AGCOM AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2020

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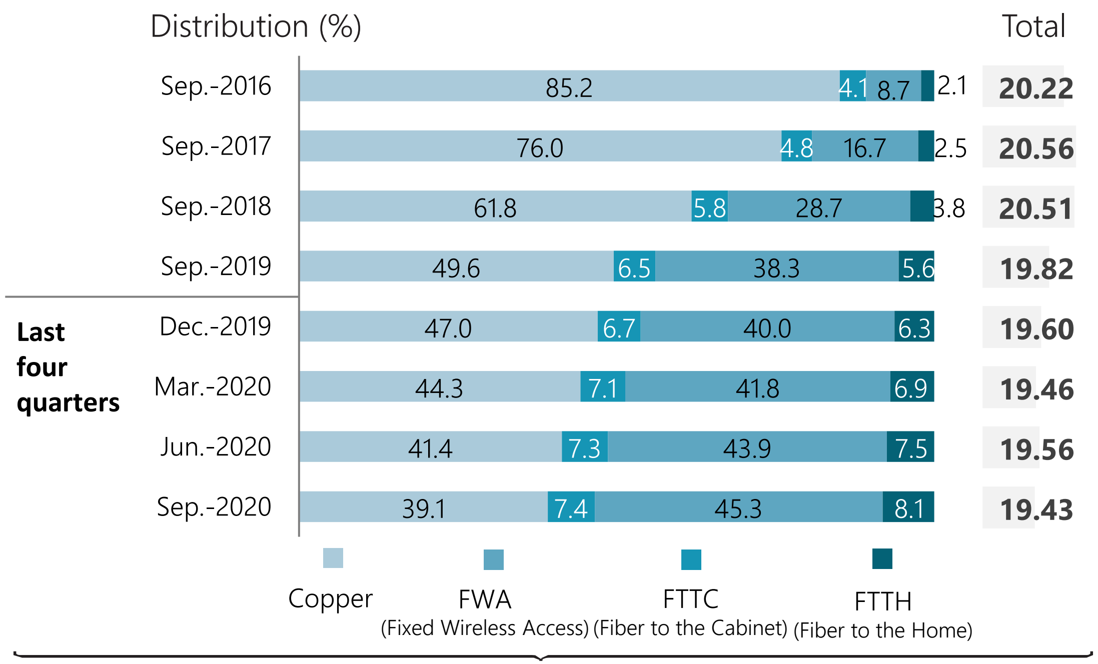
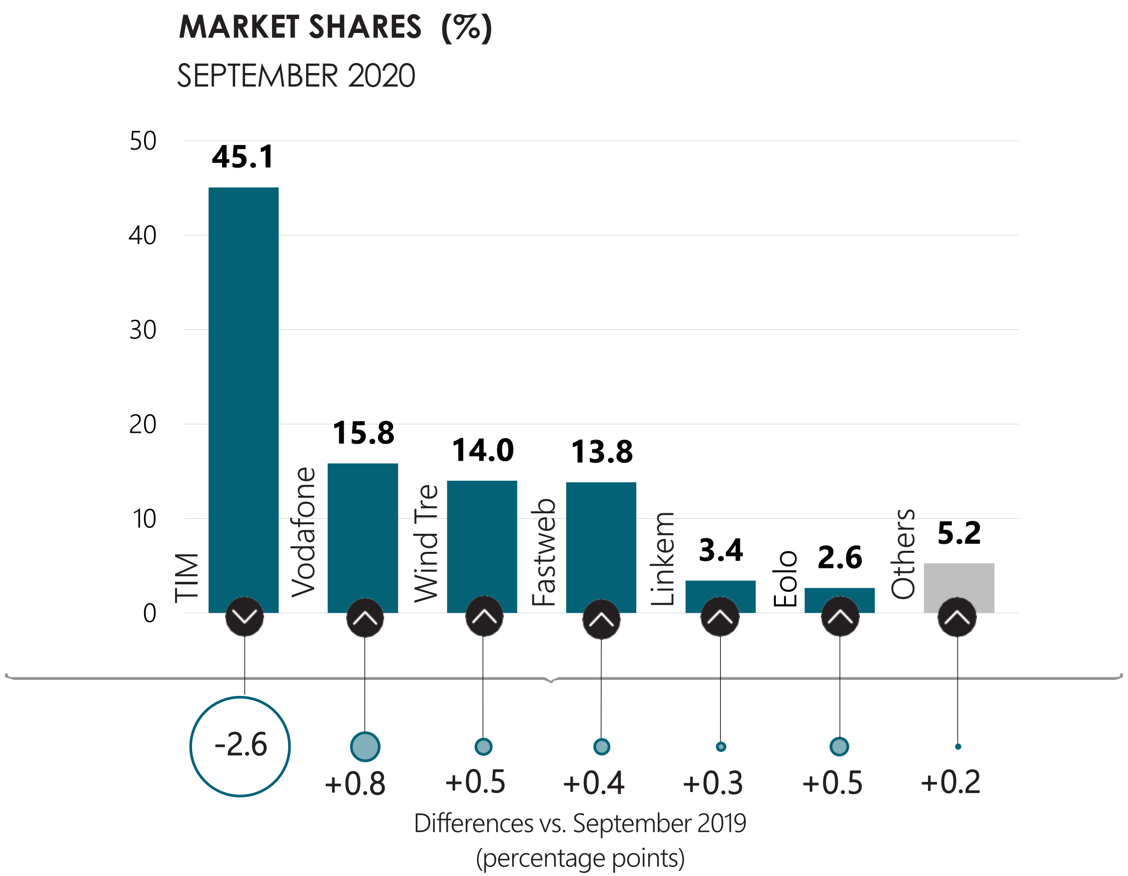
The following figures are based on AGCOM's elaborations on firms' data and other sources (updated to September 2020). Due to changes in firms' accounting methods, some figures cannot be compared directly with those reported in previous issues. Percentages may not total 100 due to rounding.

AGCOM





Total lines	(no of lines)	(Δ %)
Quarterly change (March 2020 – September 2020)	**+131 K** accesses	-0.7%
Annual change (September 2019 – September 2020)	**-391 K** accesses	-2.0%
4-Year change (September 2016 – September 2020)	**-792 K** accesses	-3.9%

Distribution

(Δ 2019-2020) percentage points

Copper:	-10.4
FWA:	+0.9
FTTC:	+7.0
FTTH:	+2.5

TIM's market share has dropped to **45.1%**

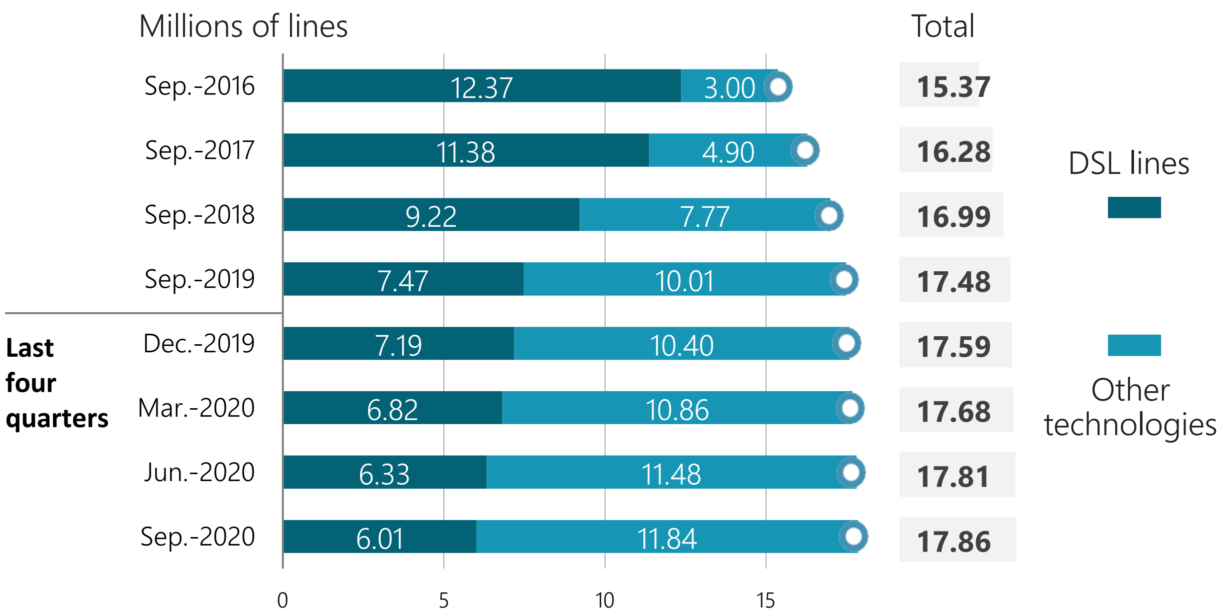
The market shares of **Vodafone**, **Wind Tre** and **Fastweb** has increased

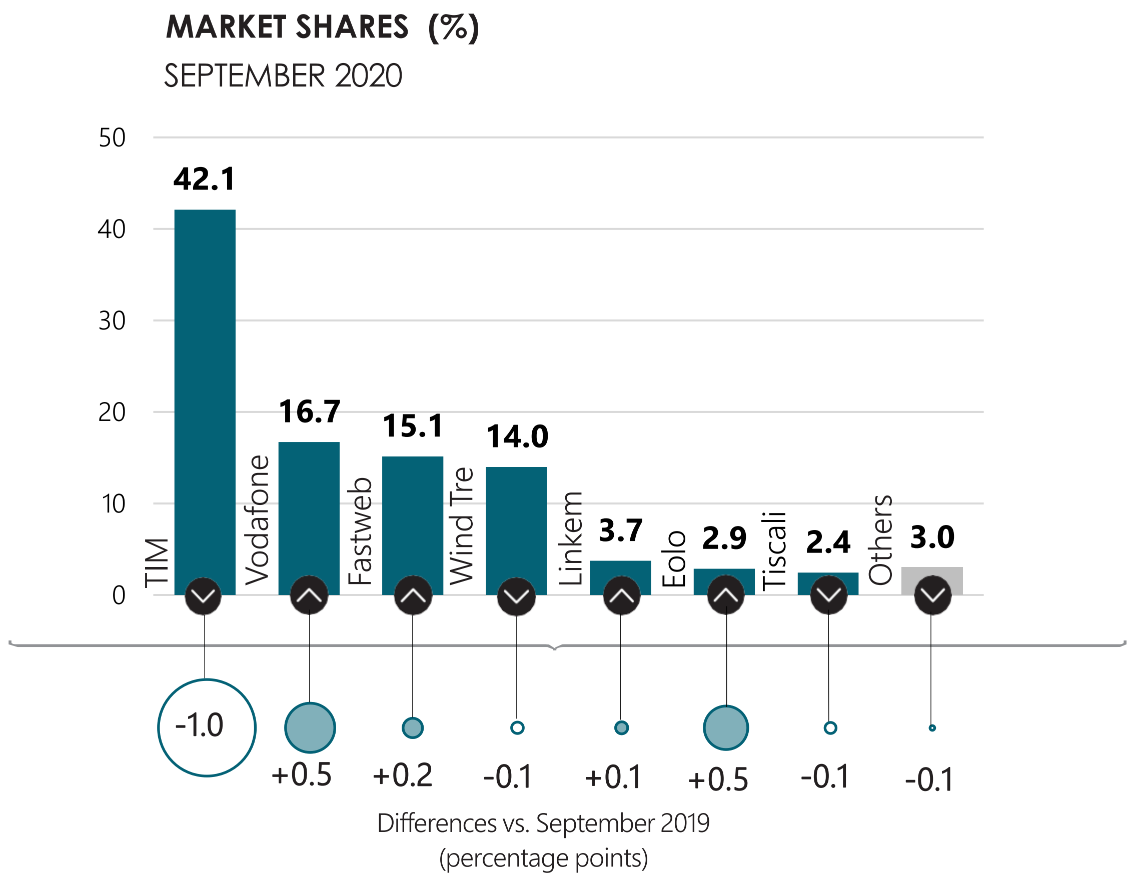
Other operators have increased their market share

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

1.2: FIXED LINES: BROADBAND AND ULTRABROADBAND LINES





Quarterly change
(Sept. 2020 – Sept. 2020)

Total lines

+48 K
lines
(+0.3%)

Annual change
(Sept. 2019 – Sept. 2020)

Total lines	DSL lines	Other technologies
+374 K lines (+2.1 %)	**-1.455 M** lines (-19.5%)	**+1.830 M** lines (+18.3%)

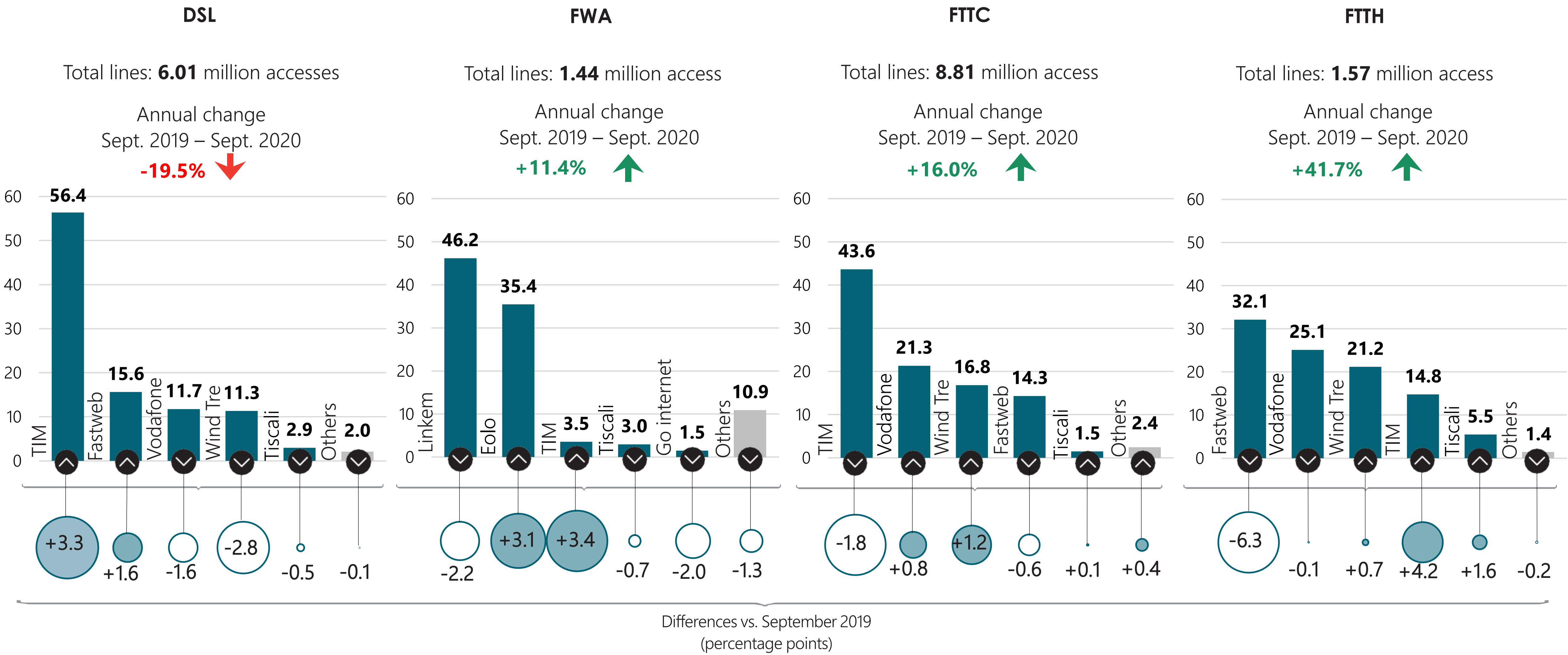
K = thousand
M = million

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

The market shares of **Vodafone** and **Fastweb** has increased

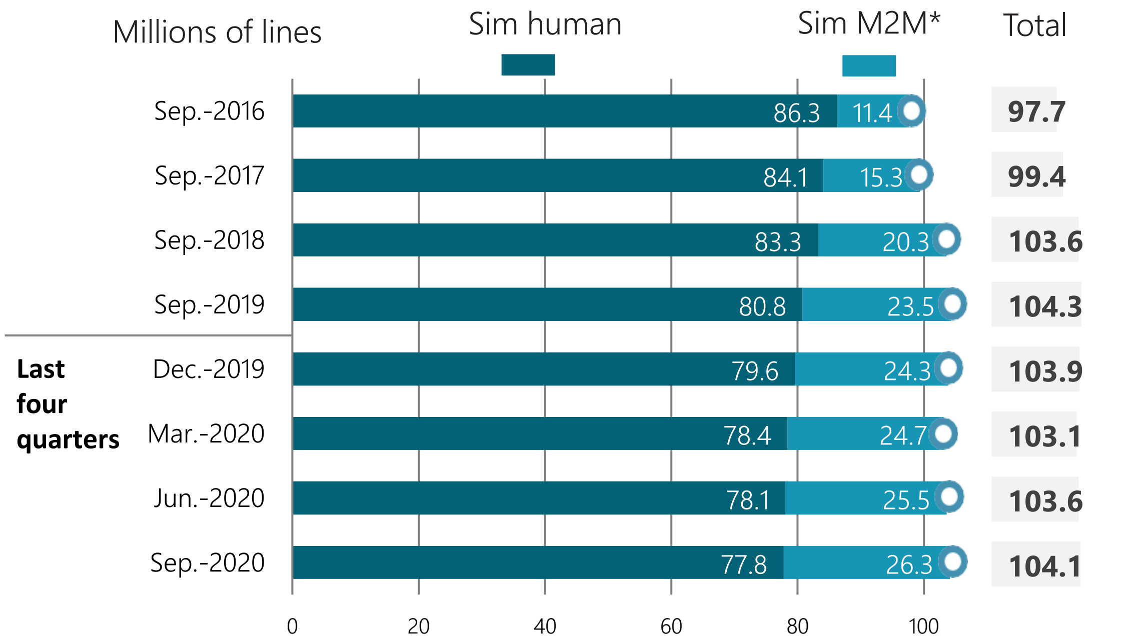
Wind Tre's market share has decreased

SEPTEMBER 2020



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

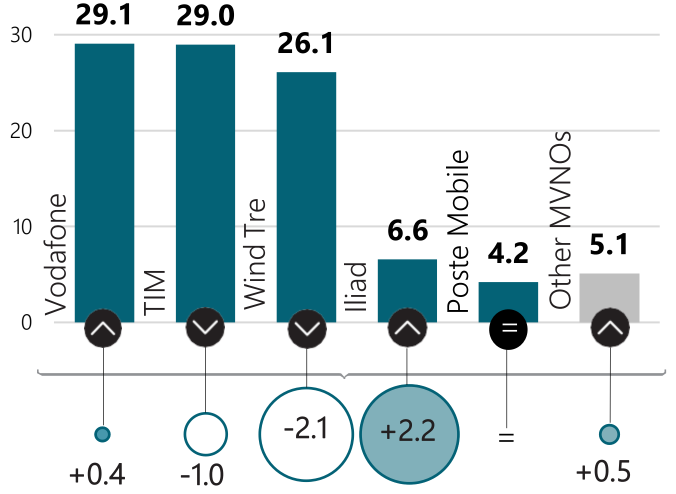
	Quarterly change (June 2020 – Sept. 2020) (no of sim in thousand)		Quarterly change (Δ %)	Annual change (Sept. 2019 – Sept. 2020) (no of sim in thousand)		Annual change (Δ %)
Total sim cards:	+485	↑	+0.5%	-219	↓	-0.2%
Sim human:	-279	↓	-0.4%	-3,008	↓	-3.7%
Sim M2M:	+764	↑	+3.0%	+2,788	↑	+11.9%

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 (%)

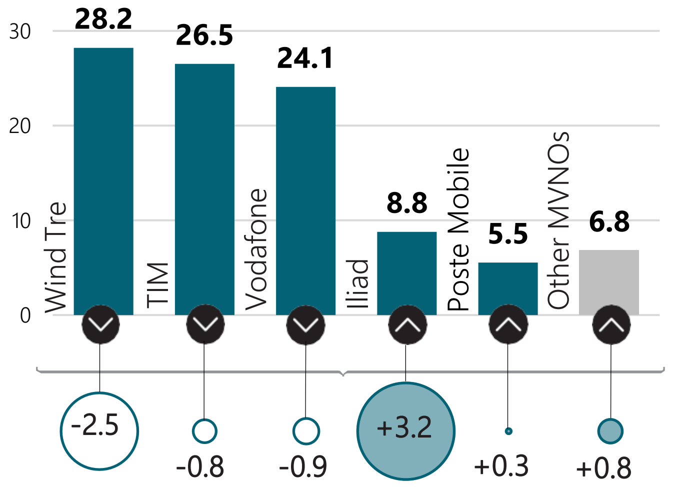
SEPTEMBER 2020

Sim total



Differences vs. September 2019 (percentage points)

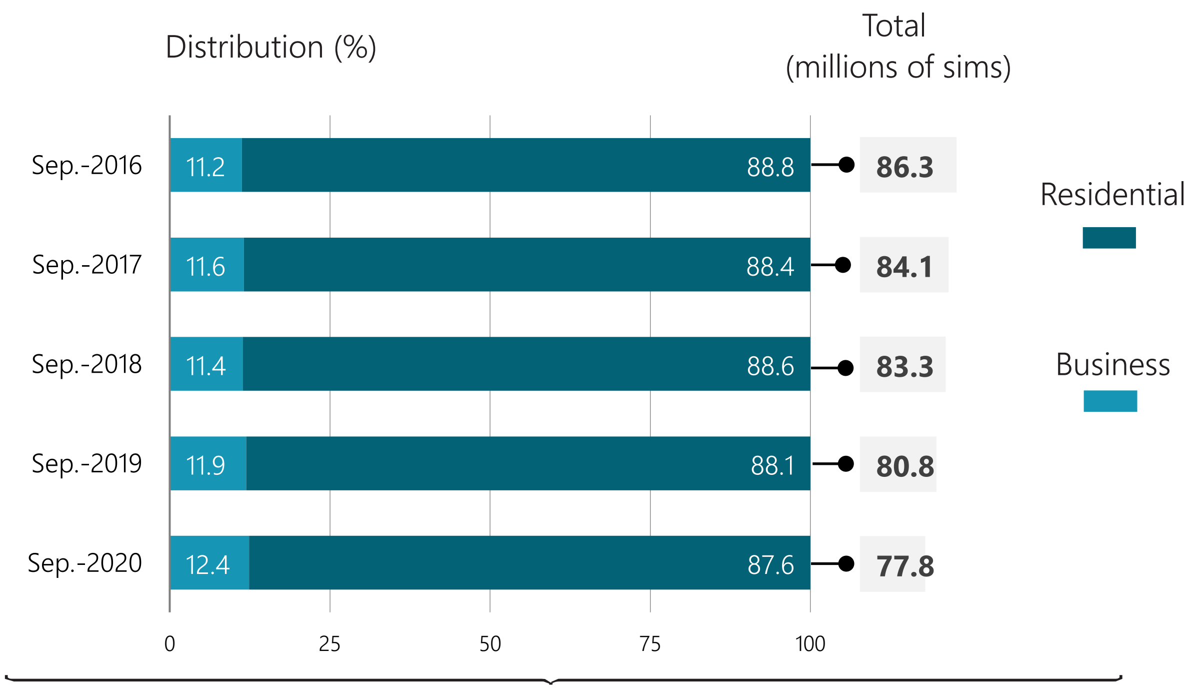
Sim human*



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

Differences vs. September 2019 (percentage points)

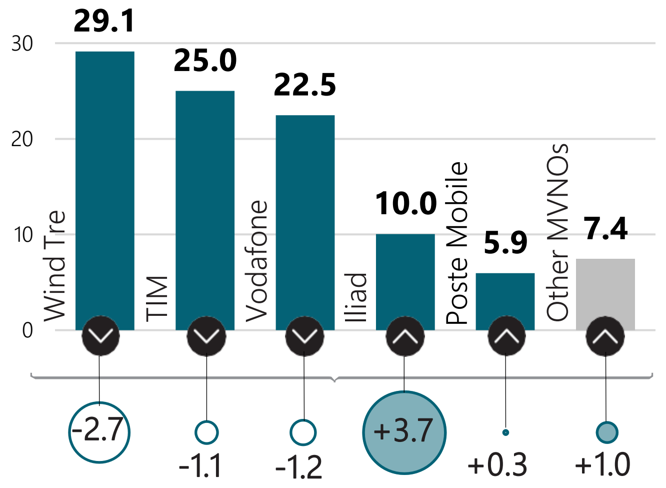
1.5: MOBILE LINES: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



	Annual change (Sept. 2019 – Sept. 2020) (no of sim in thousand)		Annual change (Δ %)	4-Year change (Sept. 2016 – Sept. 2020) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	-3,007	↓	-3.7%	-8,496	↓	-9.8%
Residential sim card:	-3,025	↓	-4.3%	-8,456	↓	-11.0%
Business sim cards:	+18	↑	+0.2%	-40	↓	+0.4%

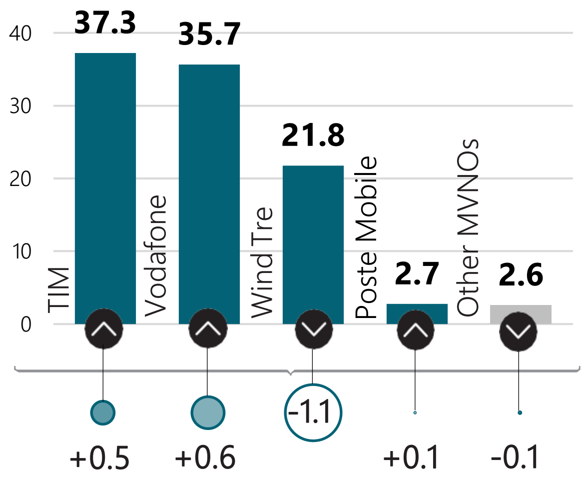
MARKET SHARES (%)

SEPTEMBER 2020



Residential

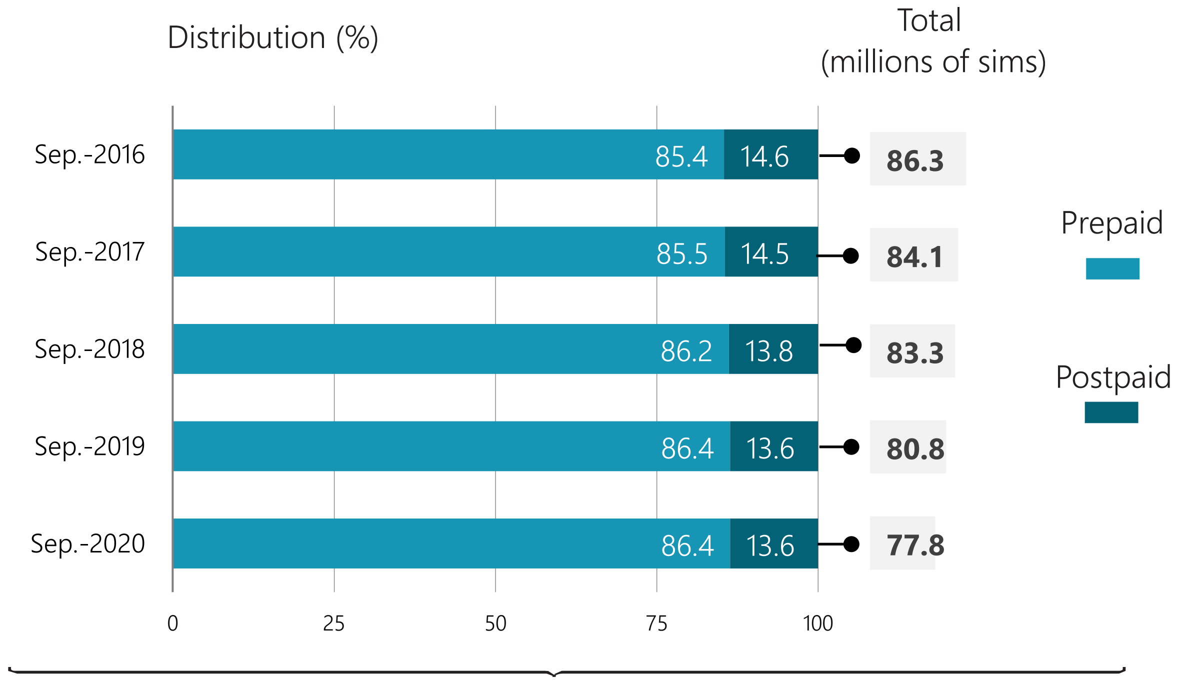
Differences vs. September 2019 (percentage points)



Business

Differences vs. September 2019 (percentage points)

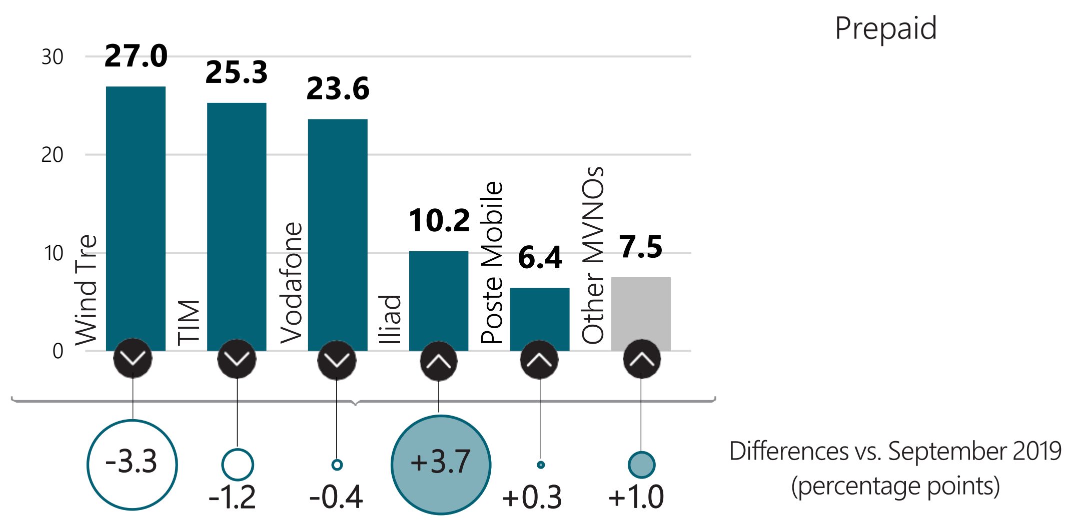
1.6: MOBILE LINES: SUBSCRIBERS BY TYPE OF CONTRACT

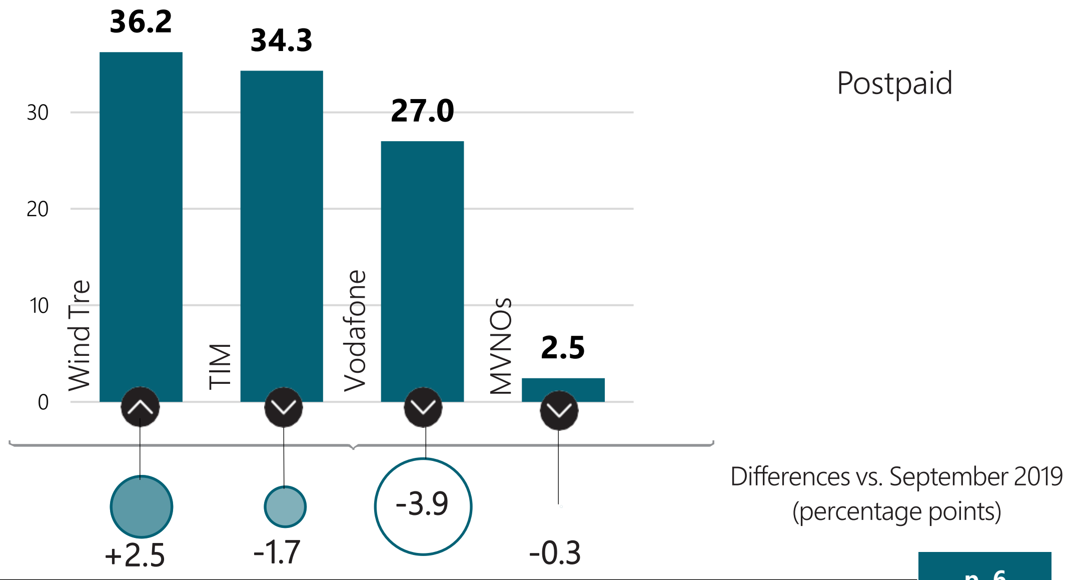


	Annual change (Sept. 2019 – Sept. 2020) (no of sim in thousand)	Annual change (Δ %)	4-Year change (Sept. 2016 – Sept. 2020) (no of sim in thousand)	4-Year change (Δ %)
Total human sim cards:	-3,007	-3.7%	-8,496	-9.8%
Prepaid sim cards:	-2,591	-3.7%	-6,525	-8.9%
Postpaid sim cards:	-416	-3.8%	-1,971	-15.7%

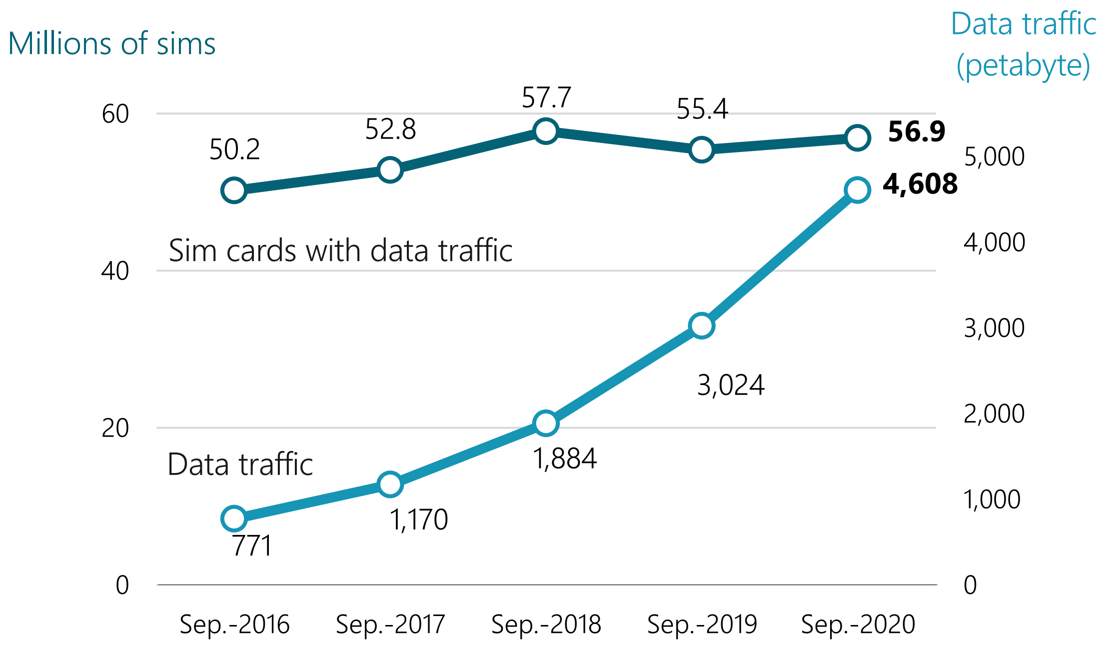
MARKET SHARES (%)

SEPTEMBER 2020

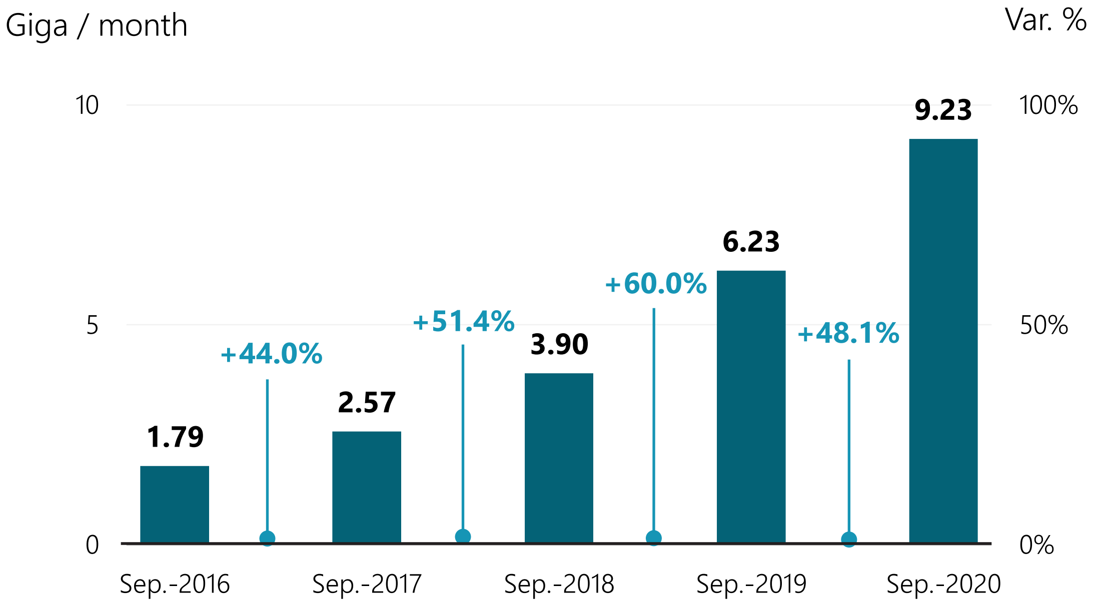




DATA TRAFFIC SINCE THE BEGINNING OF THE YEAR



AVERAGE MONTHLY CONSUMPTION



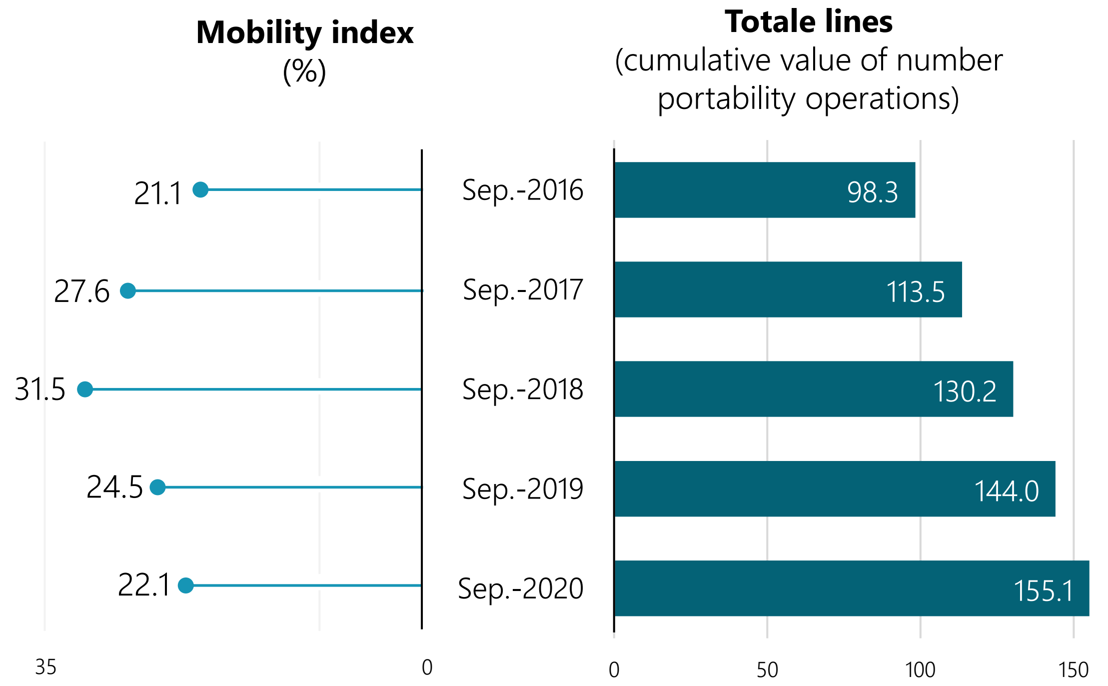
	Annual change (Sept. 2019 – Sept. 2020)		4-Year change (Sept. 2016 – Sept. 2020)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
SIM cards with data traffic:	+1,497	+2.7%	+6,663	+13.3%
	(petabyte)	(Δ %)	(petabyte)	(Δ %)
Data traffic:	+1,584	+52.4%	+3,837	+497,9%

September 2016 1.79 GB/month → +416.3% (Δ %) → September 2020 9.23 GB/month

At the end of September 2020, the number of sim cards with data traffic has reached **73.1%** 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

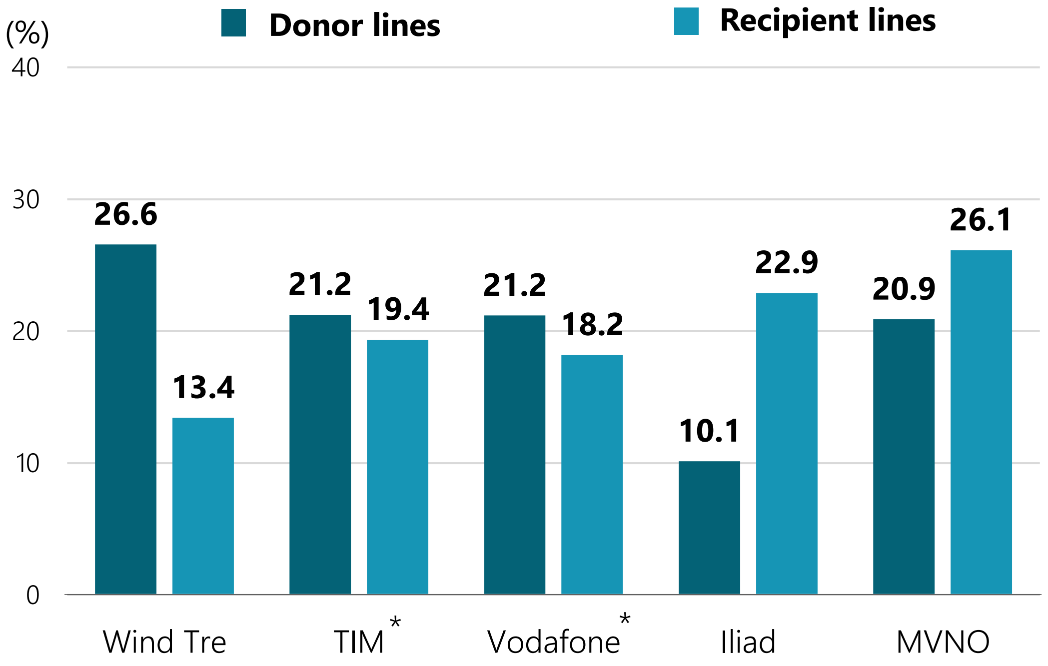
In one year (September 2019 – September 2020), there have been **12,2** million of Mobile Number Portability (MNP) operations



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)

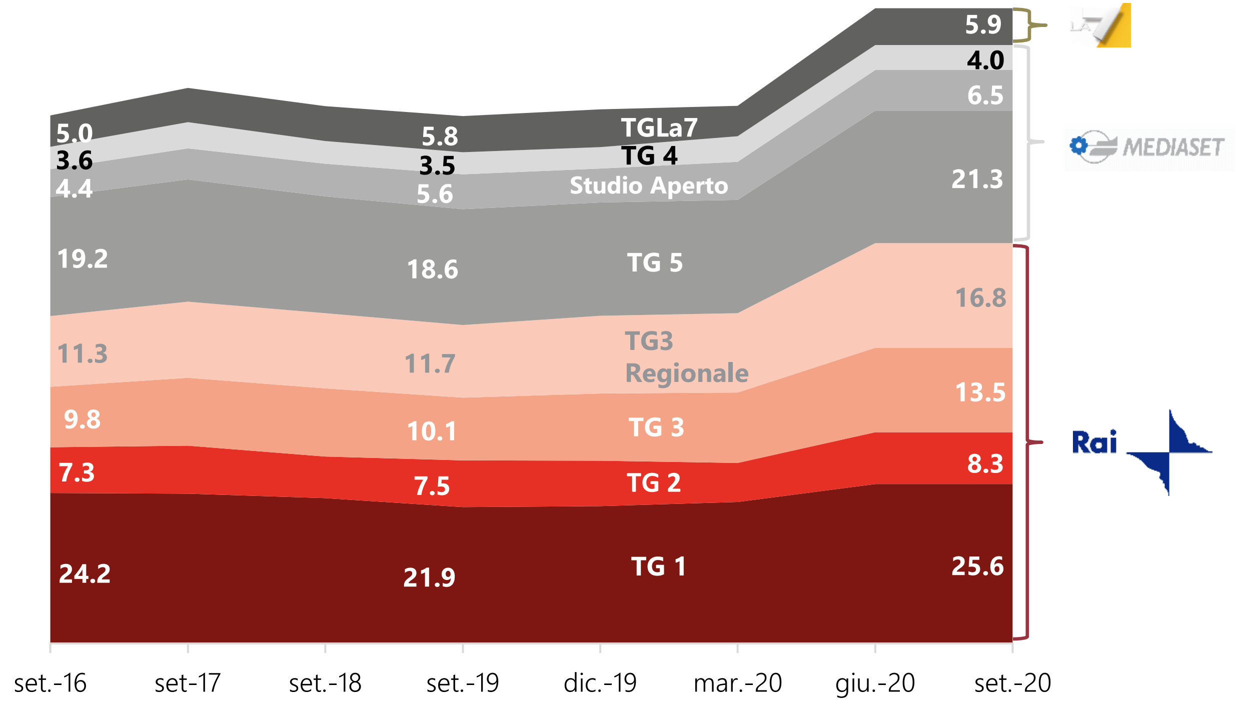
SEPTEMBER 2020



(*) **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)

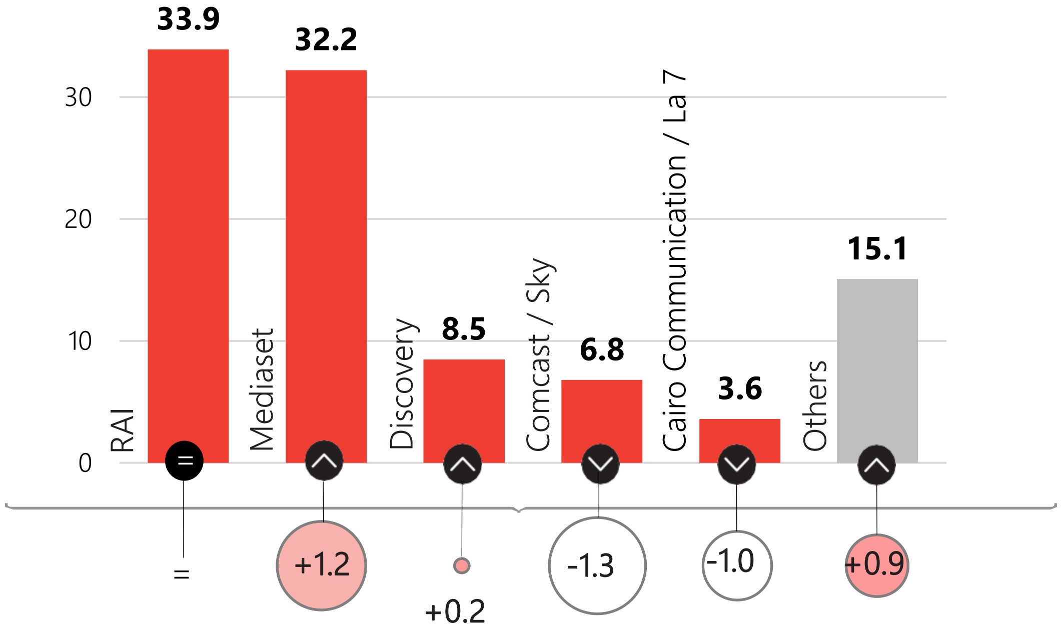
AUDIENCE OF THE MAIN EVENING NEWSCASTS (%)

AVERAGE DAY (September 2016 – September 2020)



MARKET SHARES (%)

SEPTEMBER 2020



Differences vs. September 2019 (percentage points)

Δ percentage points (September 2019 – September 2020)

Rai		MEDIASET		La7	
Tg 1	+3.7 p.p.	Tg 5	+2.6 p.p.	Tg La 7	+0.1 p.p.
Tg 2	+0.8 p.p.	Studio Aperto	+1.0 p.p.		
Tg 3	+3.5 p.p.	Tg 4	+0.5 p.p.		
Tg 3 - Regionale	+5.2 p.p.				

Average daily television viewership

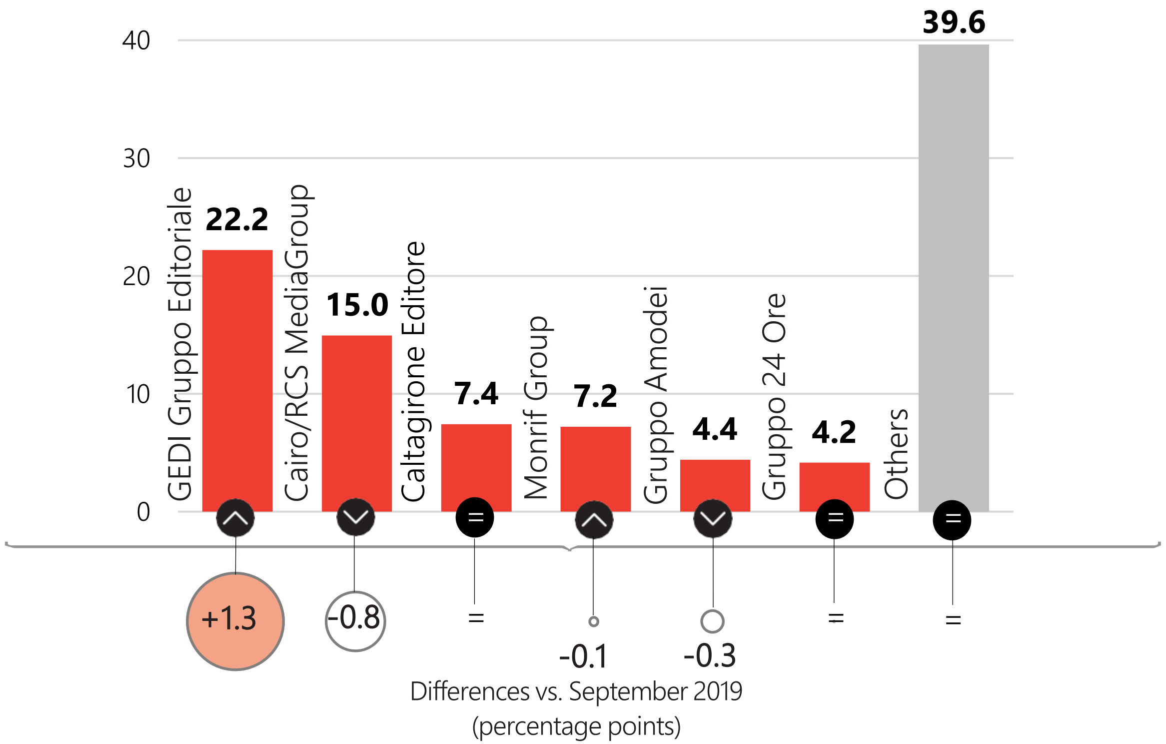
Newscasts	Broadcasters
Tg 1: **4.9 M** viewers	Rai: **3.2 M** viewers
Tg 5: **3.8 M** viewers	Mediaset: **3.1 M** viewers

M = million

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

NEWSPAPERS' TOTAL MONTHLY SALES BY EDITORIAL GROUPS (%)

SEPTEMBER 2020



Total copies sold in September 2020

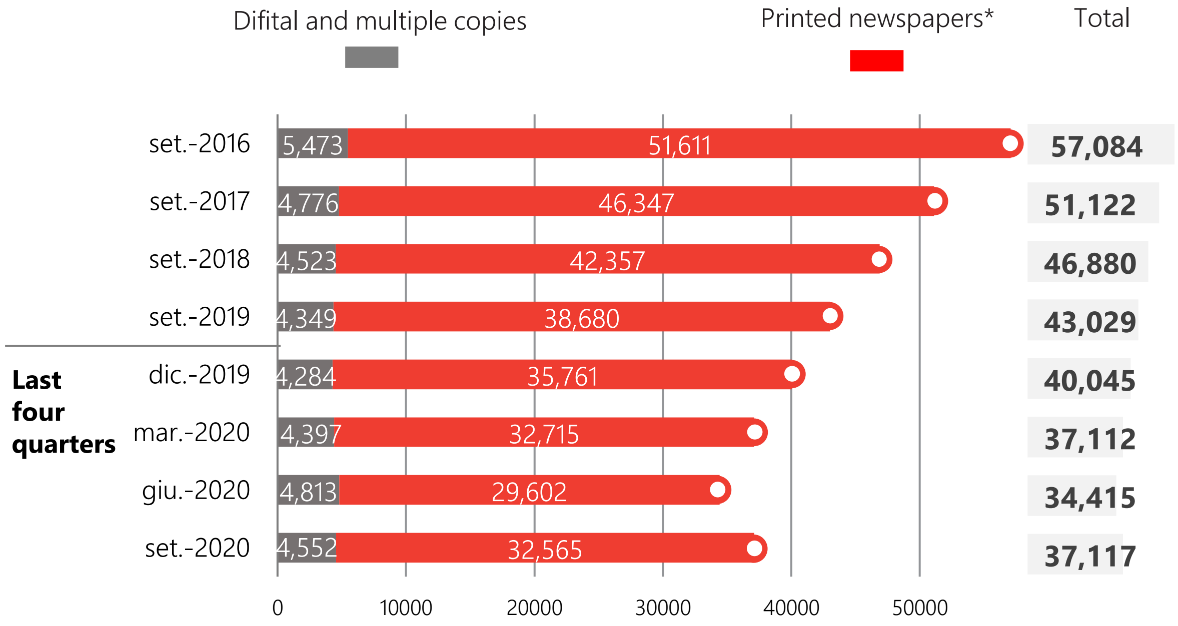
61,468,415

Annual change:
(September 2019 – September 2020)

- 14%

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

IN THOUSANDS – SEPTEMBER 2020



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

	Annual change (Sept. 2019 – Sept. 2020)	4-Year change (Sept. 2016 – Sept. 2020)
Printed newspapers:	-16%	-37%
Digital and multiple copies: (represent 12.3 % of total sales)	+5%	-17%

Source: Agcom elaboration on data from ADS and IES

2.3: MEDIA: DAILY AND PERIODICAL PUBLISHING VOLUMES TREND (PAPER COPIES)*

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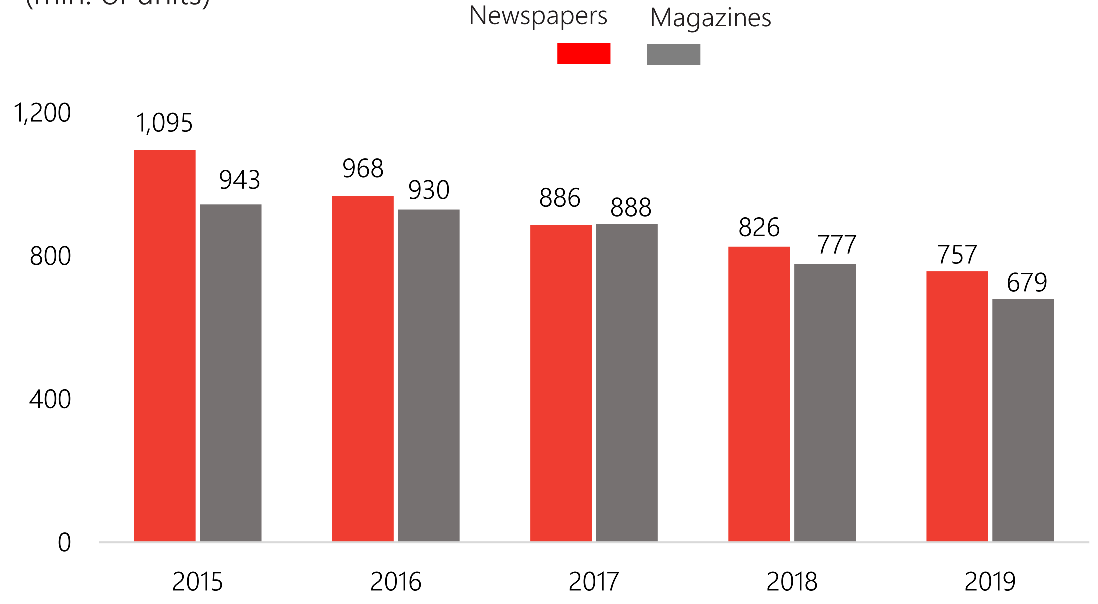
TOTAL COPIES SOLD

(mln. of units)



	Newspapers	Magazines
variazione di periodo 2015 - 2019	**-30.9%**	**-28.1%**
variazione annuale 2018 - 2019	**-8.3%**	**-12.7%**

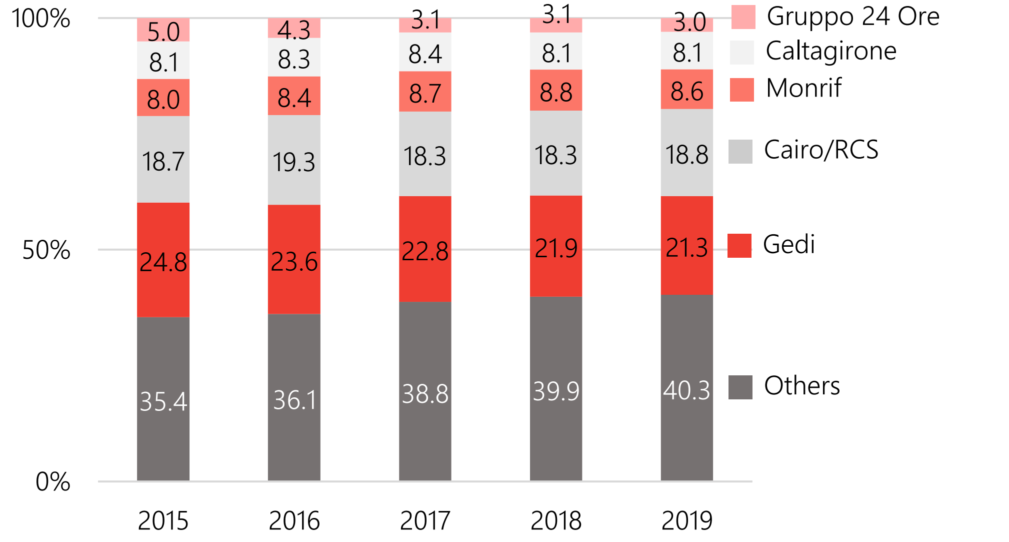
(*) Note: data are census and are, therefore, not directly comparable with similar sample-based analysis

(**) Note: the time series, to ensure the comparability of values, was built with the same market boundaries in order to overcome the problems related to mergers and acquisitions involving the publish companies Gruppo Cairo/RCS Mediagroup and GELE/Itedi

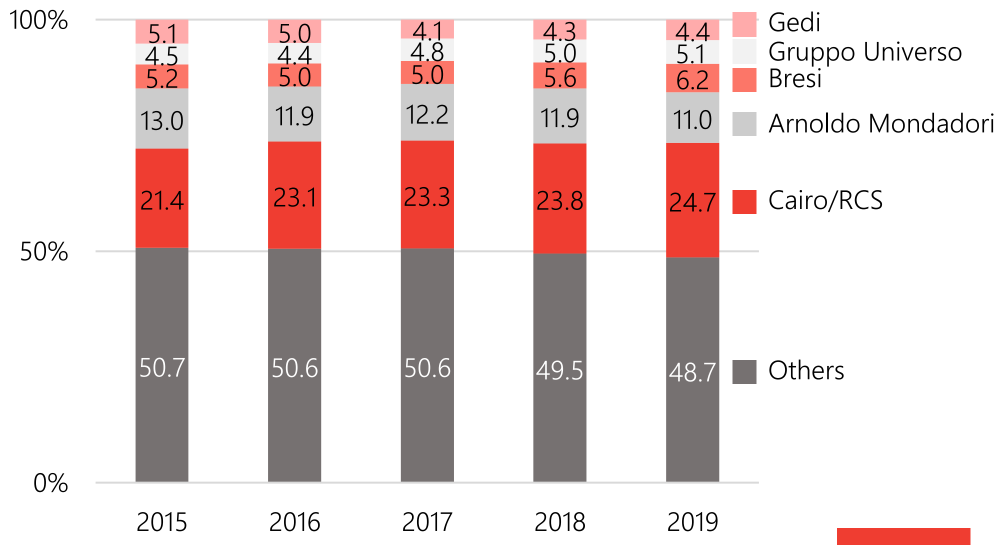
DISTRIBUTION OF COPIES

(%)

DAILY PUBLISHING**

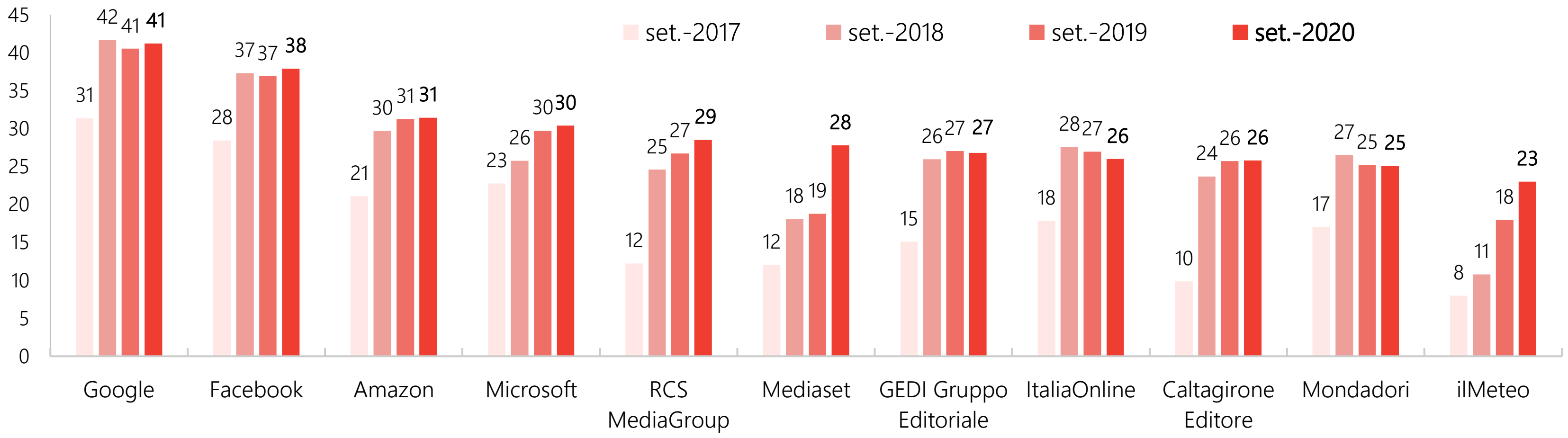


PERIODICAL PUBLISHING**



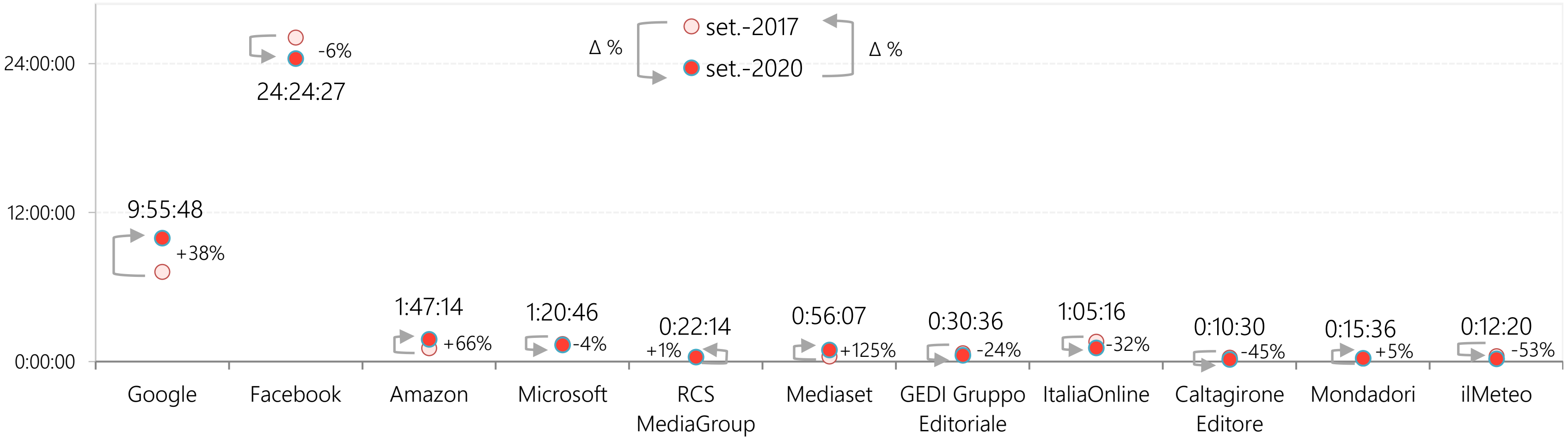
2.4: MEDIA INTERNET: ACTIVE USERS OF THE MAIN OPERATORS

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



In September 2020, **42** million unique users connected to the internet

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



In September 2020, a total amount of **59** hours of surfing, on average, per person per month

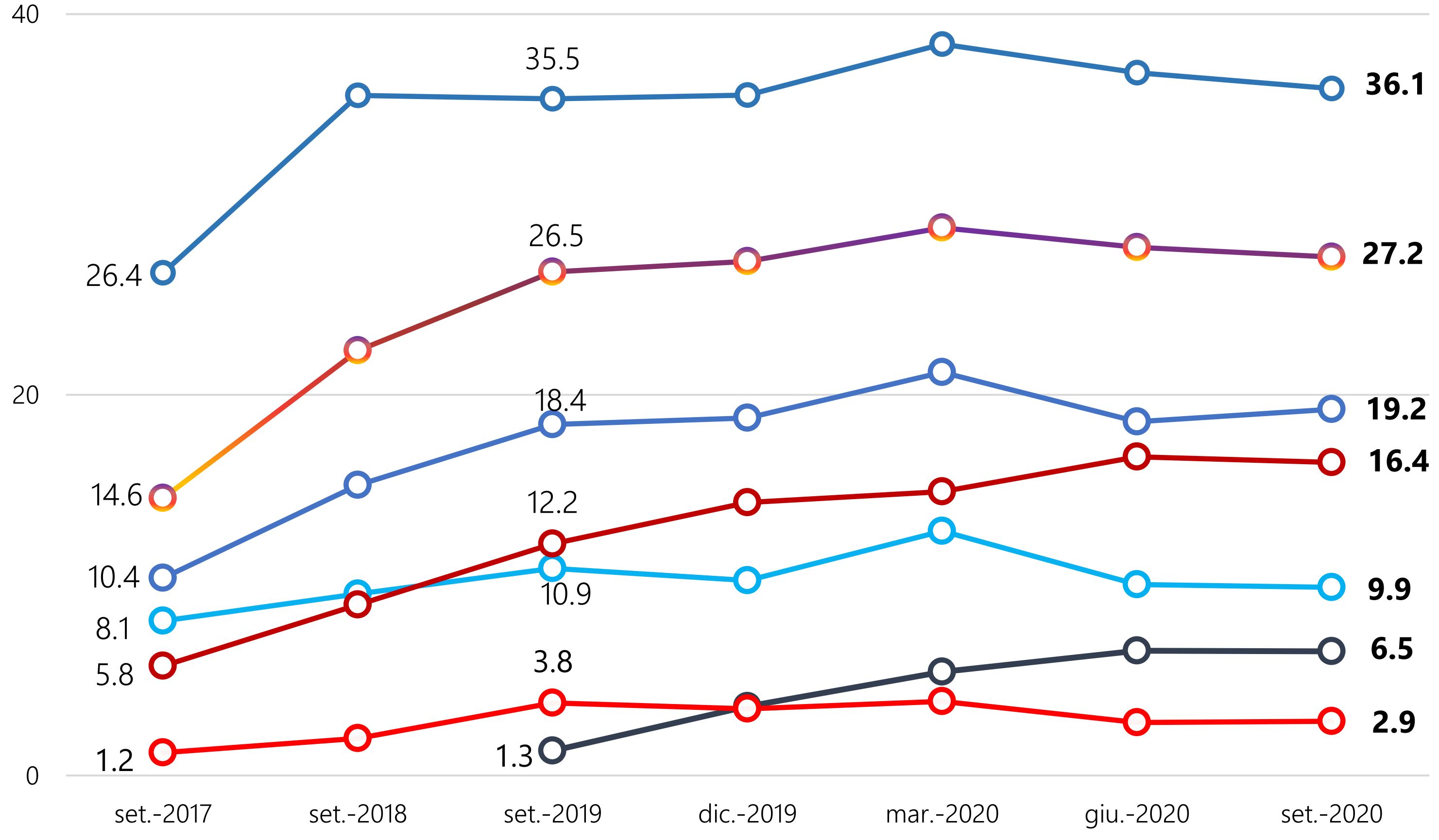
Note: Since March 2018, the Audiweb system has adopted a new methodology

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

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

MAIN SOCIAL NETWORKS USERS

SEPTEMBER 2017 – SEPTEMBER 2020
IN MILLIONS

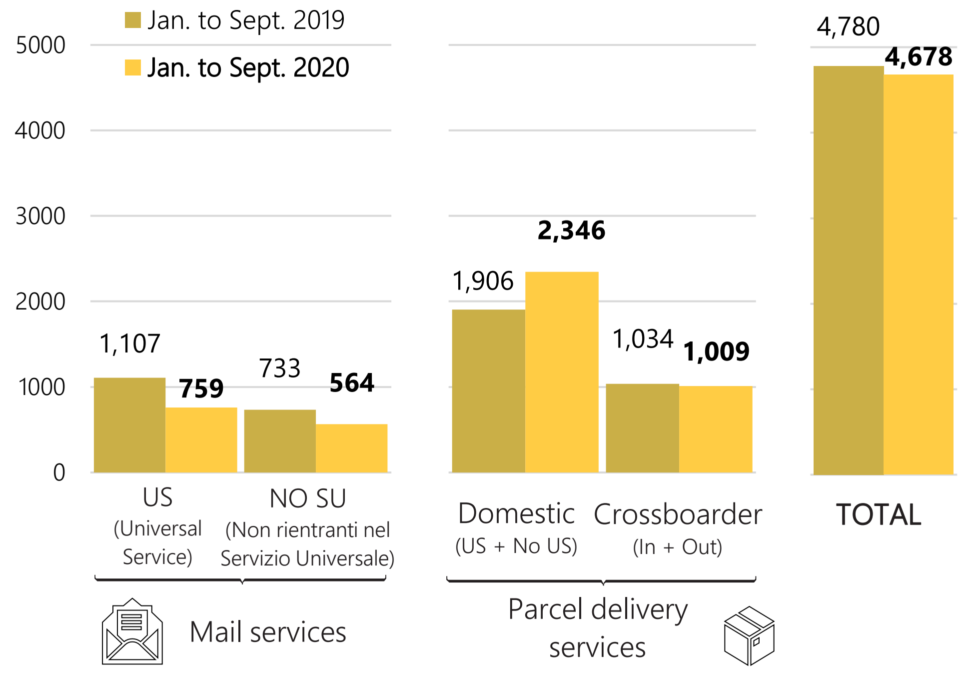


	Quarterly change (June 2020 – Sept. 2020)	Annual change (Sept. 2019 – Sept. 2020)
Facebook	-2.2% ↓	+1.5% ↑
Instagram	-1.8% ↓	+3.0% ↑
Linkedin	+3.5% ↑	+4.3% ↑
Pinterest	-1.8% ↓	+35.0% ↑
Twitter	-1.4% ↓	-9.1% ↓
TikTok	-0.4% ↓	+400% ↑
Reddit	+2.5% ↑	-25.2% ↓

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

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



Annual change
(Sept. 2019 – Sept. 2020)

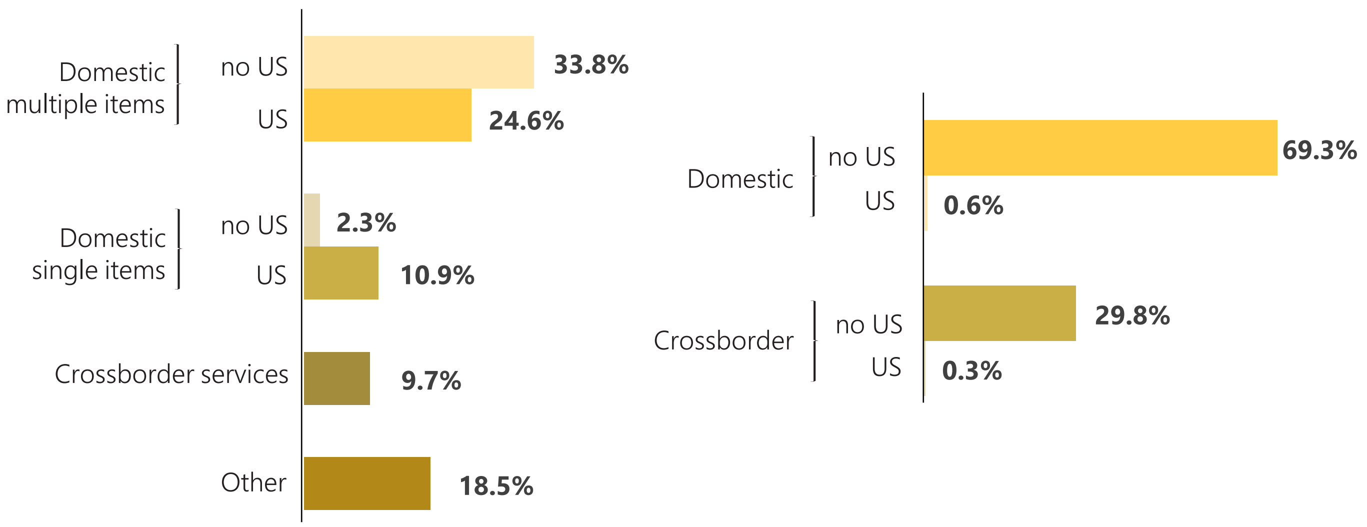
Mail services	Parcel delivery services	Total
-28.1%	+14.1%	-2.1%

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

JANUARY TO SEPTEMBER 2020

Mail services

Parcel delivery services



Annual change
(Sept. 2019 – Sept. 2020)

Domestic multiple items	Domestic single items	Crossborder services	Other	Domestic	Crossborder
-24.3%	-29.2%	-26.4%	-37.9%	+23.1%	-2.5%

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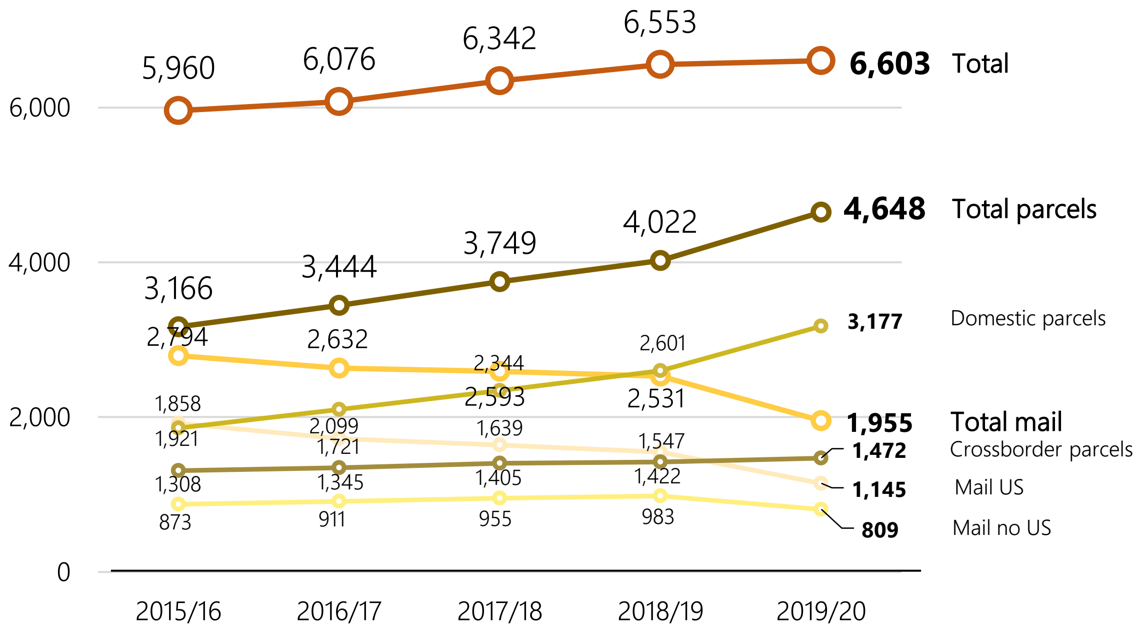
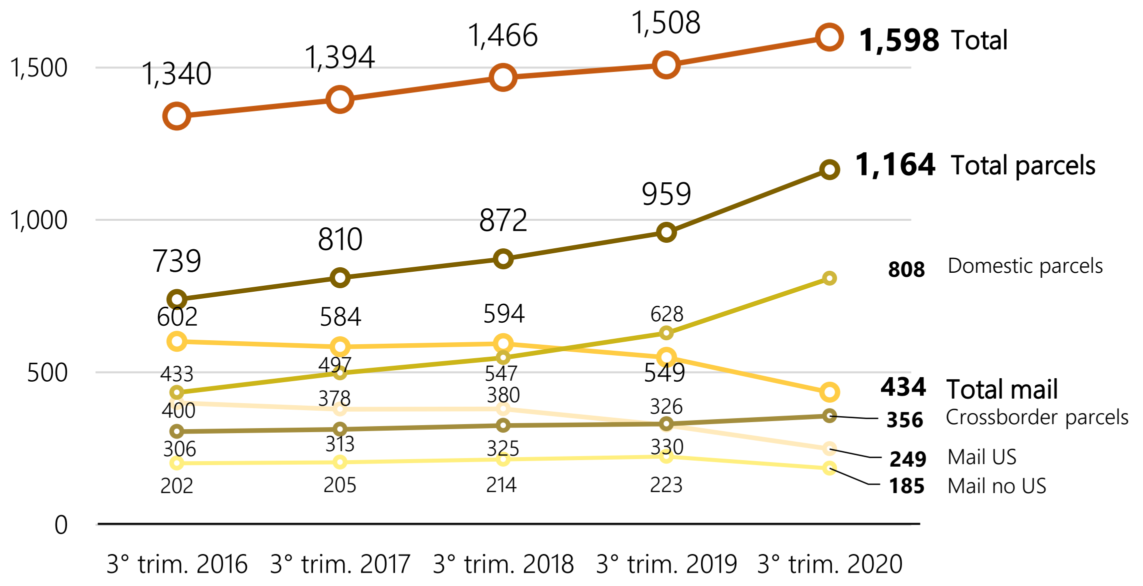
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €

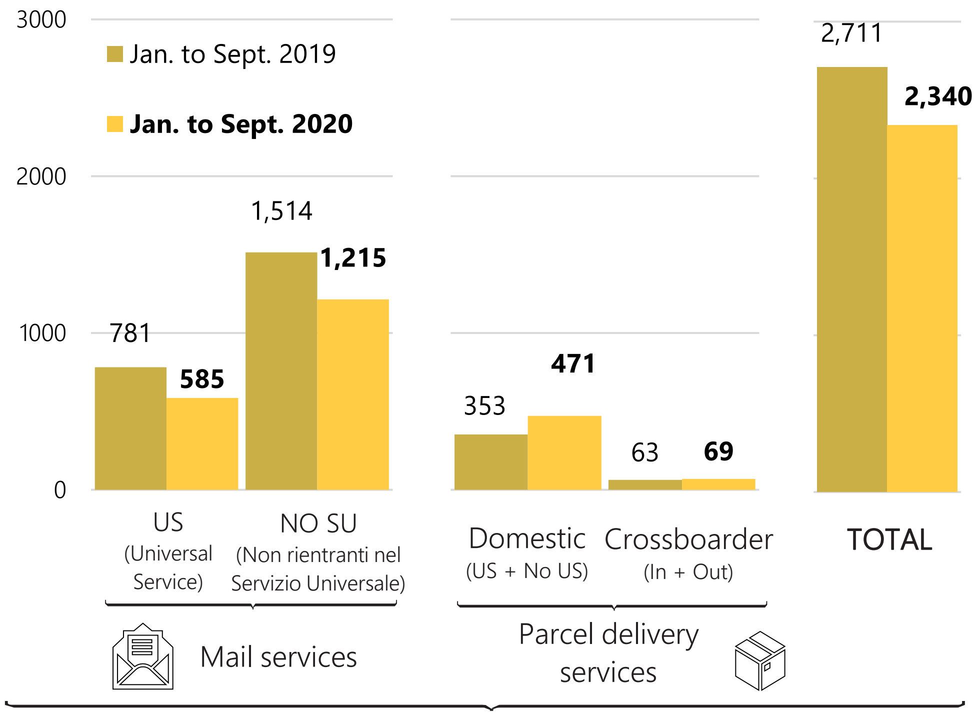


	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Total:	**+10.8%** ↑	**-0.8%** ↓
Mail services:	**-30.0%** ↓	**-22.8%** ↓
- Universal Service:	-40.4% ↓	-26.0% ↓
- No Universal Service:	-7.3% ↓	-17.7% ↓
Parcel delivery services:	**+46.8%** ↑	**+15.6%** ↑
- Domestic:	+71.0% ↑	+22.1% ↑
- Crossborder:	+12.5% ↑	+3.5% ↑

	Change (Sept. 2016 – Sept. 2020)	Change (Sept. 2019 – Sept. 2020)
Total:	**+19.3%** ↑	**+6.0%** ↑
Mail services:	**-27.9%** ↓	**-21.0%** ↓
- Universal Service:	-37.8% ↓	-23.7% ↓
- No Universal Service:	-8.1% ↓	-17.0% ↓
Parcel delivery services:	**+57.7%** ↑	**+21.9%** ↑
- Domestic:	+86.6% ↑	+28.6% ↑
- Crossborder:	+16.6% ↑	+7.9% ↑

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS



Annual change
(Sept. 2019 – Sept. 2020)

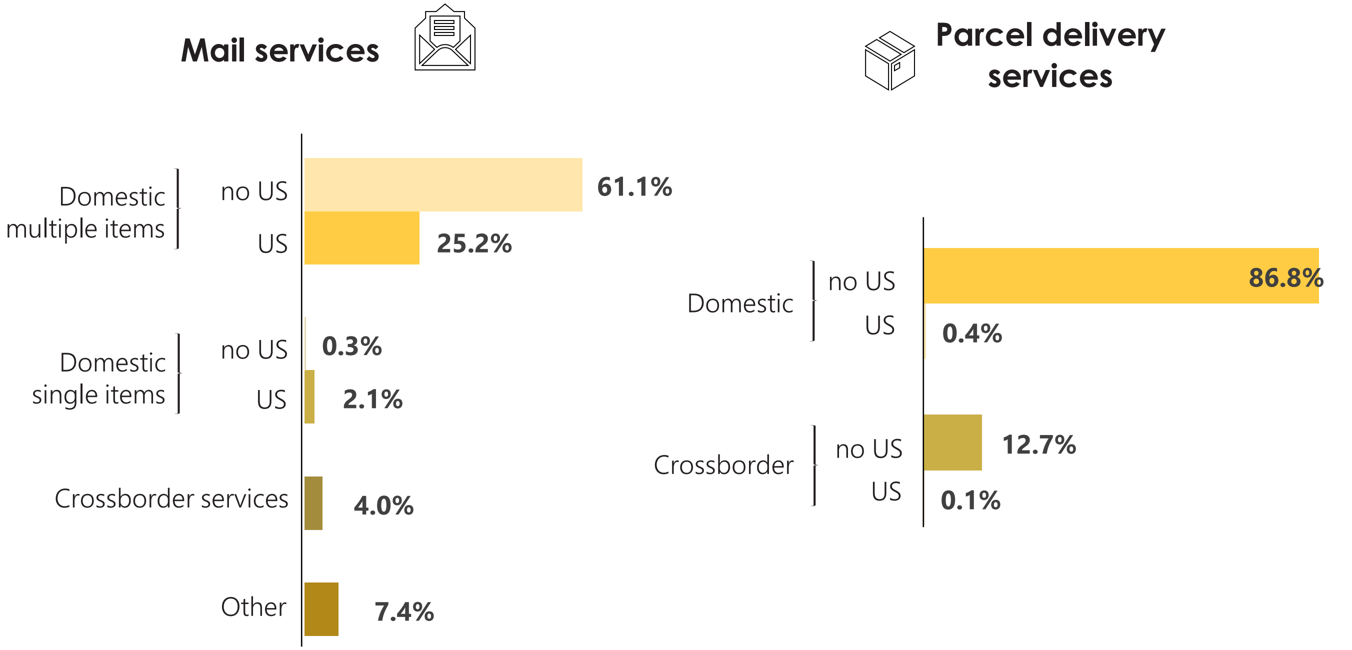
-21.6% (Mail services)

+29.7% (Parcel delivery services)

-13.7% Total

VOLUMES BY SOURCE TYPE (%)

SEPTEMBER 2020



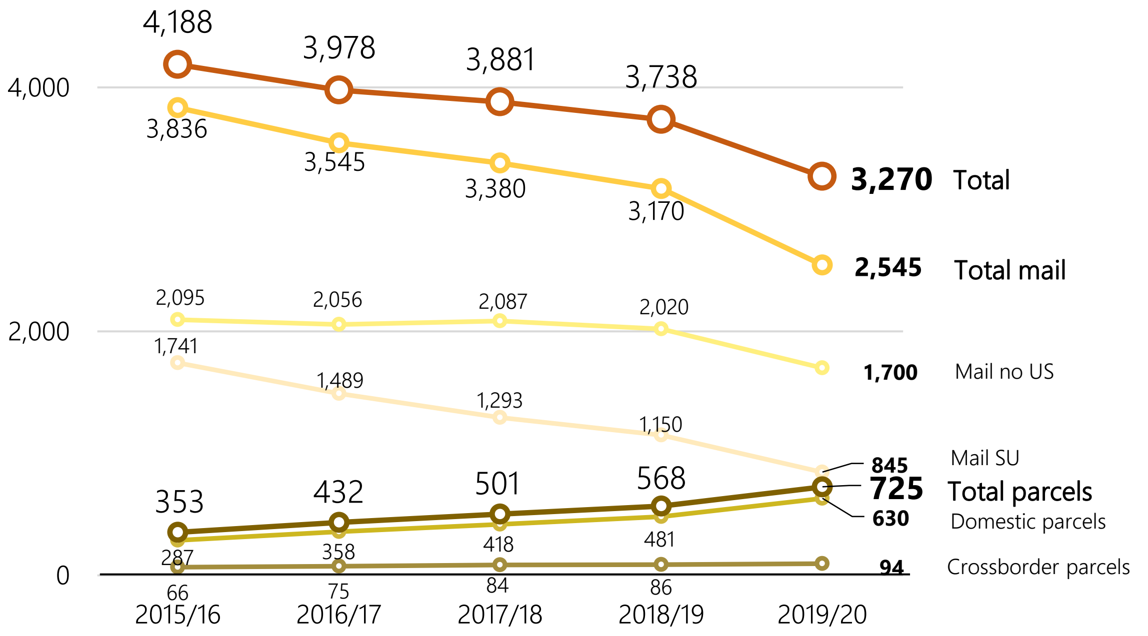
Annual change
(Sept. 2019 – Sept. 2020)

-19.8%	-35.9%	-31.9%	-28.7%	+33.4%	+9.4%
Domestic multiple items	Domestic single items	Crossborder services	Other	Domestic	Crossborder

3.4: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

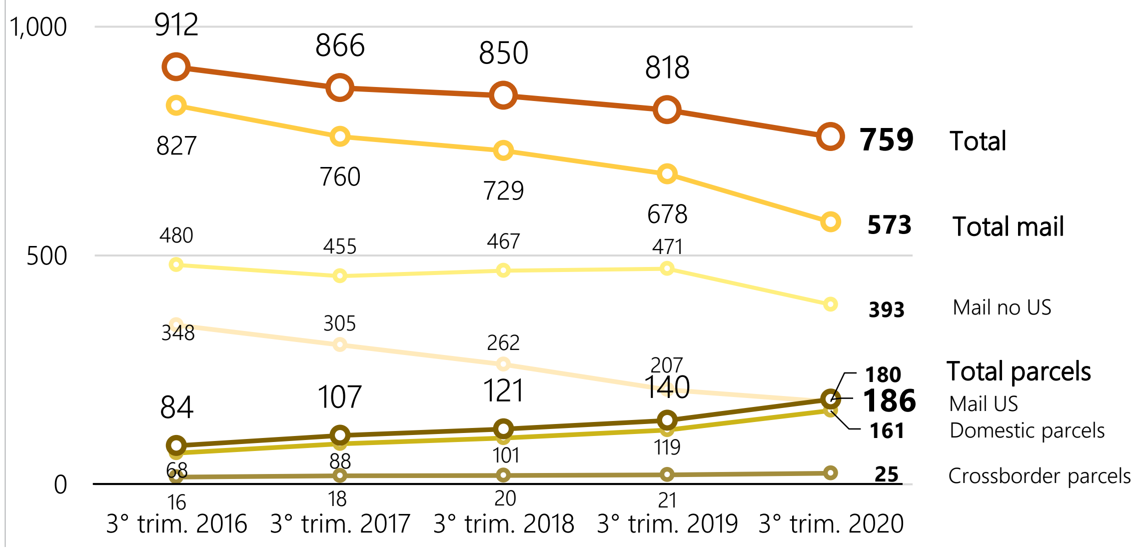
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

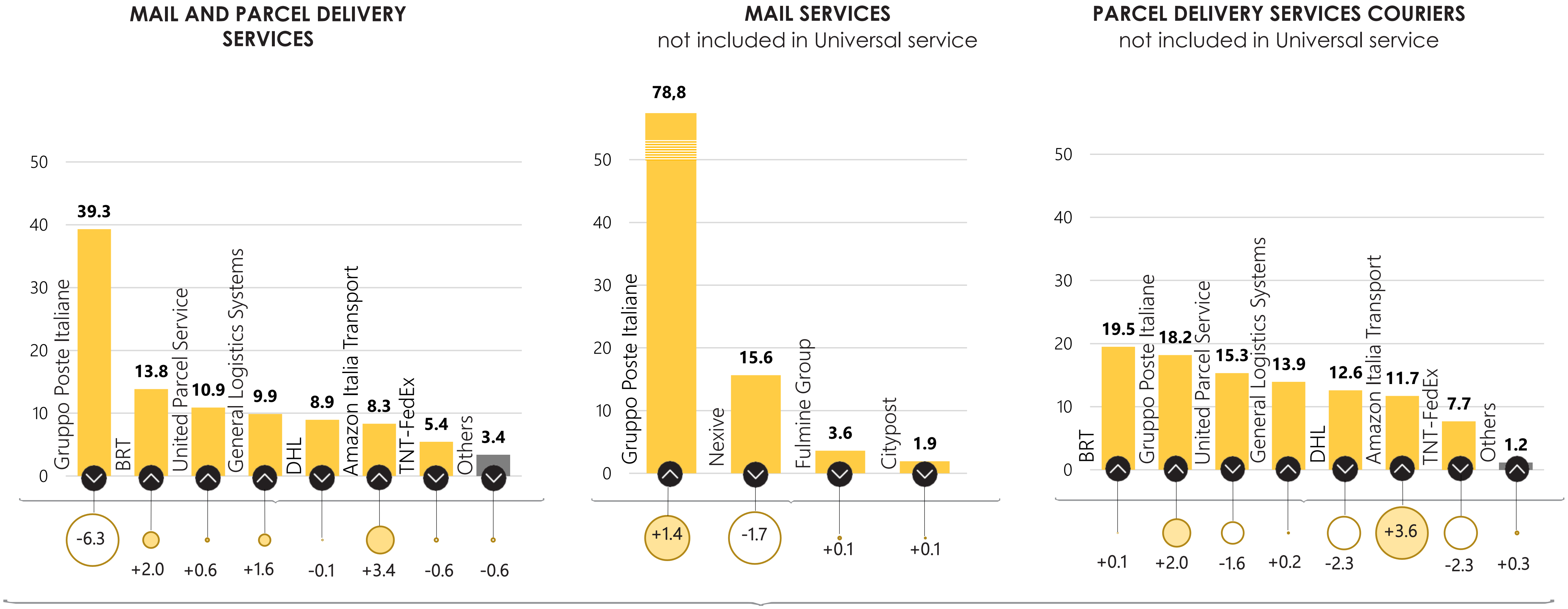
MILLIONS OF UNITS



	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Total:	**-21.9%** ↓	**-12.5%** ↓
Mail services:	**-33.6%** ↓	**-19.7%** ↓
- Universal Service:	-51.4% ↓	-26.5% ↓
- No Universal Service:	-18.8% ↓	-15.9% ↓
Parcel delivery services:	**+105.3%** ↑	**+27.6%** ↑
- Domestic:	+120.0% ↑	+30.9% ↑
- Crossborder:	+41.9% ↑	+8.9% ↑

	Change (Sept. 2016 – Sept. 2020)	Change (Sept. 2019 – Sept. 2020)
Total:	**-16.7%** ↓	**-7.2%** ↓
Mail services:	**-30.7%** ↓	**-15.5%** ↓
- Universal Service:	-48.1% ↓	-12.7% ↓
- No Universal Service:	-18.1% ↓	-16.7% ↓
Parcel delivery services:	**+120.7%** ↑	**+33.1%** ↑
- Domestic:	+136.3% ↑	+35.5% ↑
- Crossborder:	+54.2% ↑	+18.5% ↑

SEPTEMBER 2020



Differences vs. September 2019
(percentage points)

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

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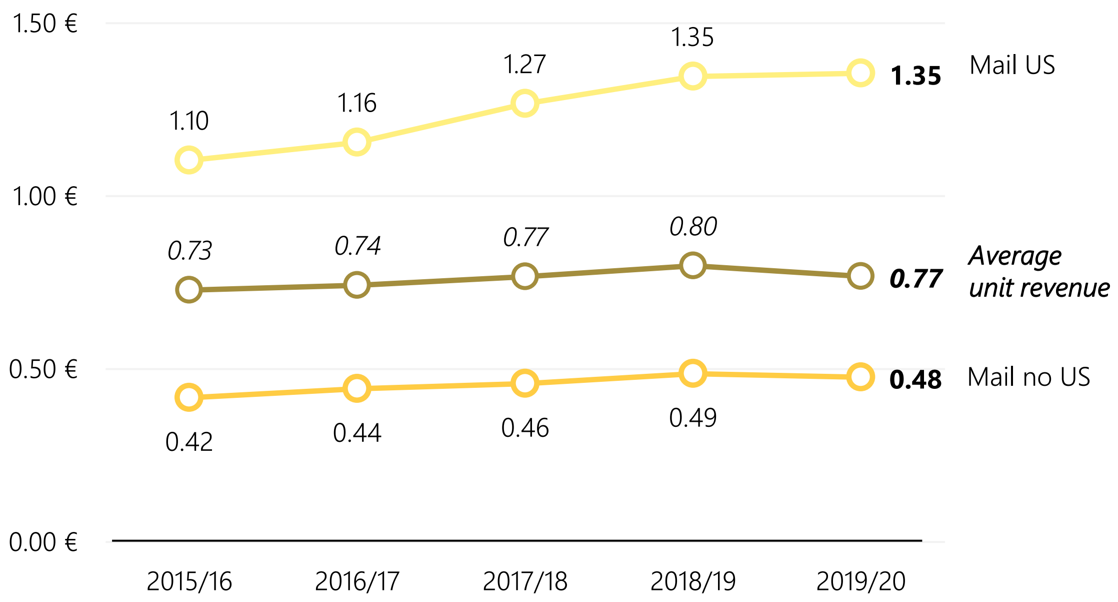
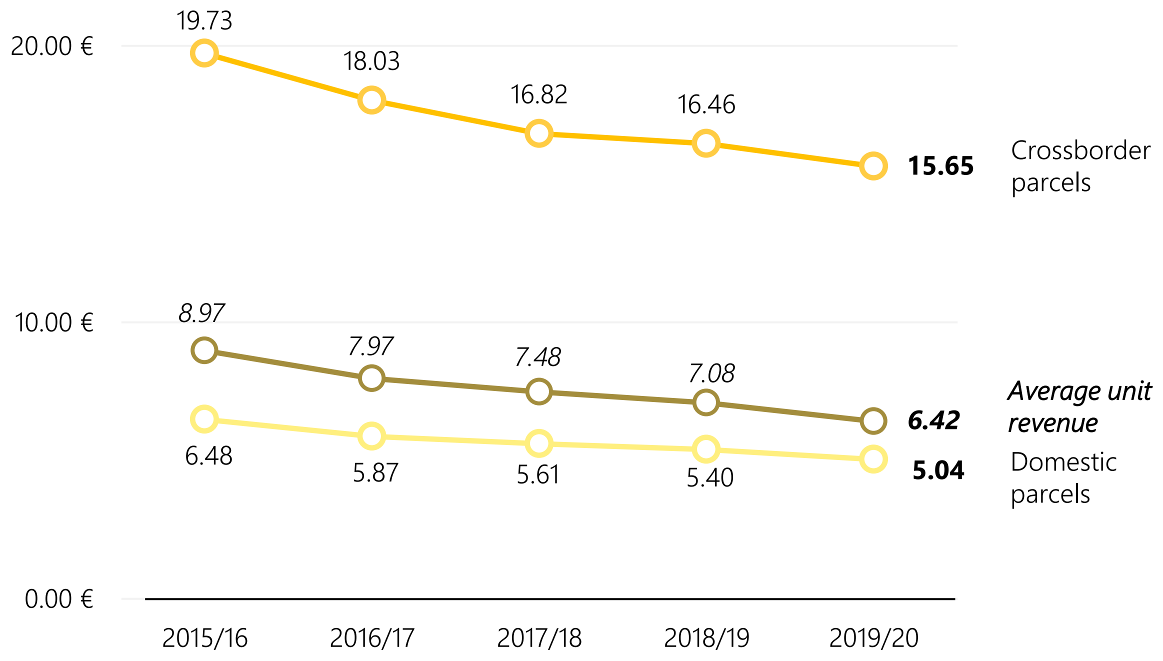
MAIL SERVICES



PARCELS DELIVERY SERVICES

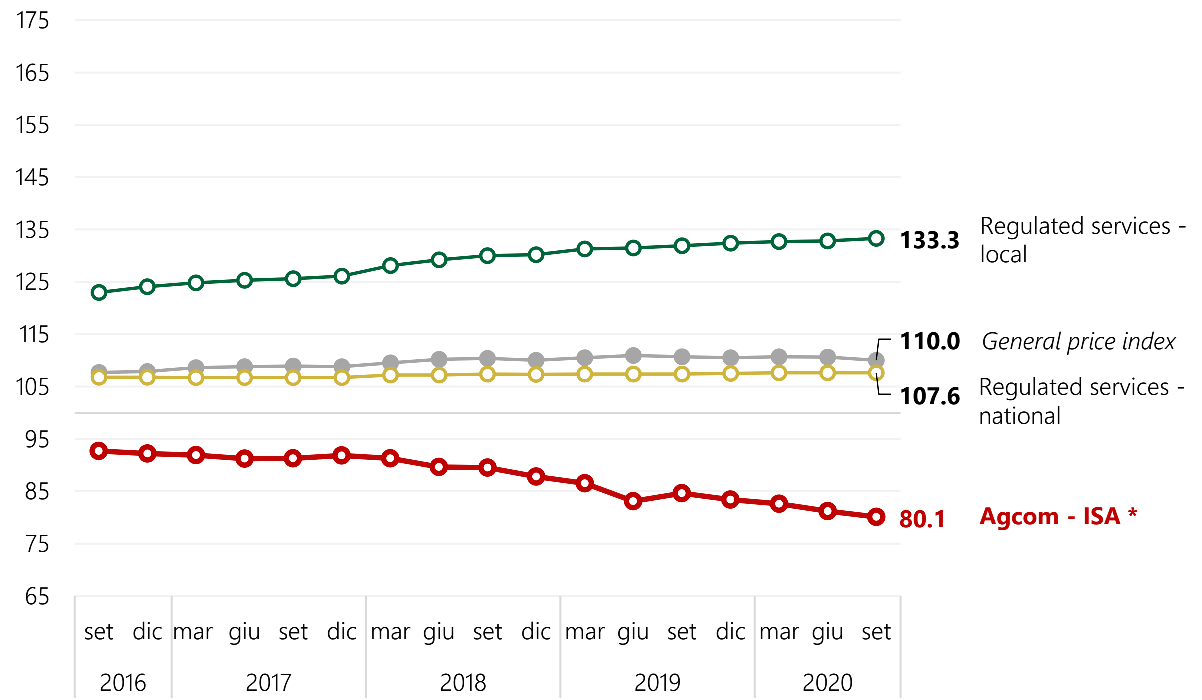


	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Average unit revenue:	+5.4%	-3.8%
- Mail US:	+22.8%	+0.7%
- Mail no US:	+14.2%	-2.2%

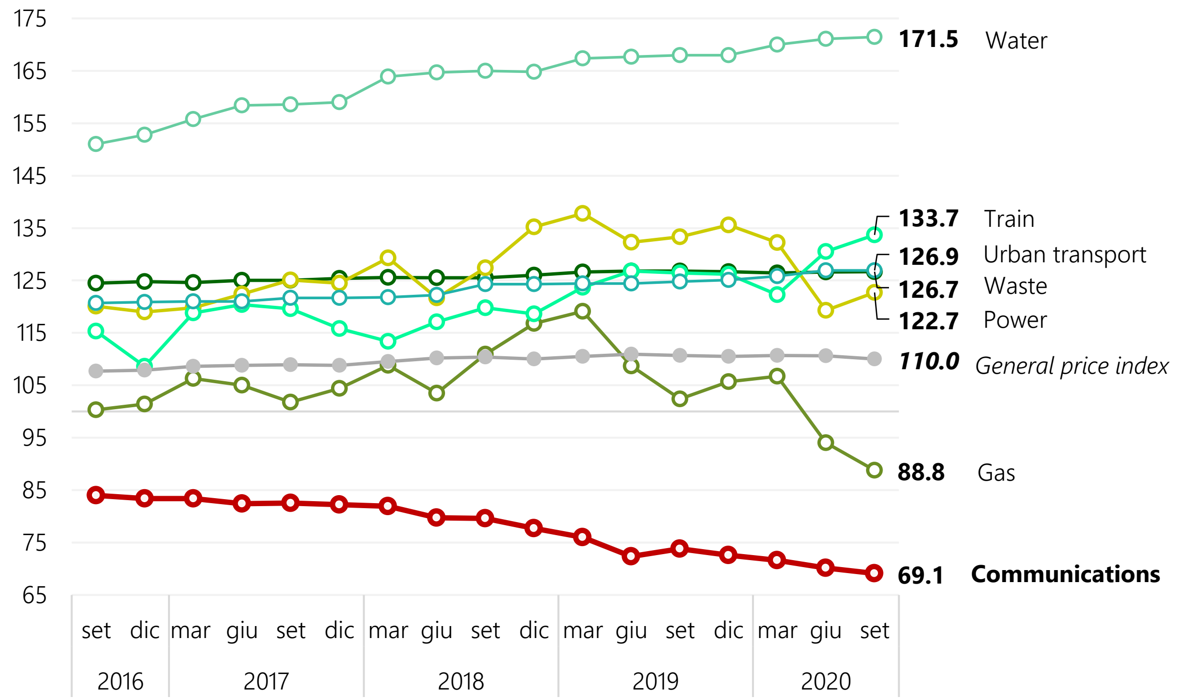
	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Average unit revenue:	-28.5%	-9.4%
Crossborder parcels:	-20.7%	-4.9%
- US:	*-16.8%*	*+10.2%*
- No US:	*-20.5%*	*-5.0%*
Domestic parcels:	-22.3%	-6.7%
- US:	*-3.2%*	*-6.5%*
- No US:	*-22.4%*	*-6.7%*

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):	-13.6%	-5.3%
General price index:	+2.1%	-0.6%
Regulated services - local:	+8.4%	+1.1%
Regulated services - national:	+0.7%	+0.2%

(*) 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).

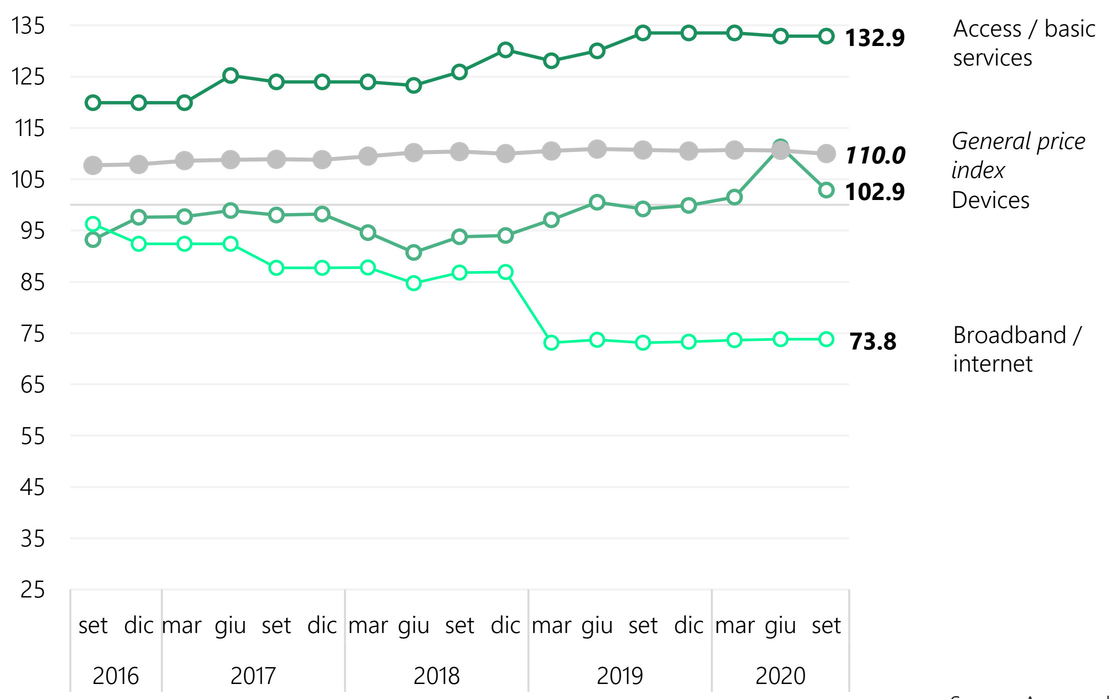
	4-Year change	Annual change
Water *(04.4.1)*:	+13.6%	+2.1%
Waste *(04.4.2)*:	+1.8%	-0.1%
Power *(04.5.1)*:	+2.2%	-8.0%
Gas *(04.5.2)*:	-11.5%	-13.3%

	4-Year change	Annual change
Train *(07.3.1)*:	+16.0%	+5.8%
Urban transport *(07.3.2.1.1)*:	+5.1%	+1.7%
Communications *(08)*:	-17.7%	-6.4%

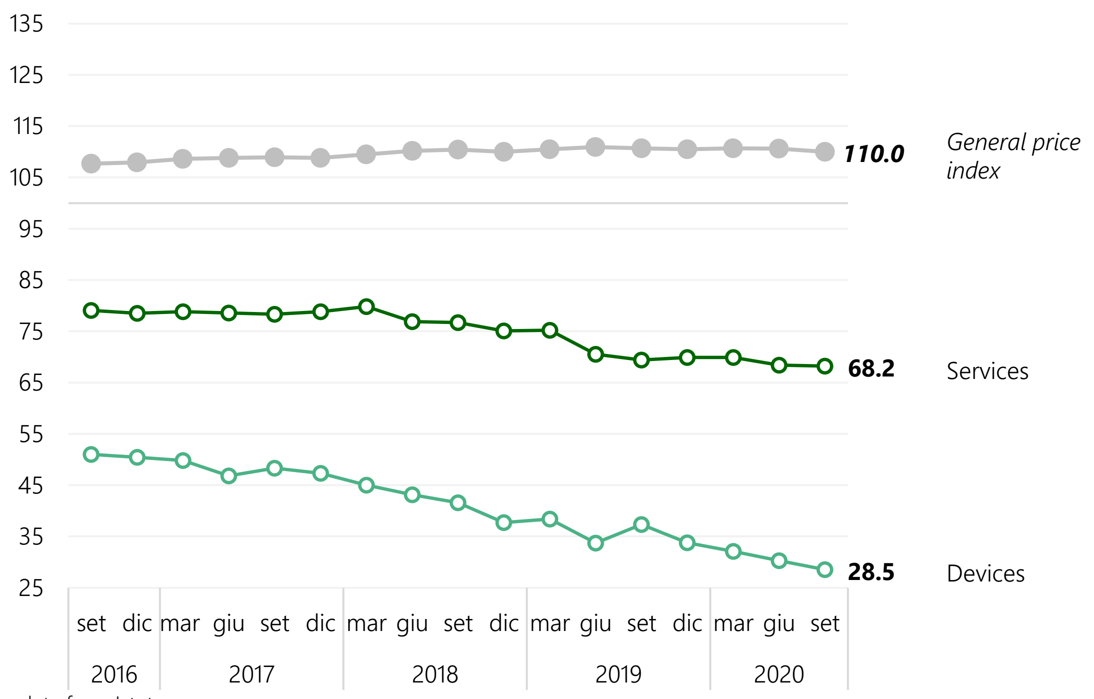
(COICOP - Classification of Individual Consumption by Purpose)

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

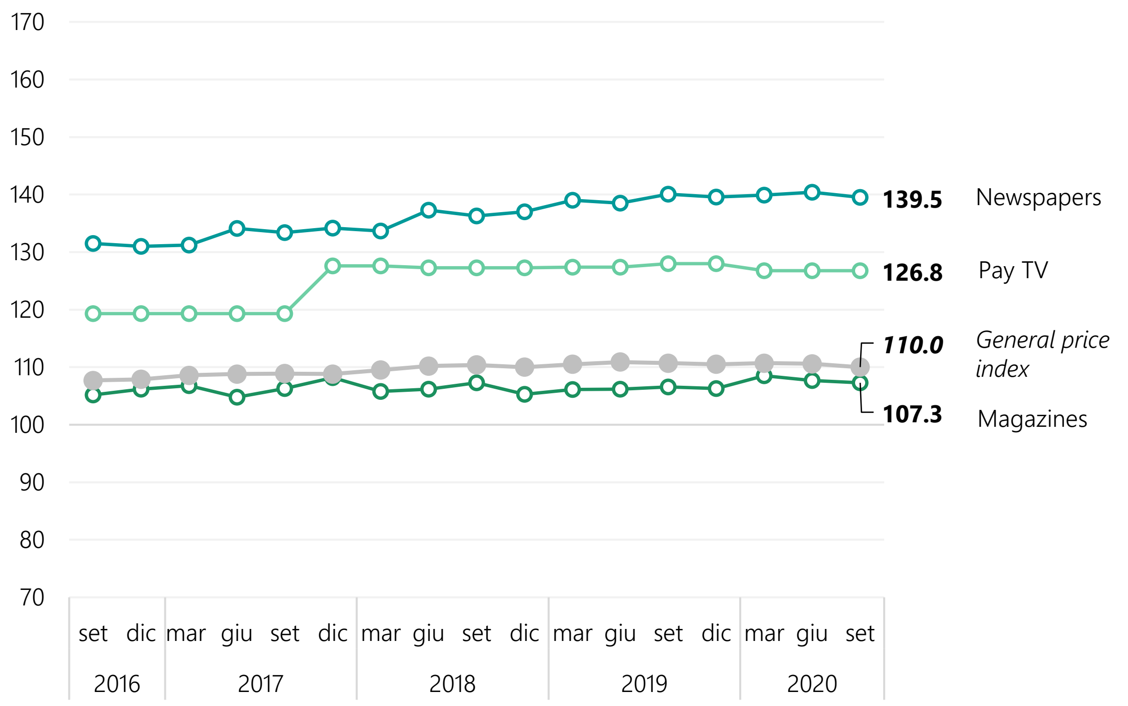
	4-Year change	Annual change
Access / basic services *(08.3.0.1)*:	**+10.8%**	**-0.4%**
Devices *(08.2.0.1)*:	**+10.4%**	**+3.7%**
Broadband / internet *(08.3.0.3.0.01)*:	**-23.4%**	**+1.0%**

	4-Year change	Annual change
Servces *(08.3.0.2)*:	**-13.8%**	**-1.7%**
Devices *(08.2.0.2)*:	**-44.1%**	**-23.6%**

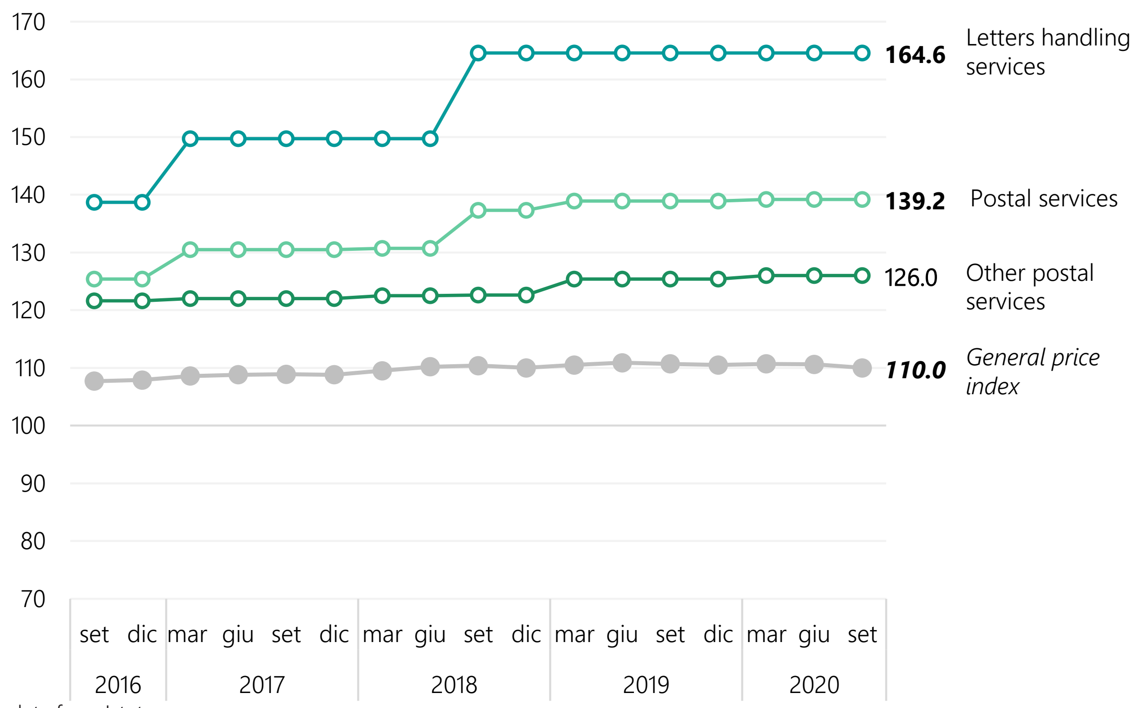
(COICOP - Classification of Individual Consumption by Purpose)

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)*:	**+6.1%**	**-0.4%**
Pay TV *(09.4.2.3.0.02)*:	**+6.3%**	**-0.9%**
Magazines *(09.5.2.2.0)*:	**+2.0%**	**+0.7%**

	4-Year change	Annual change
Postal services *(08.1)*:	**+11.0%**	**+0.2%**
Letters handling services *(08.1.0.1.0.00)*:	**+18.7%**	**=**
Other postal services *(08.1.0.9.0.00)*:	**+3.6%**	**+0.5%**

(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

Source: Agcom elaboration on data from Eurostat

1-Year change %

Sept. 2019 - Sept. 2020

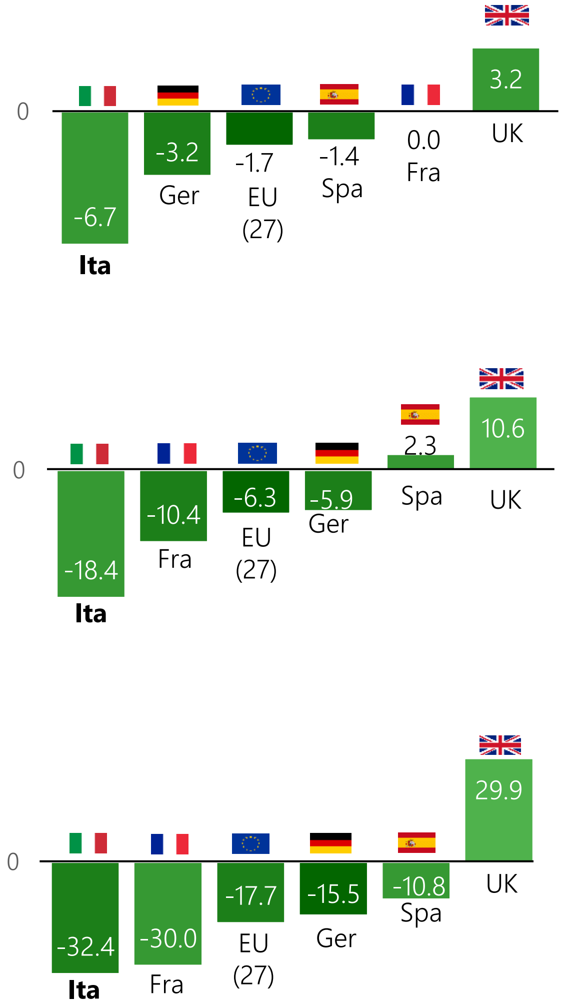
5-Year change %

Sept. 2015 - Sept. 2020

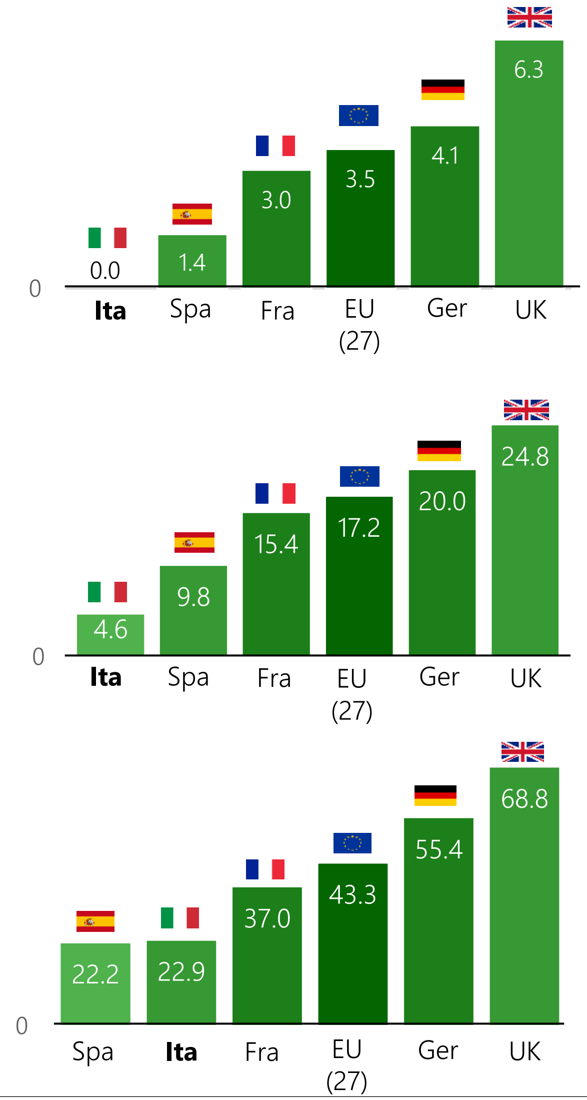
10-Year change %

Sept. 2010 - Sept. 2020

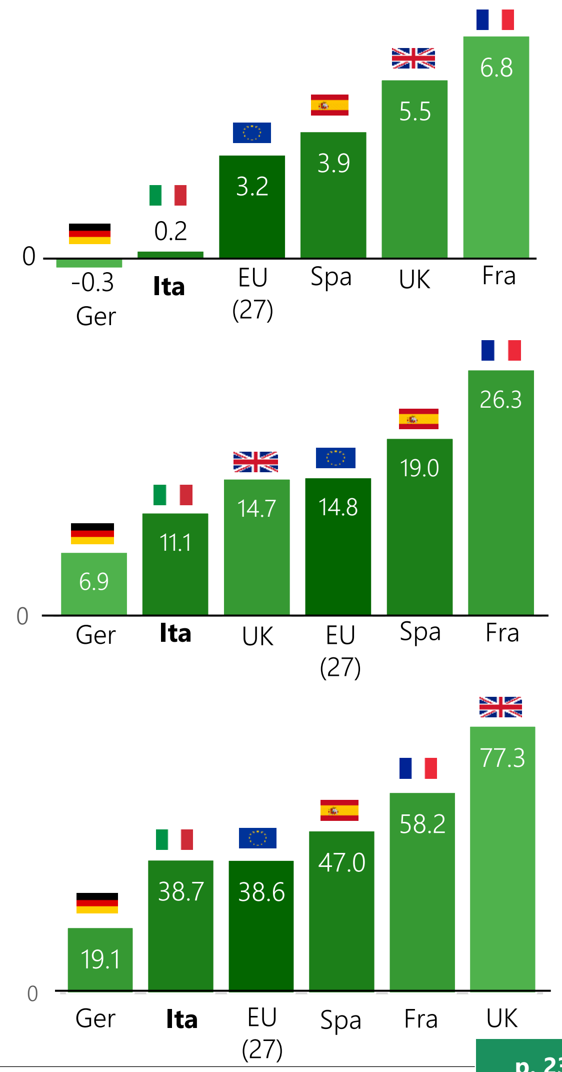
TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)



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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