COMMUNICATION MARKETS MONITORING SYSTEM
no. 1/2021
The following figures are based on AGCOM's elaborations on firms' data and other sources (updated to December 2020). Due to changes in firms' accounting methods, some figures cannot be compared directly with those reported in previous issues. Percentages may not total 100 due to rounding.
1.1: FIXED LINES: TOTAL LINES

Distribution (%)

<table>
<thead>
<tr>
<th></th>
<th>Copper</th>
<th>FWA</th>
<th>FTTC</th>
<th>FTTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec.-2016</td>
<td>83.4</td>
<td>4.2</td>
<td>10.2</td>
<td>2.2</td>
</tr>
<tr>
<td>Dec.-2017</td>
<td>72.2</td>
<td>5.1</td>
<td>19.9</td>
<td>2.8</td>
</tr>
<tr>
<td>Dec.-2018</td>
<td>57.9</td>
<td>3.8</td>
<td>31.8</td>
<td>6.4</td>
</tr>
<tr>
<td>Dec.-2019</td>
<td>47.0</td>
<td>6.3</td>
<td>40.0</td>
<td>6.3</td>
</tr>
</tbody>
</table>

Last four quarters

<table>
<thead>
<tr>
<th></th>
<th>Copper</th>
<th>FWA</th>
<th>FTTC</th>
<th>FTTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mar.-2020</td>
<td>44.3</td>
<td>6.9</td>
<td>41.8</td>
<td>7.1</td>
</tr>
<tr>
<td>Jun.-2020</td>
<td>41.3</td>
<td>7.5</td>
<td>43.9</td>
<td>7.3</td>
</tr>
<tr>
<td>Sep.-2020</td>
<td>39.1</td>
<td>8.2</td>
<td>45.3</td>
<td>7.8</td>
</tr>
<tr>
<td>Dec.-2020</td>
<td>36.3</td>
<td>9.3</td>
<td>46.6</td>
<td>7.8</td>
</tr>
</tbody>
</table>

Total lines

<table>
<thead>
<tr>
<th></th>
<th>(no of lines)</th>
<th>(Δ %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarterly change (September 2020 – December 2020)</td>
<td>+144 K accesses</td>
<td>-0.7%</td>
</tr>
<tr>
<td>Annual change (December 2019 – December 2020)</td>
<td>-9 K accesses</td>
<td>-2.0%</td>
</tr>
<tr>
<td>4-Year change (December 2016 – December 2020)</td>
<td>-653 K accesses</td>
<td>-3.9%</td>
</tr>
</tbody>
</table>

Distribution (Δ 2019-2020) percentage points

- Copper: -10.7%
- FWA: +1.1%
- FTTC: +6.6%
- FTTH: +3.0%

TIM’s market share has dropped to 44.7%

The market shares of Vodafone, Wind Tre and Fastweb has increased

Other operators, as a whole, have increased their market share

Note: Due to changes in firms’ accounting methods and methodological refinements introduced by the Authority, the total number of fixed lines is not directly comparable with previous versions.
## 1.2: Fixed Lines: Broadband and Ultrabroadband Lines

### Market Shares (%)

**December 2020**

<table>
<thead>
<tr>
<th>Operator</th>
<th>Total Lines (Millions)</th>
<th>DSL Lines</th>
<th>Other Technologies</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>15.49</td>
<td>16.53</td>
<td>17.60</td>
</tr>
<tr>
<td>Vodafone</td>
<td>16.4</td>
<td>15.2</td>
<td>14.0</td>
</tr>
<tr>
<td>Wind Tre</td>
<td>42.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fastweb</td>
<td>3.8</td>
<td></td>
<td>3.0</td>
</tr>
<tr>
<td>Linkem</td>
<td>2.4</td>
<td>0.4</td>
<td>3.1</td>
</tr>
<tr>
<td>Eolo</td>
<td></td>
<td>0.1</td>
<td></td>
</tr>
<tr>
<td>Tiscali</td>
<td></td>
<td>0.2</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td>0.3</td>
<td></td>
</tr>
</tbody>
</table>

**Quarterly change (Sept. 2020 – Dec. 2020)**

- Total lines: +274 K lines (+0.3%)
- DSL lines: -1.563 M lines (-19.5%)
- Other technologies: +2.096 M lines (+18.3%)


- Total lines: +533 K lines (+2.1%)
- Other technologies: +0.2 K lines (+0.1%)
- TIM: -0.1 K lines (-1.1%)

**TIM’s market share has dropped to 42.1%**

**The market shares of Vodafone, Wind Tre and Fastweb have increased**

**Other operators, as a whole, have increased their market share**
### RESIDENTIAL CUSTOMERS

Total lines: **15.312** million lines

<table>
<thead>
<tr>
<th>Operator</th>
<th>Fixed Lines (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>42.1</td>
</tr>
<tr>
<td>Vodafone</td>
<td>16.4</td>
</tr>
<tr>
<td>Fastweb</td>
<td>14.7</td>
</tr>
<tr>
<td>Wind</td>
<td>14.5</td>
</tr>
<tr>
<td>Linkem</td>
<td>4.3</td>
</tr>
<tr>
<td>Eolo</td>
<td>3.1</td>
</tr>
<tr>
<td>Tiscali</td>
<td>2.6</td>
</tr>
<tr>
<td>Others</td>
<td>2.2</td>
</tr>
</tbody>
</table>

### BUSINESS CUSTOMERS

Total lines: **2.816** million lines

<table>
<thead>
<tr>
<th>Operator</th>
<th>Fixed Lines (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>42.3</td>
</tr>
<tr>
<td>Vodafone</td>
<td>17.6</td>
</tr>
<tr>
<td>Wind</td>
<td>16.6</td>
</tr>
<tr>
<td>Eolo</td>
<td>11.2</td>
</tr>
<tr>
<td>BT Italia</td>
<td>2.2</td>
</tr>
<tr>
<td>Tiscali</td>
<td>1.9</td>
</tr>
<tr>
<td>Others</td>
<td>1.3</td>
</tr>
</tbody>
</table>

#### Speed Classes

- **Up to 30 Mbps**: 30.9%
- **30 Mbps ≤ Mbps < 100 Mbps**: 52.6%
- **Over 100 Mbps**: 16.5%

- **Up to 30 Mbps**: 42.9%
- **30 Mbps ≤ Mbps < 100 Mbps**: 45.1%
- **Over 100 Mbps**: 12.0%
1.4: FIXED LINES: BROADBAND AND ULTRABROADBAND LINES BY TECHNOLOGY AND OPERATORS

DECEMBER 2020

**DSL**
- Total lines: 5.62 million accesses
  -21.8%

**FWA**
- Total lines: 1.54 million access
  +16.3%

**FTTC**
- Total lines: 9.13 million access
  +16.4%

**FTTH**
- Total lines: 1.82 million access
  +48.6%

Note: elaborations based on data provided by companies in the context of the preparation of European reporting. A few thousand lines allocated by the companies in the categories “Other non-NGA” and “Other NGA” are excluded from the analysis.
1.5: MOBILE LINES: TOTAL SUBSCRIBERS

<table>
<thead>
<tr>
<th>Millions of lines</th>
<th>Sim human*</th>
<th>Sim M2M*</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec.-2016</td>
<td>86.0</td>
<td>12.2</td>
<td>98.2</td>
</tr>
<tr>
<td>Dec.-2017</td>
<td>83.9</td>
<td>16.3</td>
<td>100.2</td>
</tr>
<tr>
<td>Dec.-2018</td>
<td>82.6</td>
<td>21.0</td>
<td>103.6</td>
</tr>
<tr>
<td>Dec.-2019</td>
<td>79.6</td>
<td>24.3</td>
<td>103.9</td>
</tr>
</tbody>
</table>

Last four quarters
| Mar.-2020         | 78.4       | 24.7     | 103.1 |
| Jun.-2020         | 78.1       | 25.5     | 103.6 |
| Sep.-2020         | 77.8       | 26.3     | 104.1 |
| Dec.-2020         | 77.6       | 26.3     | 103.9 |

(*) Note: Machine-to-Machine sims are based on the technologies that enable devices and sensors or “things” (within the IoT) to communicate with each other and with other Internet-enabled devices and systems.

Quarterly change (Sept. 2020 – Dec. 2020)
<table>
<thead>
<tr>
<th>(no of sim in thousand)</th>
<th>(Δ %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total sim cards:</td>
<td>-182</td>
</tr>
<tr>
<td>Sim human:</td>
<td>-216</td>
</tr>
<tr>
<td>Sim M2M:</td>
<td>+34</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>(no of sim in thousand)</th>
<th>(Δ %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total sim cards:</td>
<td>+75</td>
</tr>
<tr>
<td>Sim human:</td>
<td>-2,016</td>
</tr>
<tr>
<td>Sim M2M:</td>
<td>+2,091</td>
</tr>
</tbody>
</table>

Note: the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho).

MARKET SHARES (%)
DECEMBER 2020

<table>
<thead>
<tr>
<th>Sim total</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
</tr>
<tr>
<td>Vodafone</td>
</tr>
<tr>
<td>Wind</td>
</tr>
<tr>
<td>Iliad</td>
</tr>
<tr>
<td>Poste Mobile</td>
</tr>
<tr>
<td>Other MVNOs</td>
</tr>
</tbody>
</table>

Differences vs. December 2019 (percentage points)
| TIM        | -0.7 |
| Vodafone   | +0.2 |
| Wind       | -1.8 |
| Iliad      | +1.9 |
| Poste Mobile | +0.2 |
| Other MVNOs | +0.3 |

Sim human*

<table>
<thead>
<tr>
<th>Wind</th>
<th>TIM</th>
<th>Vodafone</th>
<th>Iliad</th>
<th>Poste Mobile</th>
<th>Other MVNOs</th>
</tr>
</thead>
<tbody>
<tr>
<td>-2.2</td>
<td>-0.6</td>
<td>-0.8</td>
<td>+2.7</td>
<td>+0.3</td>
<td>+0.6</td>
</tr>
</tbody>
</table>

(*) Note: sim human refers to sim (voice and data or only voice or data) used by individual, excluding M2M sim cards.
MARKET SHARES (%)
DECEMBER 2020

Residential

<table>
<thead>
<tr>
<th>MVNO</th>
<th>No of Sims (in thousands)</th>
<th>Δ %</th>
<th>No of Sims (in thousands)</th>
<th>Δ %</th>
</tr>
</thead>
<tbody>
<tr>
<td>WindTre</td>
<td>28.6</td>
<td>-2.4</td>
<td>TIM</td>
<td>+0.6</td>
</tr>
<tr>
<td>Vodafone</td>
<td>25.0</td>
<td>-0.9</td>
<td>Vodafone</td>
<td>+3.1</td>
</tr>
<tr>
<td>Iliad</td>
<td>22.3</td>
<td>-1.0</td>
<td>Poste Mobile</td>
<td>+0.4</td>
</tr>
<tr>
<td>Poste Mobile</td>
<td>10.7</td>
<td>+0.7</td>
<td>Other MVNOs</td>
<td>+2.5</td>
</tr>
<tr>
<td>Other MVNOs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Business

<table>
<thead>
<tr>
<th>MVNO</th>
<th>No of Sims (in thousands)</th>
<th>Δ %</th>
<th>No of Sims (in thousands)</th>
<th>Δ %</th>
</tr>
</thead>
<tbody>
<tr>
<td>TIM</td>
<td>37.9</td>
<td>+1.2</td>
<td>Vodafone</td>
<td>+0.6</td>
</tr>
<tr>
<td>Vodafone</td>
<td>35.1</td>
<td>-0.4</td>
<td>WindTre</td>
<td>-0.4</td>
</tr>
<tr>
<td>WindTre</td>
<td>21.7</td>
<td></td>
<td>Poste Mobile</td>
<td>-0.2</td>
</tr>
<tr>
<td>Poste Mobile</td>
<td></td>
<td></td>
<td>Other MVNOs</td>
<td></td>
</tr>
<tr>
<td>Other MVNOs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


- Total human sim cards:
  - No of sim in thousand: -2,016
  - Δ %: -2.5%
  - No of sim in thousand: -8,375
  - Δ %: -9.7%

- Residential sim card:
  - No of sim in thousand: -2,389
  - Δ %: -3.4%
  - No of sim in thousand: -8,416
  - Δ %: -11.0%

- Business sim cards:
  - No of sim in thousand: +373
  - Δ %: +4.0%
  - No of sim in thousand: +41
  - Δ %: +0.4%

Differences vs. December 2019 (percentage points)
1.7: MOBILE LINES: SUBSCRIBERS BY TYPE OF CONTRACT

### Annual change (Dec. 2019 – Dec. 2020)
- **Total human sim cards:** -2,016 (-2.5%)
- **Prepaid sim cards:** -1,205 (-1.7%)
- **Postpaid sim cards:** -811 (-7.7%)

### 4-Year change (Dec. 2016 – Dec. 2020)
- **Total human sim cards:** -8,375 (-9.7%)
- **Prepaid sim cards:** -5,516 (-7.5%)
- **Postpaid sim cards:** -2,858 (-22.8%)

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### MARKET SHARES (%)
**DECEMBER 2020**

#### Distribution (%)
- **Total:** 86.0
  - **Prepaid:** 85.4
  - **Postpaid:** 86.1

#### Total (millions of sims)
- **Dec. 2016:** 14.6
- **Dec. 2017:** 14.4
- **Dec. 2018:** 13.9
- **Dec. 2019:** 13.2
- **Dec. 2020:** 12.5

#### Differences vs. December 2019 (percentage points)
- **Prepaid:** -1.9
- **Postpaid:** -1.4

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#### Prepaid
- **Total:** 27.5
  - **TIM:** 24.9
  - **Vodafone:** 23.1
  - **Iliad:** 10.7
  - **Poste Mobile:** 6.4
  - **Other MVNOs:** 7.5

#### Postpaid
- **Total:** 38.9
  - **TIM:** 29.4
  - **Vodafone:** 29.2
  - **Wind:** -0.2
  - **Tre:** 2.5

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### 1.8: MOBILE LINES: DATA TRAFFIC

#### DATA TRAFFIC SINCE THE BEGINNING OF THE YEAR

<table>
<thead>
<tr>
<th>Millions of sims</th>
<th>Data traffic (petabyte)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec.-2016</td>
<td>1,078</td>
</tr>
<tr>
<td>Dec.-2017</td>
<td>1,655</td>
</tr>
<tr>
<td>Dec.-2018</td>
<td>2,705</td>
</tr>
<tr>
<td>Dec.-2019</td>
<td>4,251</td>
</tr>
<tr>
<td>Dec.-2020</td>
<td>6,440</td>
</tr>
</tbody>
</table>

#### SIM cards with data traffic

- **Sim cards with data traffic:**
  - Dec.-2016: 50.6
  - Dec.-2017: 52.3
  - Dec.-2018: 55.1
  - Dec.-2019: 56.8
  - Dec.-2020: 56.3

#### Data traffic

- **Data traffic:**
  - Dec.-2016: 4,301
  - Dec.-2017: 5,000
  - Dec.-2018: 6,440
  - Dec.-2019: 7,500
  - Dec.-2020: 8,500


- **SIM cards with data traffic:**
  - -433 (−0.8%)

- **Data traffic:**
  - +2,188 (+51.5%)  

#### 4-Year change (Dec. 2016 – Dec. 2020)

- **SIM cards with data traffic:**
  - +5,714 (+11.3%)

- **Data traffic:**
  - +5,362 (+497.5%)  

### AVERAGE MONTHLY CONSUMPTION

<table>
<thead>
<tr>
<th>Giga / month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec.-2016</td>
</tr>
<tr>
<td>Dec.-2017</td>
</tr>
<tr>
<td>Dec.-2018</td>
</tr>
<tr>
<td>Dec.-2019</td>
</tr>
<tr>
<td>Dec.-2020</td>
</tr>
</tbody>
</table>


- **Dec. 2016:** 420.5%

#### 4-Year change (Dec. 2016 – Dec. 2020)

- **Dec. 2019:** +47.0%

#### At the end of December 2020, the number of sim cards with data traffic has reached **72.6%** of the total human sim cards.

**Note:** Due to changes in firms’ accounting methods and methodological refinements introduced by the Authority, the total number of sim cards with data traffic is not directly comparable with previous versions.
1.9: Mobile lines: number portability

In one year (December 2019 – December 2020), there have been 11.6 million of Mobile Number Portability (MNP) operations

**Mobility index** (%)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec. 2016</td>
<td>29.2</td>
<td>35.9</td>
<td>40.8</td>
<td>30.6</td>
<td>29.4</td>
</tr>
<tr>
<td>Totale lines</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(cumulative value of number portability operations)</td>
<td>101.8</td>
<td>117.0</td>
<td>134.0</td>
<td>146.4</td>
<td>158.0</td>
</tr>
</tbody>
</table>

**Mobility index**: the ratio between (i) total donating lines plus total recipient lines since the beginning of the year, and (ii) the corresponding average costumer base (net off M2M sims)

**DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months)**

**DECEMBER 2020**

<table>
<thead>
<tr>
<th></th>
<th>Donor lines</th>
<th>Recipient lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wind Tre</td>
<td>25.5</td>
<td>27.8</td>
</tr>
<tr>
<td>TIM*</td>
<td>14.0</td>
<td>23.3</td>
</tr>
<tr>
<td>Vodafone*</td>
<td>20.4</td>
<td>20.1</td>
</tr>
<tr>
<td>Iliad</td>
<td>18.0</td>
<td>21.4</td>
</tr>
<tr>
<td>MVNO</td>
<td>10.7</td>
<td>23.3</td>
</tr>
</tbody>
</table>

(*) Note: the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho)
2.1: MEDIA: TV

AUDIENCE OF THE MAIN EVENING NEWSCASTS (%)
AVERAGE DAY (December 2016 – December 2020)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tg 1</td>
<td>6.0</td>
<td>3.9</td>
<td>5.6</td>
<td>19.1</td>
<td>18.2</td>
<td>12.8</td>
<td>11.3</td>
<td>8.0</td>
</tr>
<tr>
<td>Tg 2</td>
<td>19.1</td>
<td>18.2</td>
<td>12.8</td>
<td>10.9</td>
<td>12.3</td>
<td>12.9</td>
<td>12.9</td>
<td>11.3</td>
</tr>
<tr>
<td>Tg 3</td>
<td>35.4</td>
<td>32.2</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
</tr>
<tr>
<td>Studio Aperto</td>
<td>35.4</td>
<td>32.2</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
<td>34.7</td>
</tr>
<tr>
<td>TG La7</td>
<td>5.0</td>
<td>5.2</td>
<td>5.4</td>
<td>4.9</td>
<td>4.9</td>
<td>4.9</td>
<td>4.9</td>
<td>4.9</td>
</tr>
<tr>
<td>TG 5</td>
<td>5.2</td>
<td>5.4</td>
<td>5.6</td>
<td>5.2</td>
<td>5.2</td>
<td>5.2</td>
<td>5.2</td>
<td>5.2</td>
</tr>
<tr>
<td>TG 4</td>
<td>3.6</td>
<td>3.6</td>
<td>3.6</td>
<td>3.6</td>
<td>3.6</td>
<td>3.6</td>
<td>3.6</td>
<td>3.6</td>
</tr>
</tbody>
</table>

MARKET SHARES (%)
DECEMBER 2020

- Rai: 4.2 M viewers
- Mediaset: 3.9 M viewers
- Discovery: 7.0
- Comcast / Sky: 6.4
- Cairo Communication / La7: 15.5
- Others: +1.8

Δ percentage points (December 2019 – December 2020)

- Tg 1: +2.0 p.p.
- Tg 2: +0.7 p.p.
- Tg 3: +1.6 p.p.
- Tg 3 - Regionale: +2.0 p.p.
- Tg 5: +12.0 p.p.
- Studio Aperto: -0.3 p.p.
- Tg 4: -0.6 p.p.
- Tg La7: +0.3 p.p.

Source: Agcom elaboration on Auditel’s data (Nielsen)
2.2: MEDIA: QUOTIDIANI

NEWSPAPERS’ TOTAL MONTHLY SALES BY EDITORIAL GROUPS (%)*
DECEMBER 2020

Differences vs. December 2019
(percentage points)

-1.1  -0.1  -0.1  -0.4  -0.6

6.1 Gruppo Anmodi
8.4 Gruppo 24 Ore
4.8 Caltagione Editore
8.7 Cairo/RCS MediaGroup
25.4 GEDI Gruppo Editoriale

Total copies sold in December 2019
51,147,917

Annual change:
(December 2019 – December 2020)
- 14%

(*) Note: During the last quarter of 2020, GEDI completed the sale of the business unit of the magazines Il Tirreno, La Gazzetta di Modena, La Gazzetta di Reggio, La Nuova Ferrara to the company SAE Srl. The data shown refer to the ownership configuration of the subjects prior to this operation.

Source: Agcom elaboration on data from ADS and IES
2.3: MEDIA INTERNET: ACTIVE USERS OF THE MAIN OPERATORS

AUDIENCE ON AN AVERAGE DAY (%) (DECEMBER 2017 – DECEMBER 2020)
IN MILLIONS

AVERAGE MONTHLY TIME SPENT ON WEBSITE BY VISITORS (DECEMBER 2017 – DECEMBER 2020)
(hh:mm:ss)

In December 2020, 45 million unique users connected to the internet

In December 2020, a total amount of 66 hours of surfing, on average, per person per month

Note: Since March 2018, the Audiweb system has adopted a new methodology

Source: Agcom elaboration on Audweb’s data (Nielsen)
### 2.4: MEDIA INTERNET: ACTIVE USERS OF THE MAIN SOCIAL NETWORKS

#### MAIN SOCIAL NETWORKS USERS

DECEMBER 2017 – DECEMBER 2020

IN MILLIONS

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Facebook</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>38.2</td>
</tr>
<tr>
<td>Instagram</td>
<td></td>
<td></td>
<td></td>
<td>18.8</td>
<td></td>
<td>14.3</td>
<td>19.2</td>
<td>20.0</td>
</tr>
<tr>
<td>Pinterest</td>
<td>11.6</td>
<td>7.0</td>
<td>4.7</td>
<td>3.6</td>
<td>3.5</td>
<td>8.5</td>
<td>11.8</td>
<td>19.2</td>
</tr>
<tr>
<td>Linkedin</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>20.0</td>
</tr>
<tr>
<td>Twitter</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11.8</td>
</tr>
<tr>
<td>TikTok</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>8.5</td>
</tr>
<tr>
<td>Reddit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>3.6</td>
</tr>
</tbody>
</table>

**Quarterly change** (Sept. 2020 – Dec. 2020)

- **Facebook**: +5.9%
- **Instagram**: +8.6%
- **Pinterest**: +21.9%
- **Linkedin**: -0.4%
- **Twitter**: +19.6%
- **TikTok**: +30.0%
- **Reddit**: +26.7%


- **Facebook**: +6.9%
- **Instagram**: +9.5%
- **Pinterest**: +39.8%
- **Linkedin**: +2.0%
- **Twitter**: +15.4%
- **TikTok**: +133%
- **Reddit**: +3.0%

**Source**: Agcom elaboration on Audweb’s data (Nielsen)
3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR
MILLIONS OF €

- **Mail services**
  - Domestic multiple items
    - No US: 1,491 (US + No US: 2,729)
    - US: 1,067 (964 + 759)
  - Domestic single items
    - No US: 1,427 (US + No US: 2,729)
    - US: 1,452
  - Crossborderer (In + Out)
    - No US: 3,606
    - US: 6,611 (Total: 6,884)

- **Parcel delivery services**
  - Domestic multiple items
    - No US: 1,491
    - US: 1,067
  - Domestic single items
    - No US: 1,427
    - US: 1,452
  - Crossborderer (In + Out)
    - No US: 3,606
    - US: 6,611 (Total: 6,884)

- **Other**
  - No US: 736
  - US: 759

- Mail services: -25.6%
- Parcel delivery services: +21.7%
- Total: +4.1%
- Domestic multiple items: -22.2%
- Domestic single items: -25.9%
- Crossborderer services: -24.9%
- Other: -34.5%
- Domestic: +32.1%
- Crossborder: +1.8%
### 3.2: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

#### ON A YEARLY BASIS (12 months cumulative sum)

**MILLIONS OF €**

<table>
<thead>
<tr>
<th>Year</th>
<th>Total</th>
<th>Mail services</th>
<th>Parcel delivery services</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>5,978</td>
<td>-30.6%</td>
<td>+86.0%</td>
</tr>
<tr>
<td>2017</td>
<td>6,125</td>
<td>-33.4%</td>
<td>+131.5%</td>
</tr>
<tr>
<td>2018</td>
<td>6,426</td>
<td>-18.3%</td>
<td>+55.8%</td>
</tr>
<tr>
<td>2019</td>
<td>6,611</td>
<td>+19.3%</td>
<td>+13.0%</td>
</tr>
<tr>
<td>2020</td>
<td>6,884</td>
<td>+34.5%</td>
<td>+41.8%</td>
</tr>
</tbody>
</table>

#### ON A QUARTERLY BASIS

**MILLIONS OF €**

<table>
<thead>
<tr>
<th>Quarter</th>
<th>Total</th>
<th>Mail services</th>
<th>Parcel delivery services</th>
</tr>
</thead>
<tbody>
<tr>
<td>4Q 2016</td>
<td>1,640</td>
<td>-30.6%</td>
<td>+86.0%</td>
</tr>
<tr>
<td>4Q 2017</td>
<td>1,689</td>
<td>-36.5%</td>
<td>+131.5%</td>
</tr>
<tr>
<td>4Q 2018</td>
<td>1,773</td>
<td>-18.9%</td>
<td>+55.8%</td>
</tr>
<tr>
<td>4Q 2019</td>
<td>1,816</td>
<td>-19.3%</td>
<td>+13.0%</td>
</tr>
<tr>
<td>4Q 2020</td>
<td>2,206</td>
<td>+21.5%</td>
<td>+41.8%</td>
</tr>
</tbody>
</table>

**Change (2016 – 2020)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>+15.2%</td>
</tr>
<tr>
<td>Mail services:</td>
<td></td>
</tr>
<tr>
<td>- Universal Service:</td>
<td>-33.4%</td>
</tr>
<tr>
<td>- No Universal Service:</td>
<td>-16.2%</td>
</tr>
<tr>
<td>Parcel delivery services:</td>
<td></td>
</tr>
<tr>
<td>- Domestic:</td>
<td>+56.3%</td>
</tr>
<tr>
<td>- Crossborder:</td>
<td>+9.4%</td>
</tr>
</tbody>
</table>

**Change (2019 – 2020)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>+4.1%</td>
</tr>
<tr>
<td>Mail services:</td>
<td></td>
</tr>
<tr>
<td>- Universal Service:</td>
<td>-25.6%</td>
</tr>
<tr>
<td>- No Universal Service:</td>
<td>-21.3%</td>
</tr>
<tr>
<td>Parcel delivery services:</td>
<td></td>
</tr>
<tr>
<td>- Domestic:</td>
<td>+21.7%</td>
</tr>
<tr>
<td>- Crossborder:</td>
<td>+1.8%</td>
</tr>
</tbody>
</table>
3.3: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR
MILLIONS OF UNITS

- **US** (Universal Service)
  - at the end of 2019: 1,042
  - at the end of 2020: 817

- **NO SU** (Non rientranti nel Servizio Universale)
  - at the end of 2019: 1,997
  - at the end of 2020: 1,620

**Mail services**
- Domestic multiple items
  - no US: 510
  - US: 718
- Domestic single items
  - no US: 87
  - US: 100

**Parcel delivery services**
- Domestic
  - no US: 1,042
  - US: 1,997
- Crossborder
  - no US: 817
  - US: 1,620

**Total**
- 3,636
- 3,254

**VOLUMES BY SOURCE TYPE (%)**
DECEMBER 2020

- **Mail services**
  - Domestic multiple items
    - no US: 26.1%
    - US: 60.4%
  - Domestic single items
    - no US: 0.3%
    - US: 2.2%
  - Crossborder services
    - no US: 3.9%
  - Other
    - 7.1%

- **Parcel delivery services**
  - Domestic
    - no US: 0.4%
    - US: 87.4%
  - Crossborder
    - no US: 12.2%
    - US: 0.1%

- **Total**: -17.6%
- **Domestic multiple items**: -17.6%
- **Domestic single items**: -30.7%
- **Crossborder services**: -32.9%
- **Other**: -30.9%
- **Domestic**
  - +40.6%
- **Crossborder**: +14.7%
3.4: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

ON A YEARLY BASIS (12 months cumulative sum)
MILLIONS OF UNITS

ON A QUARTERLY BASIS
MILLIONS OF UNITS

Change (2016 – 2020)
Change (2019 – 2020)

Total:
-20.3% ↓
-10.5% ↓

Mail services:
- Universal Service:
-50.3% ↓
-21.9% ↓

- No Universal Service:
-50.3% ↓
-21.9% ↓

Parcel delivery services:
+132.2% ↑
+36.9% ↑

- Domestic:
+140.7% ↑
+40.6% ↑

- Crossborder:
+46.8% ↑
+14.7% ↑

Change (4Q 2016 – 4Q 2020)
Change (4Q 2019 – 4Q 2020)

Total:
-17.2% ↓
-0.7% ↓

Mail services:
- Universal Service:
-49.2% ↓
-11.0% ↓

- No Universal Service:
-25.3% ↓
-16.2% ↓

Parcel delivery services:
+160.7% ↑
+56.7% ↑

- Domestic:
+182.9% ↑
+61.2% ↑

- Crossborder:
+60.5% ↑
+28.4% ↑

(2019 – 2020)
3.5: POSTAL SERVICES: COMPETITIVE LANDSCAPE

DECEMBER 2020

MAIL AND PARCEL DELIVERY SERVICES

MAIL SERVICES
not included in Universal service

PARCEL DELIVERY SERVICES COURIERS
not included in Universal service

Differences vs. December 2019
(percentage points)
### 3.6: POSTAL SERVICES: PER-UNIT REVENUES HISTORICAL TRENDS IN €

#### MAIL SERVICES

<table>
<thead>
<tr>
<th>Year</th>
<th>Mail US (Average unit revenue)</th>
<th>Mail no US (Average unit revenue)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>0.74</td>
<td>0.44</td>
</tr>
<tr>
<td>2017</td>
<td>0.76</td>
<td>0.45</td>
</tr>
<tr>
<td>2018</td>
<td>0.77</td>
<td>0.46</td>
</tr>
<tr>
<td>2019</td>
<td>0.81</td>
<td>0.48</td>
</tr>
<tr>
<td>2020</td>
<td>1.31</td>
<td>0.47</td>
</tr>
</tbody>
</table>

#### PARCELS DELIVERY SERVICES

<table>
<thead>
<tr>
<th>Year</th>
<th>Crossborder parcels (Average unit revenue)</th>
<th>Domestic parcels (Average unit revenue)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>8.84</td>
<td>6.41</td>
</tr>
<tr>
<td>2017</td>
<td>7.63</td>
<td>5.68</td>
</tr>
<tr>
<td>2018</td>
<td>7.42</td>
<td>5.58</td>
</tr>
<tr>
<td>2019</td>
<td>6.96</td>
<td>5.35</td>
</tr>
<tr>
<td>2020</td>
<td>14.53</td>
<td>6.19</td>
</tr>
</tbody>
</table>

#### Change (2016 – 2020) and Change (2019 – 2020)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Average unit revenue:</td>
<td>+1.7%</td>
<td>-7.3%</td>
</tr>
<tr>
<td>- Mail US:</td>
<td>+17.0%</td>
<td>-8.8%</td>
</tr>
<tr>
<td>- Mail no US:</td>
<td>+7.3%</td>
<td>-3.0%</td>
</tr>
<tr>
<td>Crossborder parcels:</td>
<td>-30.0%</td>
<td>-11.1%</td>
</tr>
<tr>
<td>- US:</td>
<td>-25.4%</td>
<td>-11.2%</td>
</tr>
<tr>
<td>- No US:</td>
<td>-25.3%</td>
<td>+0.0%</td>
</tr>
<tr>
<td>Domestic parcels:</td>
<td>-21.6%</td>
<td>-6.0%</td>
</tr>
<tr>
<td>- US:</td>
<td>-21.7%</td>
<td>-6.5%</td>
</tr>
<tr>
<td>- No US:</td>
<td>-16.3%</td>
<td>-6.0%</td>
</tr>
</tbody>
</table>
4.1 PRICE: HARMONISED CONSUMER PRICE INDEX AND OTHER UTILITIES PRICE INDICES (2010=100)

GENERAL PRICE INDEX

REGULATED SERVICES - LOCAL:
- 2016: 80.0
- 2017: 107.6
- 2018: 110.4
- 2019: 133.7
- 2020: 133.7

REGULATED SERVICES - NATIONAL:
- 2016: 80.0
- 2017: 107.6
- 2018: 110.4
- 2019: 133.7
- 2020: 133.7

Source: Agcom elaboration on data from Istat

Utilities Price Index

**Note:** The ISA (Indice Sintetico Agcom) price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (for a total of 10 items).

 Isa (Agcom summary price index):
- 4-year change: -13.2% 
- Annual change: -4.1%

General price index:
- 4-year change: +2.3%
- Annual change: -0.1%

Regulated services - local:
- 4-year change: +7.7%
- Annual change: +1.0%

Regulated services - national:
- 4-year change: +0.7%
- Annual change: +0.1%

4-year change: Annual change
Water (04.4.1): +12.4% +2.3%
Waste (04.4.2): +1.9% +0.4%
Power (04.5.1): +9.9% -3.5%
Gas (04.5.2): -4.0% -7.9%

Train (07.3.1): +27.9% +10.1%
Urban transport (07.3.2.1): +5.1% +1.6%
Communications (08): -17.5% -5.2%

*COICOP - Classification of Individual Consumption by Purpose*
4.2 PRICE: MOBILE AND FIXED TELEPHONY PRICE INDICES (2010=100)

**FIXED TELEPHONY PRICE INDICES**

- **Access / basic services**
  - Year change: +13.5% ↑
  - Annual change: +1.9% ↑

- **General price index**
  - Year change: +10.4% ↑
  - Annual change: +1.9% ↑

- **Devices**
  - Year change: +3.8% ↑
  - Annual change: +1.4% ↑

- **Broadband / internet**
  - Year change: -19.3% ↓
  - Annual change: +1.8% ↑

**MOBILE TELEPHONY PRICE INDICES**

- **General price index**
  - Year change: +110.4% ↑
  - Annual change: +1.8% ↑

- **Services**
  - Year change: -13.2% ↓
  - Annual change: -2.6% ↓

- **Devices**
  - Year change: -45.6% ↓
  - Annual change: -18.9% ↓

Source: Agcom elaboration on data from Istat

(COICOP - Classification of Individual Consumption by Purpose)
4.3 PRICE: DAILY NEWSPAPERS, MAGAZINES, TV AND POSTAL SERVICES PRICE INDICES (2010=100)

**NEWSPAPERS, MAGAZINES, TV PRICE INDICES**

<table>
<thead>
<tr>
<th>Year</th>
<th>Newspapers</th>
<th>Pay TV</th>
<th>Magazines</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>106.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>110.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>126.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>140.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**POSTAL SERVICES PRICE INDEX**

<table>
<thead>
<tr>
<th>Year</th>
<th>Letters handling services</th>
<th>Postal services</th>
<th>Other postal services</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>106.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>110.4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>126.0</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>139.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2020</td>
<td>164.6</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**4-Year change**

- Newspapers (09.5.2.1.0): +7.0% ↑
- Pay TV (09.4.2.3.0.02): +6.3% ↑
- Magazines (09.5.2.2.0): +0.5% ↑

**Annual change**

- Newspapers (09.5.2.1.0): +0.4% ↑
- Pay TV (09.4.2.3.0.02): -0.9% ↓
- Magazines (09.5.2.2.0): +0.4% ↑

**4-Year change**

- Postal services (08.1): +11.0% ↑
- Letters handling services (08.1.0.1.0.00): +18.7% ↑
- Other postal services (08.1.0.9.0.00): +3.6% ↑

**Annual change**

- Postal services (08.1): +0.2% ↑
- Letters handling services (08.1.0.1.0.00): =
- Other postal services (08.1.0.9.0.00): +0.5% ↑

*(COICOP codes - Classification of Individual Consumption by Purpose)*

Source: Agcom elaboration on data from Istat
4.4 PRICE: INTERNATIONAL BENCHMARK

TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)

1-Year change %

5-Year change %
Dec. 2015 - Dec. 2020

10-Year change %
Dec. 2010 - Dec. 2020

Source: Agcom elaboration on data from Eurostat

NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)

POSTAL SERVICES
(COICOP 08.1)