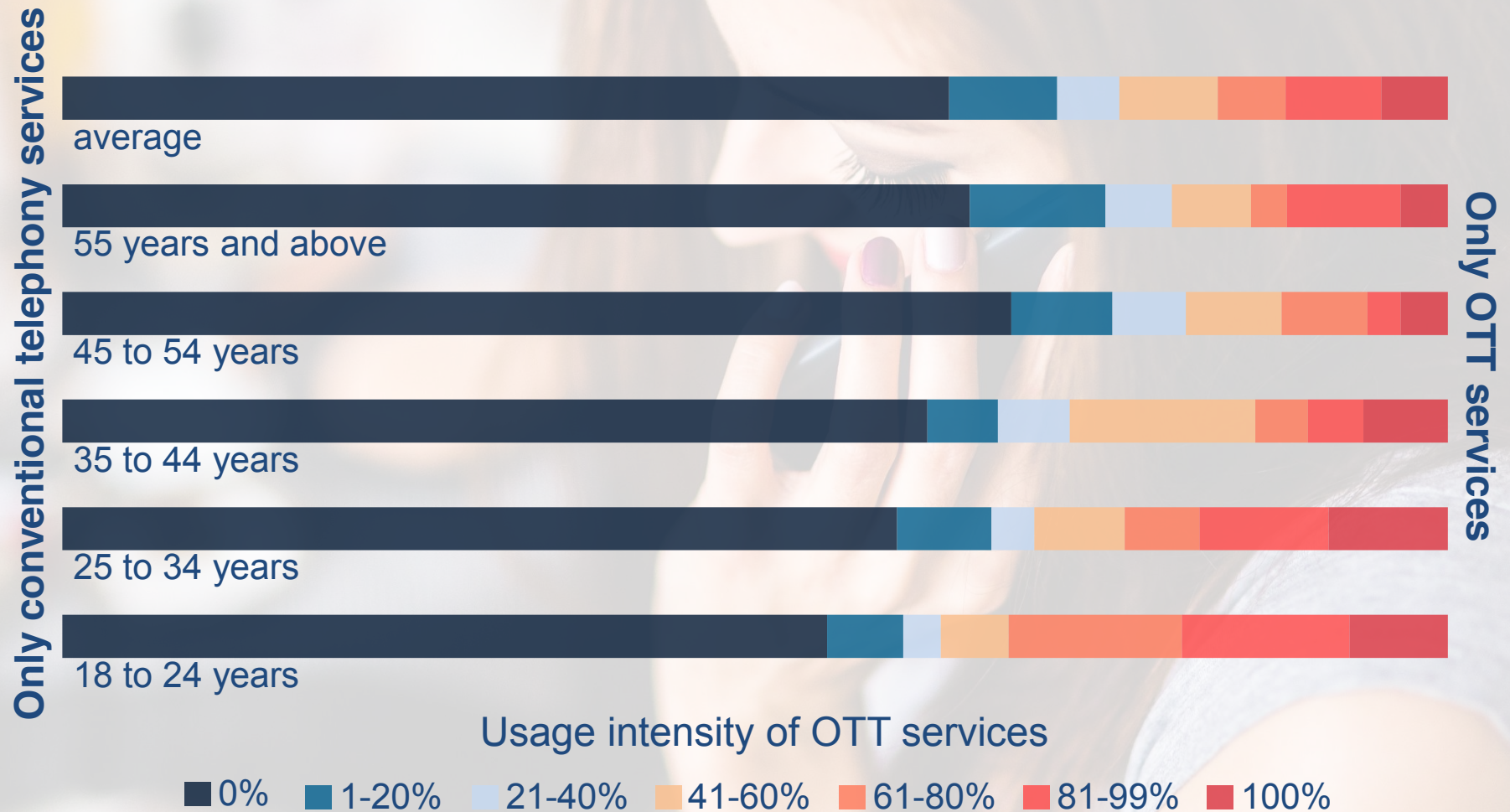


■ only ECS ■ ECS and OTT ■ only OTT ■ neither

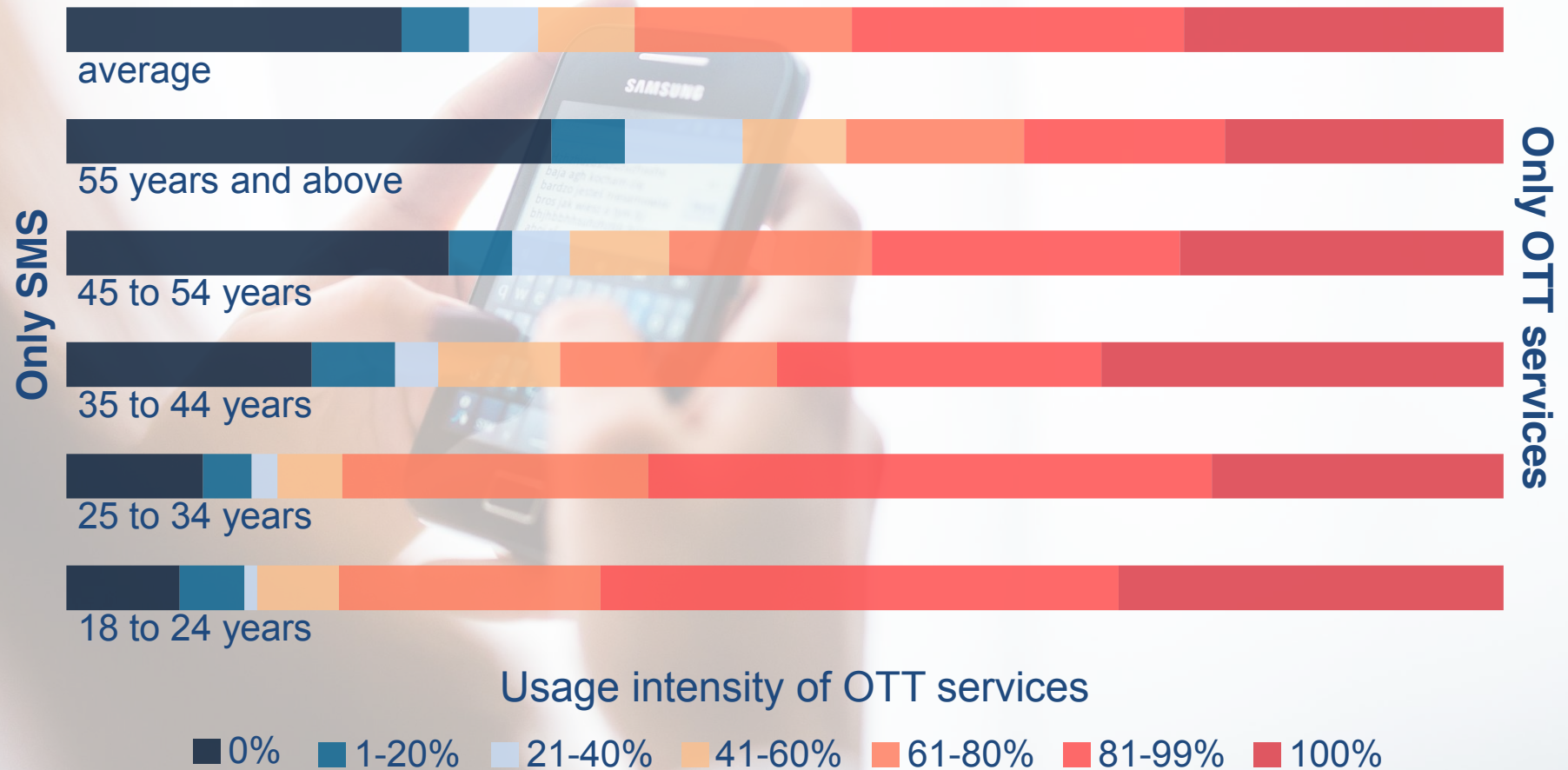
Taking a closer look at calls within Germany



Taking a closer look at calls abroad



Taking a closer look at texting



Substitution?

- Consumers use MMAs because they are different from SMS
  - Send pictures, videos, voice- and video-messages
  - New ways to negotiate emotional ties
  - Self-representation
  - Individual design options
- OTT communication services enable new communication opportunities
  - 8% of MMA users never use them instead of SMS
  - 36% of Internet telephony never use it instead of landline / mobile calls

Who is going to win?

*OTT communication services
usage intensity*

=

f (age, household income, smartphone, Apple user, new mobile plan)
--   +   +++   +   +

Linear OLS regression, n=638; R²=.256; Adj. R²=.250; F=43.5. All independent variables are statistically significant (p<.010).

How to read this figure: The usage intensity of OTT communication services, i.e. the share of OTT communication services used, decreases with the respondent's age. It increases, however, with increasing household net income, e.g. if a smartphone is used, if an Apple device is used or if a new mobile plan with more high-speed data allowance has been purchased within the last two years.

Who is going to win?

OTT communication services usage intensity

=

$$f_{--}^{+}(\text{age, household income, smartphone, Apple user, new mobile plan})$$

--   +   +++   +   +

Linear OLS regression, n=638; R²=.256; Adj. R²=.250; F=43.5. All independent variables are statistically significant (p<.010).

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OTT streaming services usage intensity

=

$$f_{----}^{++}(\text{age, university, 4G, >16Mbit/s at home, new mobile plan, new Internet plan at home})$$

----   ++   +++   ++   ++   +

Linear OLS-Regression, n=829; R²=.253; Adj. R²=.247; F=46.305, All independent variables are statistically significant (p<.10)*

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Pictures:

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**watch out for our forthcoming study
on OTT streaming services...**

About this study:

The results presented here are part of WIK Discussion Paper No. 409. The full Discussion Paper can be purchased for 7.00 Euro from Ute Schwab (u.schwab@wik.org or +49 (0)2224 / 92 25 41). The Discussion Paper is only available in German.

The online survey for this study with a representative sample of 1,027 consumers in Germany (age 18+) was conducted between 30th November 2015 and 7th December 2015 by the international market research institute YouGov. The results were weighted to draw representative conclusions for the German population (age 18+). Additionally, 28 qualitative interviews were conducted in April and May 2016.

About WIK:

Founded in 1982, WIK (Wissenschaftliches Institut für Infrastruktur und Kommunikationsdienste) in Bad Honnef, Germany offers consultancy for public and private clients around the world. Its focus is on the telecommunication, Internet, post and energy sectors giving advice on policy, regulatory and strategic issues. More information is available at: www.wik.org

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