

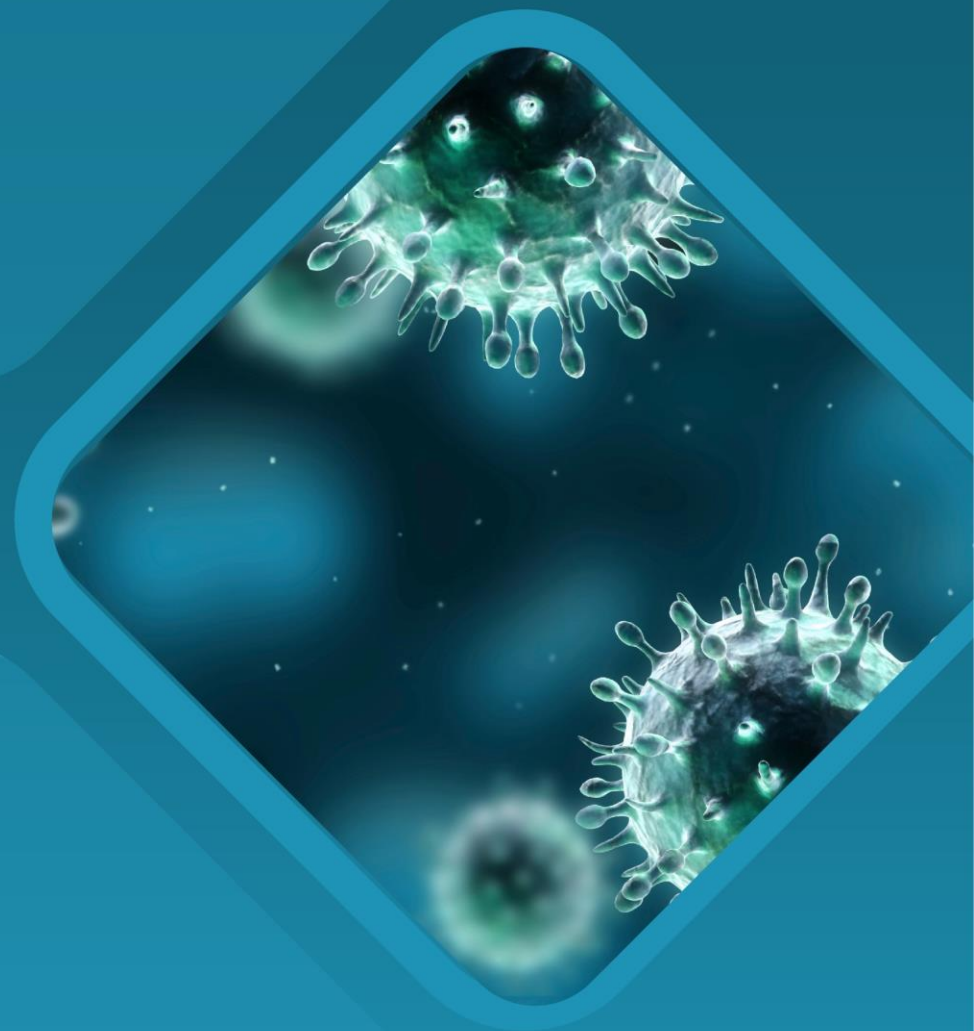


AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

COVID-19 monitoring

no. 2/2021



01 INTRODUCTION

1.1

COVID-19 monitoring:

AGCOM's role during Covid-19 emergency

02 ELECTRONIC COMMUNICATIONS

2.1

Fixed network:

average daily data traffic (download + upload)

2.2

Mobile network:

average daily data traffic (download + upload)

2.3

Fixed and mobile network:

monthly data traffic in download and upload

2.4

Fixed network:

average daily data traffic per broadband line

2.5

Mobile network:

average daily data traffic per "human" sim

03 MEDIA

3.1

TV:

overall audience of the evening editions of national news programmes

3.2

TV:

Overall audience for the evening editions of regional news programmes

3.3

Newspapers:

copies sold

3.4

Internet:

unique users of video on demand websites/apps

3.5

Internet:

unique users of generalist news sites/apps

3.6

Internet:

unique users of local information websites/apps

3.7

Internet:

unique users of e-commerce websites/apps

04 POSTAL SERVICES

4.1

Mail:

Universal Services (US) volumes (millions of items)

4.2

Mail:

other services (No US) volumes (millions of items)

4.3

Parcels:

domestic delivery services (millions of items)

4.4

Parcels:

crossborder delivery services (millions of items)

The following figures are based on AGCOM's elaborations on firms' data. The data are updated until March 2021 where possible. The results are not directly comparable with those reported in other documents produced by the Authority. Percentages may not total 100 due to rounding.

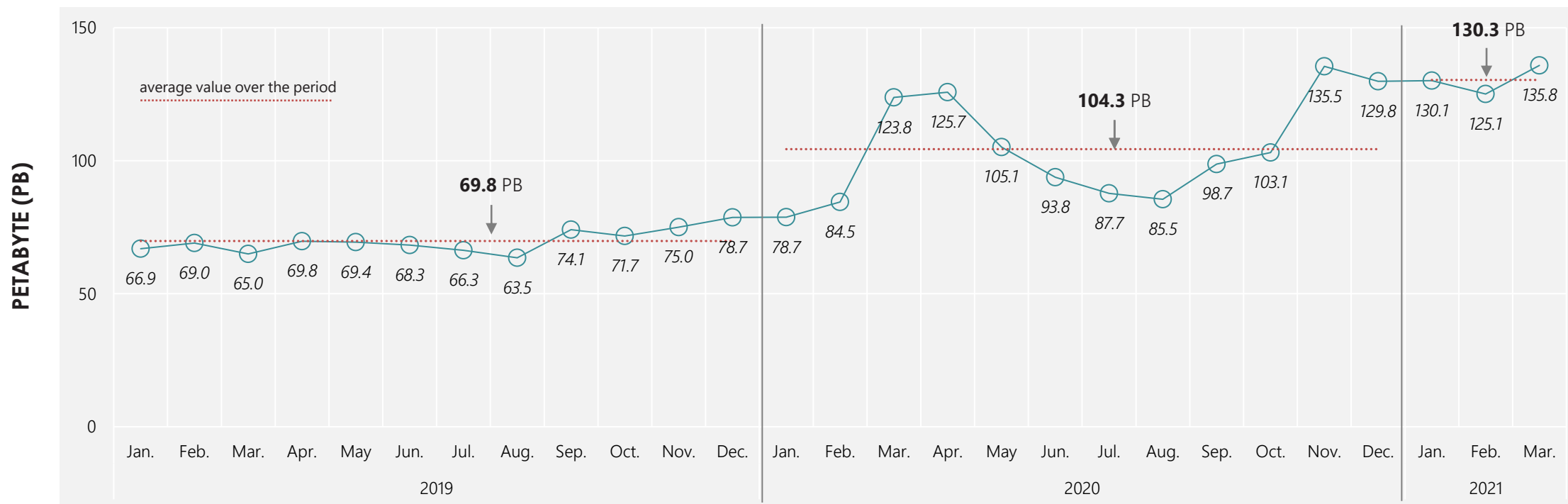
1.1: COVID-19 MONITORING: AGCOM'S ROLE DURING COVID-19 EMERGENCY

- ① The so-called "**Cura Italia**" decree reaffirmed AGCOM's role as the competent authority for any modifications, integrations or derogations to the ordinary regulations which are required necessary to deal with the health emergency, ensuring competition in the infrastructure and services markets and, at the same time, the protection of users.
- ② To this end, **permanent consultation panels** with sector operators and stakeholders have been set up in order to identify suitable proposals to resolve the main critical issues related to the COVID-19 emergency.
- ③ The **data and information** illustrated in the figures below represent the result of **a specific monitoring activity** conducted by the Authority, which has the **general objective** of providing an information base that can contribute to a better understanding of trends and any critical issues that may emerge from the current pandemic crisis.
- ④ The **information presented** in the figures below is the result of a specific **monitoring activity carried out by the Authority**, achieved also thanks to the effective collaboration with operators, with the aim of providing an information base that can contribute to a better understanding of the trends in progress in such a complex period.

Permanent consultation panels	Specific monitoring objectives	Indicators
Telco and consumers panel https://www.agcom.it/tavolo-telecomunicazioni-e-consumatori	Track the economic and financial sustainability of the sector Track the pressure on network infrastructures	Revenues Data traffic
Media service panel https://www.agcom.it/tavolo-servizi-media	Track the economic and financial sustainability of the sector Supervise the quality of information	Revenues Osservatorio sulla disinformazione online
Digital platforms and big data panel https://www.agcom.it/tavolo-piattaforme-digitali-e-big-data	Supervise the online disinformation	Osservatorio sulla disinformazione online - Speciale Coronavirus AGCOM Data Science Task Force
Postal services panel https://www.agcom.it/tavolo-servizi-postali	Track the economic and financial sustainability of the sector Monitor the use of postal services	Revenues Mail and parcel delivery volumes

2.1: FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

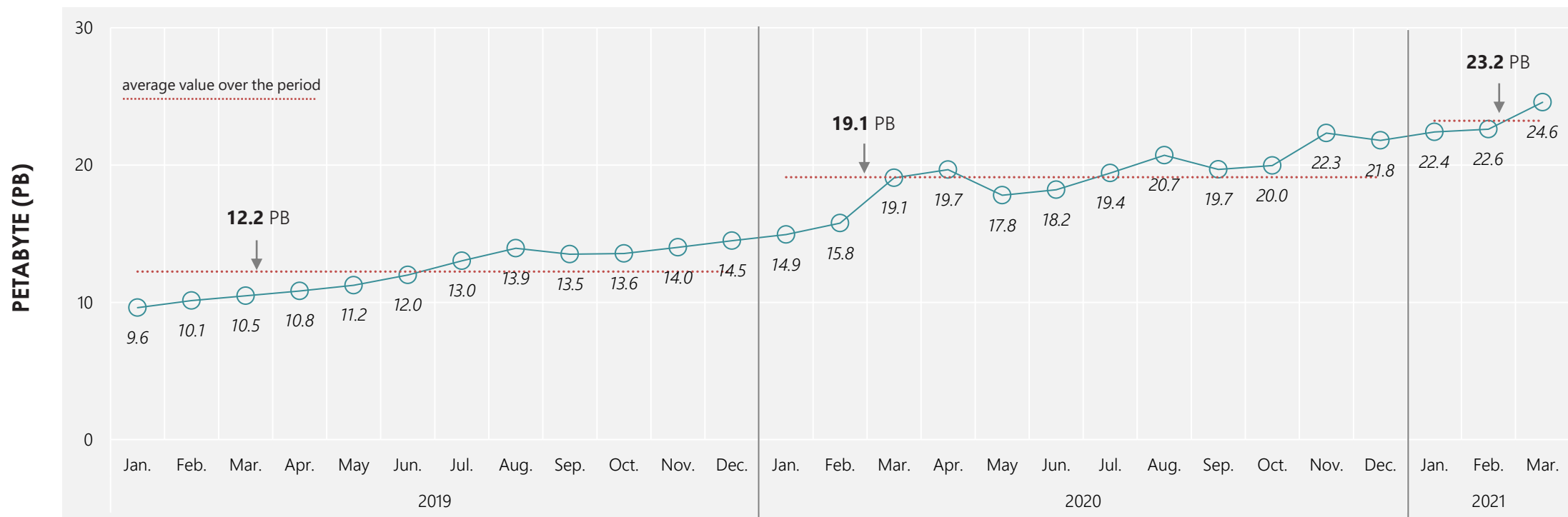
Data updated to **March 2021**



1	Average values 1Q comparison Petabyte (PB)	1Q - 2019	→	1Q - 2020	→	1Q - 2021
		66.9 PB	↑ +43.3%	95.9 PB	↑ +36.1%	130.5 PB
2	Monthly comparison Petabyte (PB)	2019	→	2020	→	2021
		January: 66.9 PB	↑ +17.7%	78.7 PB	↑ +65.2%	130.1 PB
		February: 69.0 PB	↑ +22.4%	84.5 PB	↑ +48.1%	125.1 PB
		March: 65.0 PB	↑ +90.4%	123.8 PB	↑ +9.7%	135.8 PB

2.2: MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

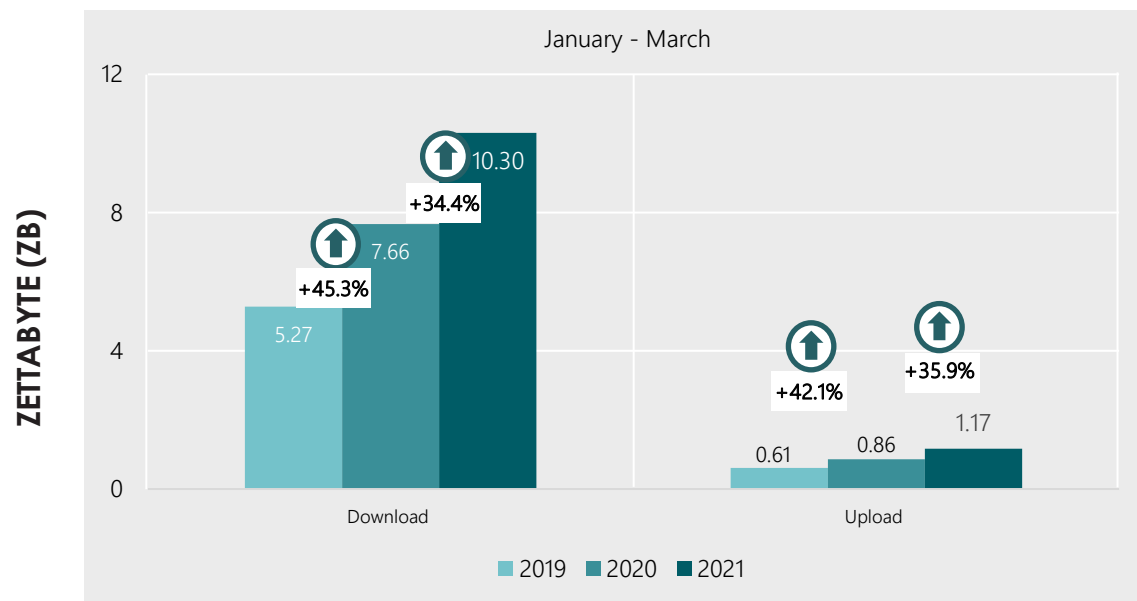
Data updated to **March 2021**



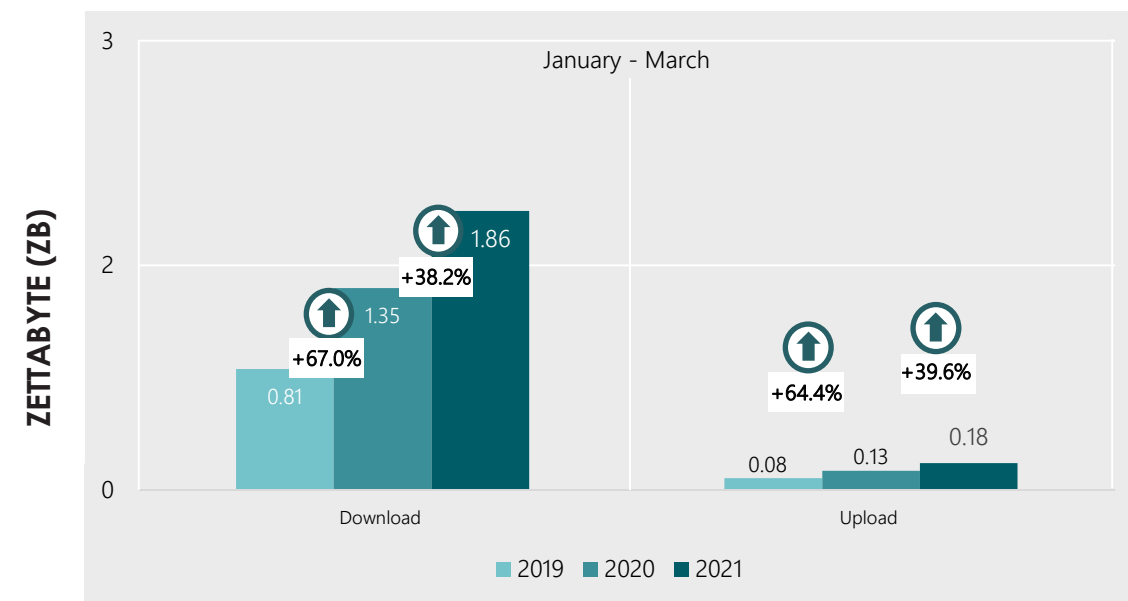
	1Q - 2019		1Q - 2020		1Q - 2021
1 Average values 1Q comparison Petabyte (PB)	10.1 PB	↑ +64.9%	16.6 PB	↑ +39.8%	23.2 PB
2 Monthly comparison Petabyte (PB)	2019		2020		2021
January:	9.6 PB	↑ +55.3%	14.9 PB	↑ +50.1%	22.4 PB
February:	10.1 PB	↑ +55.8%	15.8 PB	↑ +43.5%	22.6 PB
March:	10.5 PB	↑ +81.9%	19.1 PB	↑ +28.8%	24.6 PB

2.3: FIXED AND MOBILE NETWORK: MONTHLY DATA TRAFFIC IN DOWNLOAD AND UPLOAD

FIXED NETWORK



MOBILE NETWORK



1 Download data traffic in zettabyte (ZB)

Monthly values	2019	→	2020	→	2021
January:	1.81	↑ +18.5%	2.15	↑ +65.4%	3.55
February:	1.70	↑ +27.4%	2.16	↑ +42.2%	3.07
March:	1.77	↑ +89.8%	3.35	↑ +9.6%	3.67

2 Upload traffic in zettabyte (ZB)

Monthly values	2019	→	2020	→	2021
January:	0.21	↑ +10.2%	0.23	↑ +63.6%	0.38
February:	0.19	↑ +21.2%	0.23	↑ +49.9%	0.35
March:	0.20	↑ +95.6%	0.39	↑ +11.2%	0.44

1 Dwonload traffic in zettabyte (ZB)

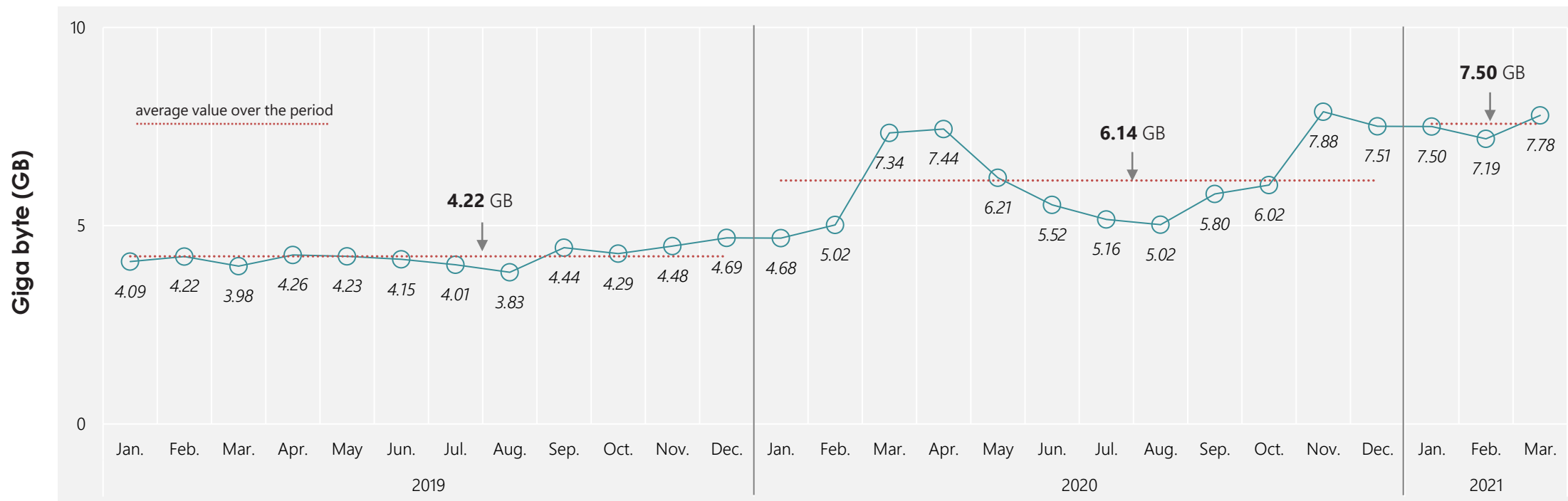
Monthly values	2019	→	2020	→	2021
January:	0.27	↑ +56.8%	0.42	↑ +49.3%	0.62
February:	0.25	↑ +62.3%	0.41	↑ +37.7%	0.57
March:	0.29	↑ +80.3%	0.52	↑ +29.7%	0.68

2 Upload traffic in zettabyte (ZB)

Monthly values	2019	→	2020	→	2021
January:	0.03	↑ +39.7%	0.04	↑ +59.7%	0.06
February:	0.02	↑ +51.3%	0.04	↑ +48.3%	0.05
March:	0.03	↑ +98.7%	0.06	↑ +20.9%	0.07

2.4: FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC PER BROADBAND LINE

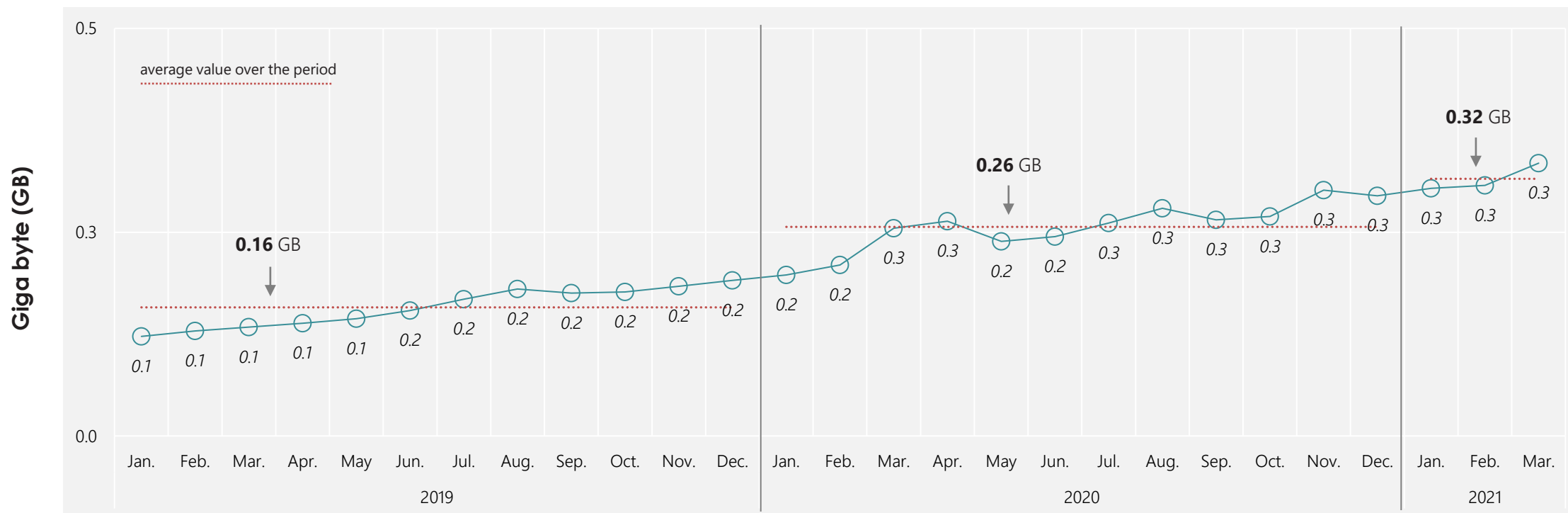
Data updated to **March 2021**



	1Q - 2019	→	1Q - 2020	→	1Q - 2021
1 Average values 1Q comparison Gigabyte (GB)	4.09 GB	↑ +39.2%	5.70 GB	↑ +31.7%	7.50 GB
	2019	→	2020	→	2021
January:	4.09 GB	↑ +14.4%	4.68 GB	↑ +60.1%	7.50 GB
February:	4.22 GB	↑ +18.8%	5.02 GB	↑ +43.3%	7.19 GB
March:	3.98 GB	↑ +84.5%	7.34 GB	↑ +6.0%	7.78 GB

2.5: MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC PER "HUMAN" SIM(*)

Data updated to **March 2021**

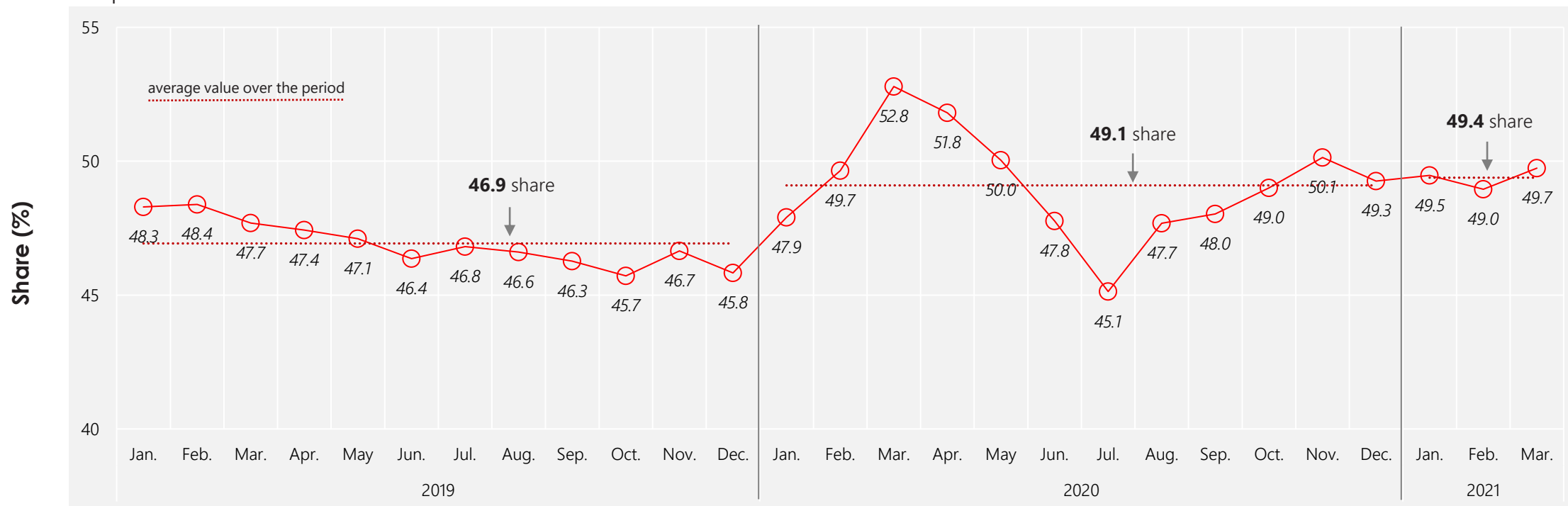


(*) Note: sim human refers to sim (voice and data or only voice or data) used by individual, excluding M2M sim cards

	1Q - 2019	→	1Q - 2020	→	1Q - 2021
1 Average values 1Q comparison Gigabyte (GB)	0.13 GB	↑ +72.3%	0.22 GB	↑ +42.8%	0.32 GB
	2019	→	2020	→	2021
2 Monthly comparison Gigabyte (GB)	January: 0.12 GB	↑ +61.7%	0.20 GB	↑ +53.7%	0.30 GB
	February: 0.13 GB	↑ +62.8%	0.21 GB	↑ +46.5%	0.31 GB
	March: 0.13 GB	↑ +90.8%	0.26 GB	↑ +31.2%	0.33 GB

3.1: TV: OVERALL AUDIENCE OF THE EVENING EDITIONS OF NATIONAL NEWS PROGRAMMES

Data updated to **March 2021**



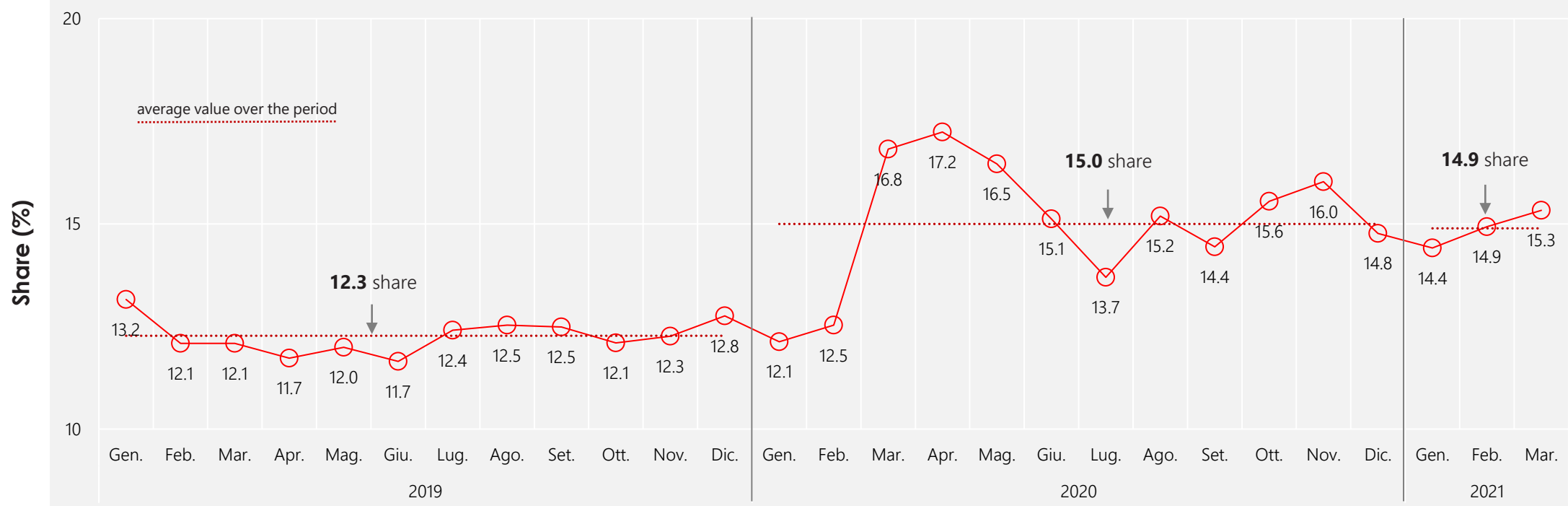
Note: the audience is measured through the **share**, which indicates the percentage ratio between the listeners of a TV channel/programme and the total number of listeners who are watching television at the same time

Source: elaboration on Auditel data

	1Q - 2019	→	1Q - 2020	→	1Q - 2021
1 Average values 1Q comparison Share (%)	48.1	↑ +4.1%	50.1	↓ -1.5%	49.4
	2019	→	2020	→	2021
January:	48.3	↓ -0.8%	47.9	↑ +3.3%	49.5
February:	48.4	↑ +2.6%	49.7	↓ -1.4%	49.0
March:	47.7	↑ +10.7%	52.8	↓ -5.8%	49.7
2 Monthly comparison Share (%)					

3.2: TV: OVERALL AUDIENCE FOR THE EVENING EDITIONS OF REGIONAL NEWS PROGRAMMES

Data updated to **March 2021**



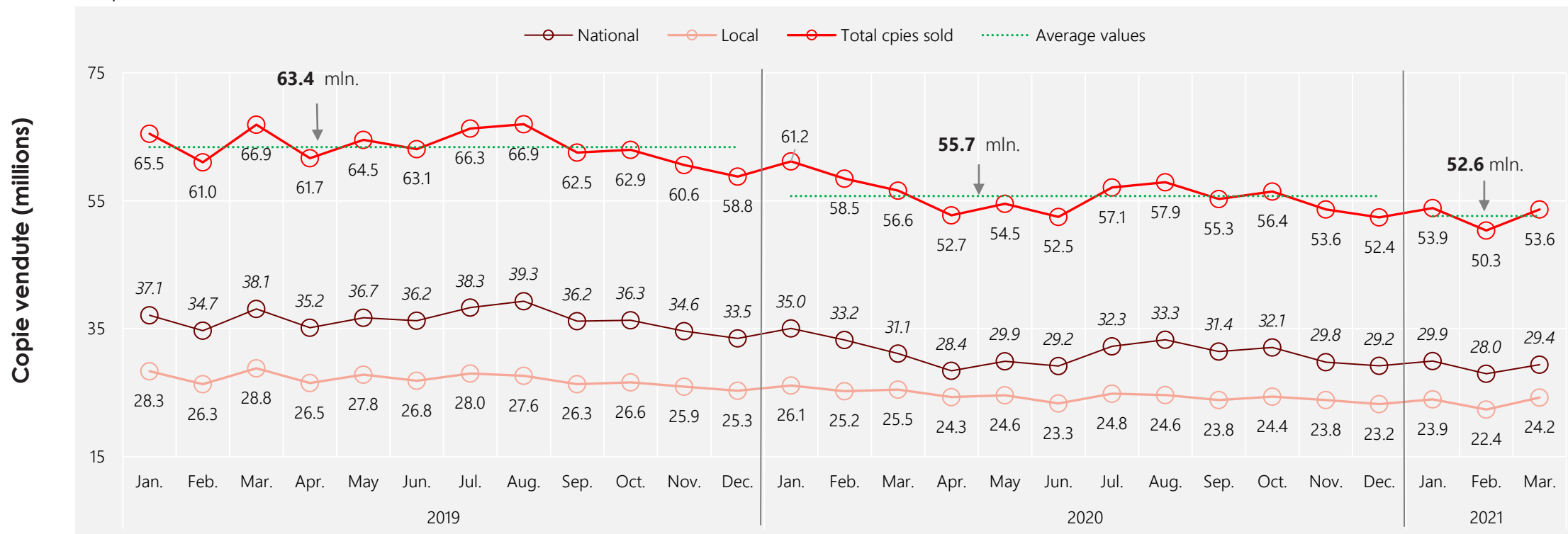
Note: the audience is measured through the **share**, which indicates the percentage ratio between the listeners of a TV channel/programme and the total number of listeners who are watching television at the same time

Source: elaboration on Auditel data

	1Q - 2019	→	1Q - 2020	→	1Q - 2021	
1 Average values 1Q comparison Share (%)	12.4	↑ +11.1%	13.8	↑ +7.7%	14.9	
	2019	→	2020	→	2021	
January:	13.2	↓ -7.8%	12.1	↑ +18.8%	14.4	
2 Monthly comparison Share (%)	February:	12.1	↑ +3.6%	12.5	↑ +19.2%	14.9
	March:	12.1	↑ +39.1%	16.8	↓ -8.9%	15.3

3.3: NEWSPAPERS: COPIES SOLD

Data updated to **March 2021**



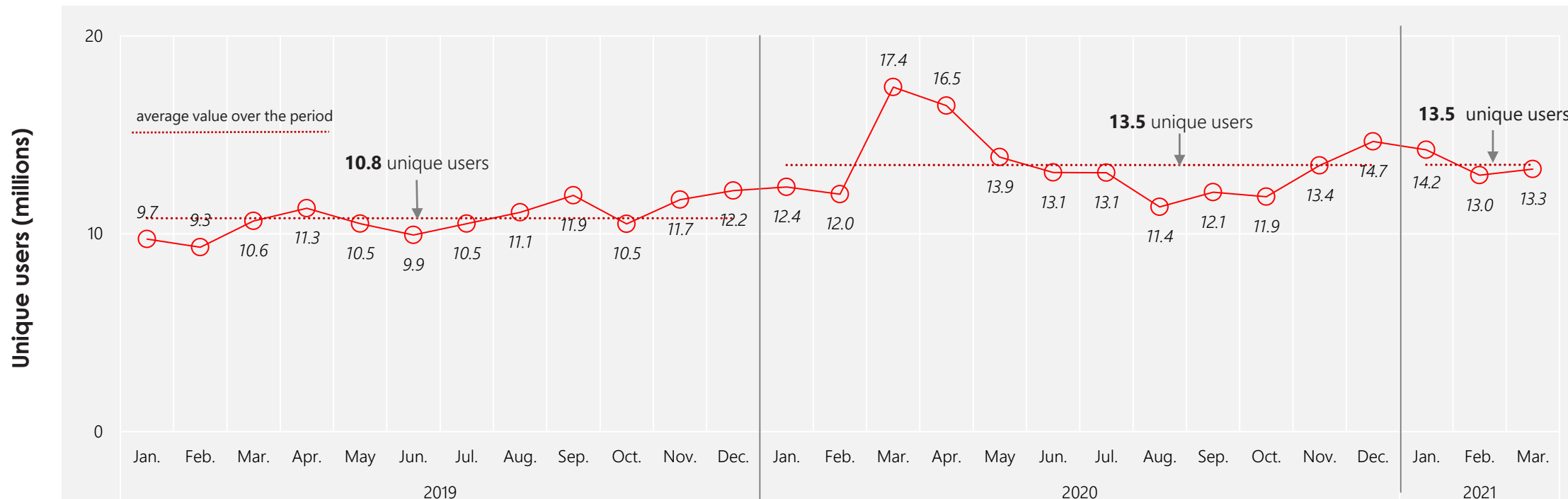
Source: elaboration on ADS data

	1Q - 2019		1Q - 2020		1Q - 2021
1 Average values 1Q comparison	64.4	↓ -8.9%	58.7	↓ -10.4%	52.6
Total copies sold (millions)					
	2019		2020		2021
January:	65.5	↓ -6.6%	61.2	↓ -11.9%	53.9
February:	61.0	↓ -4.2%	58.5	↓ -13.9%	50.3
March:	66.9	↓ -15.4%	56.6	↓ -5.2%	53.6
2 Monthly comparison					
Total copies sold (millions)					

Note: the total sales of newspaper is calculated on the basis of ADS surveys. As of January 2021, the data presentation scheme has been changed. Total sales (print and digital) are the sum of individual sales paid for by the buyer and multiple sales paid for by third parties. Digital and multiple copies are only taken into account if their price is 30% higher than that of the paper version.

3.4: INTERNET: UNIQUE USERS OF VIDEO ON DEMAND WEBSITES/APPS

Data updated to **March 2021**



Note: the graph shows the unique users of the category consisting of the websites and apps of the main operators offering pay-per-view video on demand services.

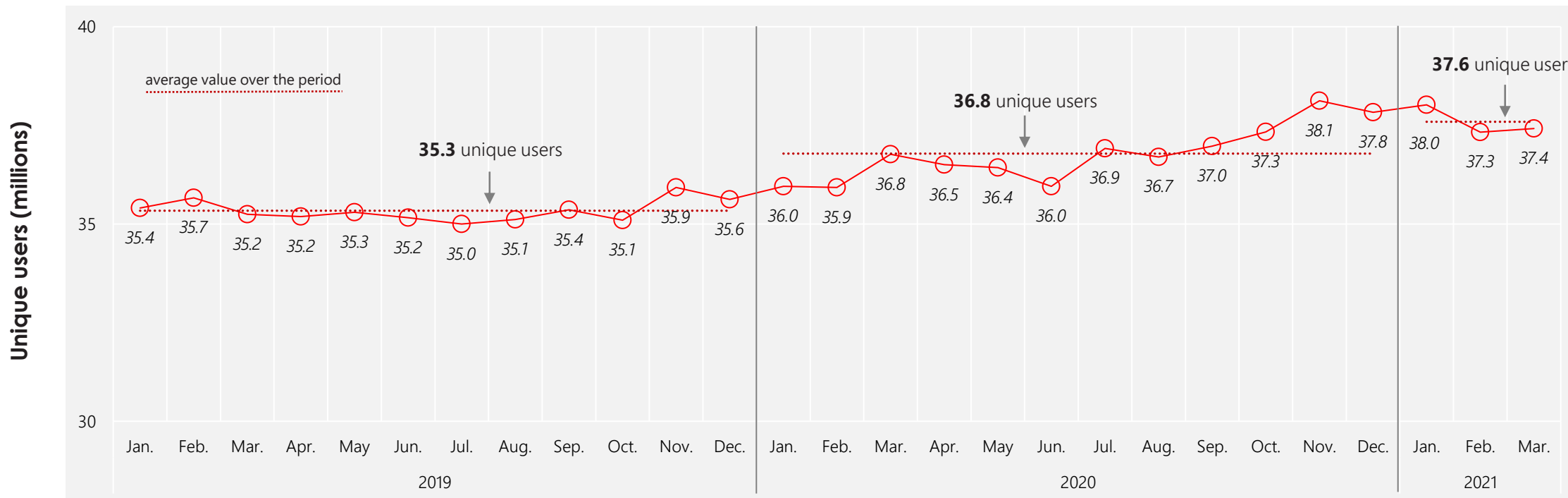
Source: elaboration on Comscore MMX® Multi-Platform data

	1Q - 2019		1Q - 2020		1Q - 2021
1 Average values 1Q comparison	9.9	↑ +40.6%	13.9	↓ -3.1%	13.5
Unique users (millions)					
	2019	→	2020	→	2021
January:	9.7	↑ +27.0%	12.4	↑ +15.2%	14.2
February:	9.3	↑ +28.7%	12.0	↑ +8.0%	13.0
March:	10.6	↑ +63.5%	17.4	↓ -23.8%	13.3
2 Monthly comparison					
Unique users (millions)					

Unique users: number of distinct users/people who visited any content of a website, category, channel or application during the reporting period.

3.5: INTERNET: UNIQUE USERS OF GENERALIST NEWS SITES/APPS

Data updated to **March 2021**



Source: elaboration on Comscore MMX® Multi-Platform data

Unique users: number of distinct users/people who visited any content of a website, category, channel or application during the reporting period.

1 Average values 1Q comparison
Unique users (millions)

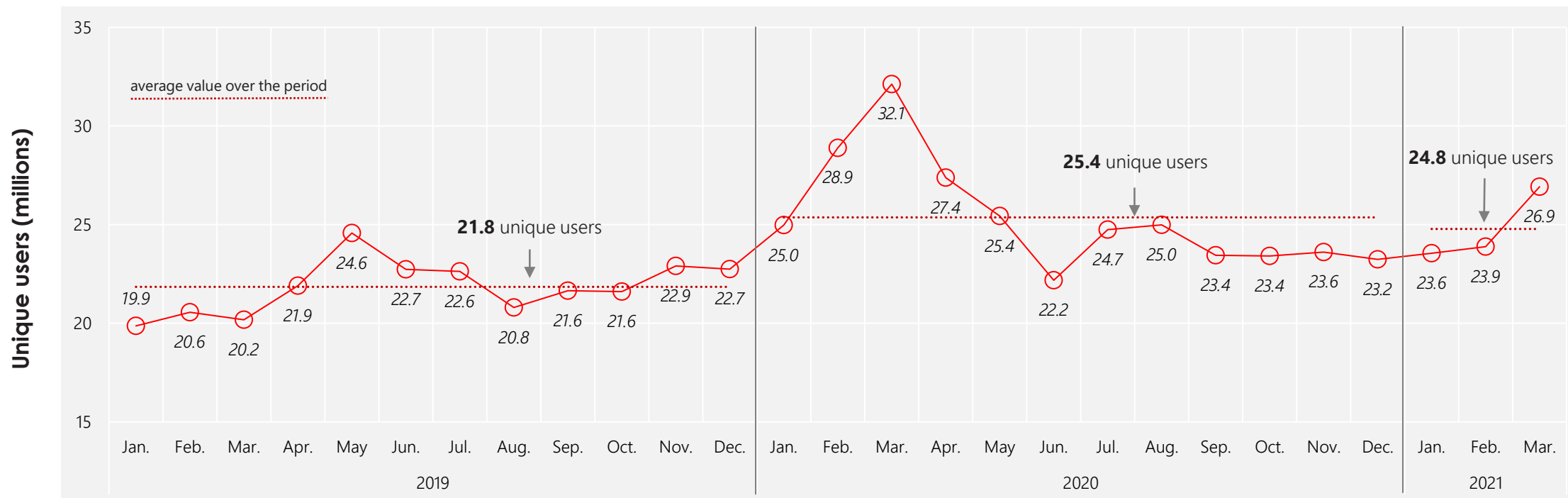
1Q - 2019	→	1Q - 2020	→	1Q - 2021
35.4	↑ +2.2%	36.2	↑ +3.8%	37.6

2 Monthly comparison
Unique users (millions)

	2019	→	2020	→	2021
January:	35.4	↑ +1.5%	36.0	↑ +5.7%	38.0
February:	35.7	↑ +0.7%	35.9	↑ +3.9%	37.3
March:	35.2	↑ +4.3%	36.8	↑ +1.8%	37.4

3.6: INTERNET: UNIQUE USERS OF LOCAL INFORMATION WEBSITES/APPS

Data updated to **March 2021**



Source: elaboration on Comscore MMX® Multi-Platform data

Unique users: number of distinct users/people who visited any content of a website, category, channel or application during the reporting period.

1 Average values 1Q comparison

Unique users (millions)

1Q - 2019	→	1Q - 2020	→	1Q - 2021
20.2	↑ +41.9%	28.7	↓ -13.5%	24.8

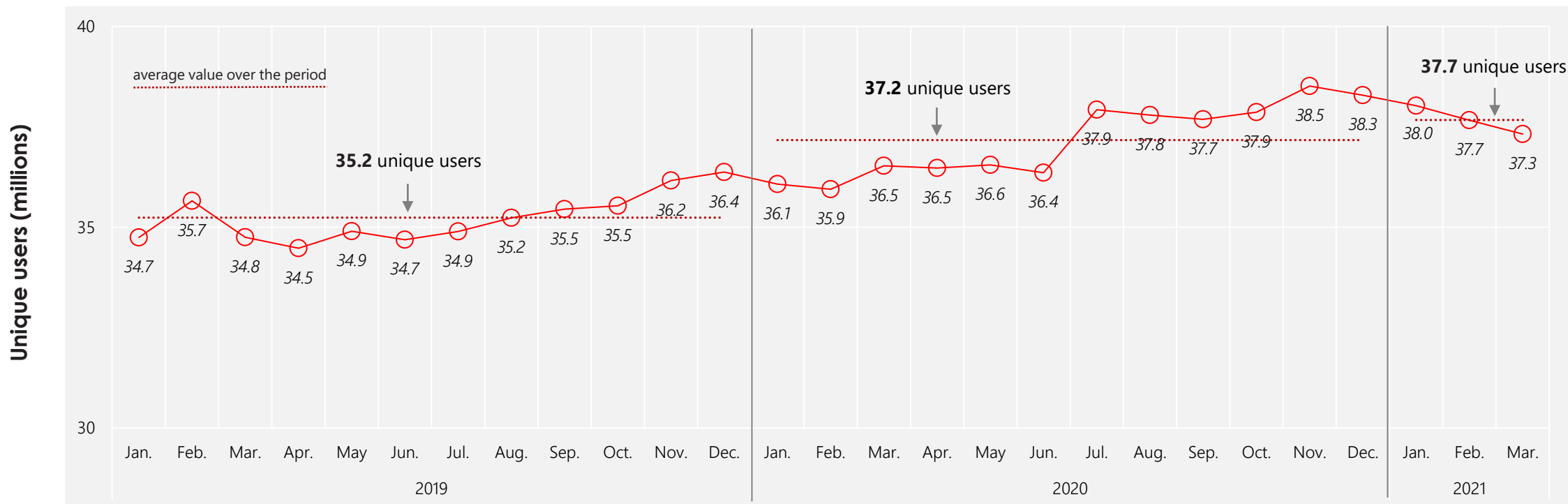
2 Monthly comparison

Unique users (millions)

	2019	→	2020	→	2021
January:	19.9	↑ +25.7%	25.0	↓ -5.7%	23.6
February:	20.6	↑ +40.6%	28.9	↓ -17.3%	23.9
March:	20.2	↑ +59.2%	32.1	↓ -16.2%	26.9

3.7: INTERNET: UNIQUE USERS OF E-COMMERCE WEBSITES/APPS

Data updated to **March 2021**



Source: elaboration on Comscore MMX® Multi-Platform data

Unique users: number of distinct users/people who visited any content of a website, category, channel or application during the reporting period.

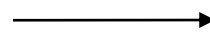
1

Average values 1Q comparison

Unique users (millions)

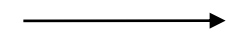
1Q - 2019

35.1



1Q - 2020

36.2



1Q - 2021

37.7

↑ +3.2%

↑ +4.1%

2

Monthly comparison

Unique users (millions)

January:

34.7

↑ +3.8%

36.1

↑ +5.4%

38.0

February:

35.7

↑ +0.8%

35.9

↑ +4.8%

37.7

March:

34.8

↑ +5.1%

36.5

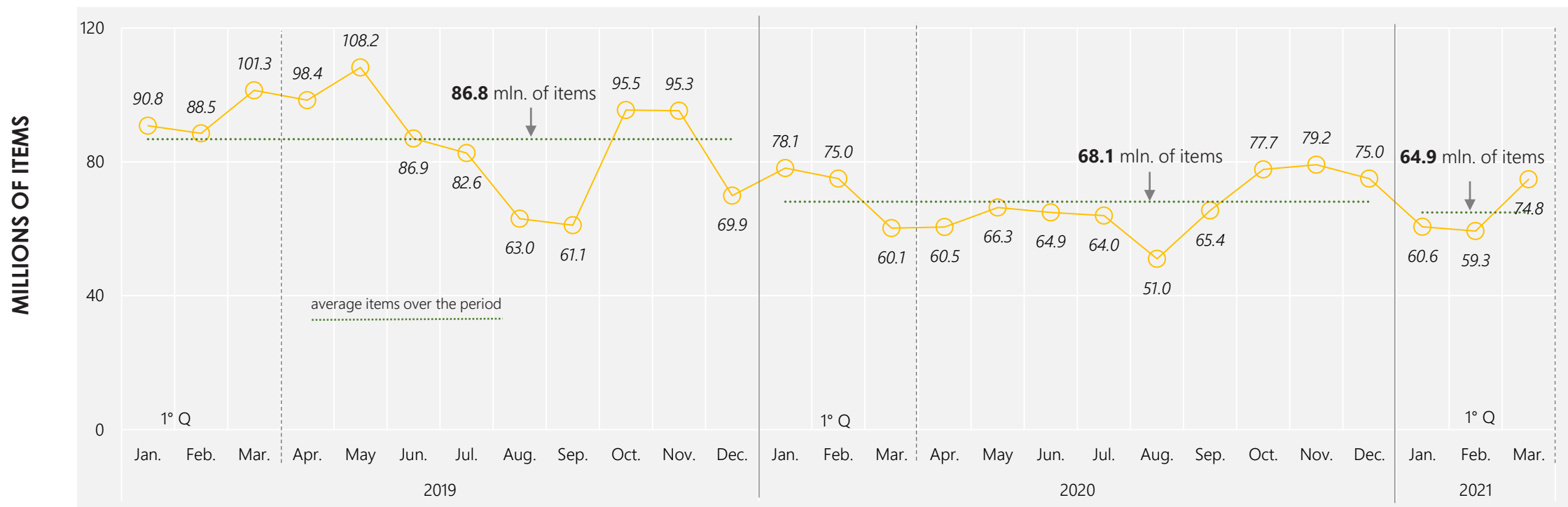
↑ +2.2%

37.3

4.1: MAIL: UNIVERSAL SERVICES (US) VOLUMES (millions of items)

Data updated to **March 2021**

UNIVERSAL SERVICE (US)

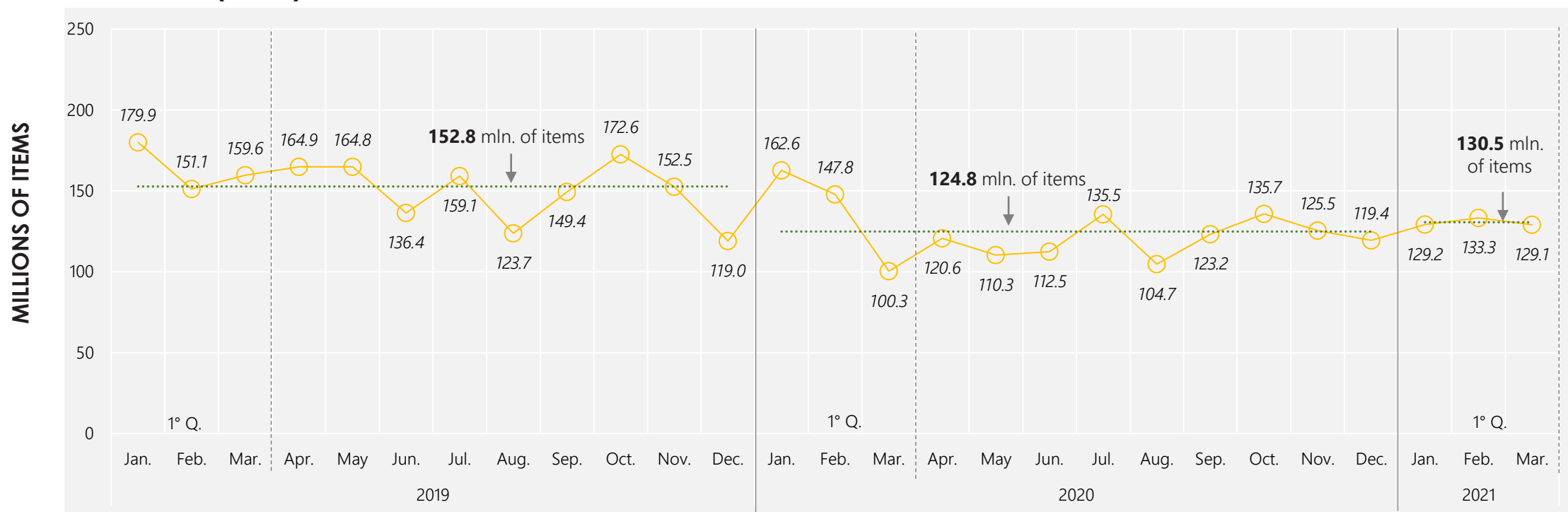


	1Q - 2019	→	1Q - 2020	→	1Q - 2021
1 Average values 1Q comparison Millions of items	93.6	↓ -24.0%	71.1	↓ -8.7%	64.9
2 Monthly comparison Millions of items	2019	→	2020	→	2021
January:	90.8	↓ -14.0%	78.1	↓ -22.5%	60.6
February:	88.5	↓ -15.2%	75.0	↓ -21.0%	59.3
March:	101.3	↓ -40.6%	60.1	↑ +24.4%	74.8

4.2: MAIL: OTHER SERVICES (NO US) VOLUMES (millions of items)

Data updated to **March 2021**

OTHER SERVICES (NO US)

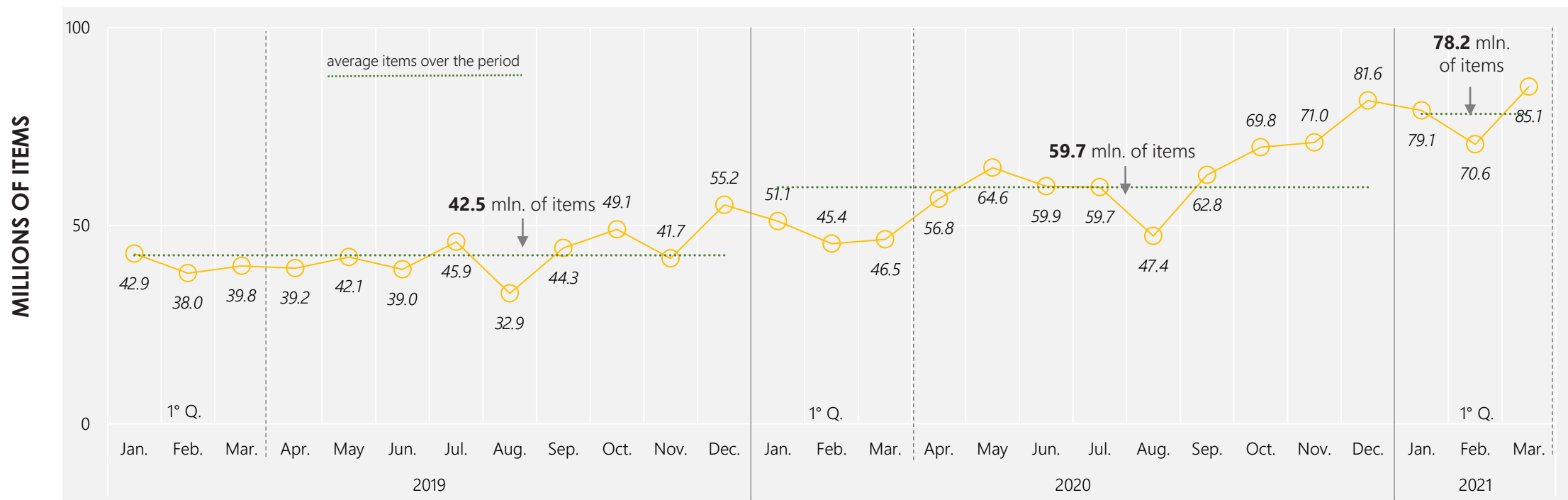


	1Q - 2019		1Q - 2020		1Q - 2021
1 Average values 1Q comparison Millions of items	163.6	→ -16.3%	136.9	→ -4.7%	130.5
2 Monthly comparison Millions of items	2019	→	2020	→	2021
January:	179.9	→ -9.6%	162.6	→ -20.5%	129.2
February:	151.1	→ -2.2%	147.8	→ -9.8%	133.3
March:	159.6	→ -37.1%	100.3	→ +28.6%	129.1

4.3: PARCEL: DOMESTIC DELIVERY SERVICES (millions of items)

Data updated to **March 2021**

Domestic parcels (US + NO US)

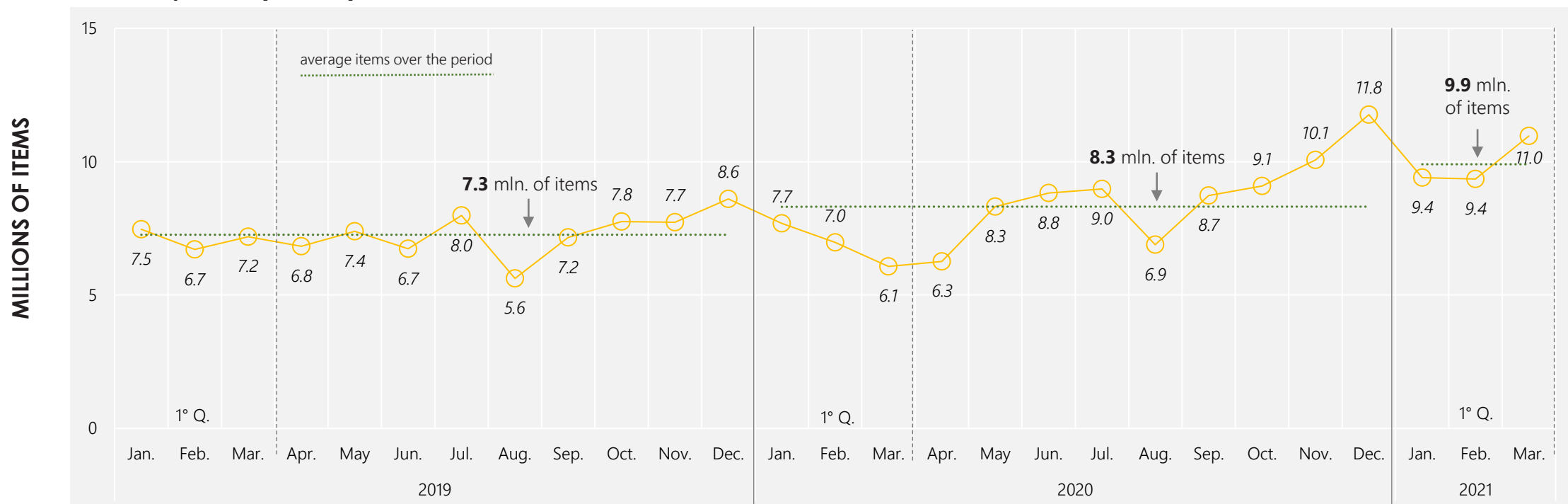


	1Q - 2019		1Q - 2020		1Q - 2021	
1 Average values 1Q comparison Millions of items	40.3	↑ +18.4%	47.7	↑ +64.1%	78.2	
2 Monthly comparison Millions of items	2019		2020		2021	
	January:	42.9	↑ +19.0%	51.1	↑ +54.8%	79.1
	February:	38.0	↑ +19.5%	45.4	↑ +55.4%	70.6
	March:	39.8	↑ +16.9%	46.5	↑ +82.8%	85.1

4.4: PARCEL: CROSSBORDER DELIVERY SERVICES (millions of items)

Data updated to **March 2021**

Crossborder parcels (in + out)



	1Q - 2019		1Q - 2020		1Q - 2021	
1 Average values 1Q comparison Millions of items	7.1	↓ -3.0%	6.9	↑ +43.3%	9.9	
2 Monthly comparison Millions of items	2019		2020		2021	
	January:	7.5	↑ +2.9%	7.7	↑ +22.3%	9.4
	February:	6.7	↑ +3.9%	7.0	↑ +34.2%	9.4
	March:	7.2	↓ -15.5%	6.1	↑ +80.4%	11.0



AUTORITÀ PER LE
GARANZIE NELLE
AGCOM COMUNICAZIONI

COMMUNICATION MONITORING MARKETS SYSTEM

COVID-19 monitoring

no. 2/2021

Servizio Economico Statistico

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