AGCOM AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 2/2021

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01 ELECTRONIC COMMUNICATIONS

02 MEDIA

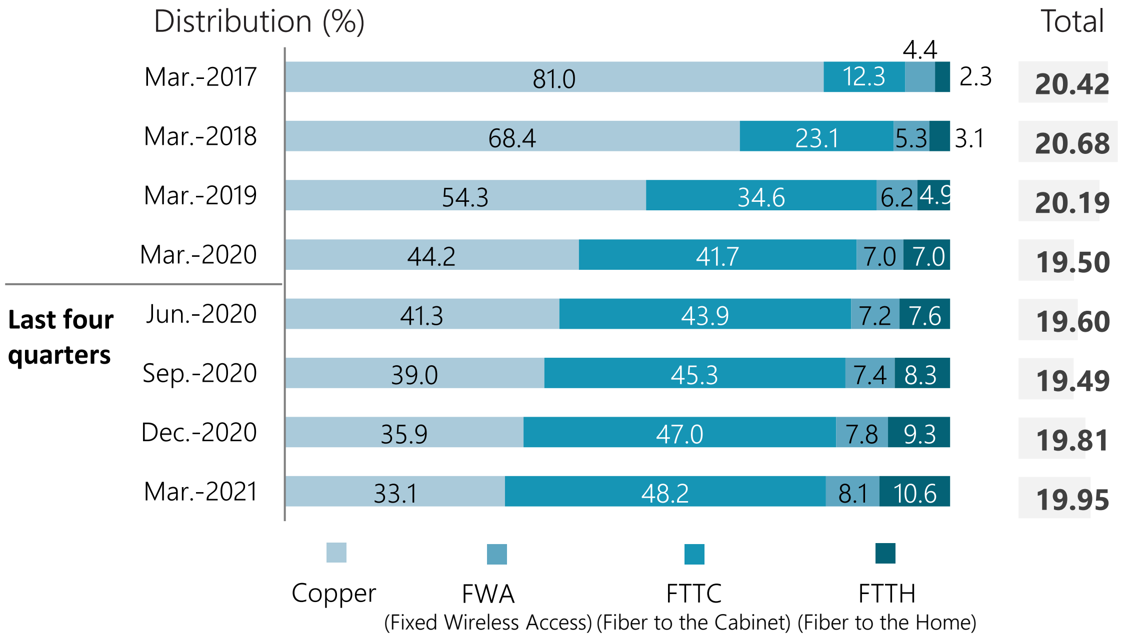
03 POSTAL SERVICES

04 COMMUNICATION SERVICES' PRICES

The following figures are based on AGCOM's elaborations on firms' data and other sources (updated to March 2021). 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.

Data on historical time series are available for electronic communications and postal services for free download at the website of the Authority (https://www.agcom.it/osservatorio-sulle-comunicazioni). The data concern the main variables collected directly from companies during March 2017 and March 2021.

1.1: FIXED LINES: TOTAL LINES



Total lines	(no of lines)	(Δ %)
Quarterly change (December 2020 – March 2021)	**+137 K** accesses	+0.7%
Annual change (March 2020 – March 2021)	**+450 K** accesses	+2.3%
4-Year change (March 2017 – March 2021)	**-471 K** accesses	-2.3%

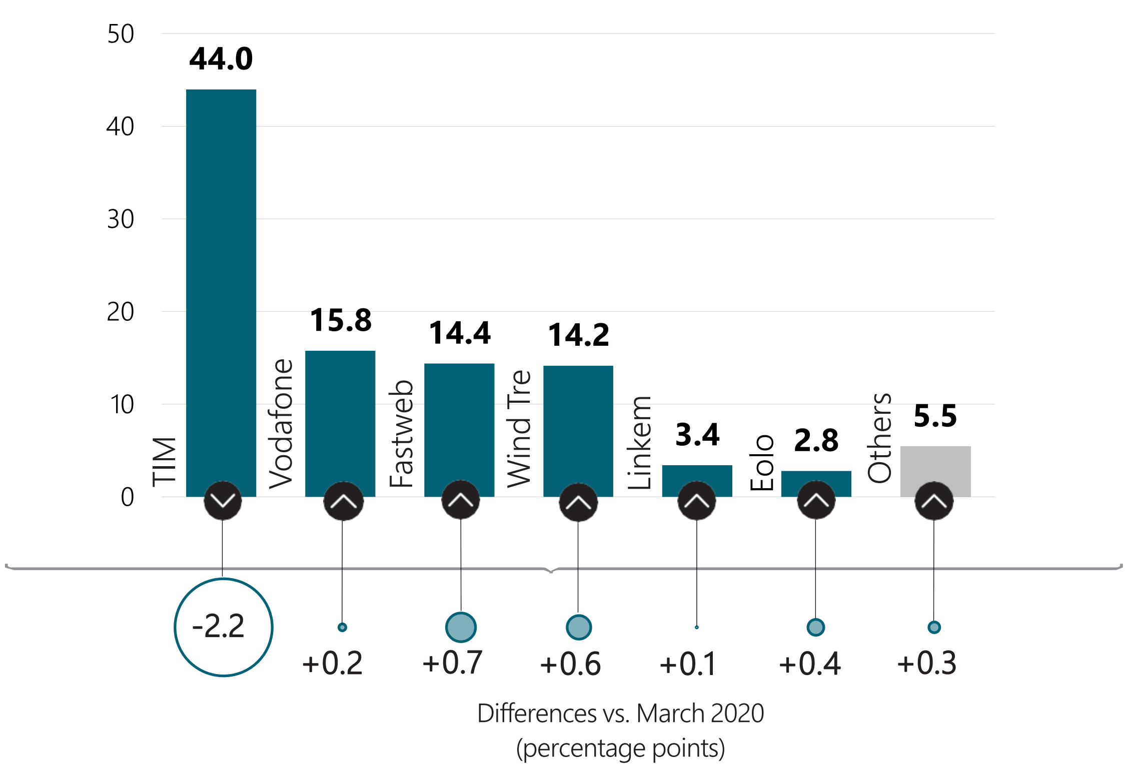
Distribution

(Δ 2020-2021) percentage points

Copper:	-11.1
FWA:	+1.0
FTTC:	+6.5
FTTH:	+3.6

MARKET SHARES (%)

MARCH 2021



TIM's market share has dropped to **44.0%**

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

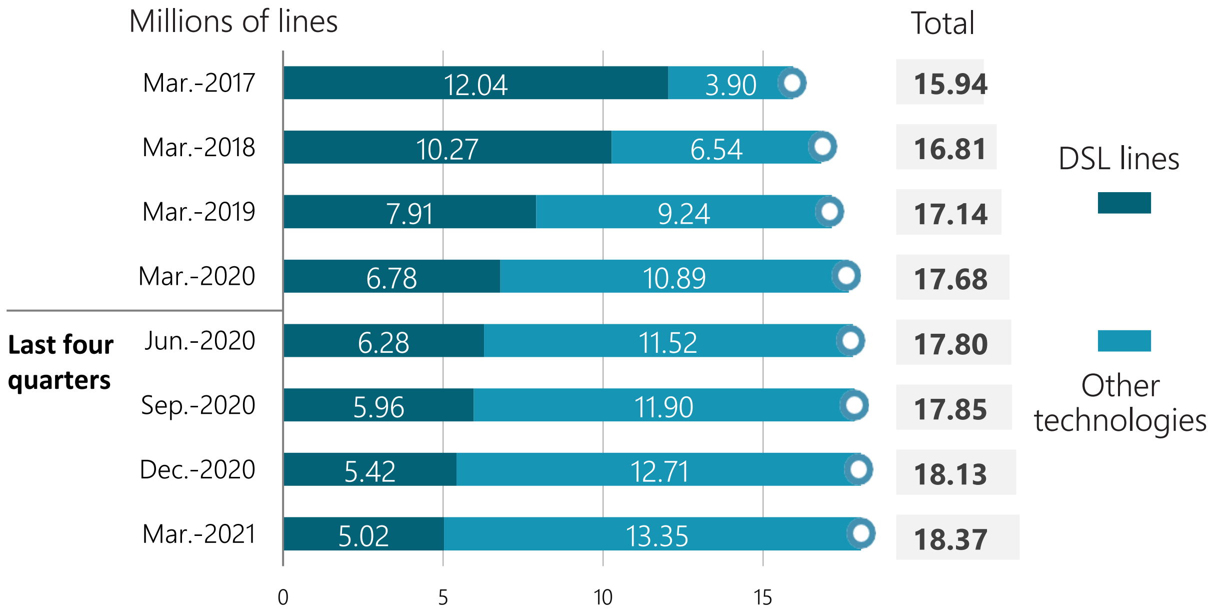
Other operators have increased their market share

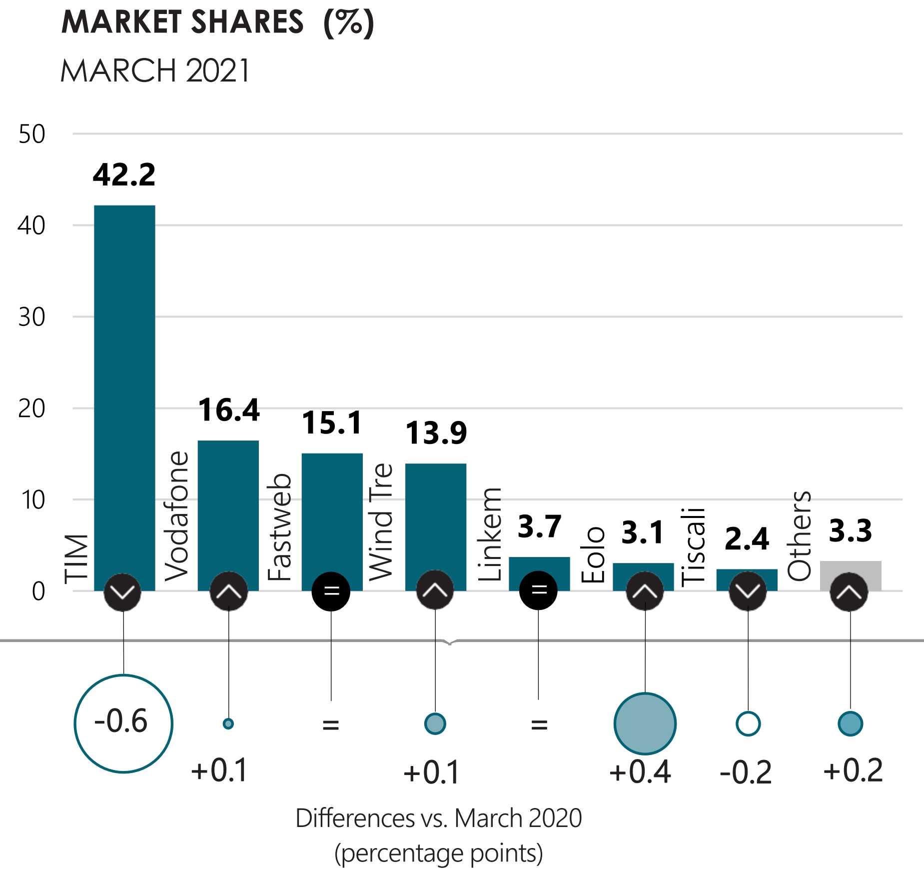
K = thousand

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

SES SERVIZIO ECONOMICO STATISTICO

1.2: FIXED LINES: BROADBAND AND ULTRABROADBAND LINES





Quarterly change
(Dec. 2020 – Mar. 2021)

Total lines

+244 K
lines
(+1.3%)

Annual change
(Mar. 2020 – Mar. 2021)

Total lines	DSL lines	Other technologies
↑ **+695 K** lines (+3.9 %)	↓ **-1.762 M** lines (-26.0%)	↑ **+2.457 M** lines (+22.6%)

K = thousand
M = million

TIM's market share has dropped to **42.2%**

The market shares of **Vodafone** and **Wind Tre** has increased

Other operators have increased their market share

1.3: FIXED LINES: BROADBAND AND ULTRABROADBAND LINES BY TECHNOLOGY AND OPERATORS

MARCH 2021

DSL

Total lines: **5.02** million accesses

Annual change
(March 2020 – March 2021)
-26.0%

FWA

Total lines: **1.61** million access

Annual change
(March 2020 – March 2021)
+16.9%

FTTC

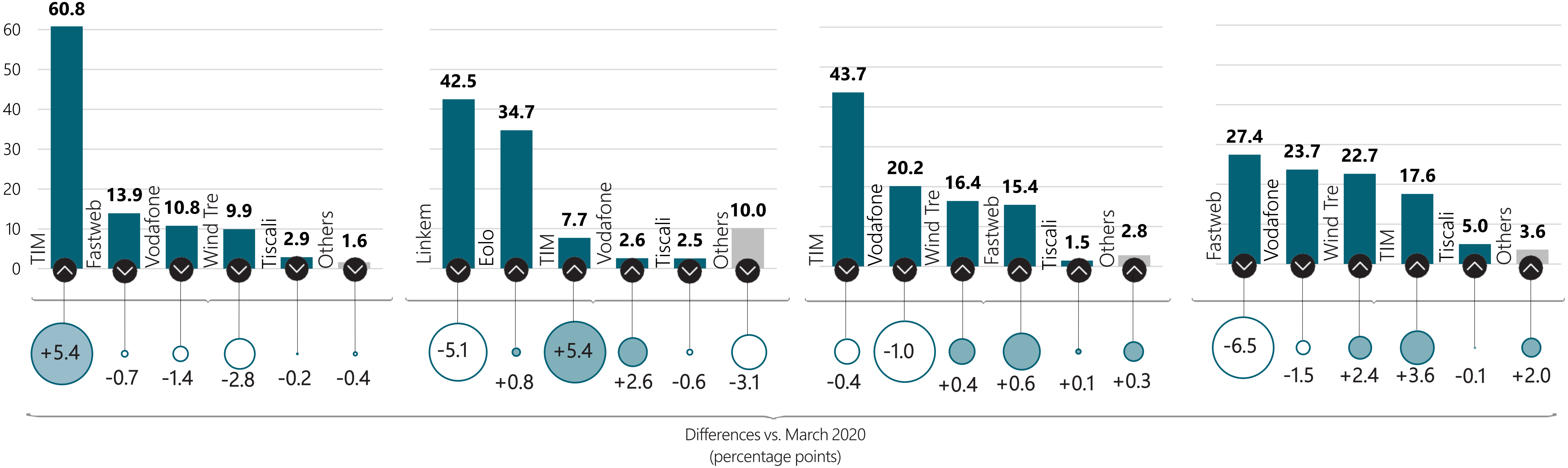
Total lines: **9.62** million access

Annual change
(March 2020 – March 2021)
+18.2%

FTTH

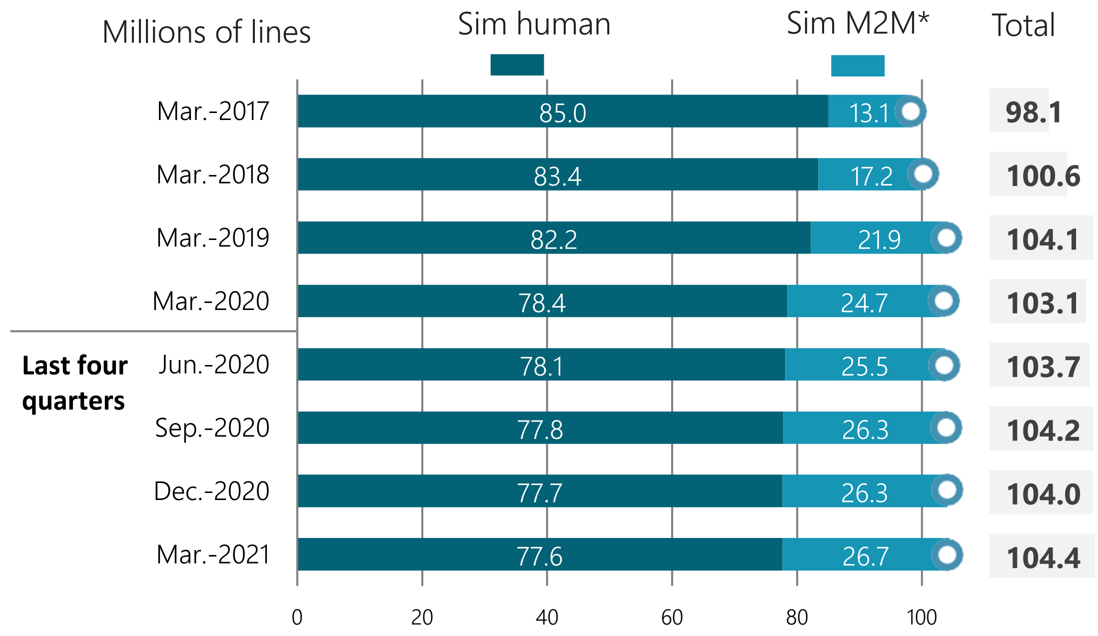
Total lines: **2.11** million access

Annual change
(March 2020 – March 2021)
+54.8%



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..

1.4: MOBILE LINES: TOTAL SUBSCRIBERS



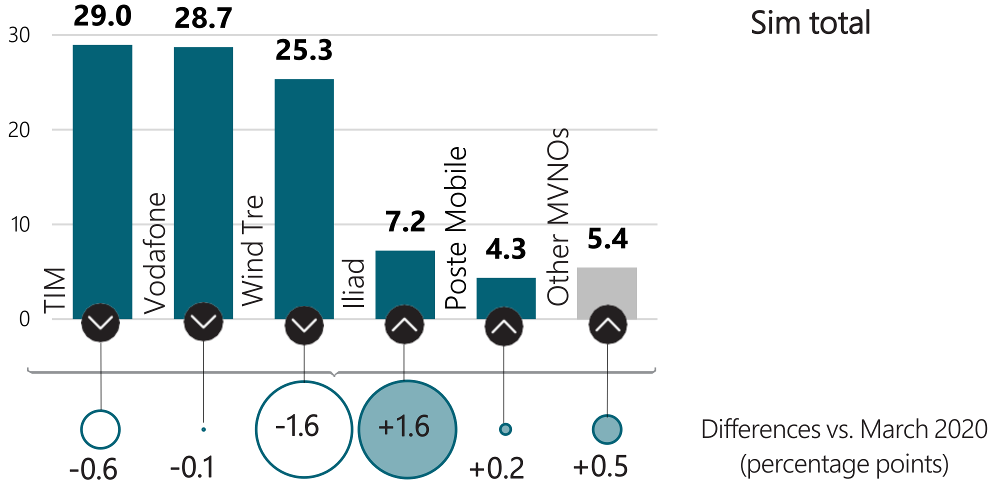
(*) **Note**: Machine-to-Machine sims are based on the technologies that enable devices and sensors or "things" (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

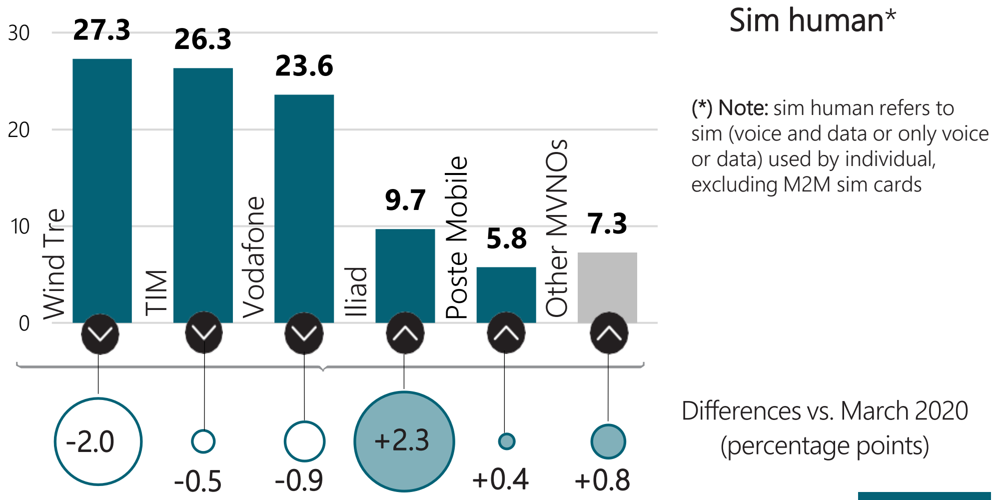
	Quarterly change (Dec. 2020 – Mar. 2020) (no of sim in thousand)	Quarterly change (Δ %)	Annual change (Mar. 2020 – Mar. 2021) (no of sim in thousand)	Annual change (Δ %)
Total sim cards:	+345	+0.3%	+1,246	+1.2%
Sim human:	-42	-0.1%	-801	-1.0%
Sim M2M:	+387	+1.5%	+2,048	+8.3%

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 (%)

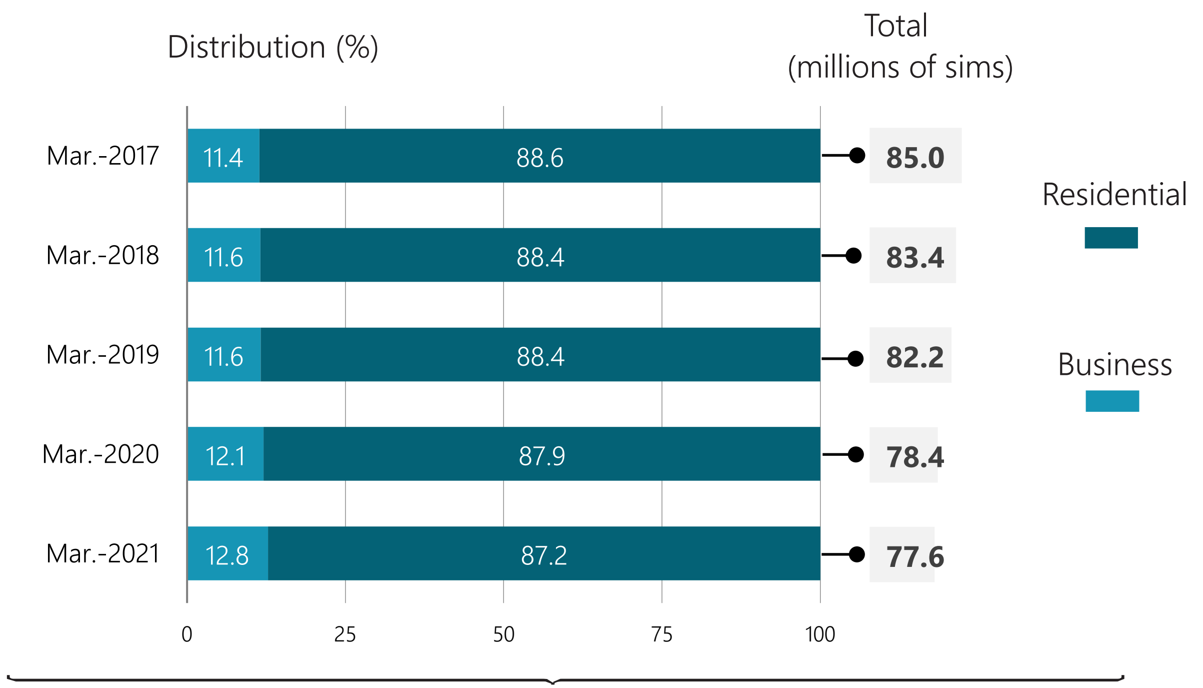
MARCH 2021





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

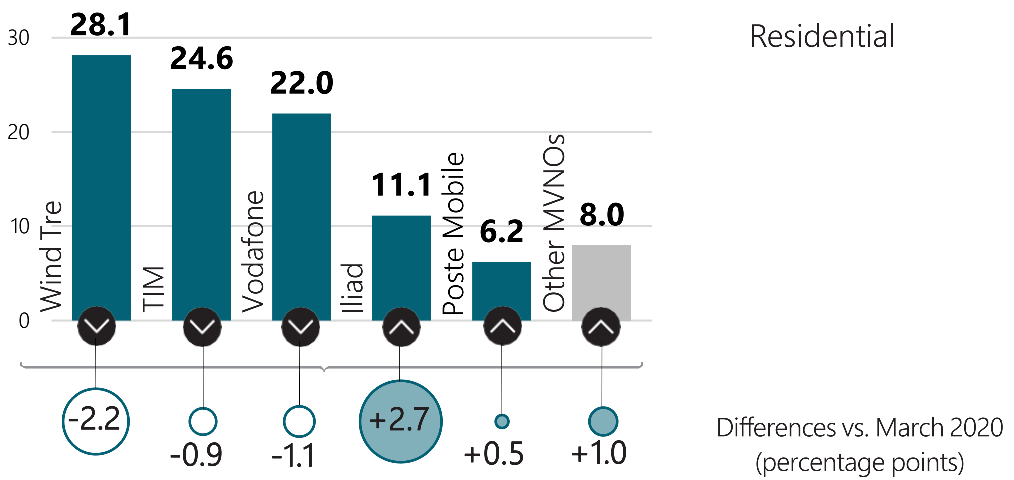
1.5: MOBILE LINES: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)

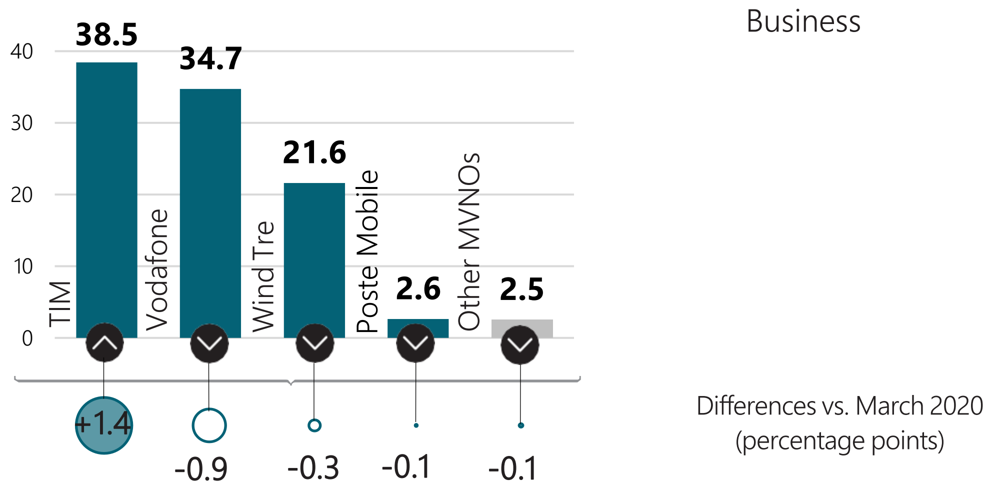


	Annual change (March 2020 – March 2021) (no of sim in thousand)		Annual change (March 2020 – March 2021) (Δ %)	4-Year change (March 2017 – March 2021) (no of sim in thousand)		4-Year change (March 2017 – March 2021) (Δ %)
Total human sim cards:	-801	↓	-1.0%	-7,389	↓	-8.7%
Residential sim card:	-1,235	↓	-1.8%	-7,597	↓	-10.1%
Business sim cards:	+435	↑	+4.6%	+209	↑	+2.1%

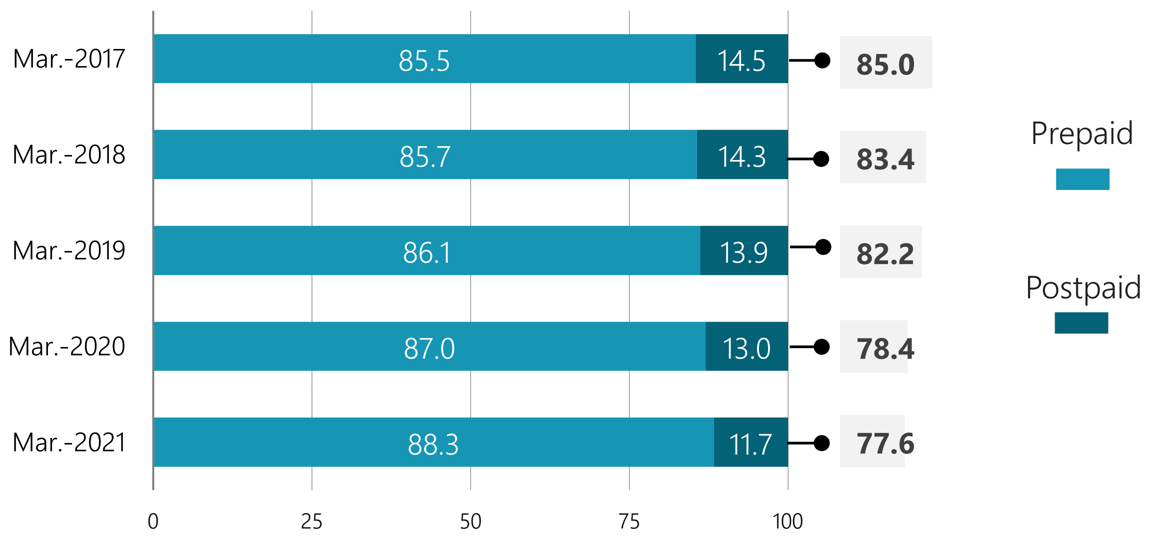
MARKET SHARES (%)

MARCH 2021



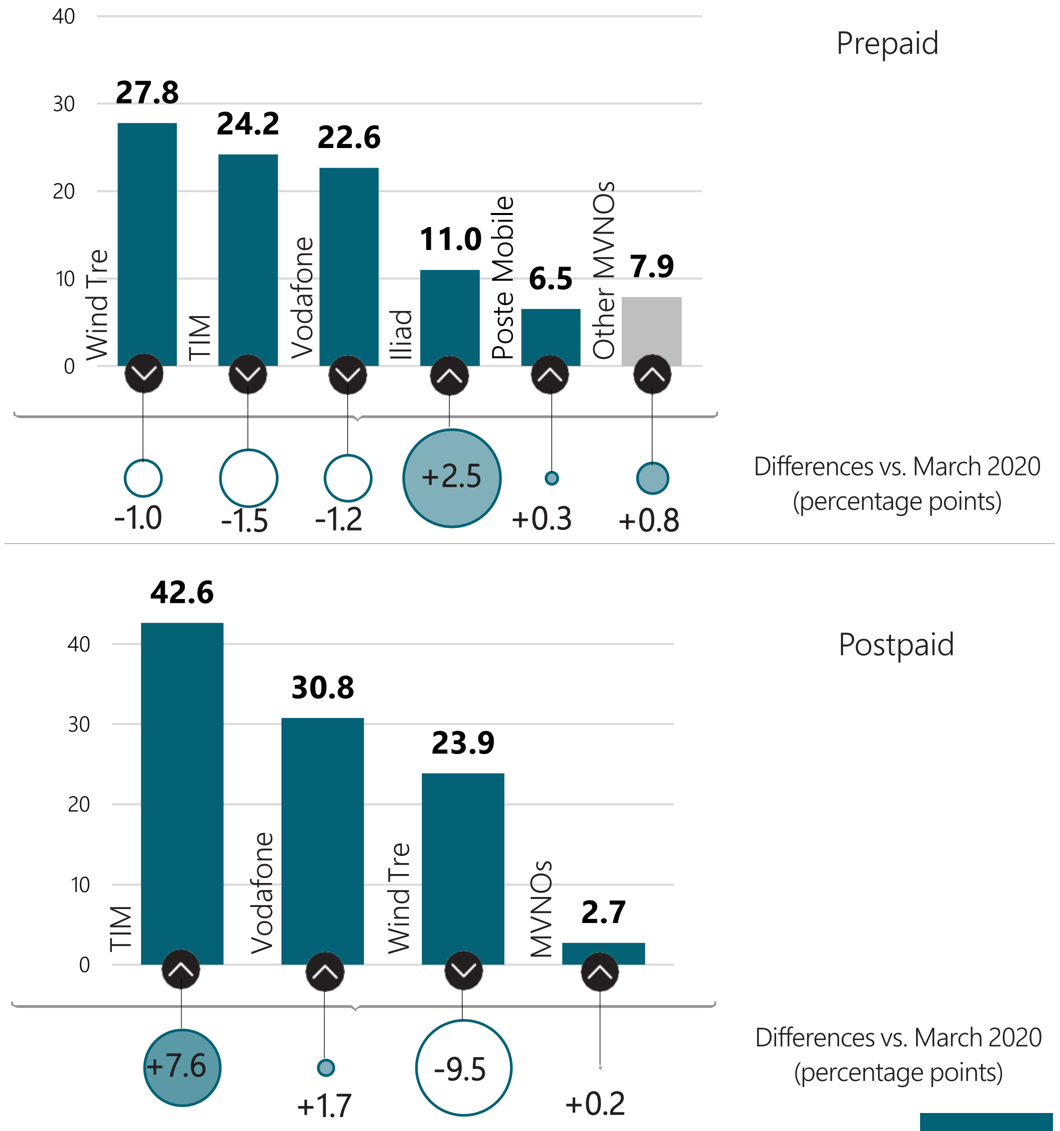


1.6: MOBILE LINES: SUBSCRIBERS BY TYPE OF CONTRACT



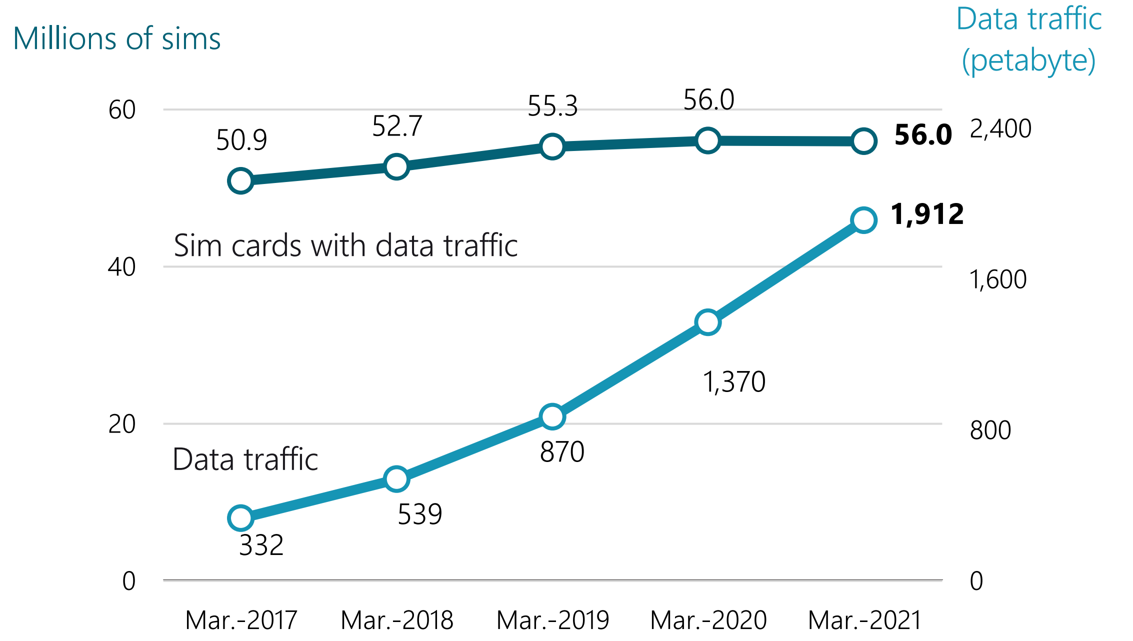
	Annual change (March 2020 – March 2021) (no of sim in thousand)		Annual change (Δ %)	4-Year change (March 2017 – March 2021) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	-801	↓	-1.0%	-7,389	↓	-8.7%
Prepaid sim cards:	+336	↑	+0.5%	-4,075	↓	-5.6%
Postpaid sim cards:	-1,138	↓	-11.2%	-3,314	↓	-26.8%

MARKET SHARES (%)
MARCH 2021



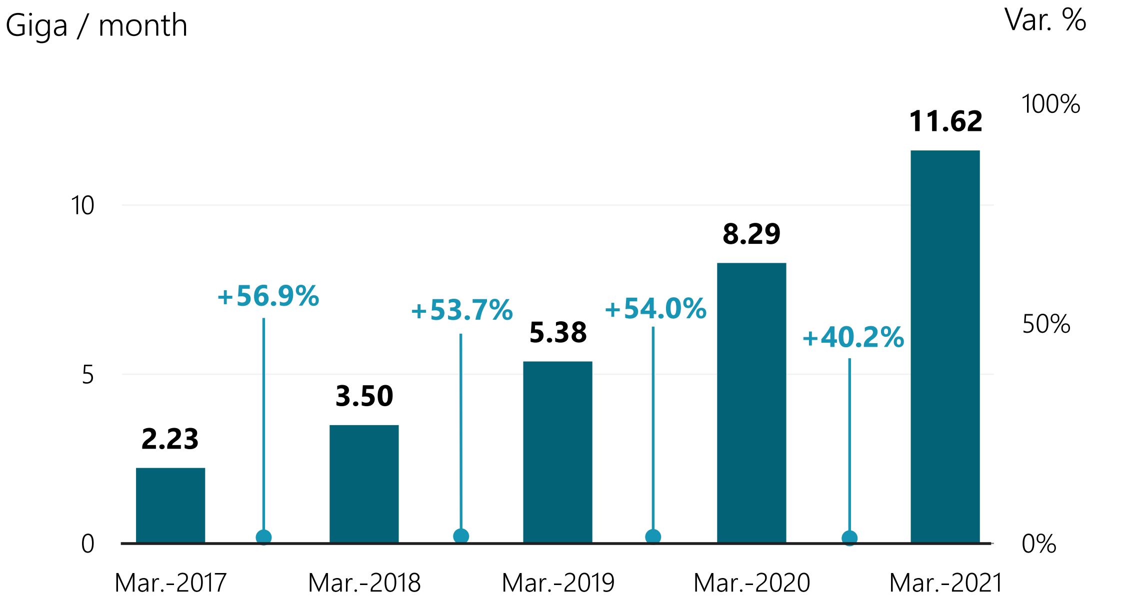
SES SERVIZIO ECONOMICO STATISTICO

DATA TRAFFIC SINCE THE BEGINNING OF THE YEAR



	Annual change (March 2020 – March 2021)			4-Year change (March 2017 – March 2021)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
SIM cards with data traffic:	-86	↓	-0.2%	+5,061	↑	+9.9%
	(petabyte)		(Δ %)	(petabyte)		(Δ %)
Data traffic:	+542	↑	+39.5%	+1,580	↑	+475.9%

AVERAGE MONTHLY CONSUMPTION

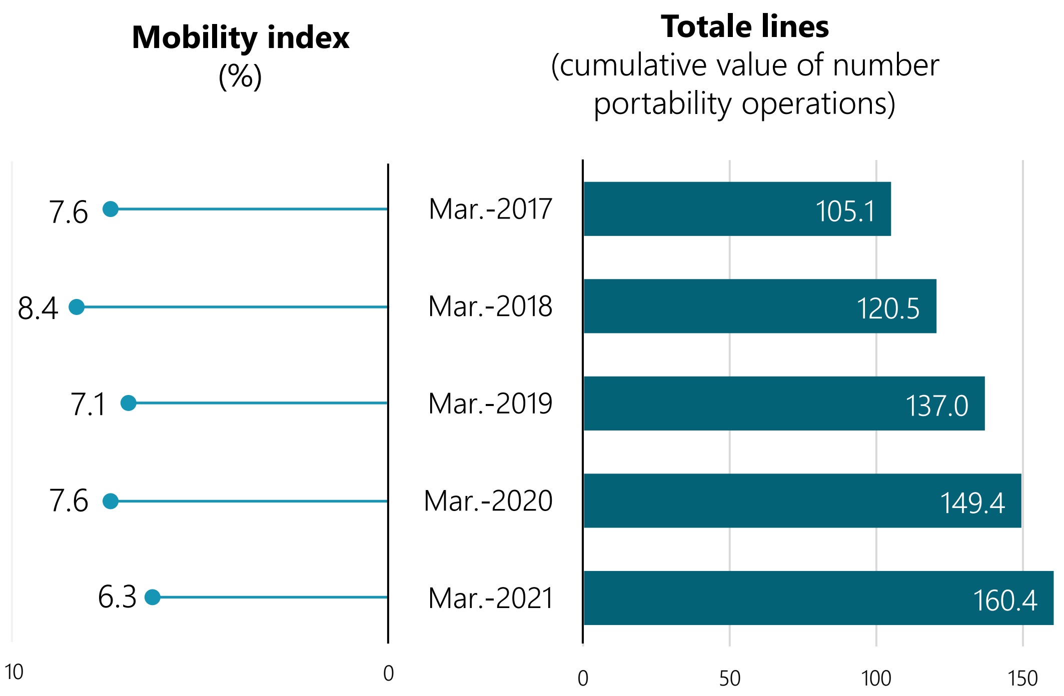


March 2017	+416.3% (Δ %)	March 2021
2.23 GB/month	→	11.62 GB/month

At the end of March 2021, the number of sim cards with data traffic has reached **72.4%** 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

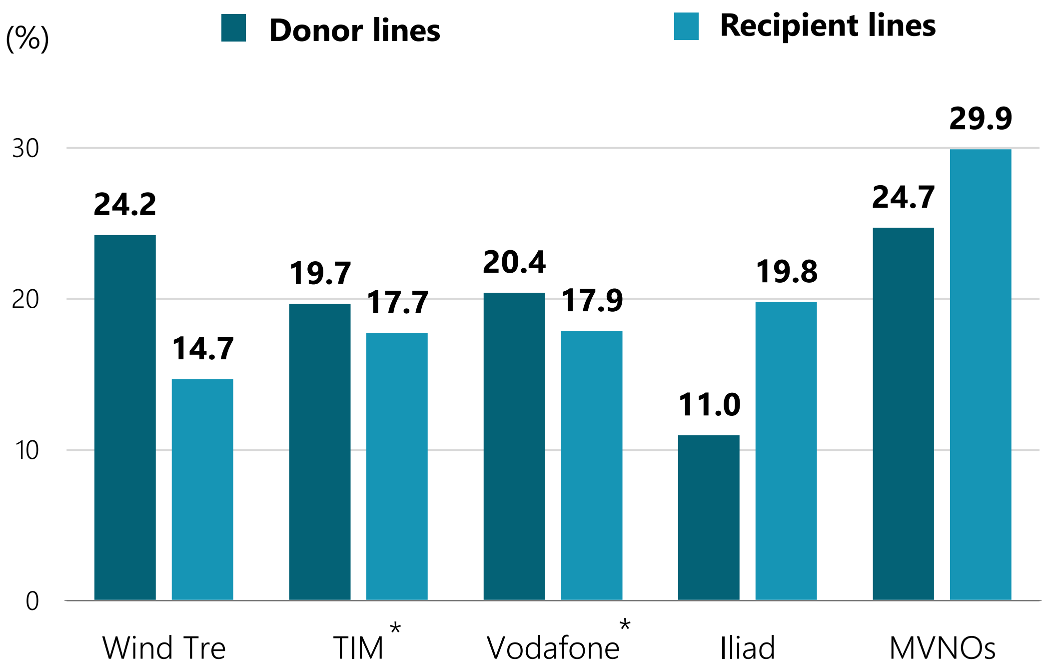
In one year (March 2020 – March 2021), there have been **11,0** million of Mobile Number Portability (MNP) operations



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)

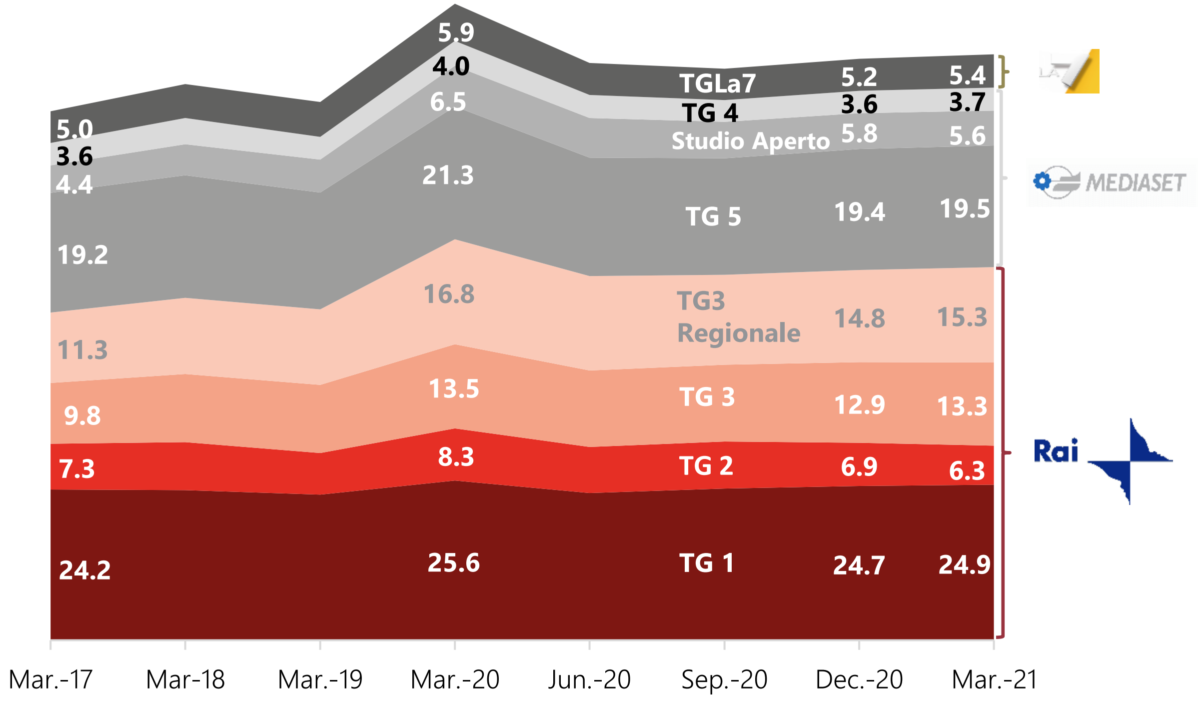
MARCH 2021



(*) 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)

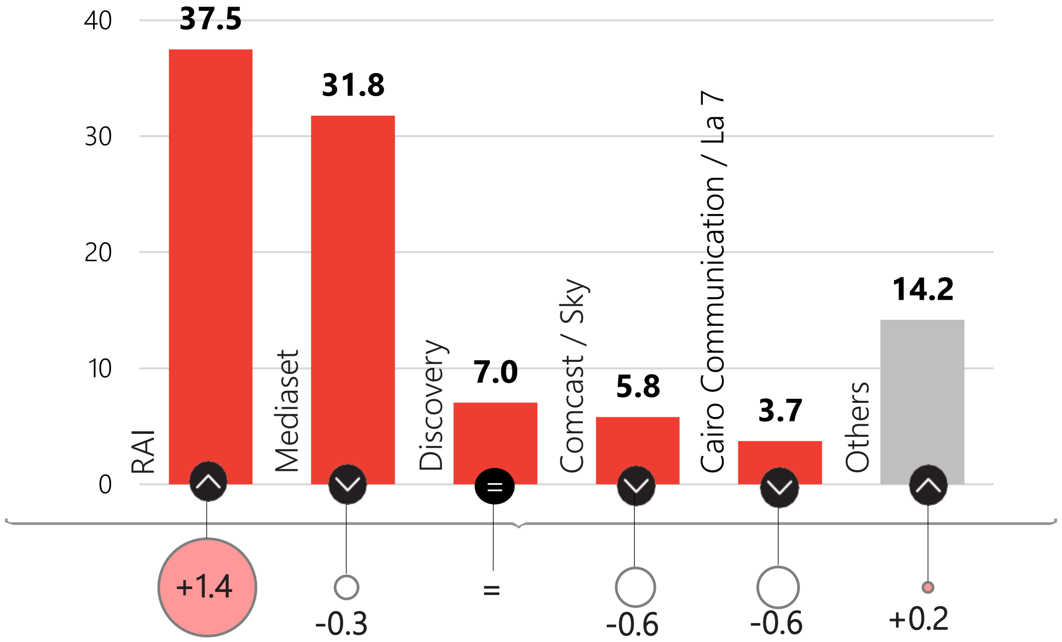
AUDIENCE OF THE MAIN EVENING NEWSCASTS (%)

AVERAGE DAY (March 2017 - March 2021)



MARKET SHARES (%)

MARCH 2021



Differences vs. March 2020 (percentage points)

Δ percentage points (March 2020 – March 2021)

Rai		MEDIASET		La7	
Tg 1	-0.7 p.p.	Tg 5	-1.8 p.p.	Tg La 7	-0.6 p.p.
Tg 2	-2.0 p.p.	Studio Aperto	-0.9 p.p.		
Tg 3	-0.2 p.p.	Tg 4	-0.3 p.p.		
Tg 3 - Regionale	-1.5 p.p.				

Average daily television viewership

Newscasts	Broadcasters
Tg 1: **6.3 M** viewers	Rai: **4.3 M** viewers
Tg 5: **5.0 M** viewers	Mediaset: **3.7 M** viewers

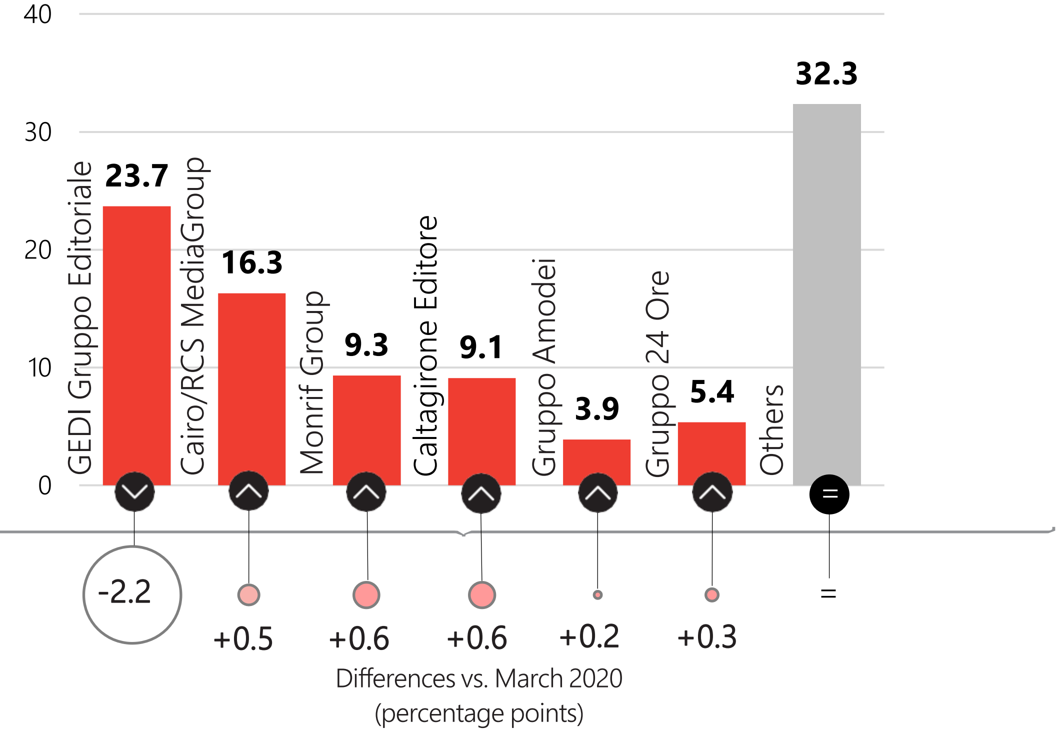
M = million

Source: Agcom elaboration on Auditel's data (Nielsen)

2.2: MEDIA: QUOTIDIANI

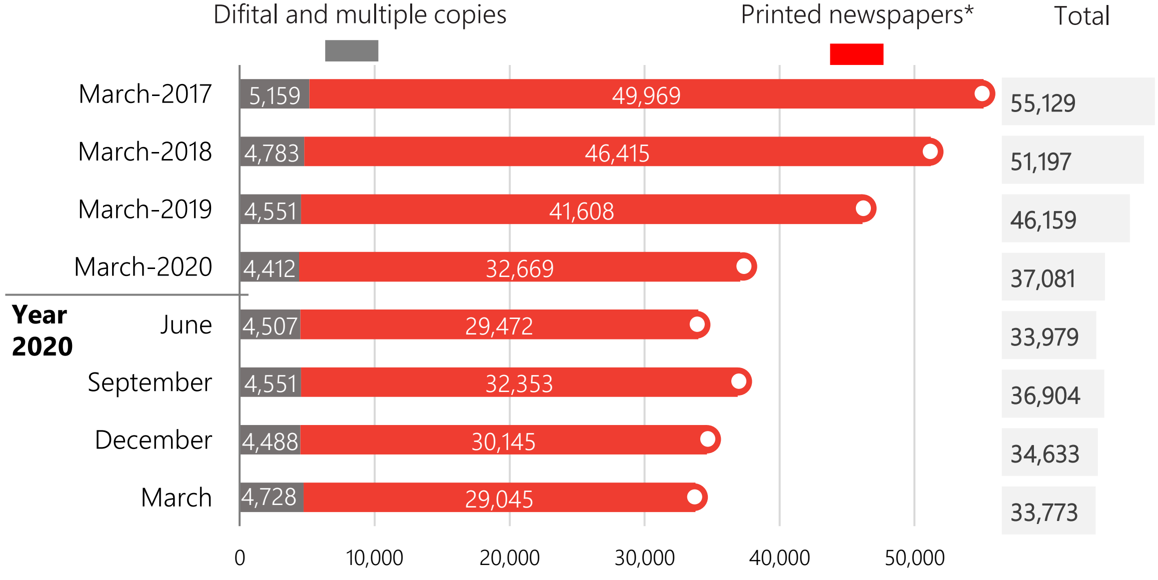
NEWSPAPERS' TOTAL MONTHLY SALES BY EDITORIAL GROUPS (%)*

MARCH 2021



NEWSPAPERS' TOTAL MONTHLY SALES BY 7 MAJOR EDITORIAL BRAND AND TYPE OF DISTRIBUTION CHANNELS*

IN THOUSANDS – MARCH 2021



(*) **Note:** copies sold via distribution channels provided for by law

Total copies sold in March 2021

49,918,662

Annual change:

(March 2020 – March 2021)

- 9%

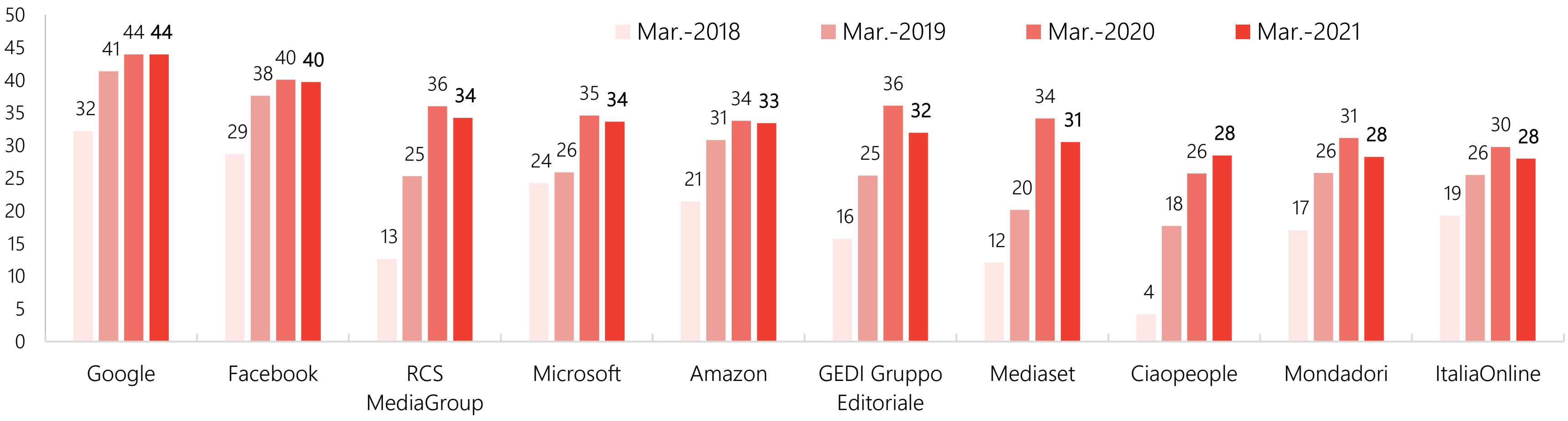
	Annual change (March 2020 – March 2021)	4-Year change (March 2017 – March 2021)
Printed newspapers:	-11%	-42%
Digital and multiple copies: (represent 12.3 % of total sales)	+7%	-8%

(*) **Note:** during the last quarter of 2020, GEDI completed the sale of the business unit of the newspapers Il Tirreno, La Gazzetta di Modena, La Gazzetta di Reggio and La Nuova Ferrara to SAE Srl. The data for the year 2000 refer to the ownership configuration of the entities prior to this transaction.

Source: Agcom elaboration on data from ADS and IES

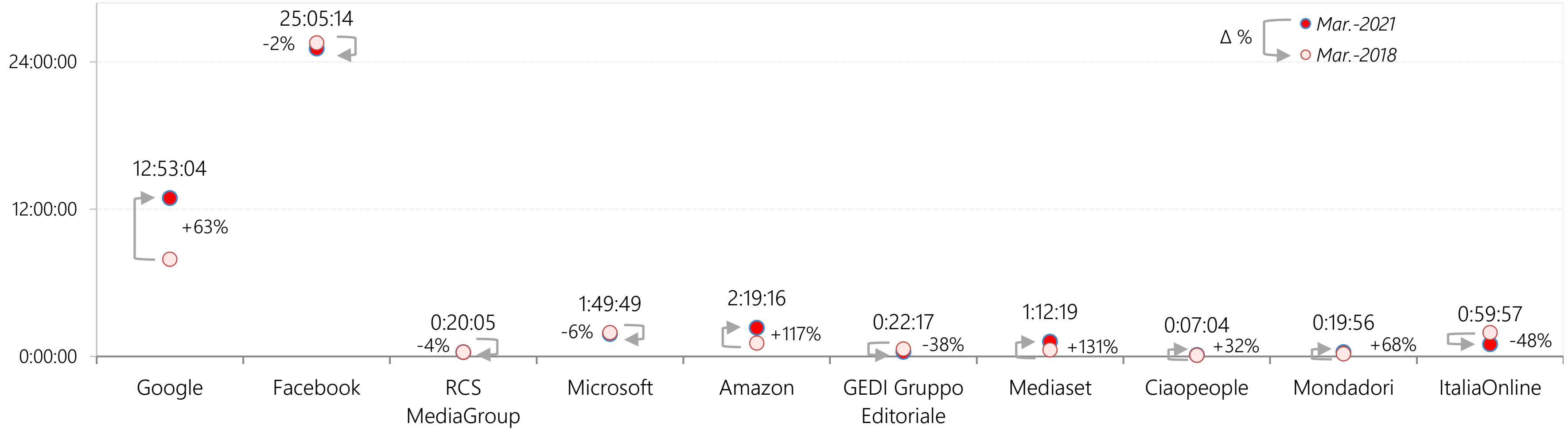
2.3: MEDIA INTERNET: ACTIVE USERS OF THE MAIN OPERATORS

AUDIENCE ON AN AVERAGE DAY (%) (MARCH 2018 – MARCH 2021)
IN MILLIONS



In March 2021, **44** million unique users connected to the internet

AVERAGE MONTHLY TIME SPENT ON WEBSITE BY VISITORS (MARCH 2018 – MARCH 2021)
(hh:mm:ss)



In March 2021, a total amount of **66** hours of surfing, on average, per person per month

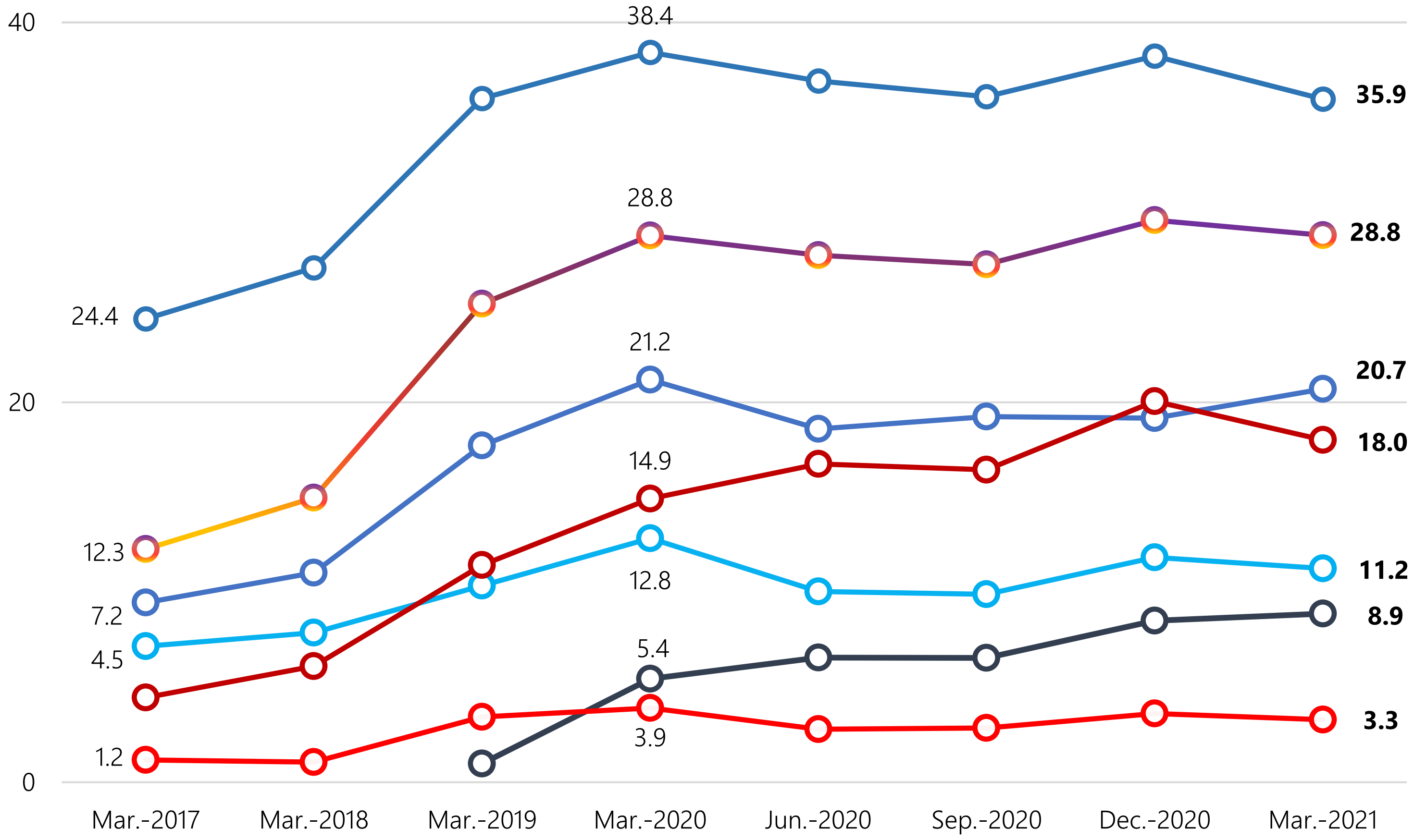
Note: Since March 2018, the Audiweb system has adopted a new methodology

Source: Agcom elaboration on Audweb's data (Nielsen)

2.4: MEDIA INTERNET: ACTIVE USERS OF THE MAIN SOCIAL NETWORKS

MAIN SOCIAL NETWORKS USERS

MARCH 2017 – MARCH 2021
IN MILLIONS

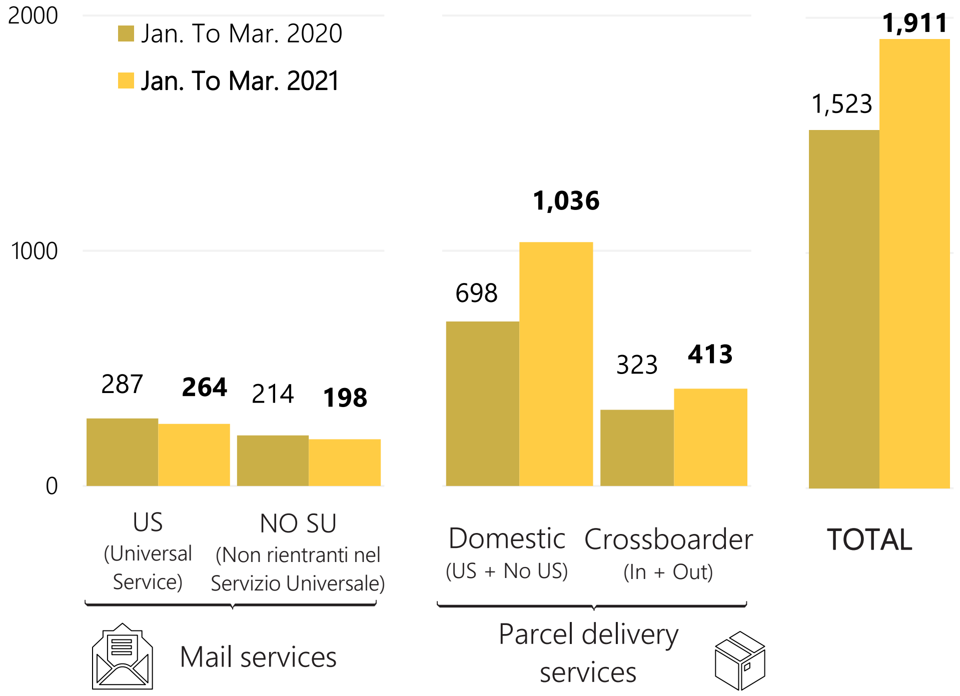


	Quarterly change (Dec. 2020 – Mar. 2021)	Annual change (Mar. 2020 – Mar. 2021)
Facebook	-5.9%	-6.4%
Instagram	-2.7%	+0.1%
Linkedin	+8.0%	-2.3%
Pinterest	-10.2%	+20.7%
Twitter	-5.0%	-12.4%
Tik Tok	+4.4%	+62.8%
Reddit	-9.2%	-15.9%

Source: Agcom elaboration on Audweb's data (Nielsen)

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



-7.9%

+41.9%

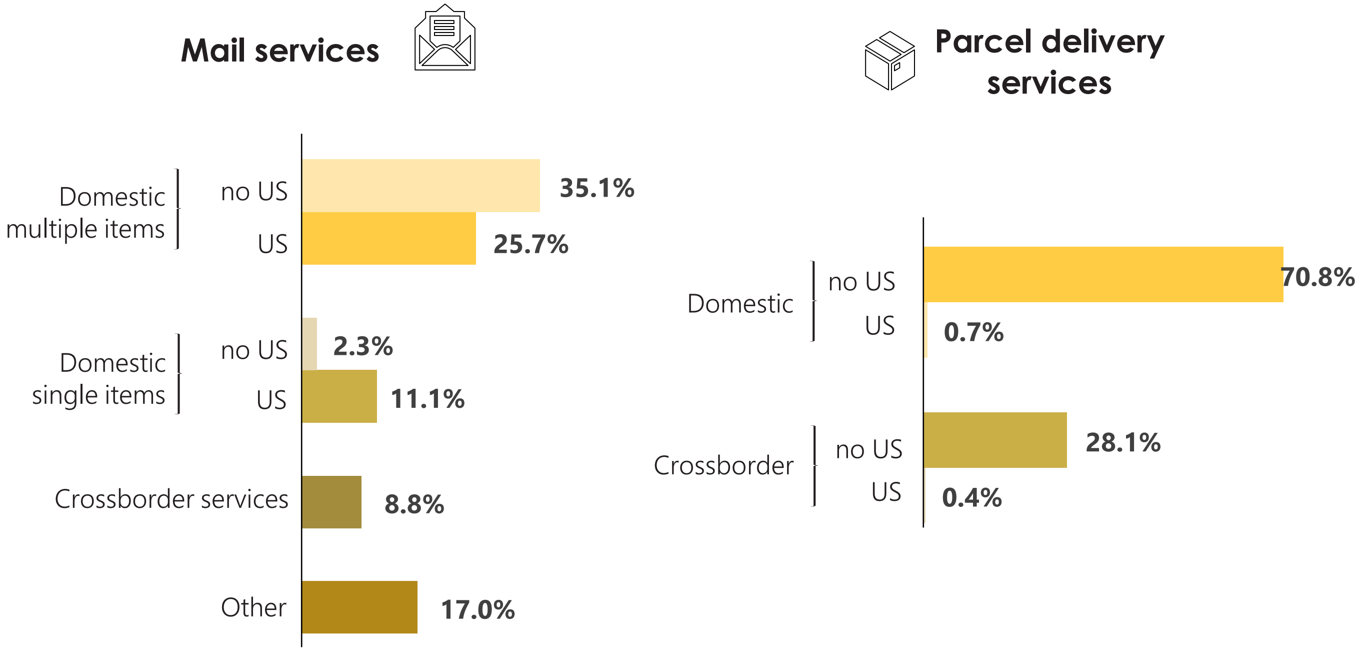
+25.5%

Total

Annual change
(March 2020 – March 2021)

REVENUES BY SOURCE TYPE SINCE THE BEGINNING OF THE YEAR (%)

JANUARY TO MARCH 2021



Annual change
(March 2020 – March 2021)

-3.0% Domestic multiple items

-6.1% Domestic single items

-14.8% Crossborder services

-20.2% Other

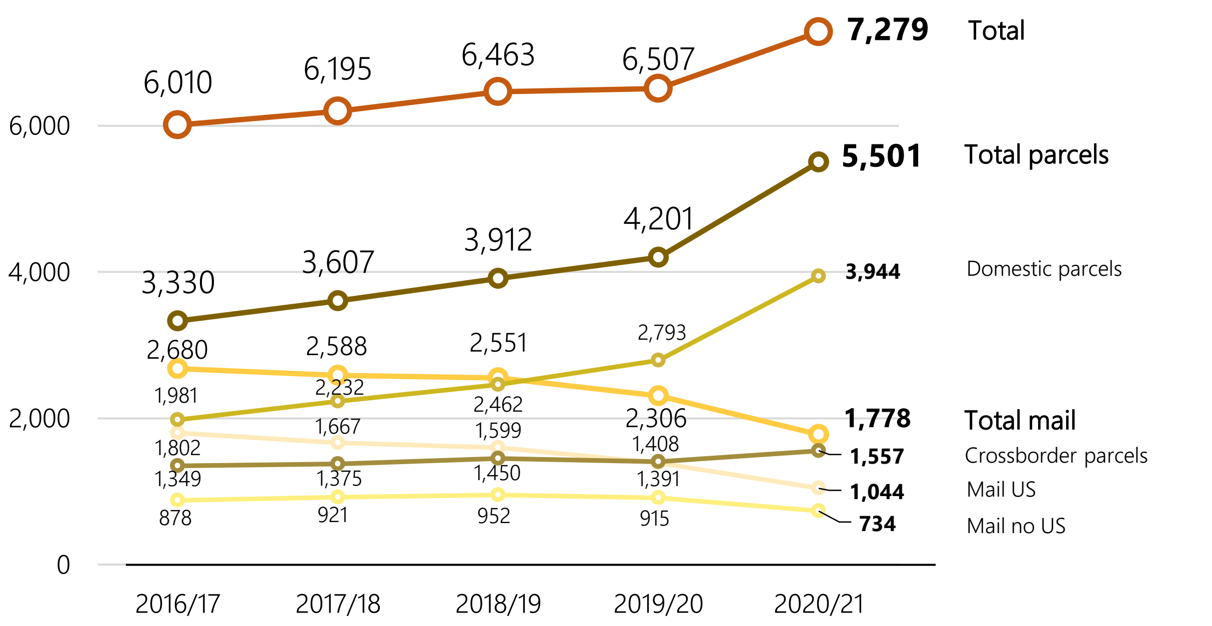
+48.3% Domestic

+27.9% Crossborder

3.2: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

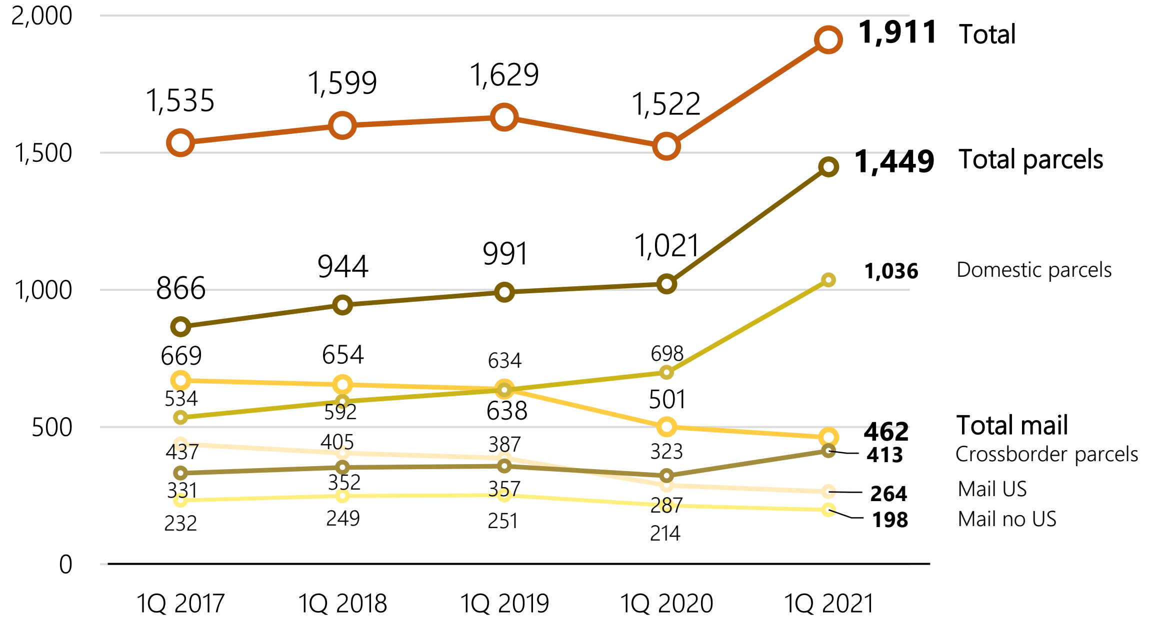
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



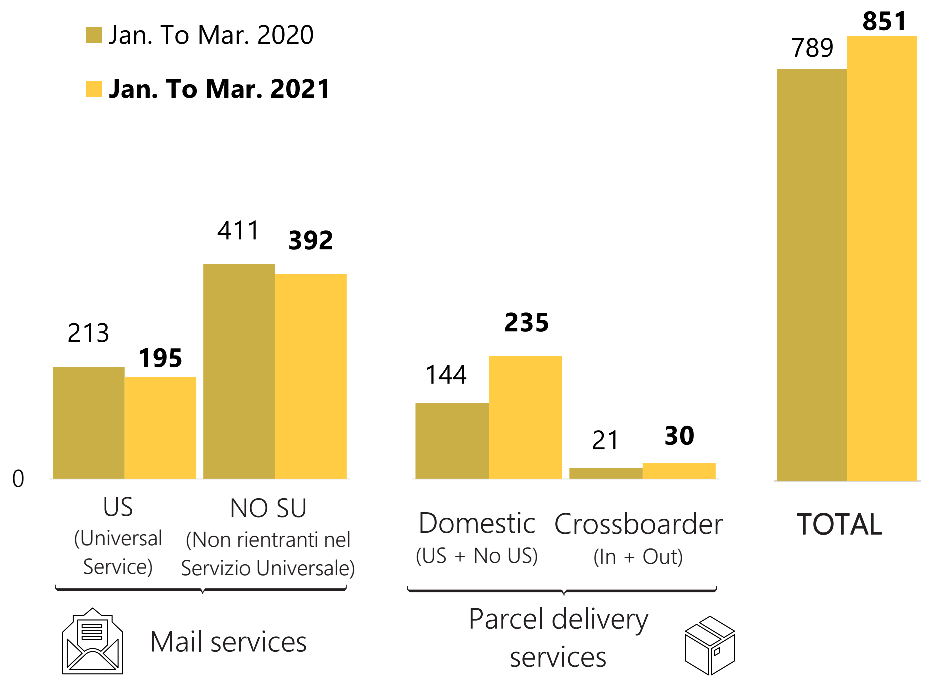
	Change (2016/2017 – 2020/2021)	Change (2019/2020 – 2020/2021)
Total:	**+21.1%** ↑	**+11.9%** ↑
Mail services:	**-33.7%** ↓	**-22.9%** ↓
- Universal Service:	-42.1% ↓	-25.0% ↓
- No Universal Service:	-16.4% ↓	-19.8% ↓
Parcel delivery services:	**+65.2%** ↑	**+30.9%** ↑
- Domestic:	+99.1% ↑	+41.2% ↑
- Crossborder:	+15.5% ↑	+10.6% ↑

	Change (1Q 2017 – 1Q 2021)	Change (1Q 2020 – 1Q 2021)
Total:	**+24.4%** ↑	**+25.5%** ↑
Mail services:	**-31.0%** ↓	**-7.8%** ↓
- Universal Service:	-39.6% ↓	-8.1% ↓
- No Universal Service:	-14.7% ↓	-7.4% ↓
Parcel delivery services:	**+67.3%** ↑	**+41.9%** ↑
- Domestic:	+93.8% ↑	+48.3% ↑
- Crossborder:	+24.6% ↑	+27.9% ↑

3.3: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS



-6.0%

+60.5%

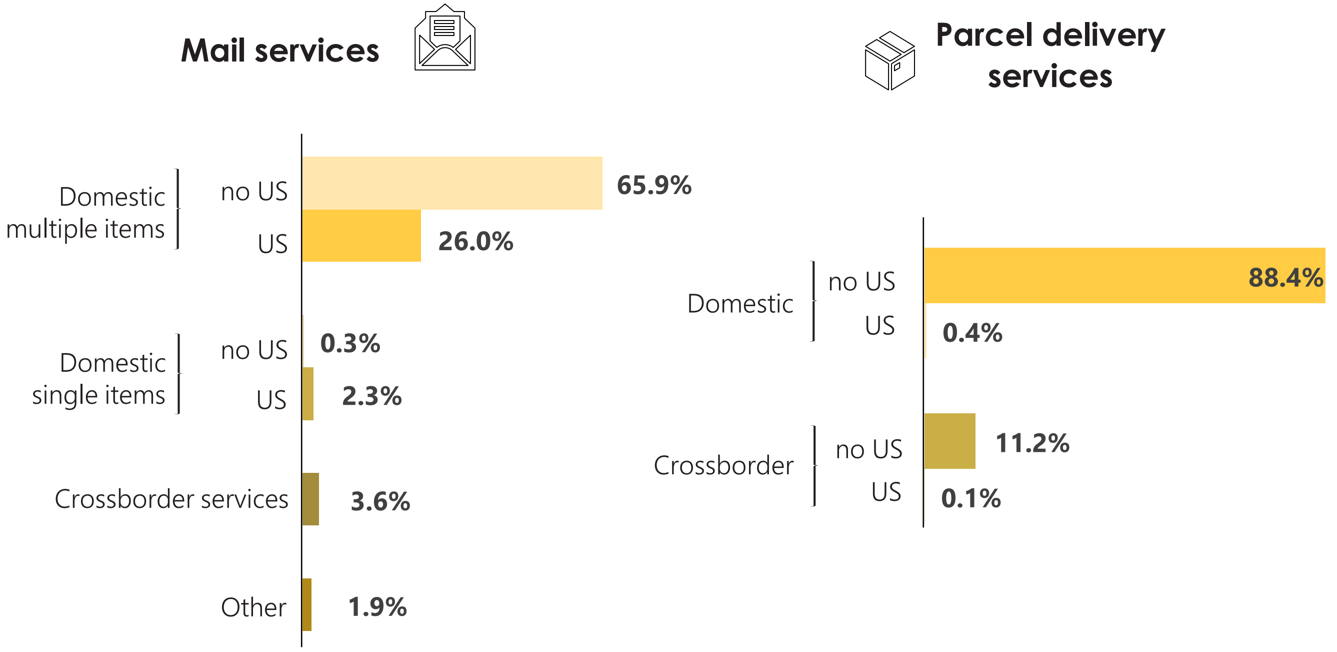
+7.9%

Total

Annual change
(March 2020 – March 2021)

VOLUMES BY SOURCE TYPE (%)

JANUARY TO MARCH 2021

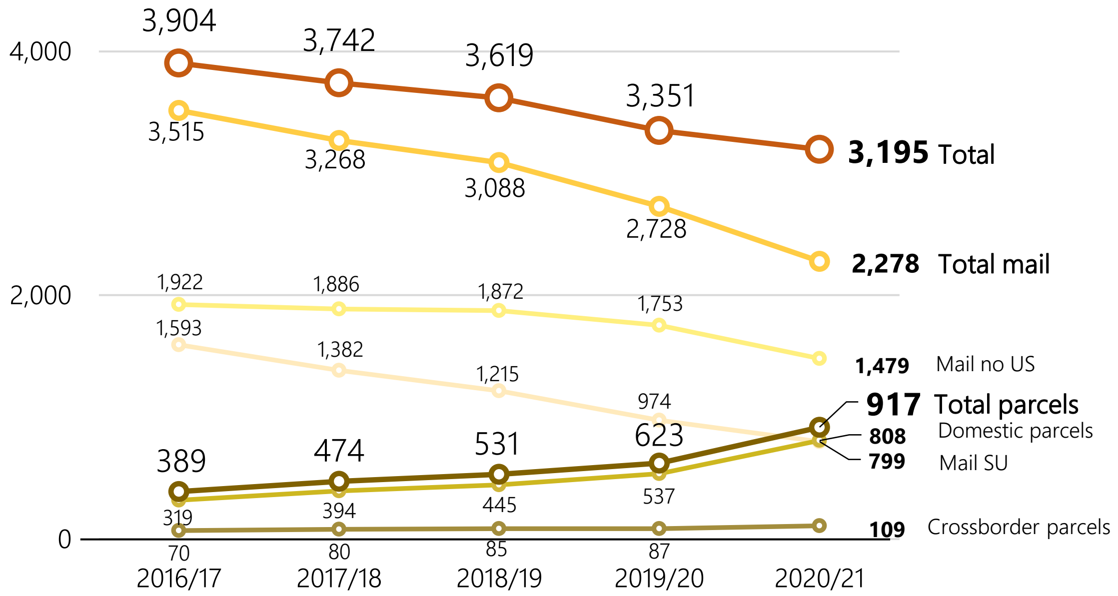


Annual change
(March 2020 – March 2021)

-4.7%	-2.8%	-24.2%	-25.3%	+62.9%	+43.5%
Domestic multiple items	Domestic single items	Crossborder services	Other	Domestic	Crossborder

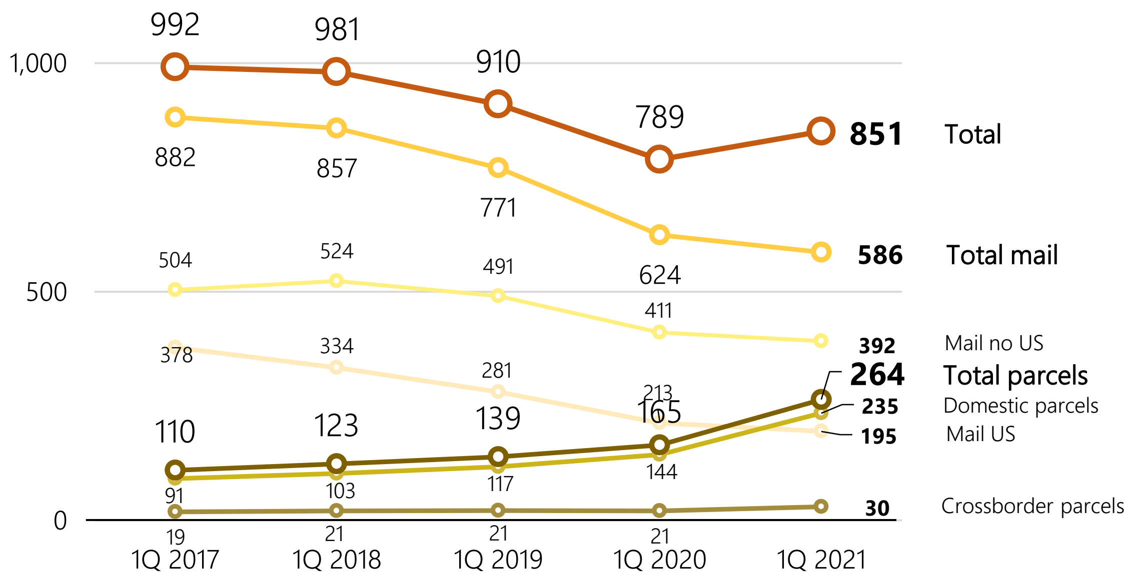
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS

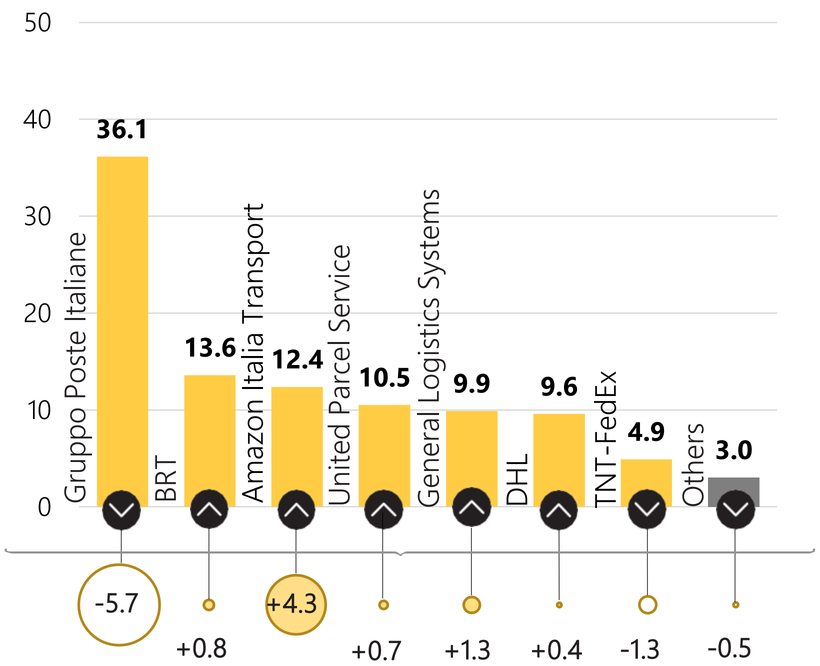


	Change (2016/2017 – 2020/2021)	Change (2019/2020 – 2020/2021)
Total:	**-18.2%**	**-4.7%**
Mail services:	**-35.2%**	**-16.5%**
- Universal Service:	-49.9%	-18.0%
- No Universal Service:	-23.1%	-15.6%
Parcel delivery services:	**+135.8%**	**+47.1%**
- Domestic:	+153.7%	+50.6%
- Crossborder:	+55.0%	+25.9%

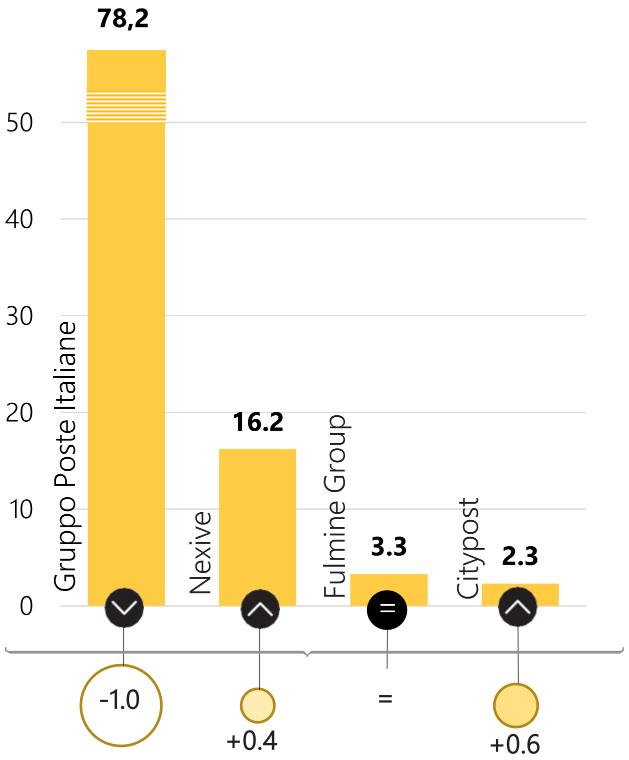
	Change (1Q 2017 – 1Q 2021)	Change (1Q 2020 – 1Q 2021)
Total:	**-14.2%**	**+7.8%**
Mail services:	**-35.5%**	**-6.1%**
- Universal Service:	-48.5%	-8.7%
- No Universal Service:	-22.2%	-4.7%
Parcel delivery services:	**+141.0%**	**+60.5%**
- Domestic:	+157.3%	+62.9%
- Crossborder:	+60.6%	+43.5%

MARCH 2021

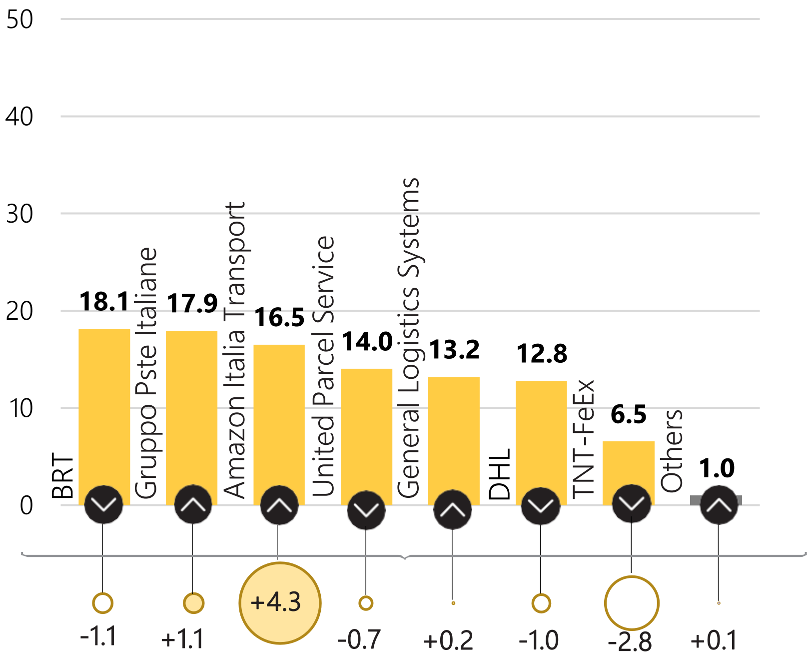
MAIL AND PARCEL DELIVERY SERVICES



MAIL SERVICES
not included in Universal service



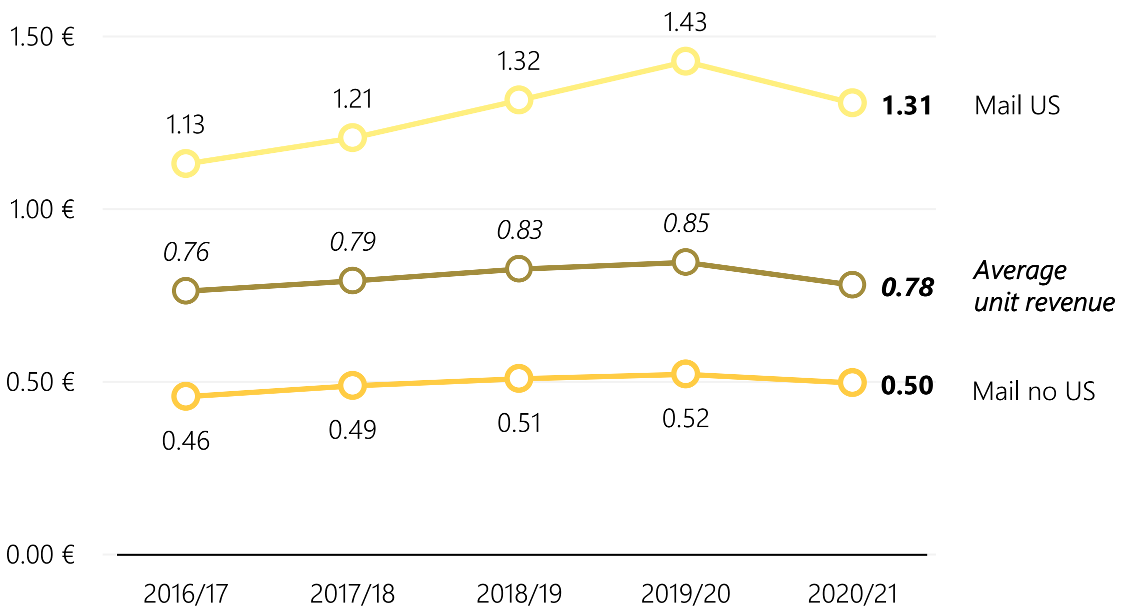
PARCEL DELIVERY SERVICES COURIERS
not included in Universal service



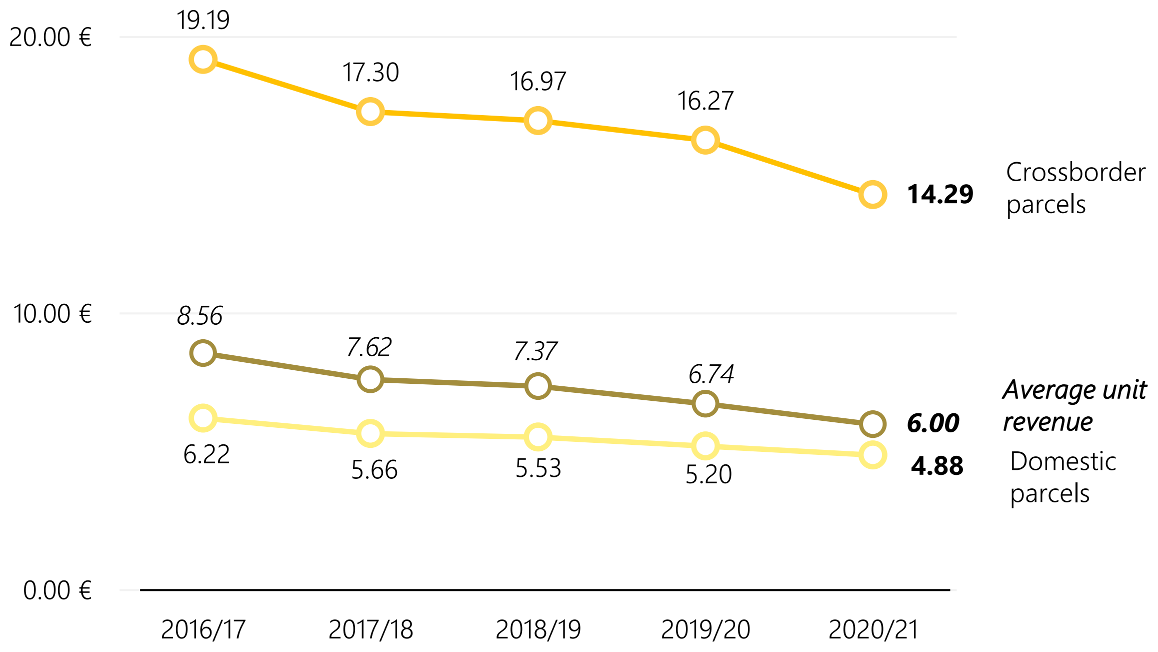
Differences vs. March 2020
(percentage points)

3.6: POSTAL SERVICES: PER-UNIT REVENUES HISTORICAL TRENDS IN €

MAIL SERVICES



PARCELS DELIVERY SERVICES

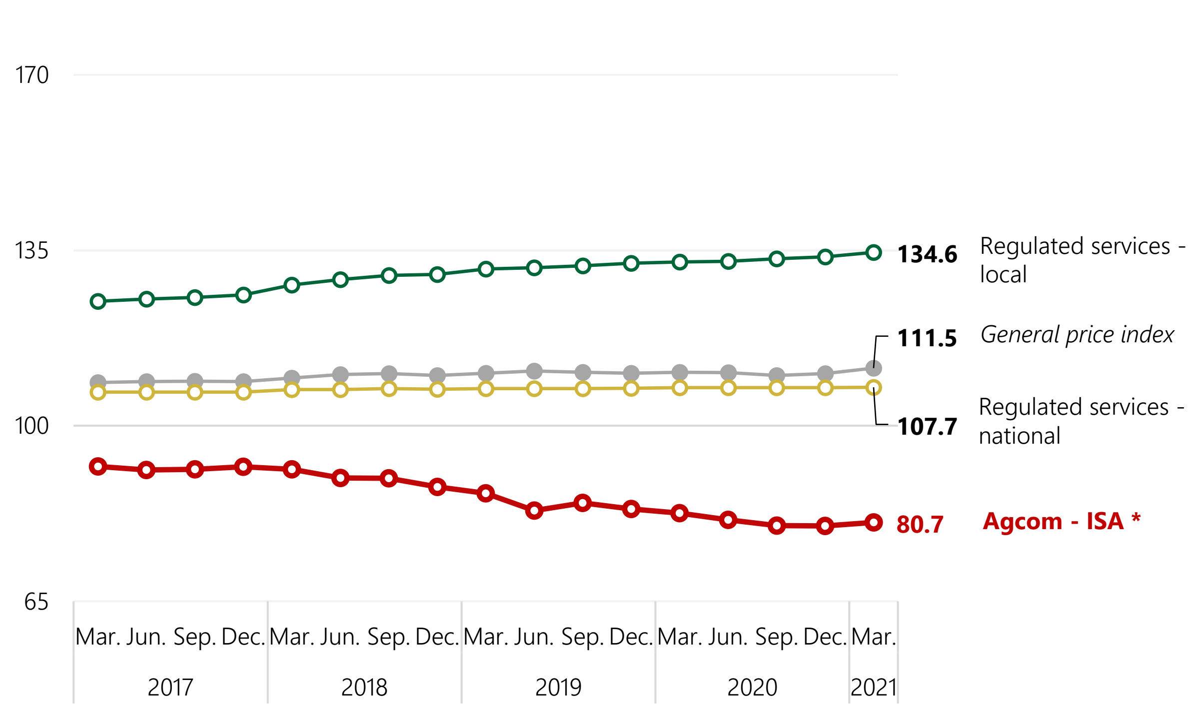


	Change (2016/2017 – 2020/2021)	Change (2019/2020 – 2020/2021)
Average unit revenue:	+2.4% ↑	-7.7% ↓
- Mail US:	+15.5% ↑	-8.5% ↓
- Mail no US:	+8.6% ↑	-4.9% ↓

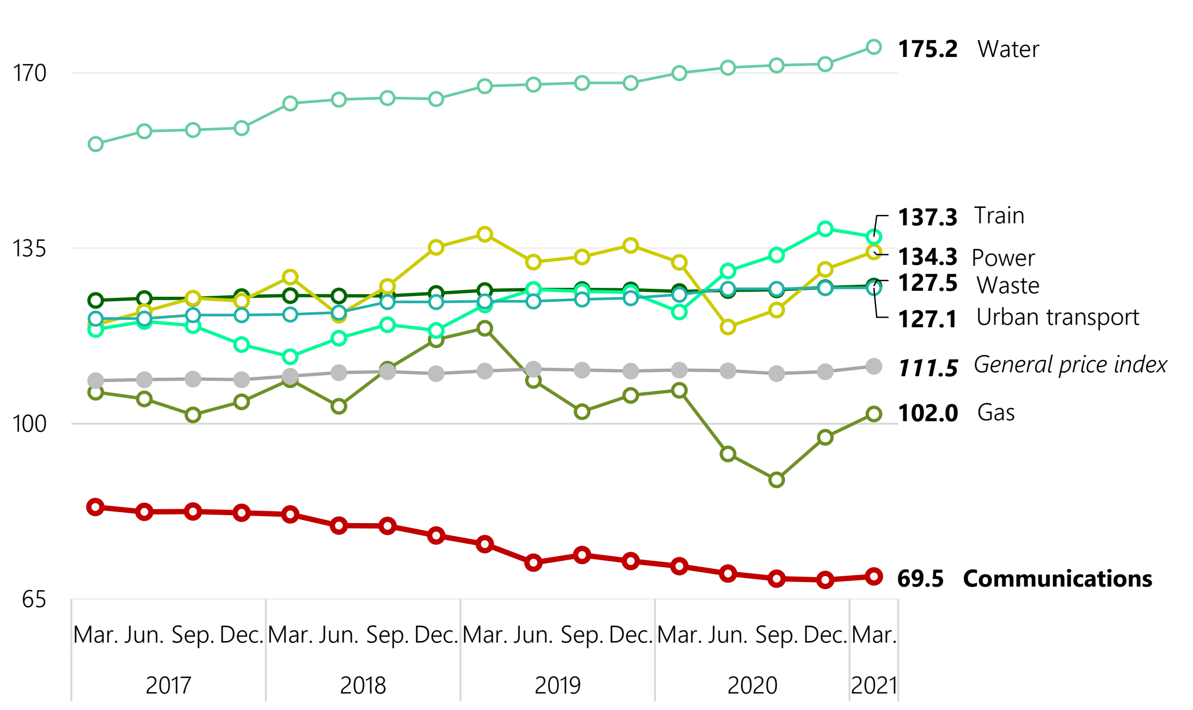
	Change (2016/2017 – 2020/2021)	Change (2019/2020 – 2020/2021)
Average unit revenue:	-30.0% ↓	-11.0% ↓
Crossborder parcels:	-25.5% ↓	-12.1% ↓
- US:	*-16.6%* ↓	*-10.3%* ↓
- No US:	*-25.4%* ↓	*-12.1%* ↓
Domestic parcels:	-21.5% ↓	-6.2% ↓
- US:	*-2.5%* ↓	*-6.1%* ↓
- No US:	*-21.7%* ↓	*-6.2%* ↓

4.1 PRICE: HARMONISED CONSUMER PRICE INDEX AND OTHER UTILITIES PRICE INDICES (2010=100)

GENERAL PRICE INDEX



UTILITIES PRICE INDEX



Source: Agcom elaboration on data from Istat

	4-Year change	Annual change
ISA (Agcom summary price index):	-12.2% ↓	-2.3% ↓
General price index:	+2.7% ↑	+0.7% ↑
Regulated services - local:	+7.9% ↑	+1.4% ↑
Regulated services - national:	+0.9% ↑	+0.1% ↑

(*) **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).

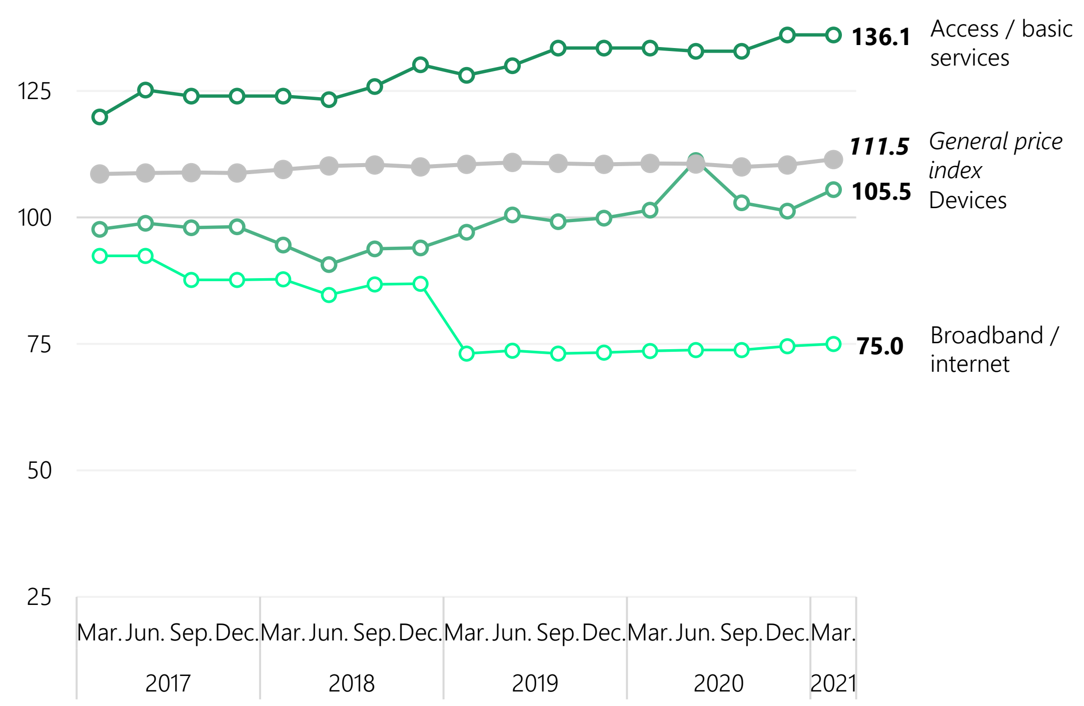
	4-Year change	Annual change
Water *(04.4.1)*:	+12.5% ↑	+3.1% ↑
Waste *(04.4.2)*:	+2.3% ↑	+0.9% ↑
Power *(04.5.1)*:	+12.1% ↑	+1.6% ↑
Gas *(04.5.2)*:	-4.0% ↓	-4.4% ↓

	4-Year change	Annual change
Train *(07.3.1)*:	+15.6% ↑	+12.3% ↑
Urban transport *(07.3.2.1.1)*:	+5.0% ↑	+1.0% ↑
Communications *(08)*:	-16.7% ↓	-2.9% ↓

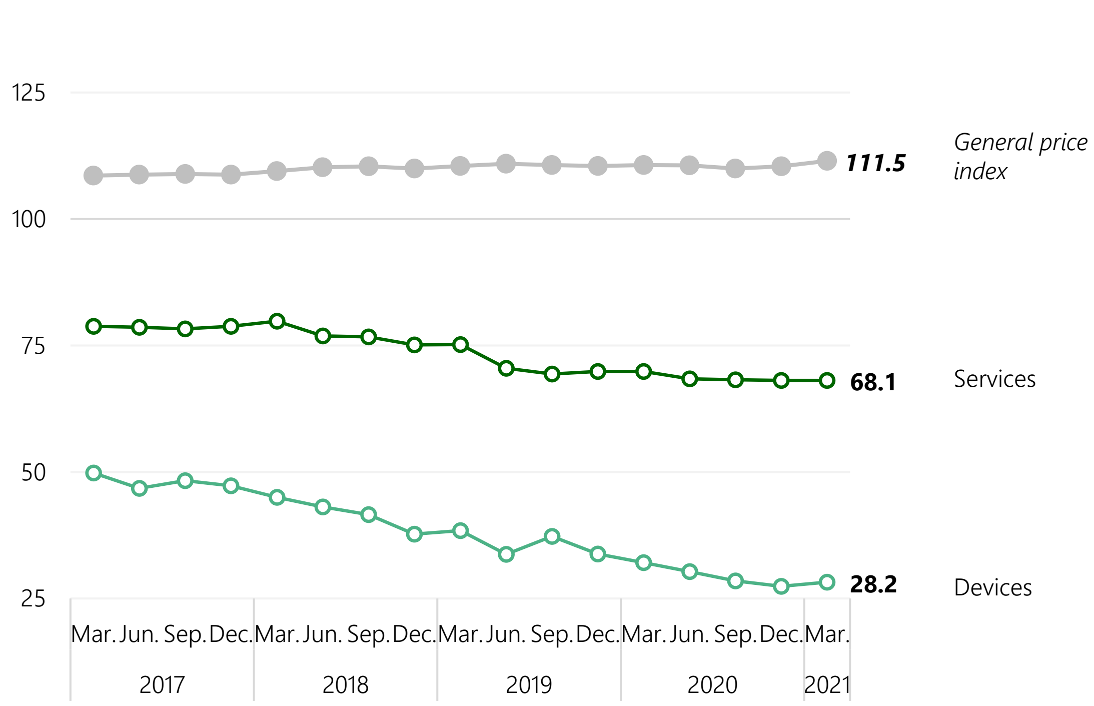
(COICOP - Classification of Individual Consumption by Purpose)

4.2 PRICE: MOBILE AND FIXED TELEPHONY PRICE INDICES (2010=100)

FIXED TELEPHONY PRICE INDICES



MOBILE TELEPHONY PRICE INDICES



Source: Agcom elaboration on data from Istat

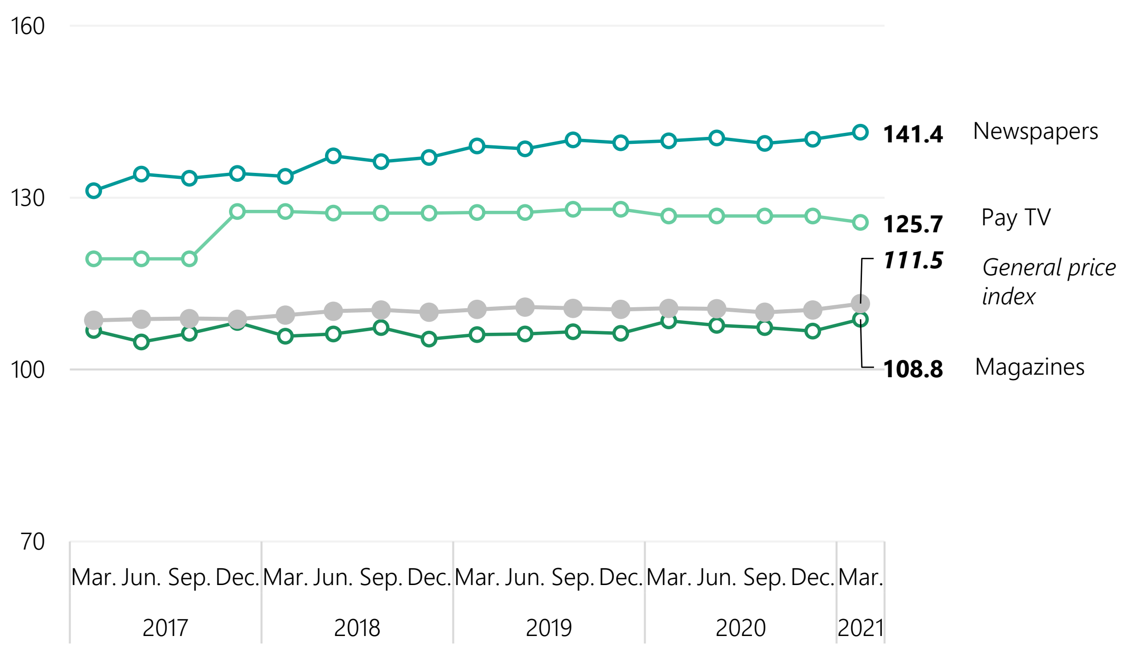
	4-Year change	Annual change
Access / basic services *(08.3.0.1)*:	**+13.5%** ↑	**+1.9%** ↑
Devices *(08.2.0.1)*:	**+8.0%** ↑	**+3.9%** ↑
Broadband / internet *(08.3.0.3.0.01)*:	**-18.8%** ↓	**+1.9%** ↑

	4-Year change	Annual change
Servces *(08.3.0.2)*:	**-13.6%** ↓	**-2.6%** ↓
Devices *(08.2.0.2)*:	**-43.4%** ↓	**-12.1%** ↓

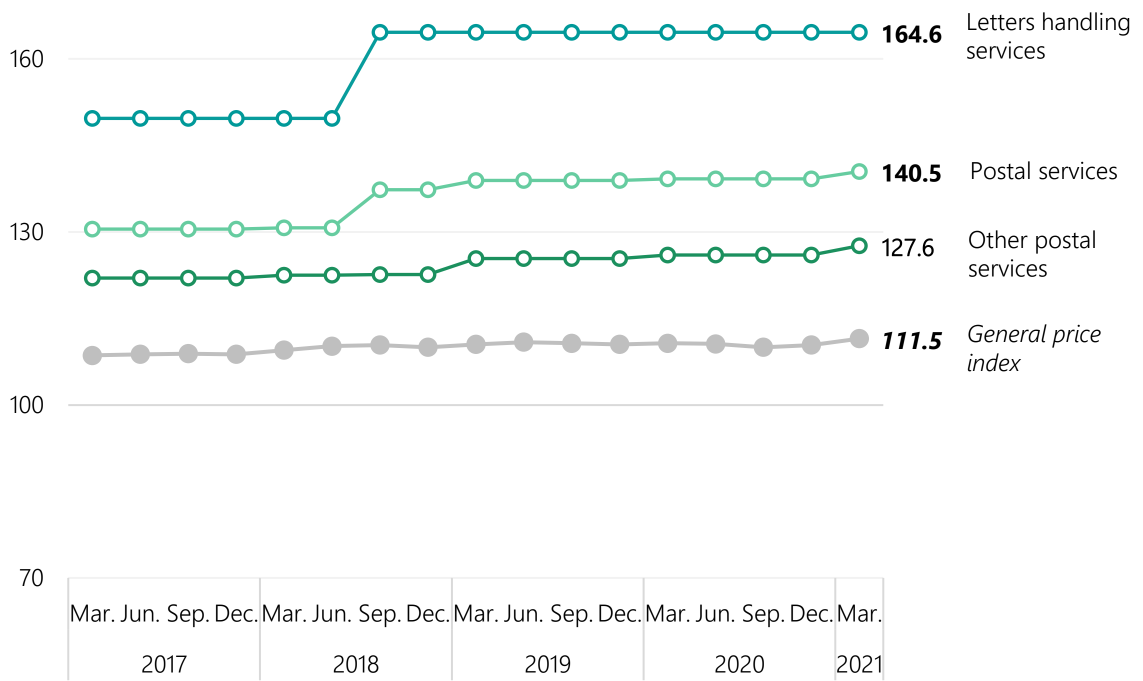
(COICOP - Classification of Individual Consumption by Purpose)

4.3 PRICE: DAILY NEWSPAPERS, MAGAZINES, TV AND POSTAL SERVICES PRICE INDICES (2010=100)

NEWSPAPERS, MAGAZINES, TV PRICE INDICES



POSTAL SERVICES PRICE INDEX



Source: Agcom elaboration on data from Istat

	4-Year change	Annual change
Newspapers *(09.5.2.1.0)*:	+7.8% ↑	+1.1% ↑
Pay TV *(09.4.2.3.0.02)*:	+5.4% ↑	-0.9% ↓
Magazines *(09.5.2.2.0)*:	+1.9% ↑	+0.3% ↑

	4-Year change	Annual change
Postal services *(08.1)*:	+7.7% ↑	+0.9% ↑
Letters handling services *(08.1.0.1.0.00)*:	+10.0% ↑	=
Other postal services *(08.1.0.9.0.00)*:	+4.6% ↑	+1.3% ↑

(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

Source: Agcom elaboration on data from Eurostat

1-Year change %

March 2020 - March 2021

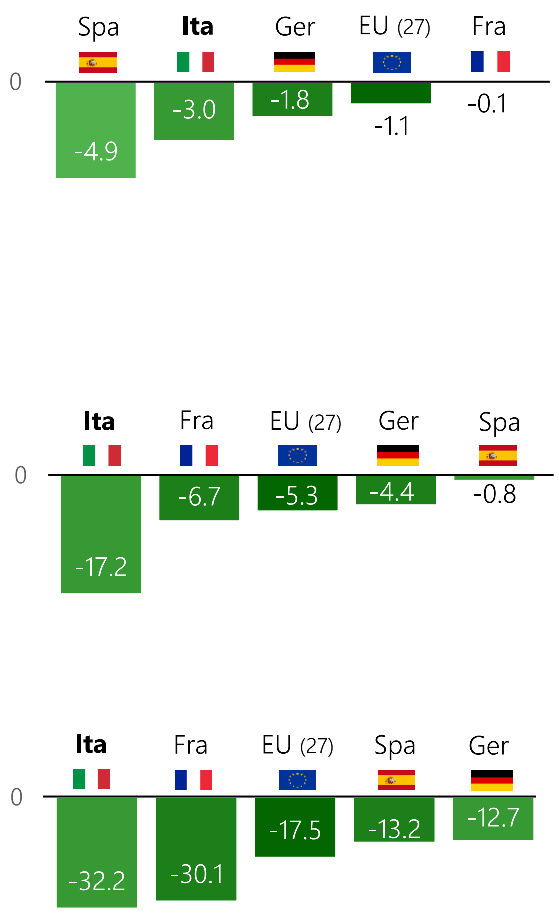
5-Year change %

March 2016 - March 2021

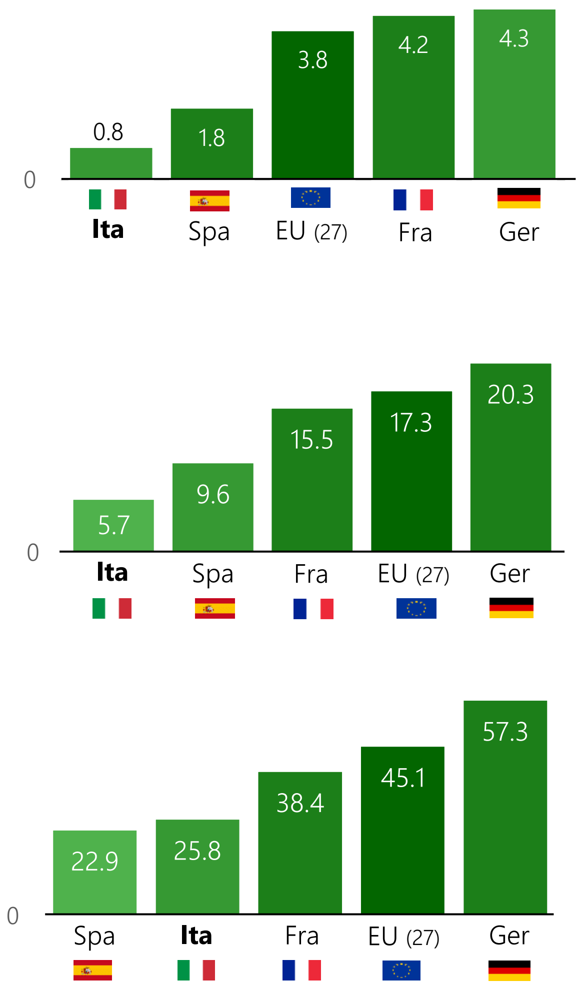
10-Year change %

March 2011 - March 2021

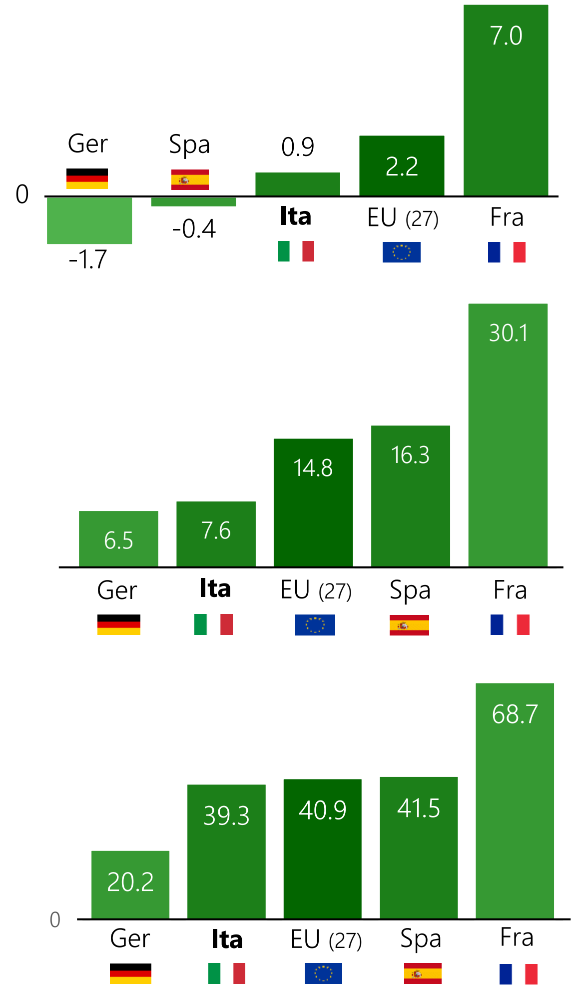
TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)



NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)



POSTAL SERVICES
(COICOP 08.1)



AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

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