AGCOM AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 2/2020

INDEX

01 ELECTRONIC COMMUNICATIONS

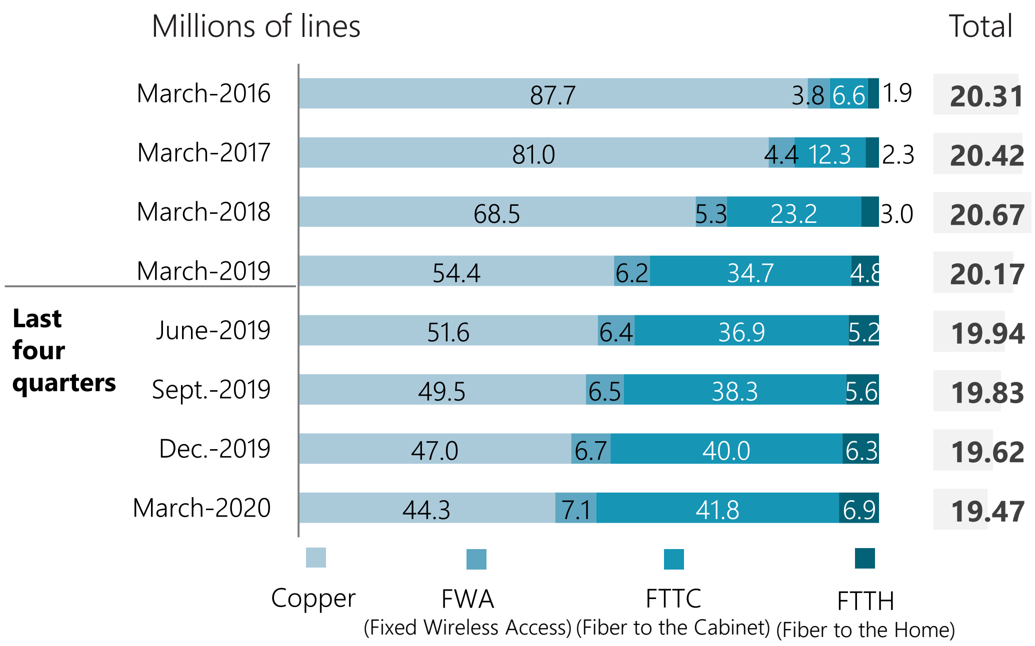
02 MEDIA

03 POSTAL SERVICES AND EXPRESS COURIERS

04 COMMUNICATION SERVICES' PRICES

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

1.2: FIXED LINES: TOTAL LINES



Total lines	(no of lines)	(Δ %)
Quarterly change (Dec. 2019 – March 2020)	**-144 K** accesses	-0.7%
Annual change (March 2019 – March 2020)	**-699 K** accesses	-3.5%
4-Year change (March 2016 – March 2020)	**-840 K** accesses	-4.1%

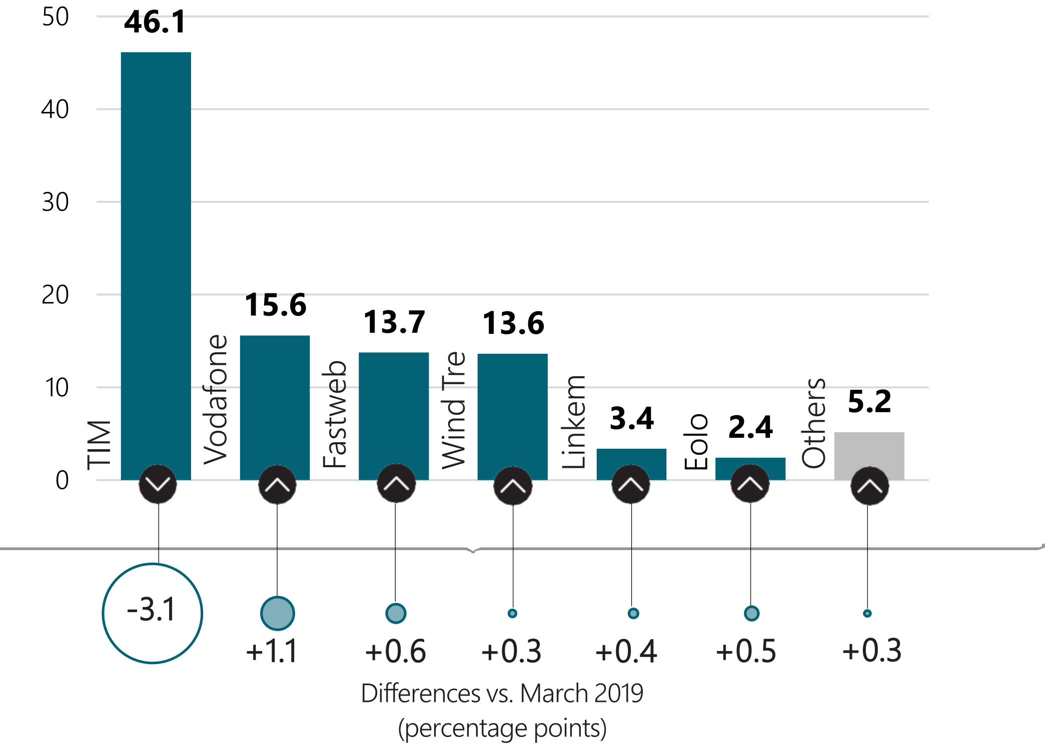
Distribution

(Δ 2019-2020) percentage points

Copper:	-10.1
FWA:	+0.9
FTTC:	+7.1
FTTH:	+2.1

MARKET SHARES (%)

MARCH 2020



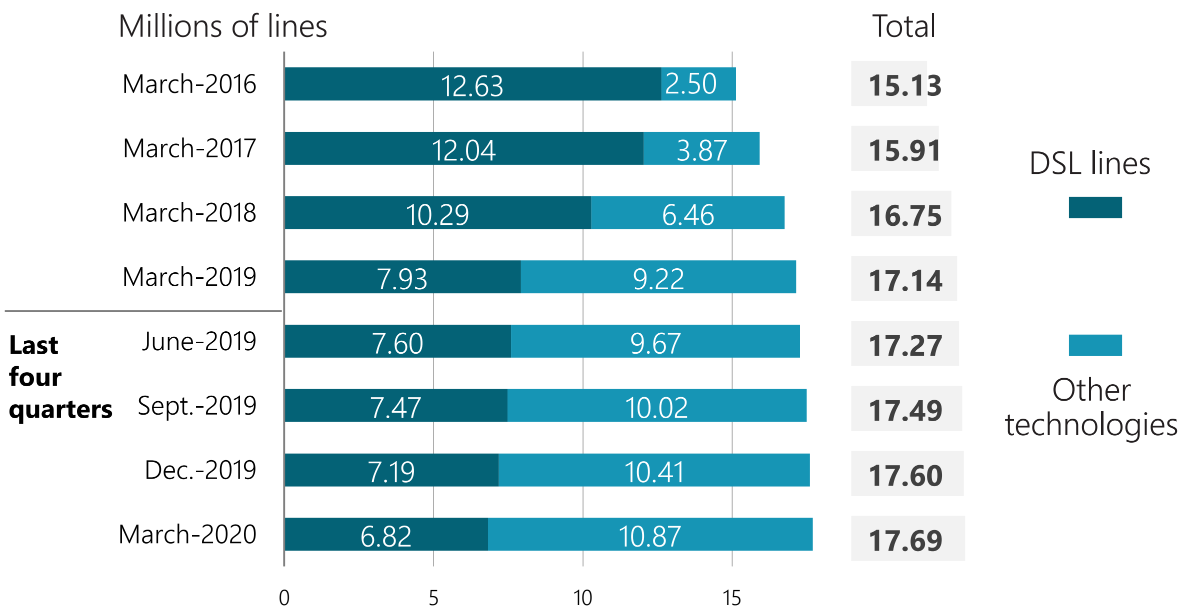
TIM's market share has dropped to **46,1%**

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

Other operators have increased their market share

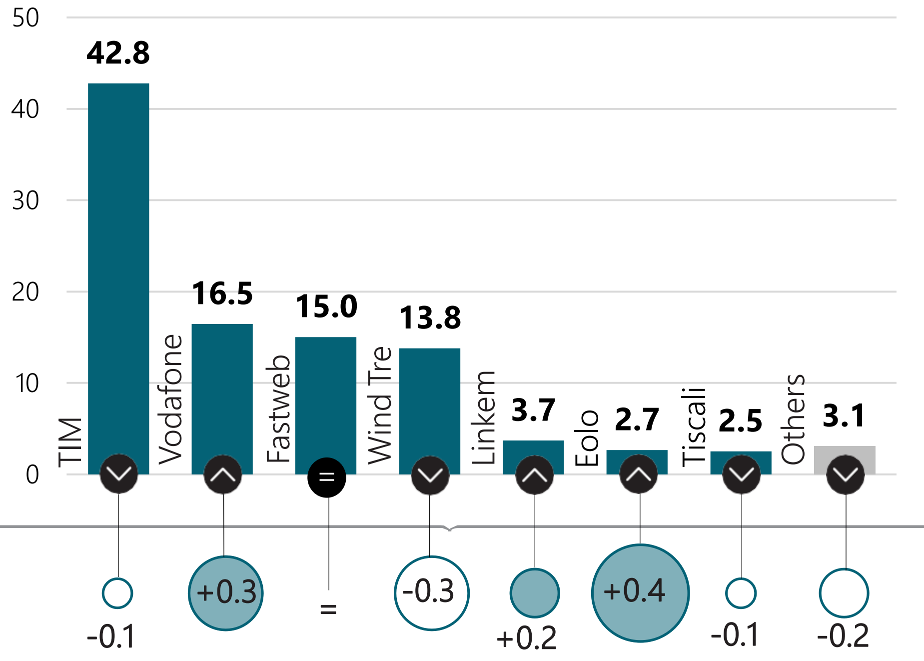
K = thousand

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



MARKET SHARES (%)

MARCH 2020



Differences vs. March 2019
(percentage points)

Quarterly change (Dec. 2019 – March 2020)	Annual change (March 2019 – March 2020)		
Total lines	Total lines	DSL lines	Other technologies
↑	↑	↓	↑
+91 K lines (+0.5%)	**+549 K** lines (+3.8 %)	**-1.107 M** lines (-14.0%)	**+1.655 M** lines (+19.2%)

K = thousand
M = million

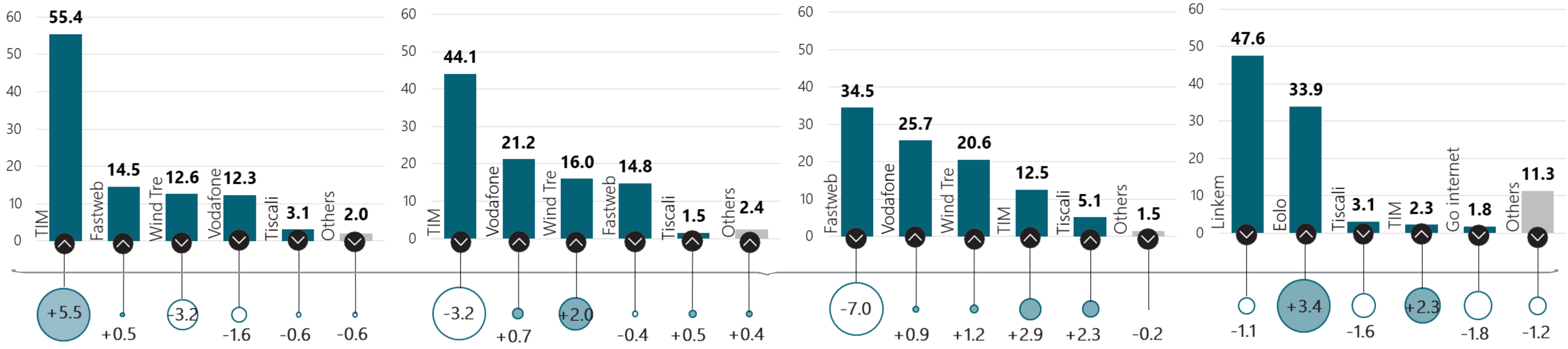
↓ **TIM**'s market share has dropped to **42.8%**

↑ **Vodafone**'s market share has increased

↓ **Wind Tre**'s market share has decreased

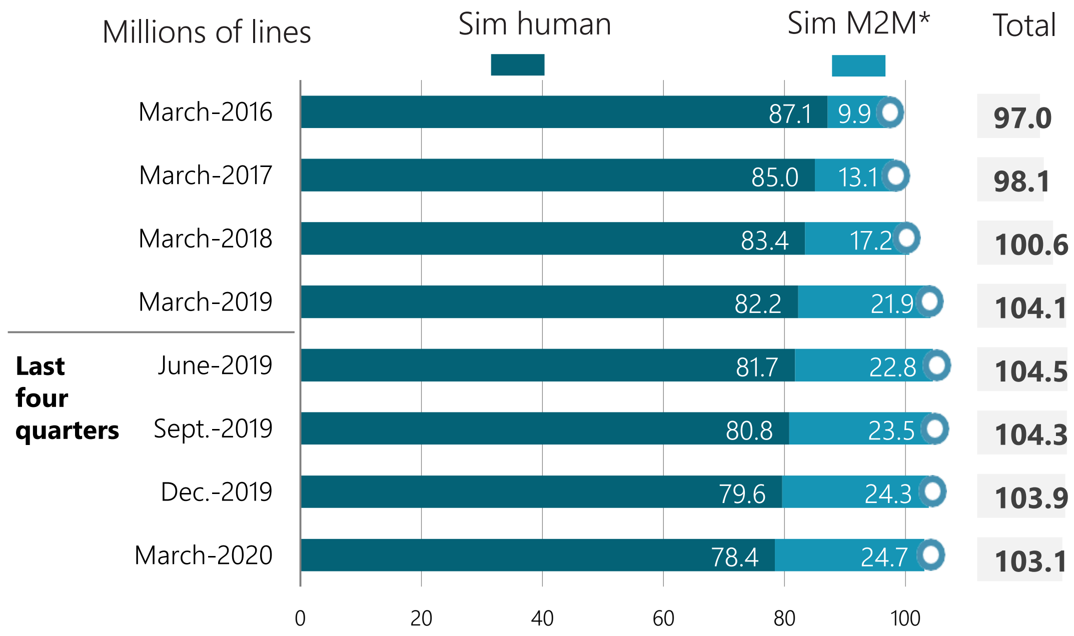
MARCH 2020

DSL	VDSL	FTTH	FWA
Total lines: **6.82** million accesses	Total lines: **8.14** million access	Total lines: **1.34** million access	Total lines: **1.37** millioni access
Annual change March 2019 – March 2020	Annual change March 2019 – March 2020	Annual change March 2019 – March 2020	Annual change March 2019 – March 2020
-14%	**+16.4%**	**+39.5%**	**+10.4%**



Differences vs. March 2019 (percentage points)

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..



(*) **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

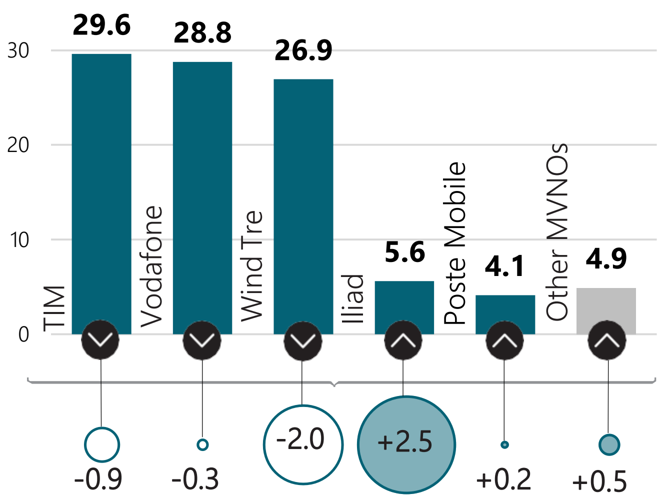
	Quarterly change (Dec. 2019 – March 2020) (no of sim in thousand)	Quarterly change (Δ %)	Annual change (March 2019 – March 2020) (no of sim in thousand)	Annual change (Δ %)
Total sim cards:	-750	-0.7%	+1,007	-1.0%
Sim human:	-1,180	-1.5%	-3,827	-4.7%
Sim M2M:	+430	+1.8%	+2,820	+12.9%

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 (%)

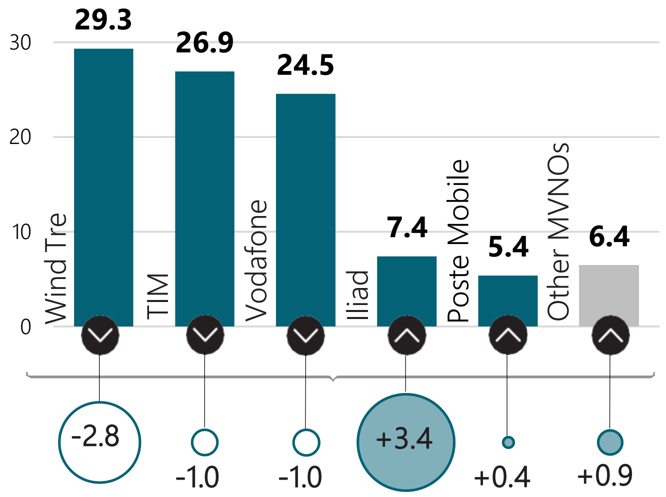
MARCH 2020

Sim total



Differences vs. March 2019 (percentage points)

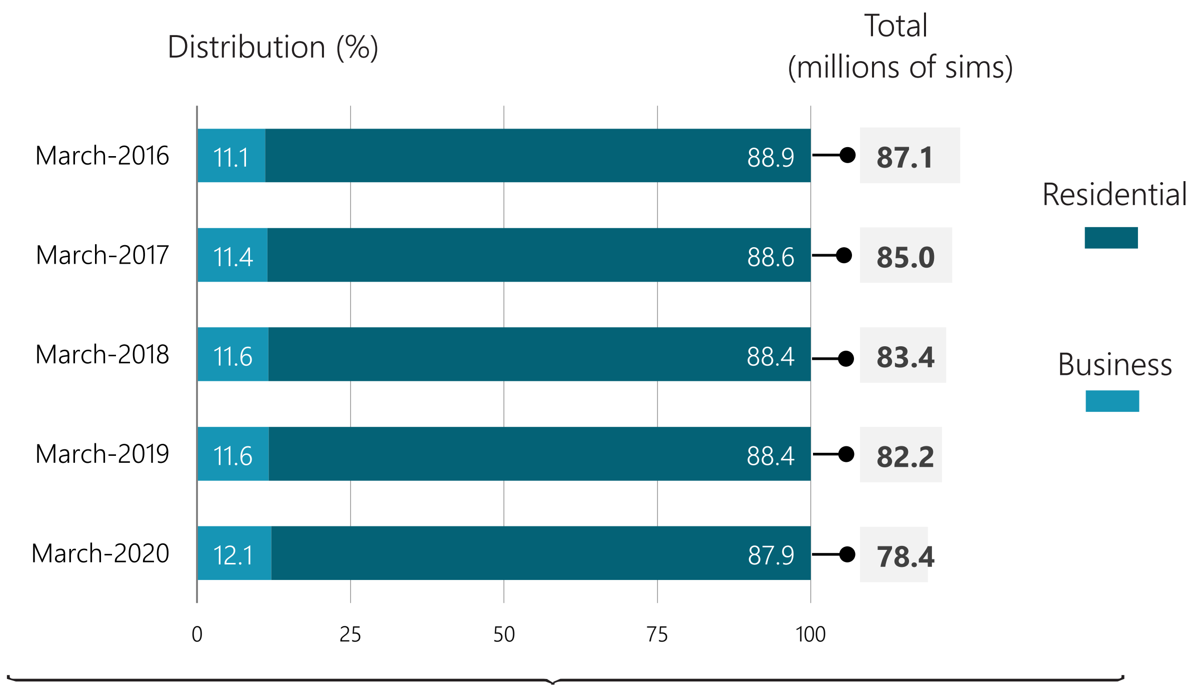
Sim human*



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

Differences vs. March 2019 (percentage points)

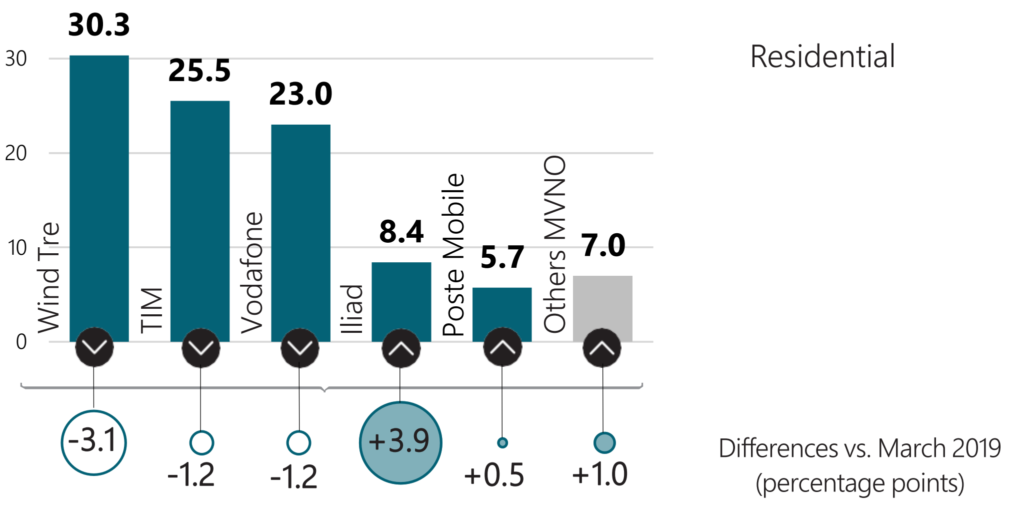
1.5: MOBILE LINES: SUBSCRIBERS BY TYPE OF CUSTOMER

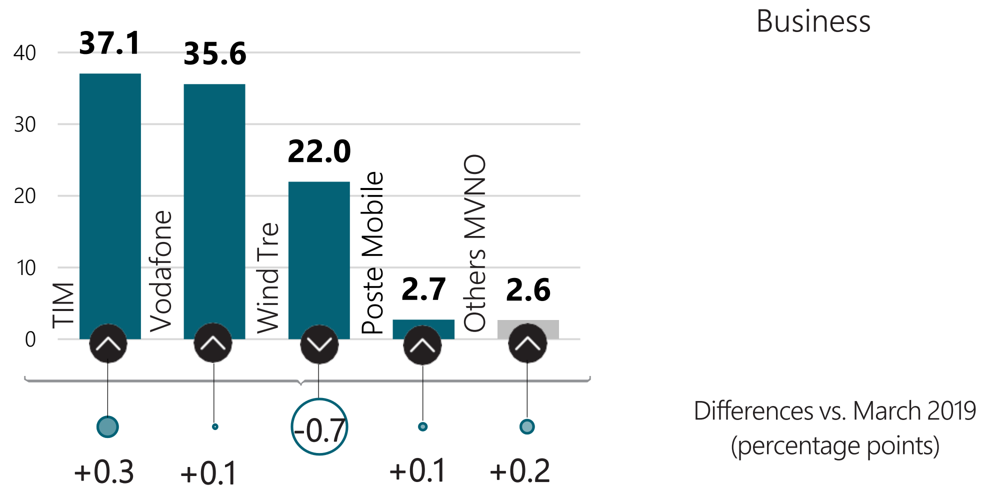


	Annual change (March 2019 – March 2020) (no of sim in thousand)		Annual change (Δ %)	4-Year change (March 2016 – March 2020) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	-3,827	↓	-4.7%	-8,725	↓	-10.0%
Residential sim card:	-3,714	↓	-5.1%	-8,533	↓	-11.0%
Business sim cards:	-86	↓	-0.9%	-191	↓	-2.0%

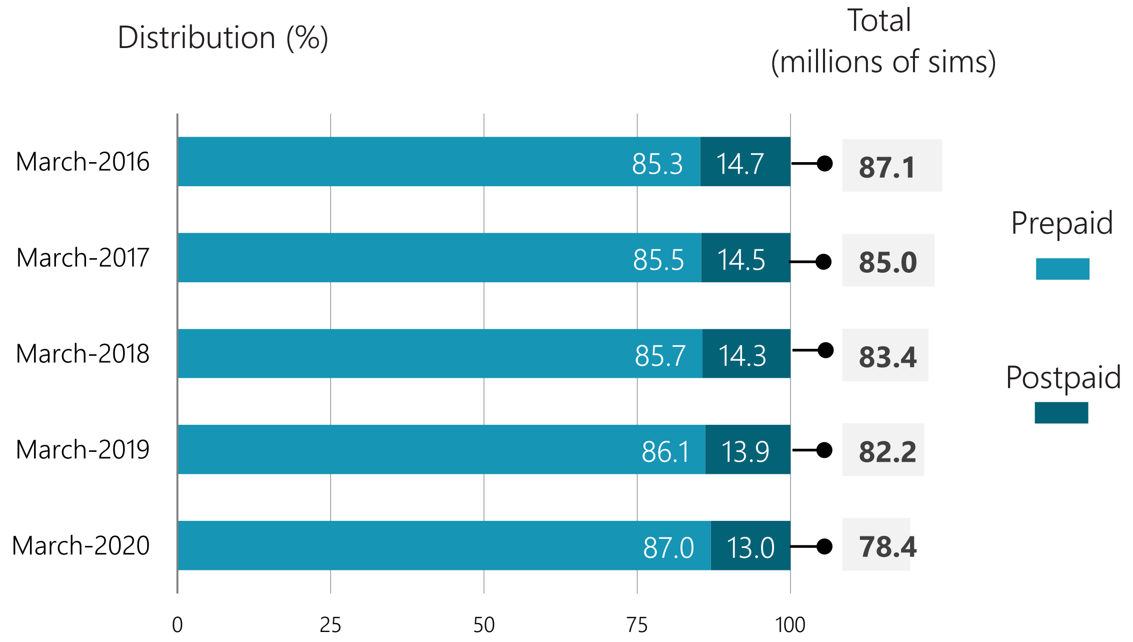
MARKET SHARES (%)

DECEMBER 2019





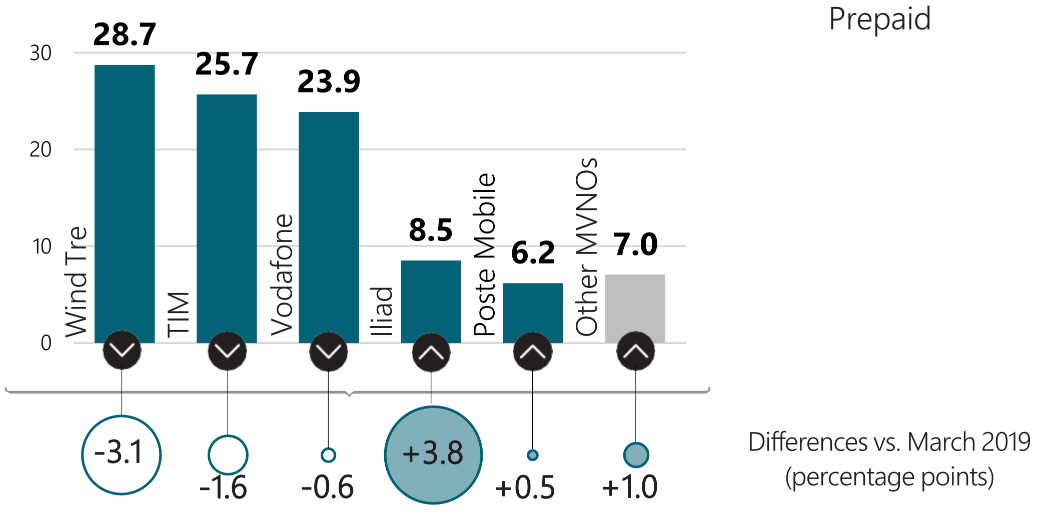
1.6: MOBILE LINES: SUBSCRIBERS BY TYPE OF CONTRACT

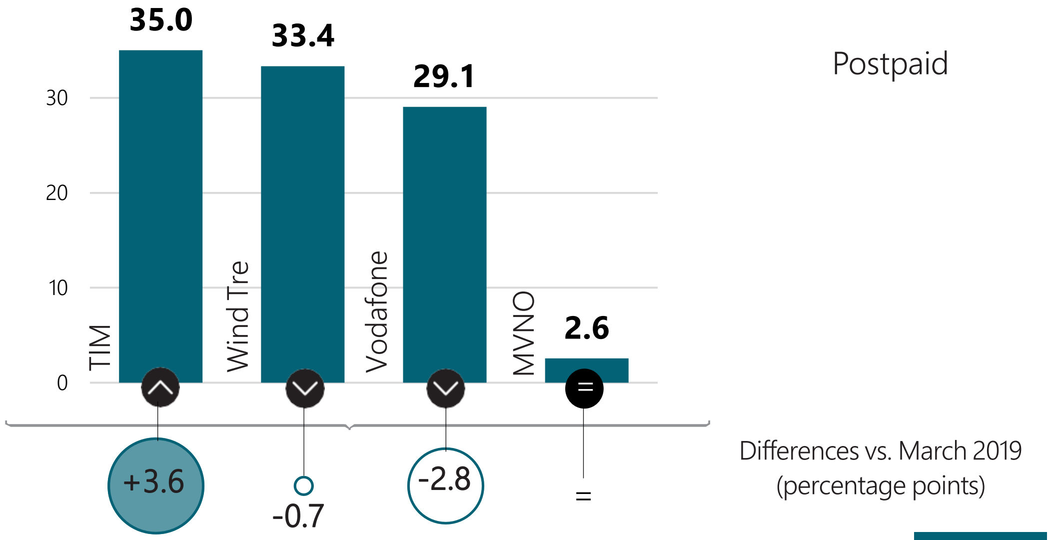


	Annual change (March 2019 – March 2020) (no of sim in thousand)	(Δ %)	4-Year change (March 2016 – March 2020) (no of sim in thousand)	(Δ %)
Total human sim cards:	-3,827	-4.7%	-8,725	-10.0%
Prepaid sim cards:	-2,619	-3.7%	-6,095	-8.2%
Postpaid sim cards:	-1,208	-10.6%	-2,630	-20.5%

QUOTE DI MERCATO (%)

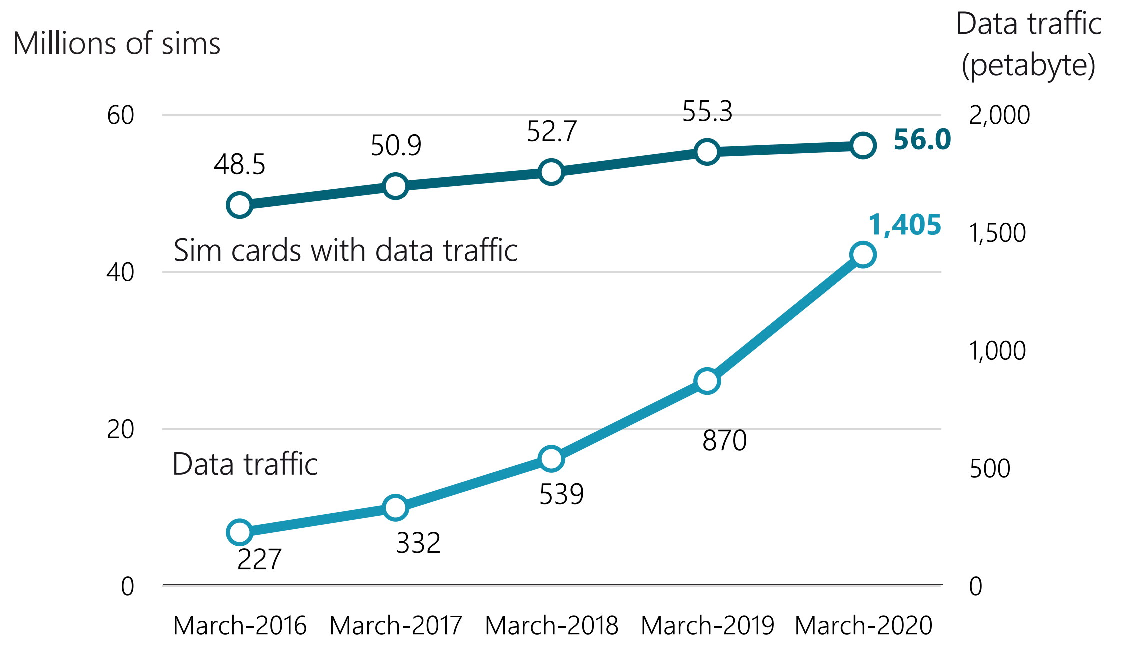
MARCH 2020



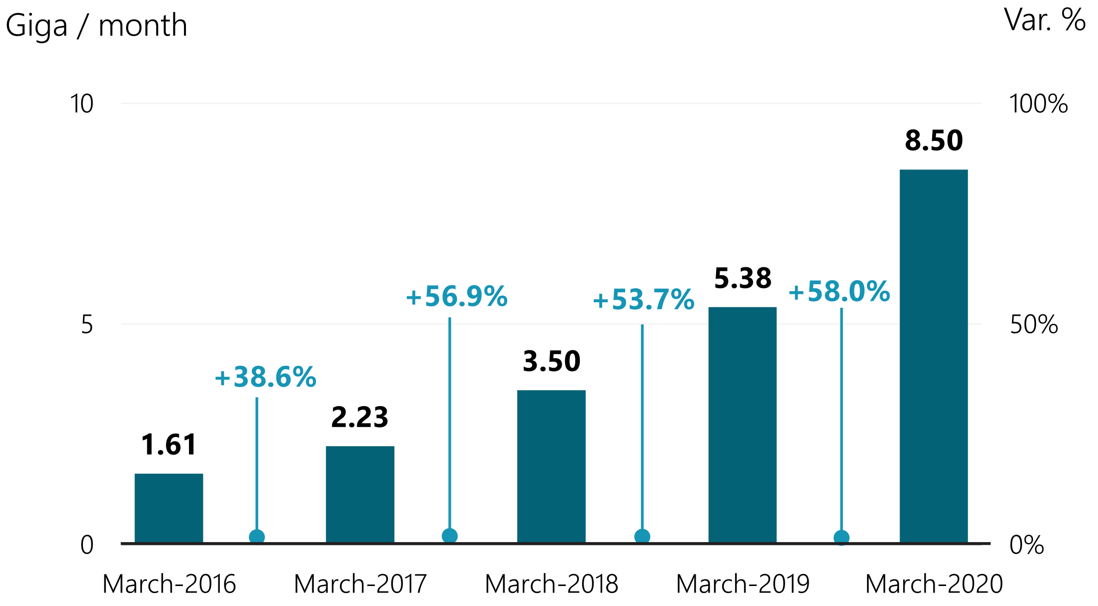


1.7: MOBILE LINES: DATA TRAFFIC

DATA TRAFFIC SINCE THE BEGINNING OF THE YEAR



AVERAGE MONTHLY CONSUMPTION



	Annual change (March 2019 – March 2020)		4-Year change (March 2016 – March 2020)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
SIM cards with data traffic:	+787	+1.4%	+7,550	+15.6%
	(petabyte)	(Δ %)	(petabyte)	(Δ %)
Data traffic:	+536	+61.6%	+1.178	+517.8%

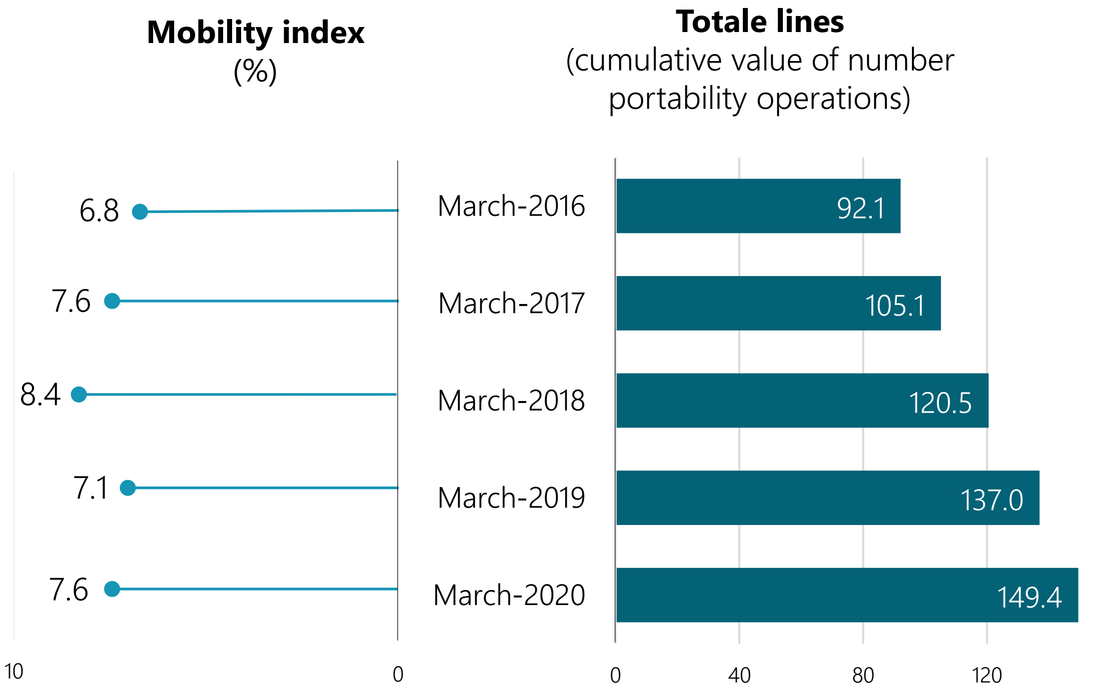
4-Year change

March 2016	+428% (Δ %)	March 2020
1.61 GB/month	→	8.50 GB/month

At the end of March 2020, the number of sim cards with data traffic has reached **71.5%** 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

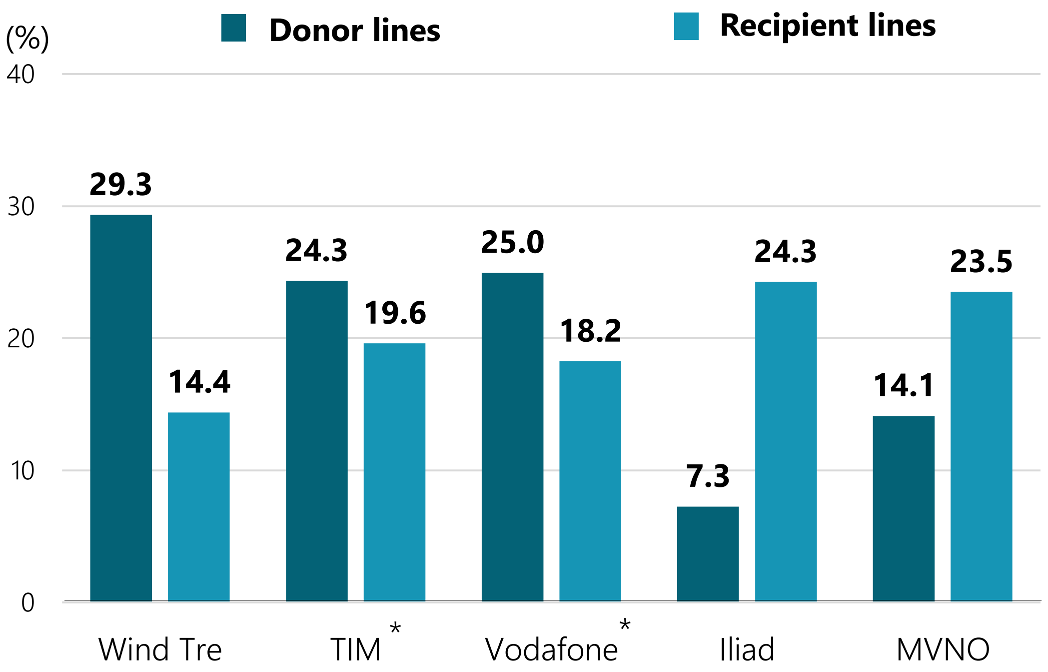
In one year (March 2019 – March 2020), there have been **12,4** million of Mobile Number Portability (MNP) operations



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

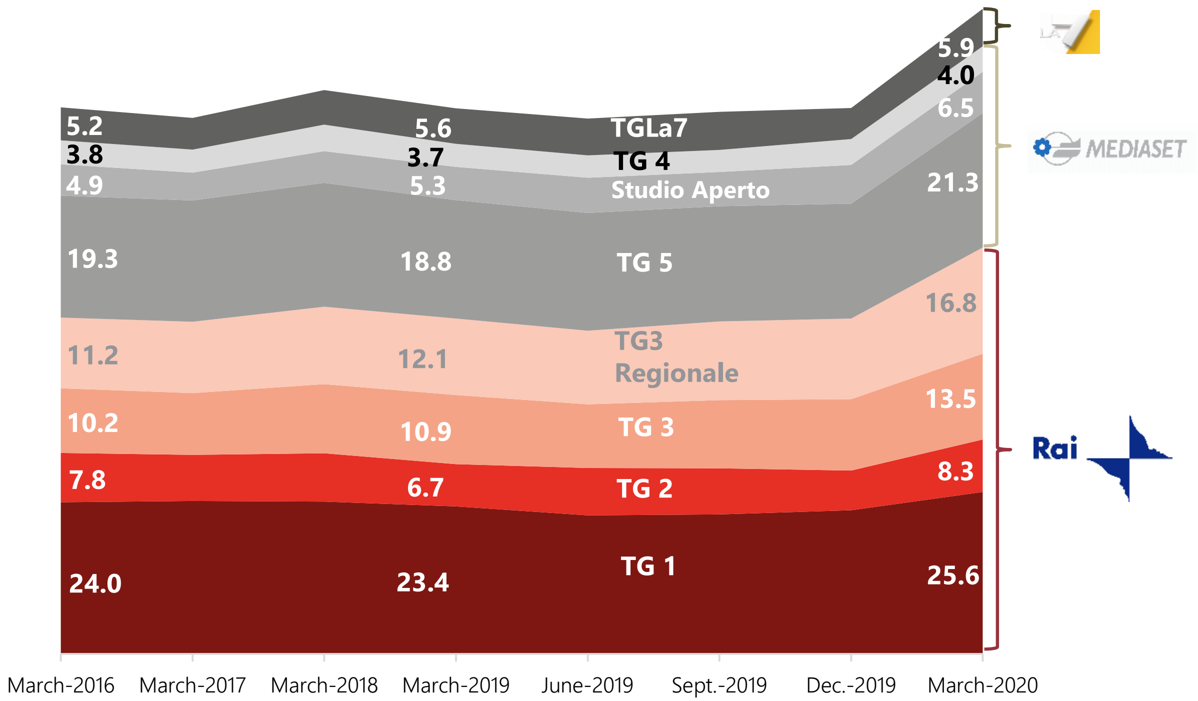
MARCH 2020



(*) 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)

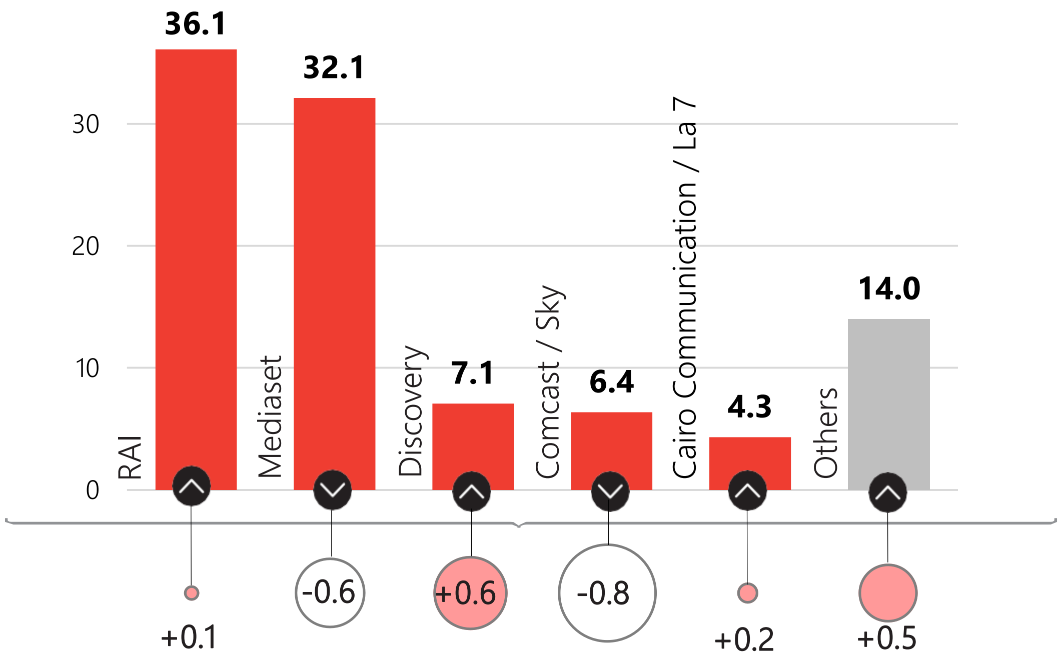
AUDIENCE OF THE MAIN EVENING NEWSCASTS (%)

AVERAGE DAY (March 2016 – March 2020)



MARKET SHARES (%)

MARCH 2020



Differences vs. March 2019
(percentage points)

Δ percentage points
(March 2019 – March 2020)

Rai		Mediaset		La 7	
Tg 1	+2.2 p.p.	Tg 5	+2.5 p.p.	Tg La 7	+0.3 p.p.
Tg 2	+1.7 p.p.	Studio Aperto	+1.3 p.p.		
Tg 3	+2.6 p.p.	Tg 4	+0.4 p.p.		
Tg 3 - Regionale	+4.7 p.p.				

Average daily television viewership

Newscasts	Broadcasters
Tg 1: **7.4 M** viewers	Rai: **5 M** viewers
Tg 5: **6.2 M** viewers	Mediaset: **4.5 M** viewers

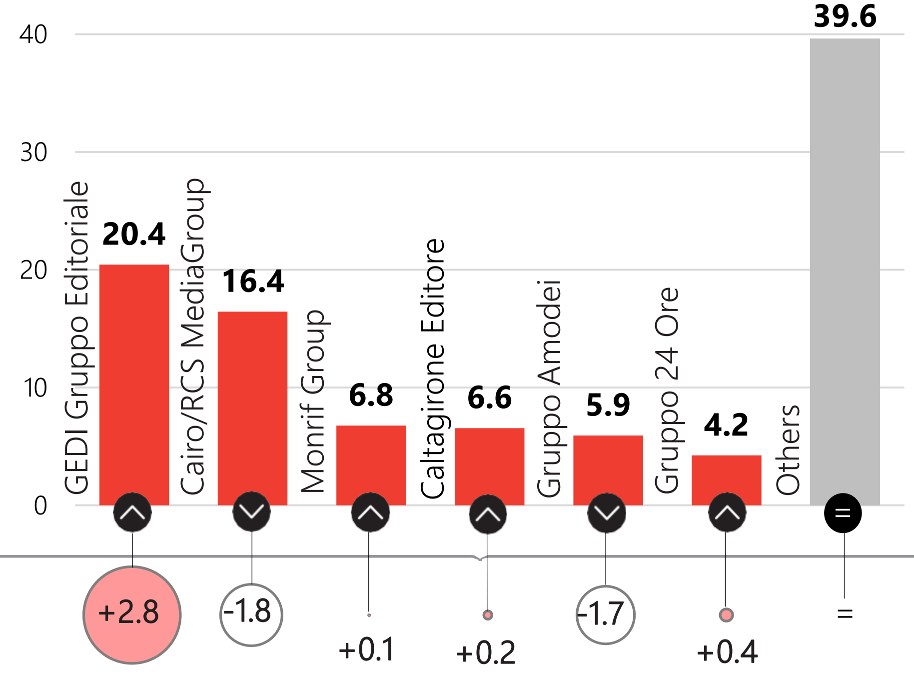
M = million

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

2.2: MEDIA: QUOTIDIANI

NEWSPAPERS' SALES BY EDITORIAL GROUPS (%)

MARCH 2020



Differences vs. March 2019 (percentage points)

Total copies sold in March 2020

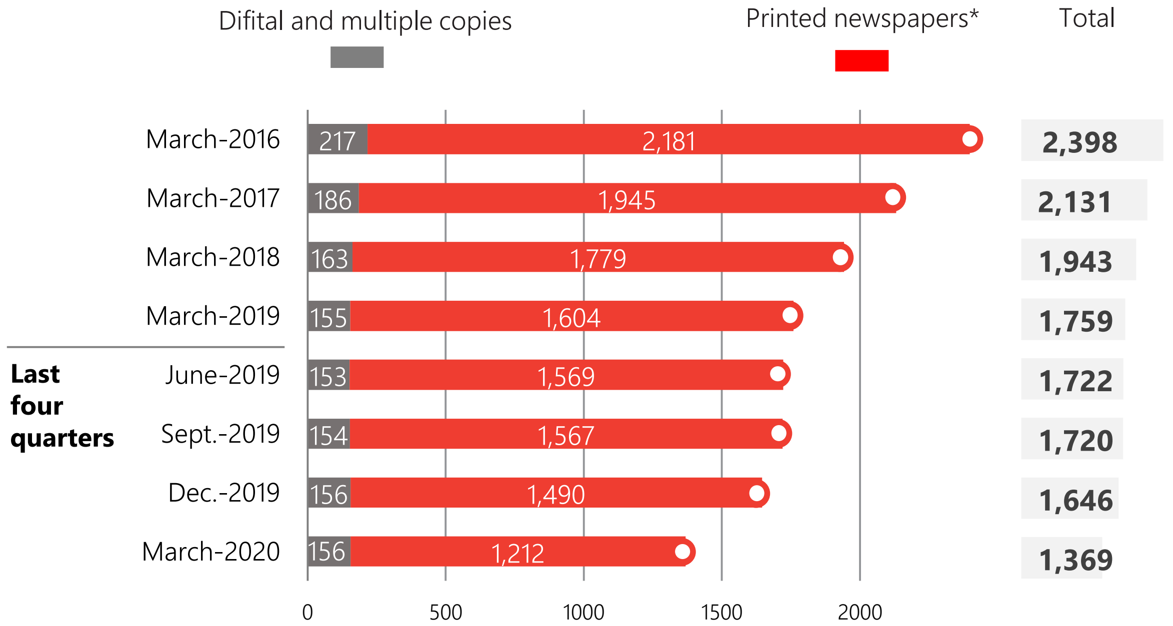
2,585,871

Annual change:
(March 2019 – March 2020)

- 22%

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

IN THOUSANDS – MARCH 2020



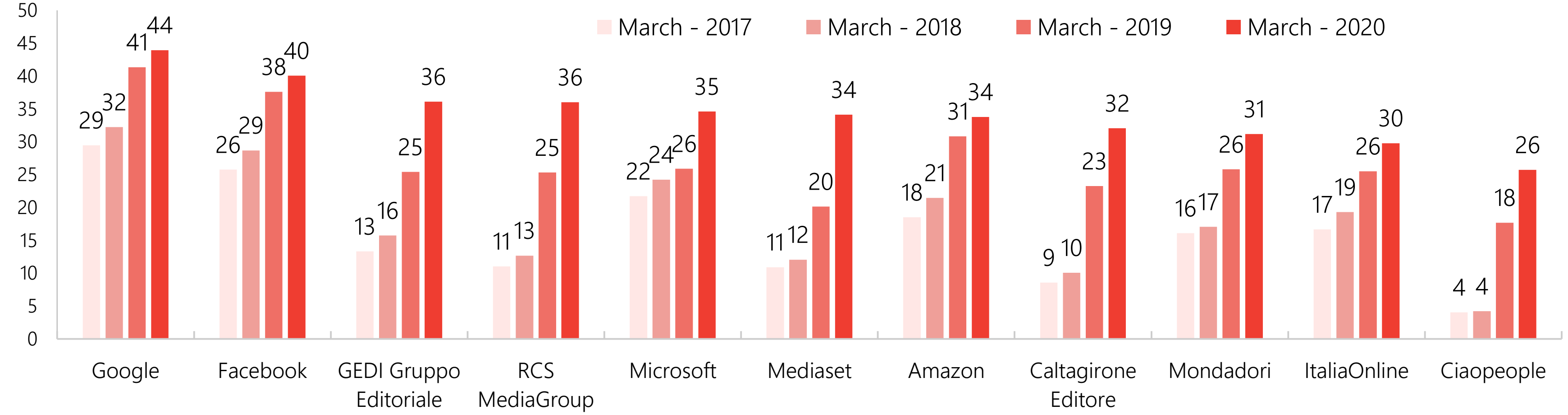
(*) **Note:** copies sold via distribution channels provided for by law

	Annual change (March 2019 – March 2020)	4-Year change (March 2016 – march 2020)
Printed newspapers:	-24%	-44%
Digital and multiple copies: (represent 11.4 % of total sales)	+1%	-28%

Source: Agcom elaboration on data from ADS and IES

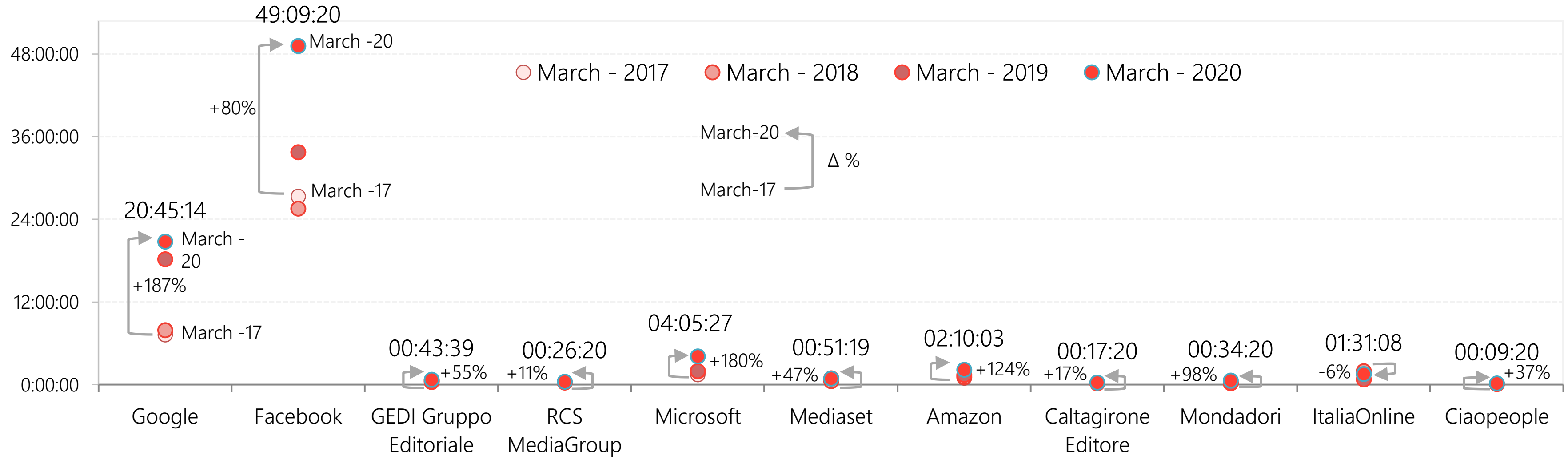
2.3: MEDIA INTERNET: ACTIVE USERS OF THE MAIN OPERATORS

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



In March 2020, **44.7** million unique users connected to the internet

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



In March 2020, a total amount of **113** hours of surfing, on average, per person per month

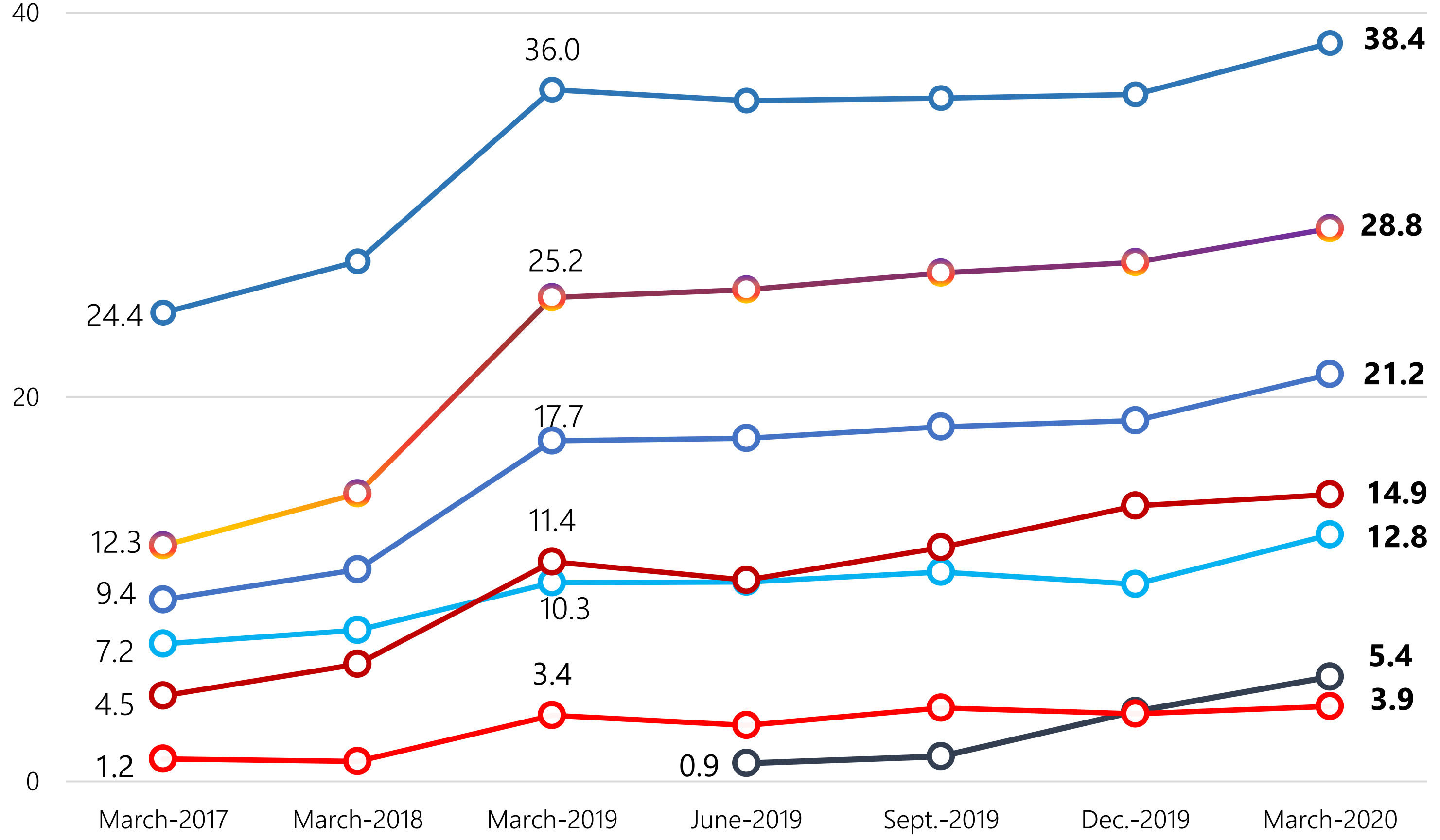
Note: Since March 2018, the Audiweb system has adopted a new methodology

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 2020
IN MILLIONS



	Quarterly change (Dec.-2019 – March 2020)	Annual change (March 2019 – March 2020)
Facebook	+7.5% ↑	+6.8% ↑
Instagram	+6.5% ↑	+14.2% ↑
Linkedin	+12.8% ↑	+19.5% ↑
Pinterest	+4.1% ↑	+30.5% ↑
Twitter	+25.2% ↑	+24.2% ↑
TikTok	+49.7% ↑	+475.1% ↑ (*)
Reddit	+11.2% ↑	+13.7% ↑

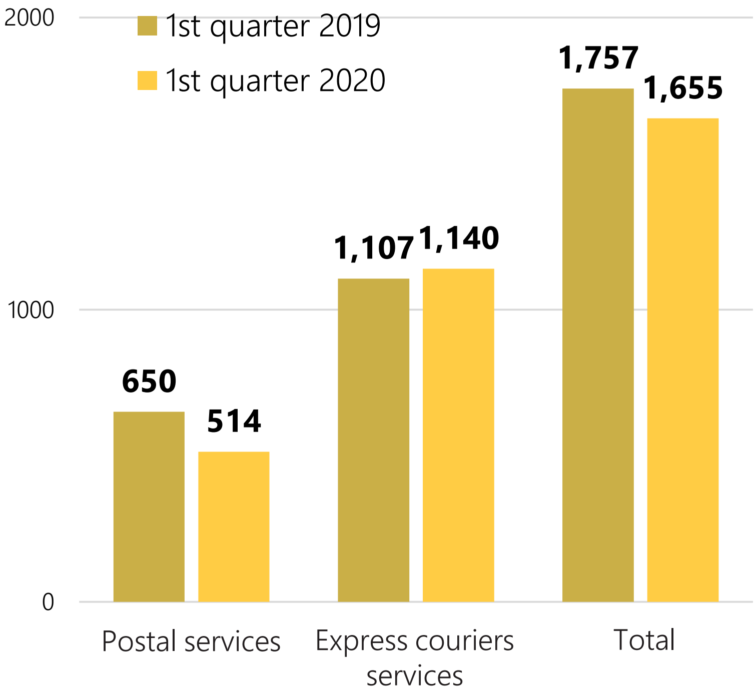
(*) Note: The growth rate of Tik Tok starts from June 2019.

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

3.1: POSTAL SERVICES AND EXPRESS COURIERS: REVENUES *

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



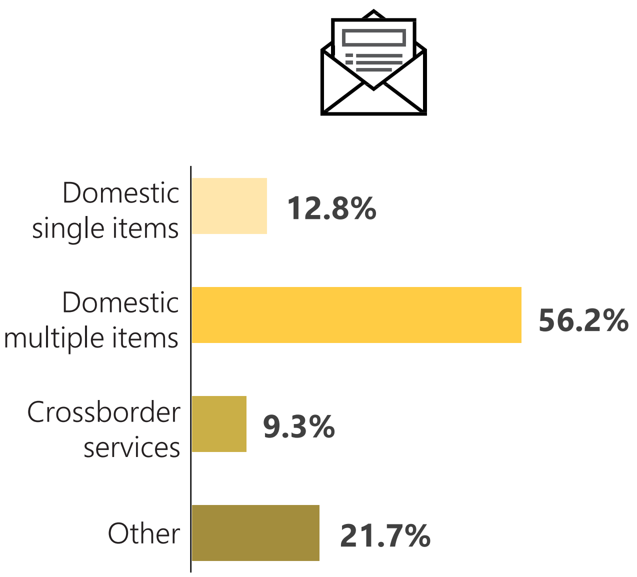
Annual change
(1st Quarter 2019 – 1st Quarter 2020)

-20.9%	+3.0%	-5.8%
Postal services	Express couriers	Total

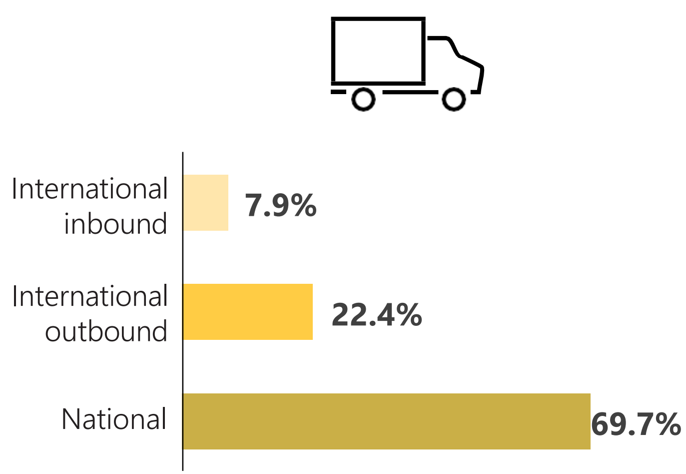
REVENUES BY SOURCE TYPE (%)

1st QUARTER 2020

Postal services



Express couriers



Annual change
(1st Quarter 2019 – 1st Quarter 2020)

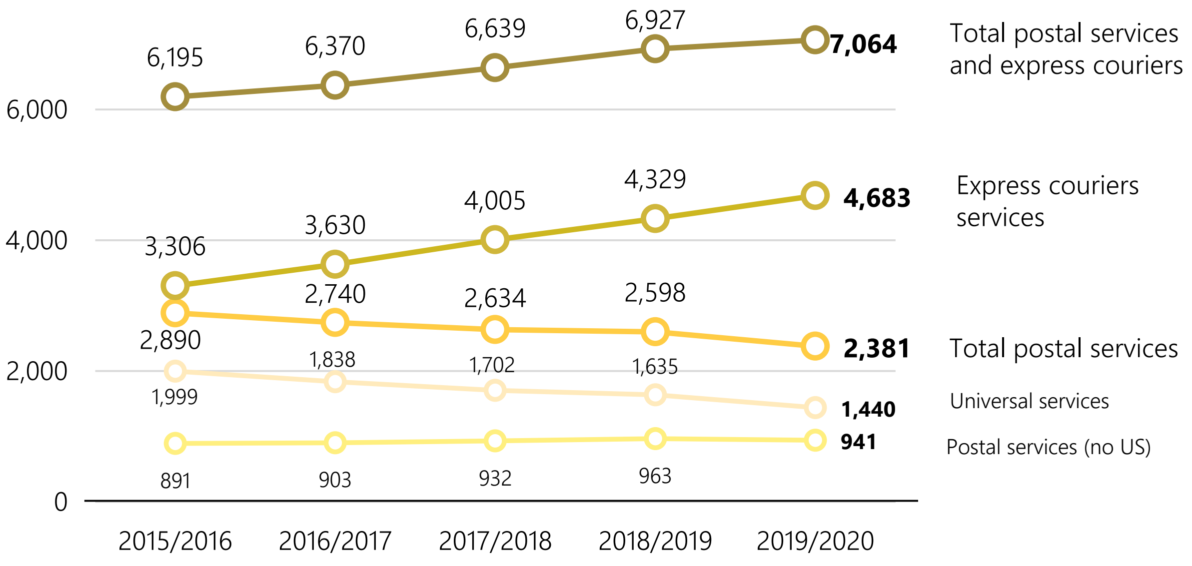
-28.8%	-18.6%	-15.0%	-23.7%	-1.6%	-5.1%	+6.5%
Domestic single items	Domestic multiple items	Crossborder services	Other	International inbound	International outbound	National

(*) **Note**: The figures also include the data from Amazon Italia Transport (AIT); therefore the data are not comparable with previous veriosions

3.2: POSTAL SERVICES AND EXPRESS COURIERS: REVENUES HISTORICAL TRENDS

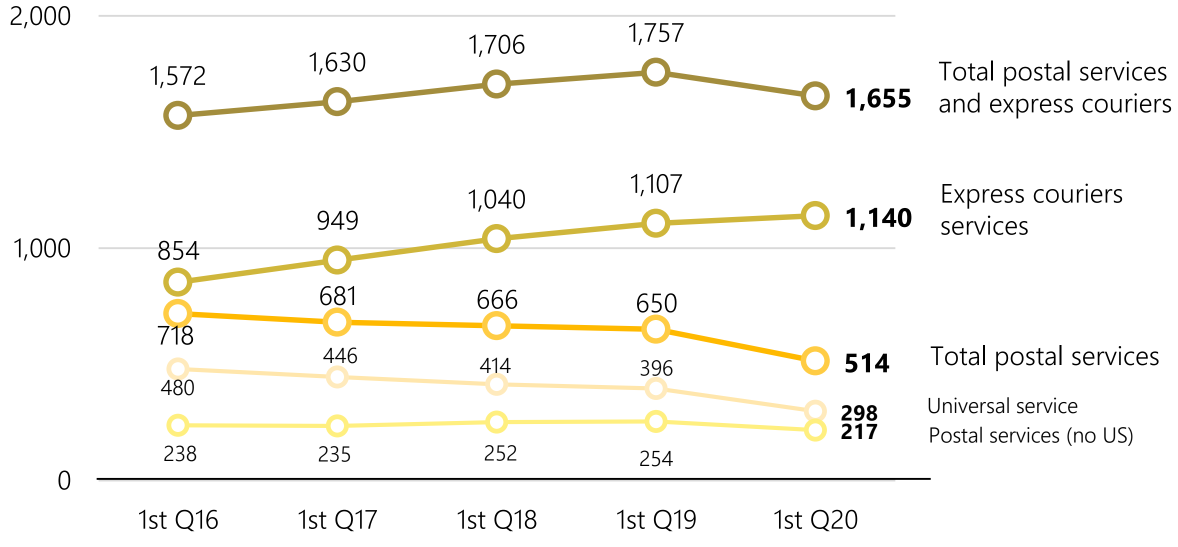
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



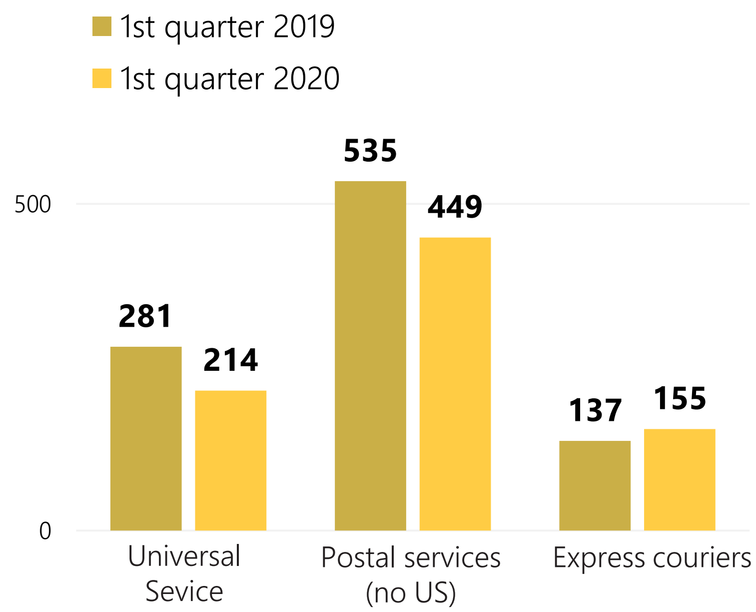
	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Total Postal services:	-17.6%	-8.3%
- Postal services (no US):	+5.6%	-2.3%
- Universal service:	-28.0%	-11.9%
Express couriers:	+41.7%	+8.2%
Total postal services and express couriers:	+14.0%	+2.0%

	Change (1st Quarter 2016 – 1st Quarter 2020)	Change (1st Quarter 2019 – 1st Quarter 2020)
Total Postal services:	-28.4%	-20.9%
- Postal services (no US):	-9.1%	-14.8%
- Universal service:	-37.9%	-24.9%
Express couriers:	+33.6%	+3.0%
Total postal services and express couriers:	+5.3%	-5.8%

3.3: POSTAL SERVICES AND EXPRESS COURIERS: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS



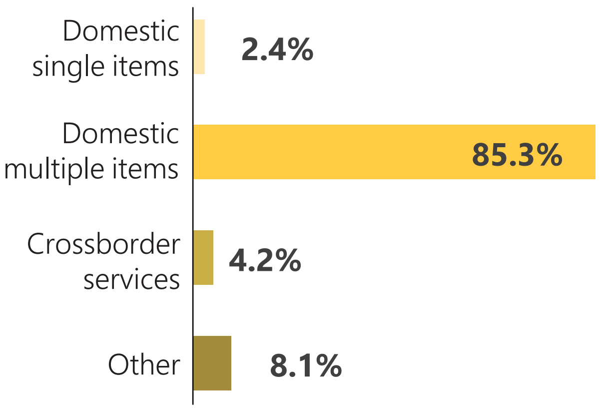
Annual change
(1st Quarter 2019 – 1st Quarter 2020)

-23.9%	-16.6%	+13.3%
Universal Sevice	Postal services (no US)	Express couriers

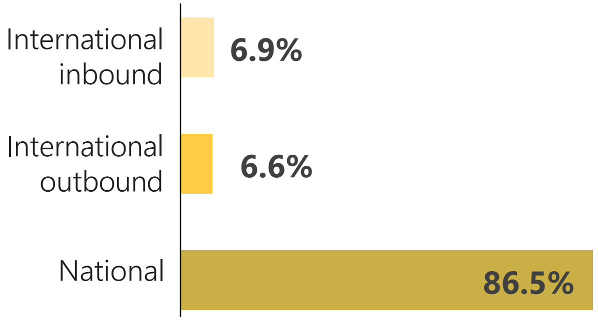
VOLUMES BY SOURCE TYPE (%)

1st QUARTER 2020

Postal services



Express couriers



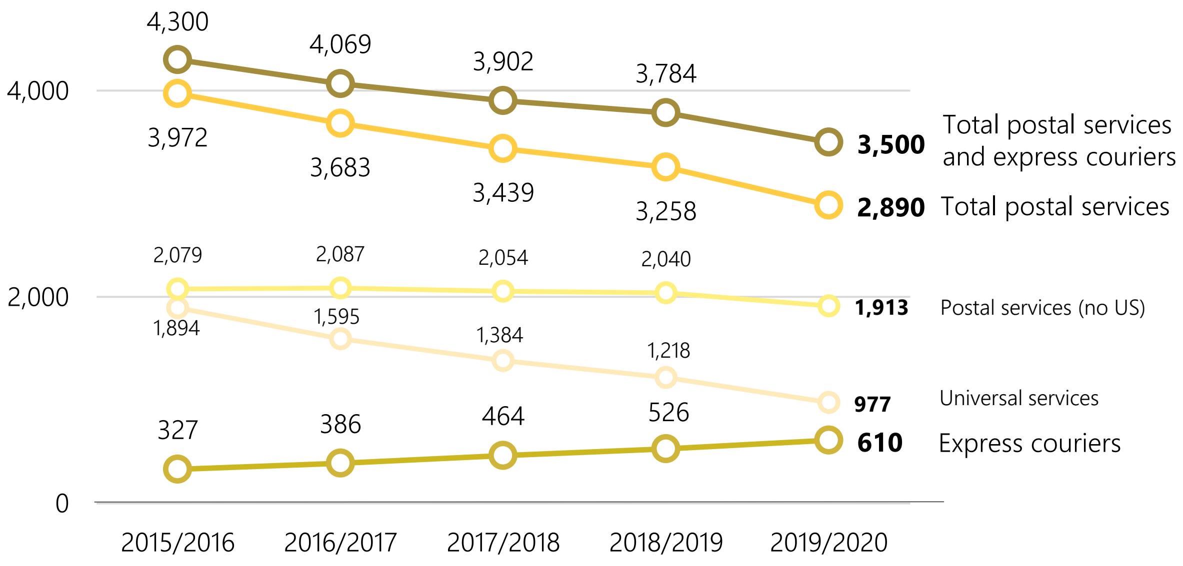
Annual change
(1st Quarter 2019 – 1st Quarter 2020)

-45.4%	-17.7%	-16.6%	-19.4%	+0.1%	-2.9%	+16.0%
Domestic single items	Domestic multiple items	Crossborder services	Other	International inbound	International outbound	National

3.4: POSTAL SERVICES AND EXPRESS COURIERS: VOLUMES HISTORICAL TRENDS

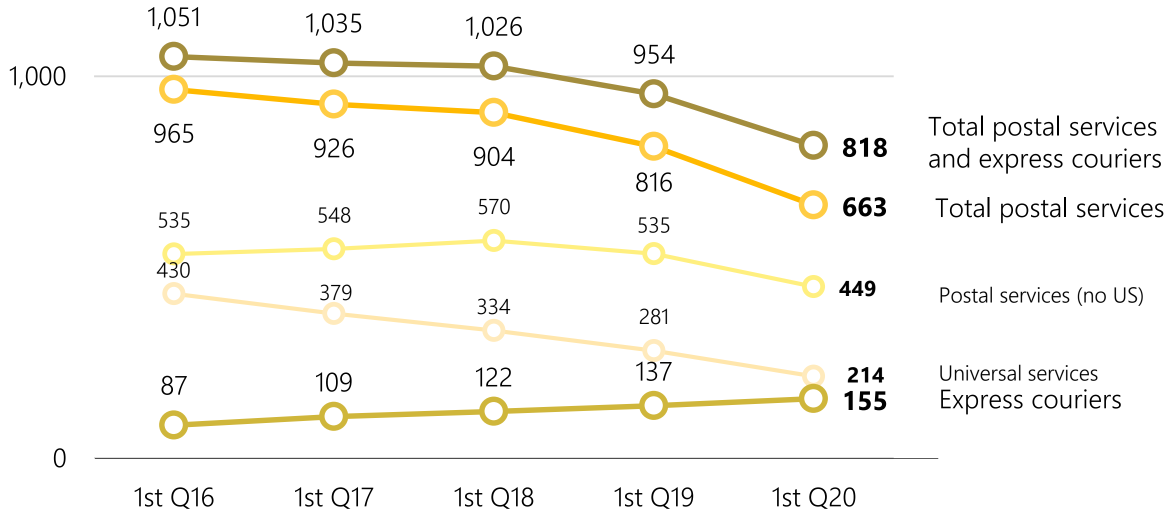
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

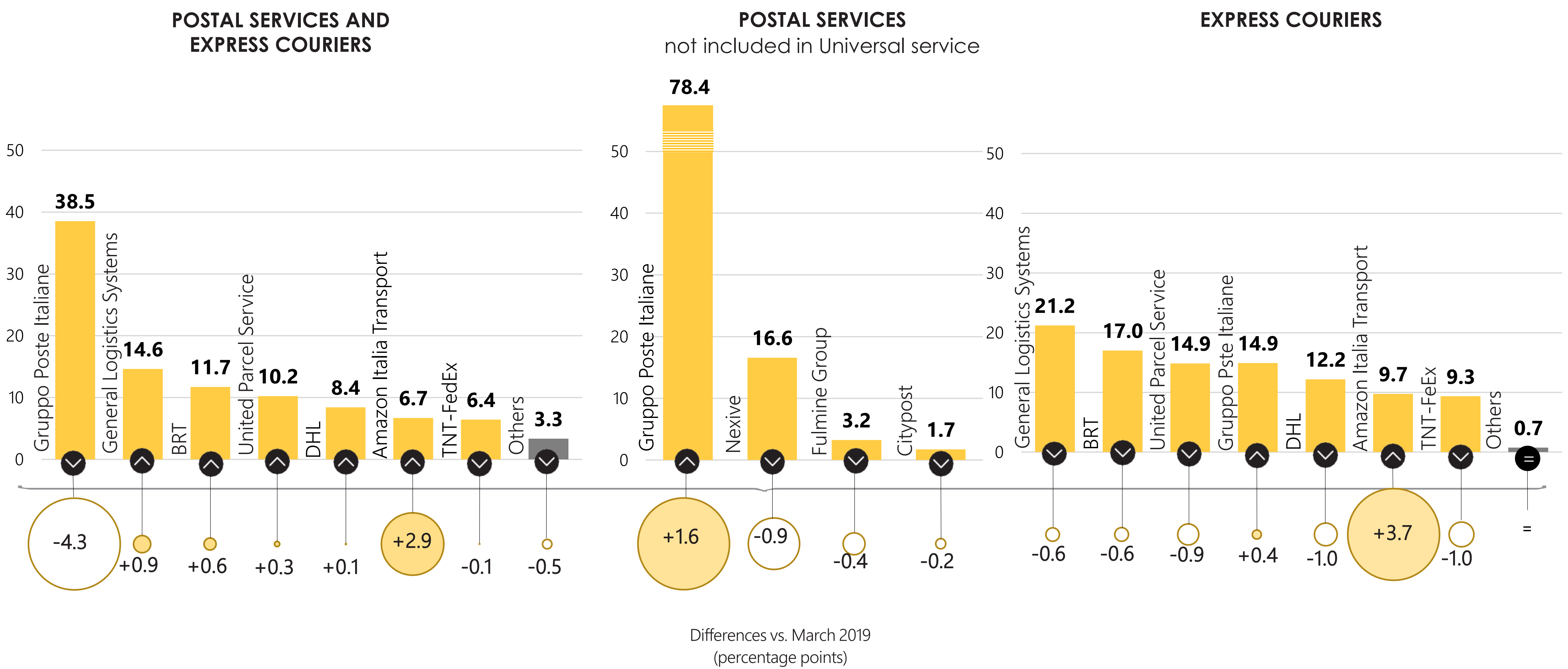
MILLIONS OF UNITS



	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Total postal services:	-27.2%	-11.3%
- Postal services (no US):	-8.0%	-6.2%
- Universal service:	-48.4%	-19.8%
Express couriers:	+86.2%	+15.8%
Total postal services and express couriers:	-18.6%	-7.5%

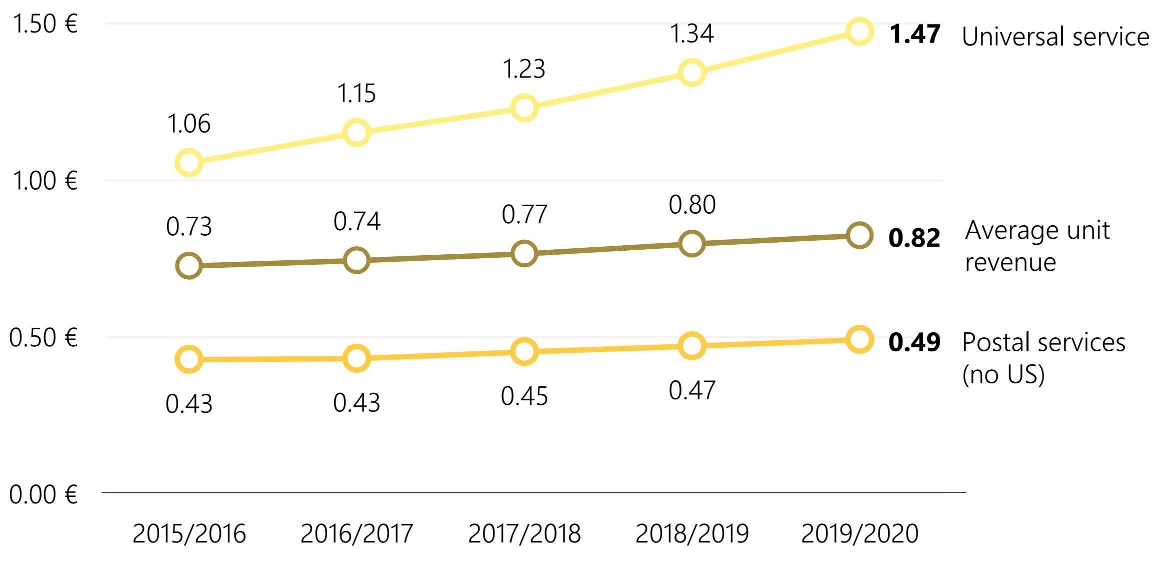
	Change (1st Quarter 2016 – 1st Quarter 2020)	Change (1st Quarter 2019 – 1st Quarter 2020)
Total postal services:	-31.3%	-18.8%
- Postal services (no US):	-16.0%	-16.1%
- Universal service:	-50.2%	-23.9%
Express couriers:	+79.7%	+13.3%
Total postal services and express couriers:	-22.2%	-14.2%

MARCH 2020

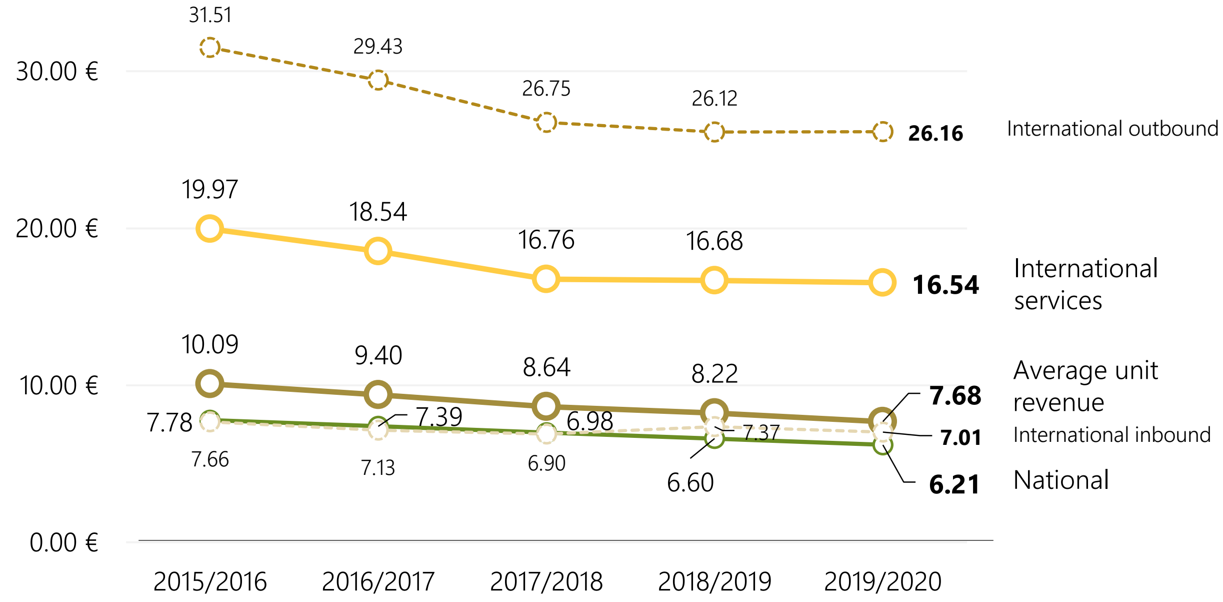

POSTAL SERVICES AND EXPRESS COURIERS
Gruppo Poste Italiane 38.5 -4.3
General Logistics Systems 14.6 +0.9
BRT 11.7 +0.6
United Parcel Service 10.2 +0.3
DHL 8.4 +0.1
Amazon Italia Transport 6.7 +2.9
TNT-FedEx 6.4 -0.1
Others 3.3 -0.5
POSTAL SERVICES
not included in Universal service
Gruppo Poste Italiane 78.4 +1.6
Nexive 16.6 -0.9
Fulmine Group 3.2 -0.4
Citypost 1.7 -0.2
EXPRESS COURIERS
General Logistics Systems 21.2 -0.6
BRT 17.0 -0.6
United Parcel Service 14.9 -0.9
Gruppo Pste Italiane 14.9 +0.4
DHL 12.2 -1.0
Amazon Italia Transport 9.7 +3.7
TNT-FeEx 9.3 -1.0
Others 0.7 =
Differences vs. March 2019
(percentage points)

3.6: POSTAL SERVICES AND EXPRESS COURIERS: PER-UNIT REVENUES HISTORICAL TRENDS IN € *

POSTAL SERVICES



EXPRESS COURIERS

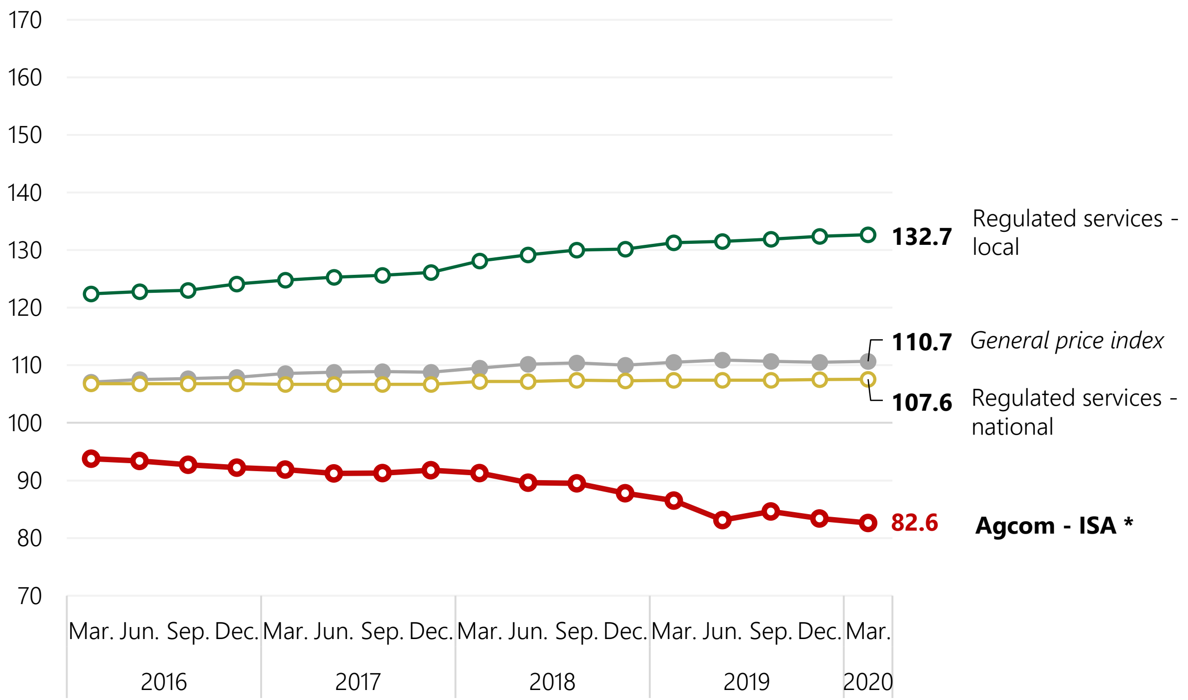


	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Average unit revenue:	+13.3% ↑	+3.3% ↑
Postal services (no US):	+14.7% ↑	+4.2% ↑
Universal service:	+39.7% ↑	+9.8% ↑

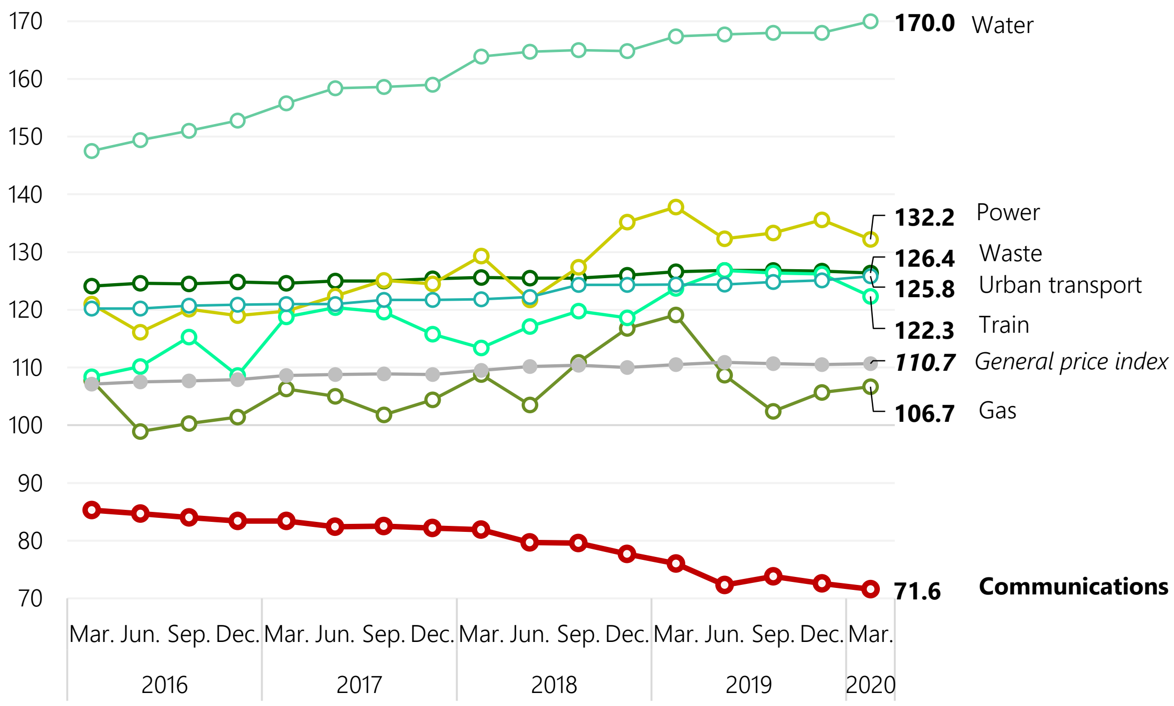
	Change (2015/2016 – 2019/2020)	Change (2018/2019 – 2019/2020)
Average unit revenue:	-23.9% ↓	-6.6% ↓
International services:	-17.2% ↓	-0.8% ↓
- International inbound:	-8.5% ↓	-4.9% ↓
- International outbound:	-17.0% ↓	-0.2% ↓
National:	-20.2% ↓	-6.0% ↓

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):	-11.9% ↓	-4.5% ↓
General price index:	+3.4% ↑	+0.2% ↑
Regulated services - local:	+8.4% ↑	+1.1% ↑
Regulated services - national:	+0.7% ↑	+0.2% ↑

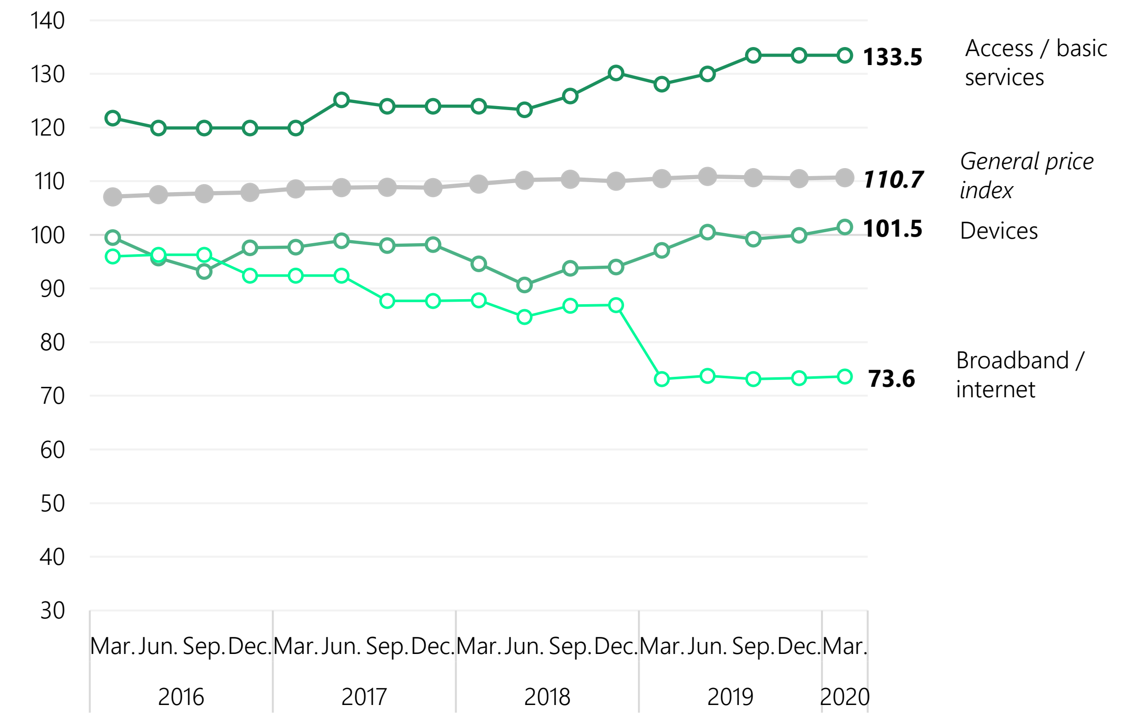
(*) **Note**: The ISA («Indice Sintetico Agcom») price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (for a total of 10 items).

	4-Year change	Annual change
Water *(04.4.1)*:	+15.3% ↑	+1.6% ↑
Waste *(04.4.2)*:	+1.9% ↑	-0.2% ↓
Power *(04.5.1)*:	+9.3% ↑	-4.1% ↓
Gas *(04.5.2)*:	-1.0% ↓	-10.4% ↓
Train *(07.3.1)*:	+12.8% ↑	-1.1% ↓
Urban transport *(07.3.2.1.1)*:	+4.7% ↑	+1.1% ↑
Communications *(08)*:	-16.1% ↓	-5.8% ↓

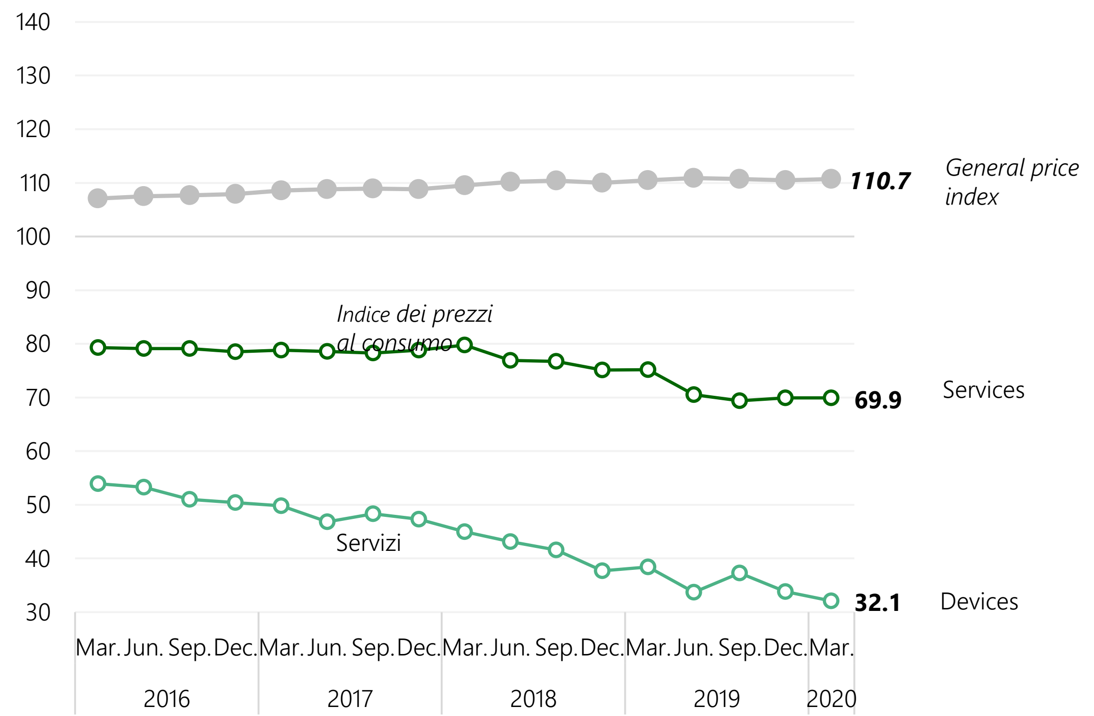
(COICOP - Classification of Individual Consumption by Purpose)

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

FIXED TELEPHONY PRICE INDICES



MOBILE TELEPHONY PRICE INDICES



Fonte: Istat ed elaborazioni Agcom

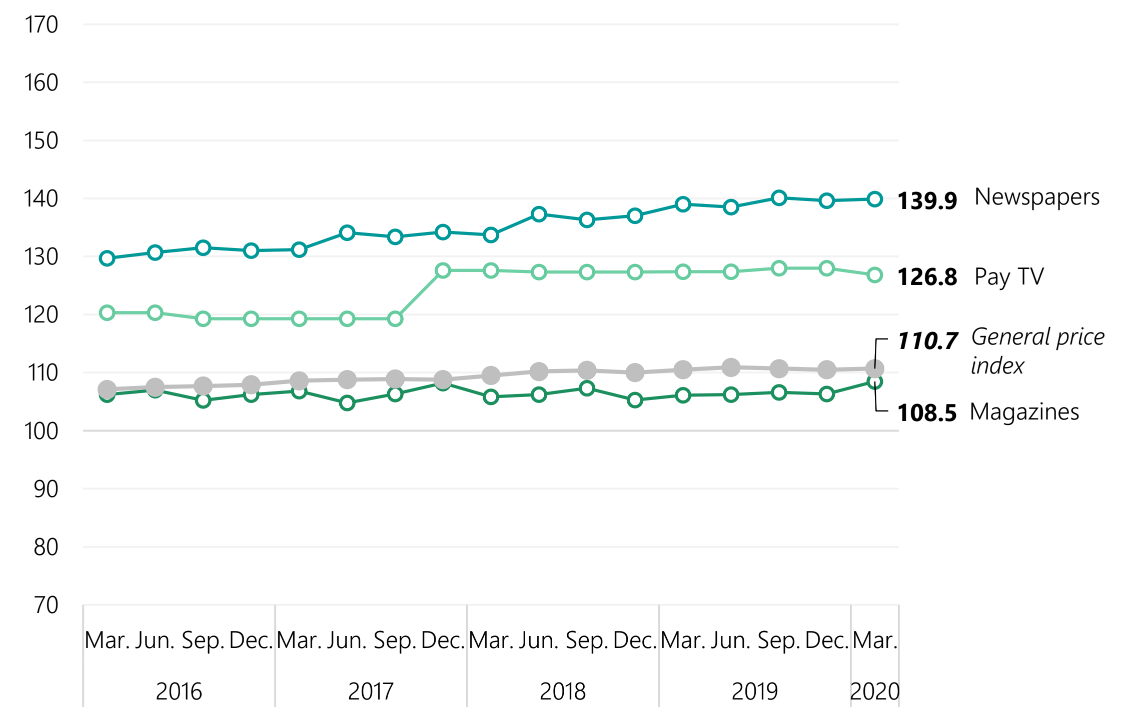
	4-Year change	Annual change
Access / basic services *(08.3.0.1)*:	**+9.6%** ↑	**+4.2%** ↑
Devices *(08.2.0.1)*:	**+2.0%** ↑	**+4.5%** ↑
Broadband / internet *(08.3.0.3.0.01)*:	**-23.3%** ↓	**-0.7%** ↑

	4-Year change	Annual change
Servces *(08.3.0.2)*:	**-11.9%** ↓	**-7.0%** ↓
Devices *(08.2.0.2)*:	**-40.4%** ↓	**-16.4%** ↓

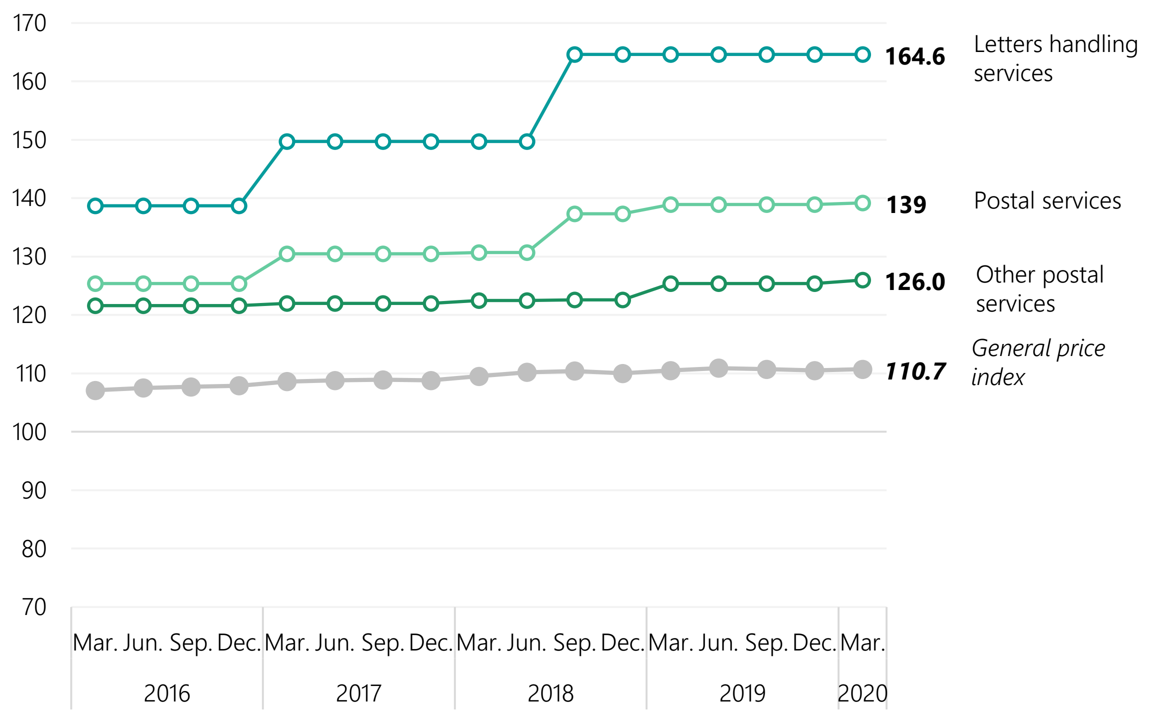
(COICOP - Classification of Individual Consumption by Purpose)

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

NEWSPAPERS, MAGAZINES, TV PRICE INDICES



POSTAL SERVICES PRICE INDEX



Fonte: Istat ed elaborazioni Agcom

	4-Year change	Annual change
Newspapers *(09.5.2.1.0)*:	**+7.9%** ↑	**+0.6%** ↑
Pay TV *(09.4.2.3.0.02)*:	**+5.4%** ↑	**-0.5%** ↓
Magazines *(09.5.2.2.0)*:	**+2.2%** ↑	**+2.3%** ↑

	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)

1-Year change %

March 2019 - March 2020

5-Year change %

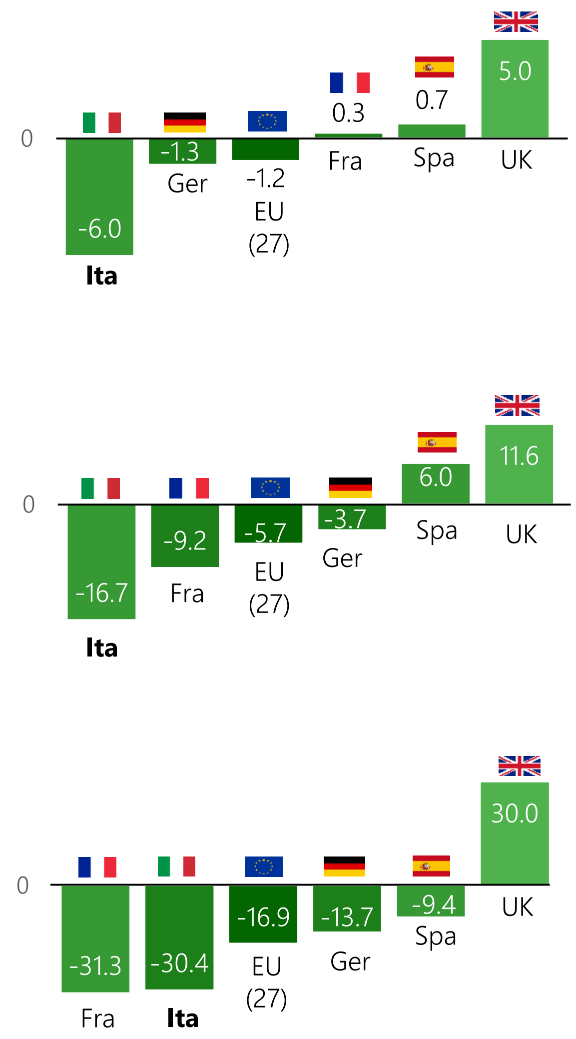
March 2015 - March 2020

10-Year change %

March 2010 - March 2020

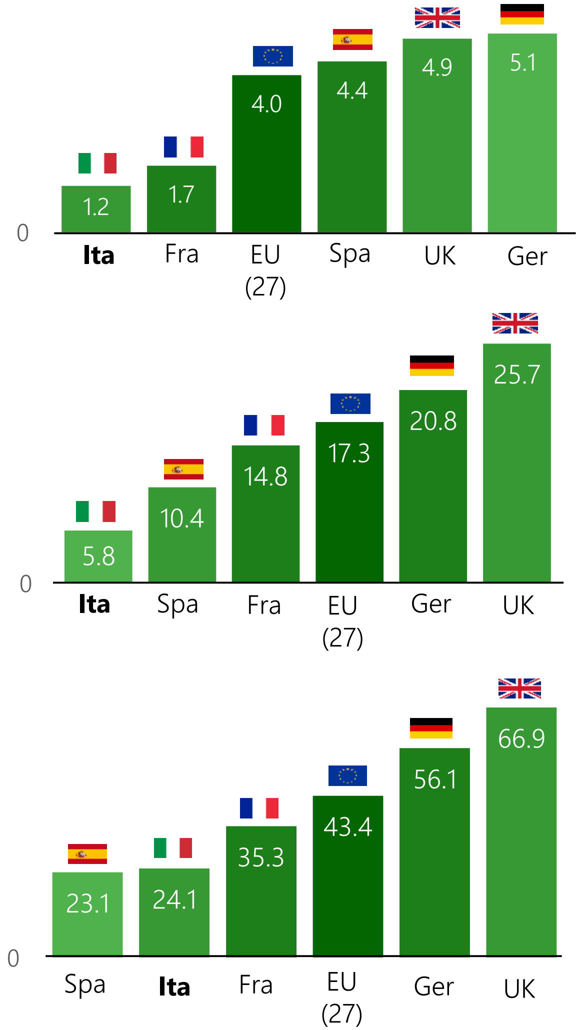
TLC – SERVICES AND EQUIPMENTS

(COICOP 08.2 - 08.3)



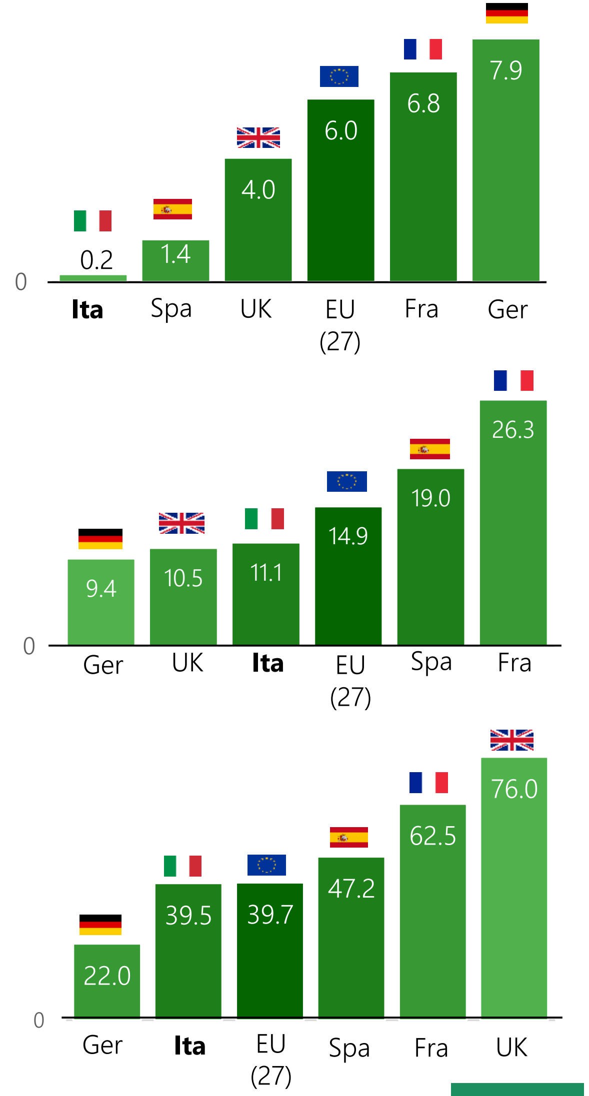
NEWSPAPERS AND MAGAZINES

(COICOP 09.5.2)



POSTAL SERVICES

(COICOP 08.1)



AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 2/2020

Servizio Economico Statistico
ses@agcom.it

Roma
Via Isonzo 21/b -00198

Napoli
Centro Direzionale Isola B5 -80143