AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

N. 1/2022

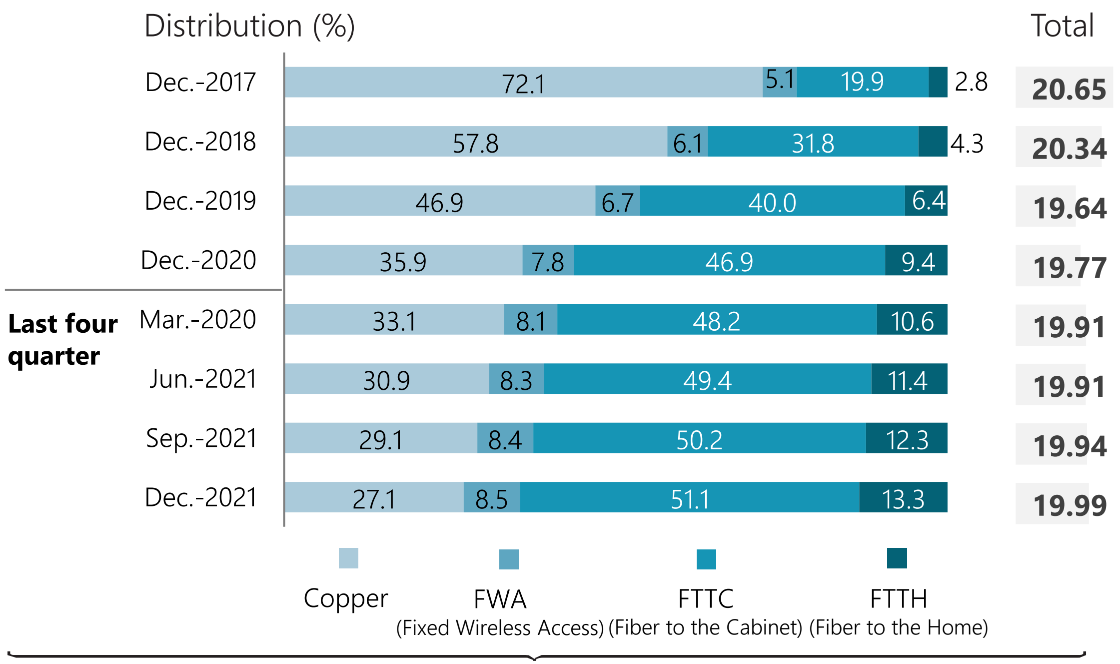
INDEX

The **Communication Markets Monitoring System** is a quarterly pubblication edited by AGCOM.

The values indicated in sections 1 and 3 are based on information provided by the main companies present in the electronic communications and mail and parcel delivery services markets. Regarding the section dedicated to media and internet platforms (section 2), the data refer to elaborations on information from external sources (Auditel, ADS, Audiweb and Comscore). In section 4, dedicated to the trend of national and international price indices of the markets for which the Authority is responsible, the data are provided by Istat, for the former, and from the Eurostat database for the latter.

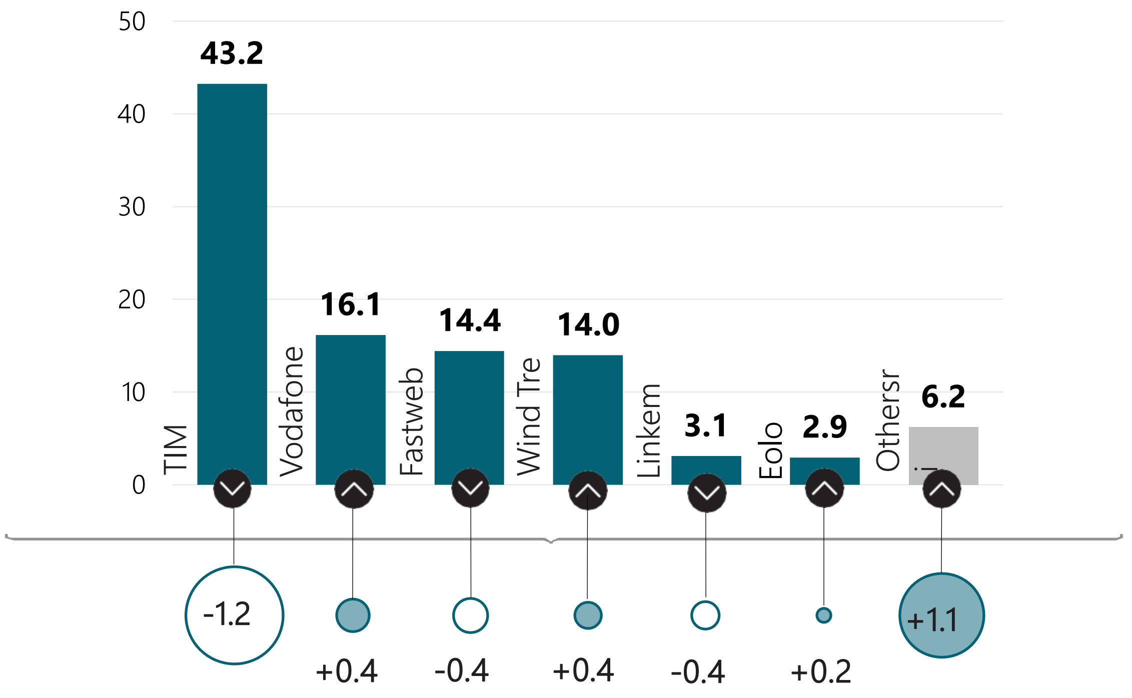
The data collected for this edition are updated to Dec. 2021. The percentage compositions are automatically rounded to the first decimal place. Due to changes in firms' accounting methods, some figures cannot be compared directly with those reported in previous issues.

1.1 FIXED NETWORK: TOTAL LINES



MARKET SHARES (%)

DECEMBER 2021



Differences vs. Dec. 2020
(percentage points)

Total lines	(no. of lines)	(Δ %)	
Quarterly change (Sep. 2021 – Dec. 2021)	**+57 K** accesses	+0.3	↑
Annual change (Dec. 2020 – Dec. 2021)	**+228 K** accesses	+1.2	↑
4-Year change (Dec. 2017 – Dec. 2021)	**-657 K** accesses	-3.2	↓

Distribution

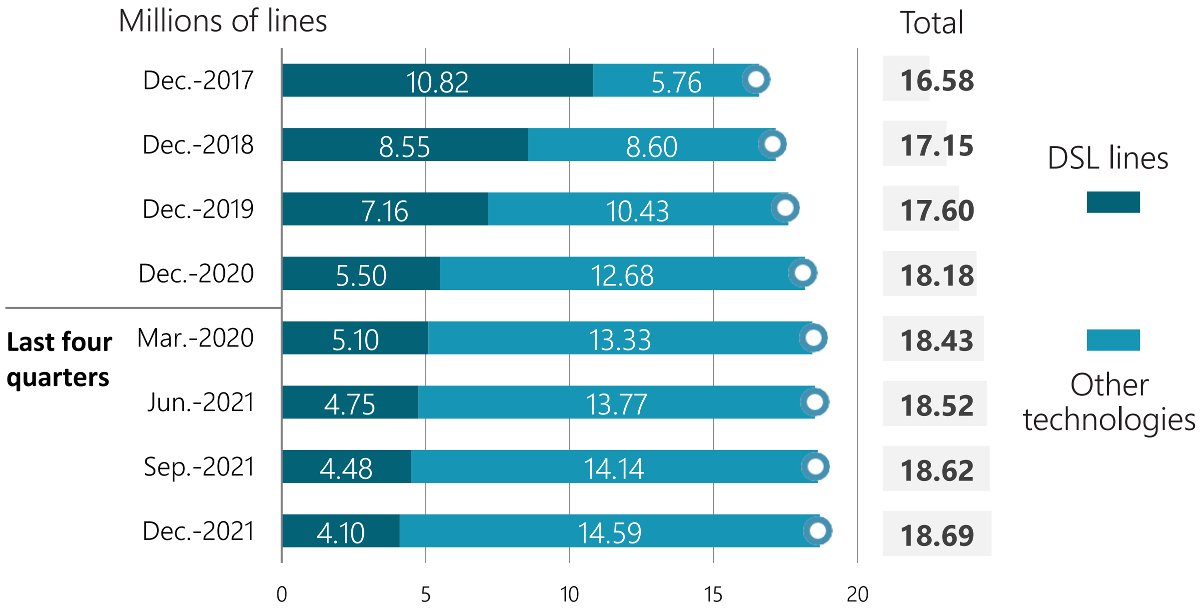
(Δ 2020-2021)
percentage points

Copper:	-8.8	↓
FWA:	+4.2	↑
FTTC:	+3.9	↑
FTTH:	+0.7	↑

K = thousand

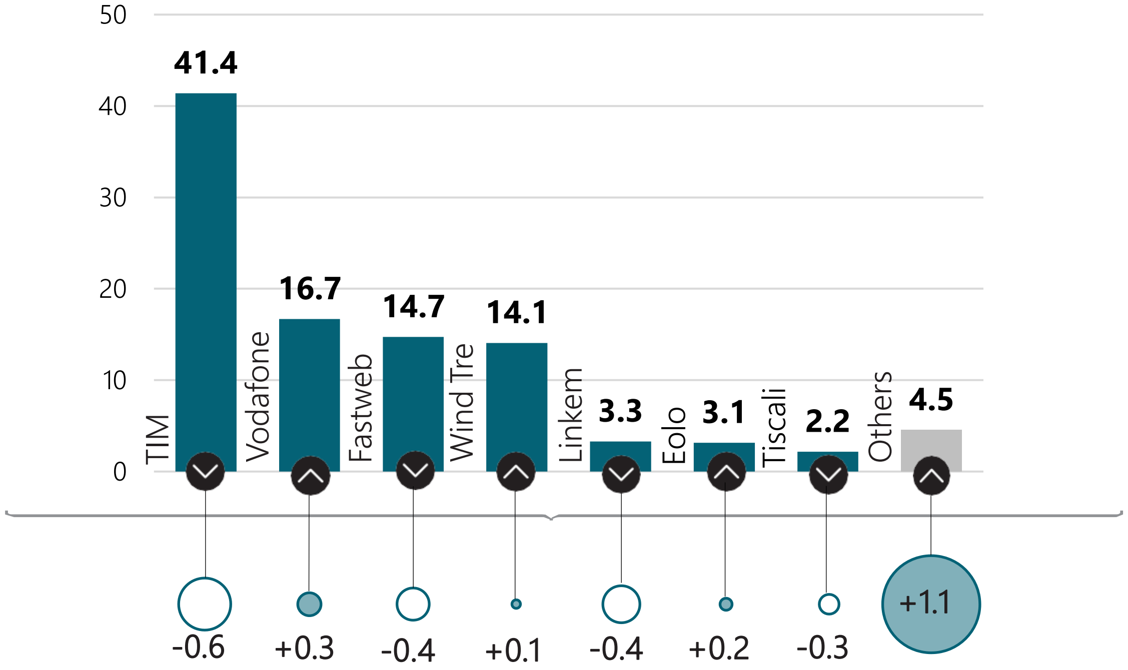
Note: Due to changes in firms' accounting methods and methodological refinements introduced by the Authority, the total number of fixed lines is not directly comparable with previous versions

1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES



MARKET SHARES (%)

DECEMBER 2021



Differences vs. Dec. 2020
(percentage points)

Quarterly change
(Sep. 2021 – Dec. 2021)

Total lines

↑

+62 K
lines
(+0.3%)

Annual change
(Dec. 2020 – Dec. 2021)

Total lines	DSL lines	Other technologies
↑	↓	↑
+508 K lines (+2.8 %)	**-1.401 M** lines (-25.5%)	**+1.910 M** lines (+15.1%)

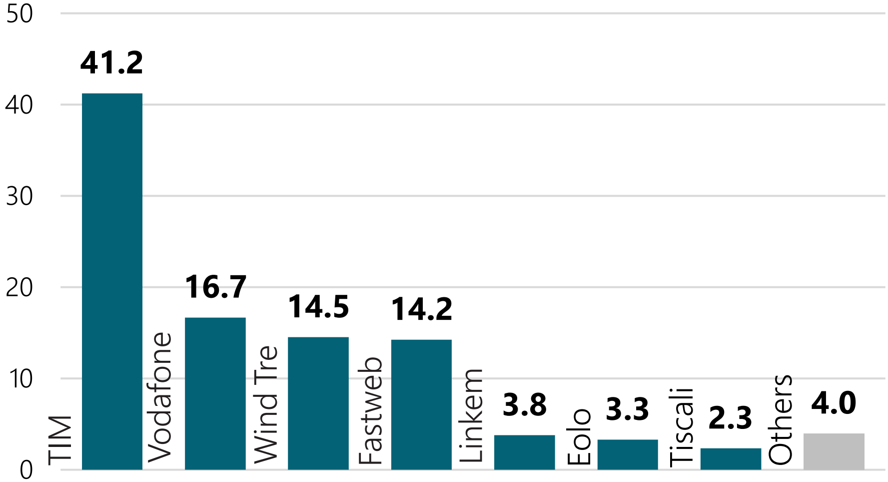
K = thousand
M = million

1.3: FIXED LINES: BROADBAND LINES BY TYPE OF CUSTOMER AND OPERATORS

DECEMBER 2021

RESIDENTIAL CUSTOMERS

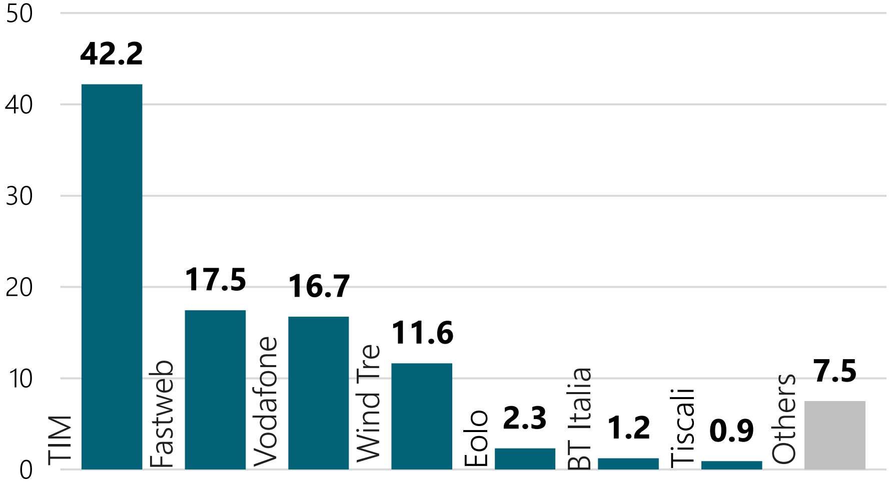
Total lines: **15.863** million lines

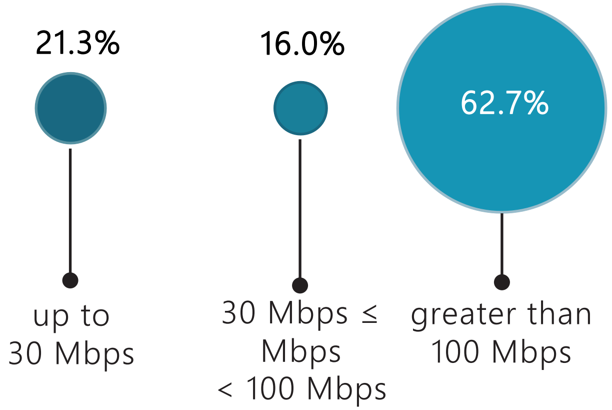


by operator (%)

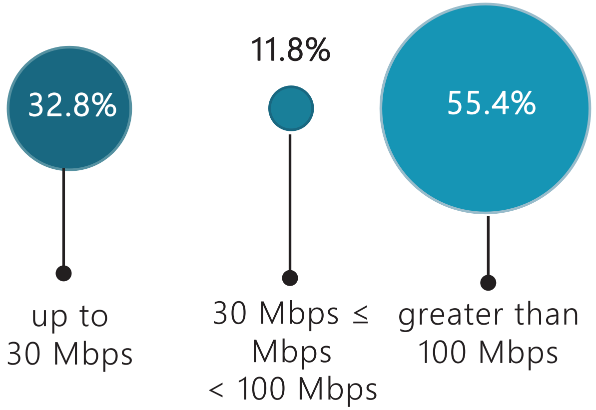
BUSINESS CUSTOMERS

Total lines: **2.824** million lines





by marketed speed classes (%)



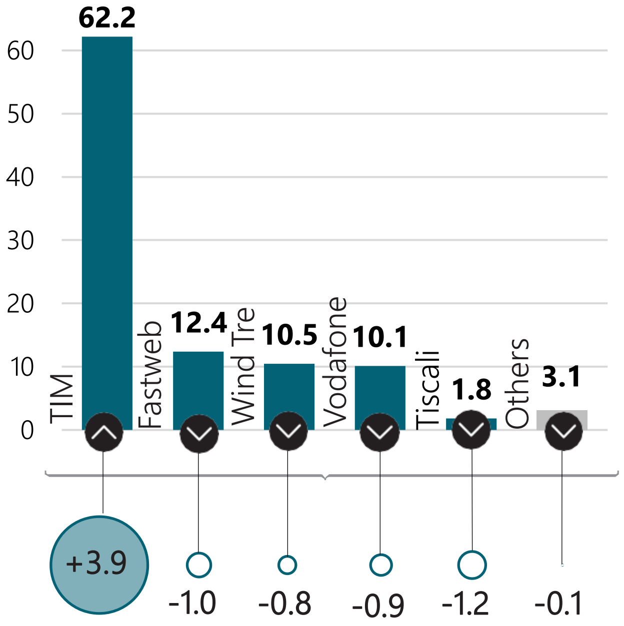
1.4 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES BY TECHNOLOGY AND OPERATORS

DECEMBER 2021

DSL

Total lines: **4.10** million accesses

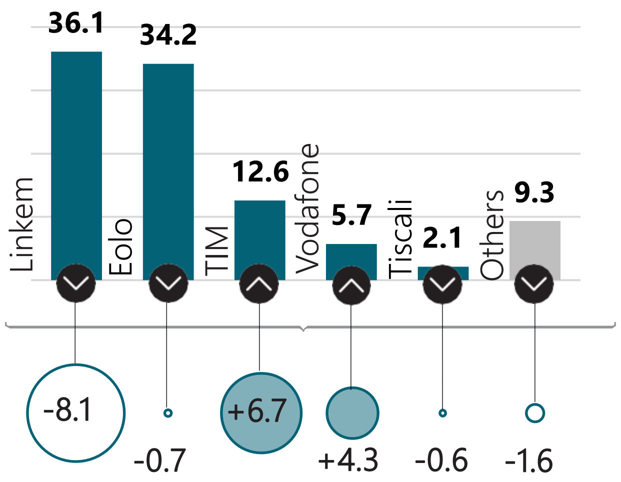
Annual change
(Dec. 2020 – Dec. 2021)
-25.5% ↓



FWA

Total lines: **1.70** million access

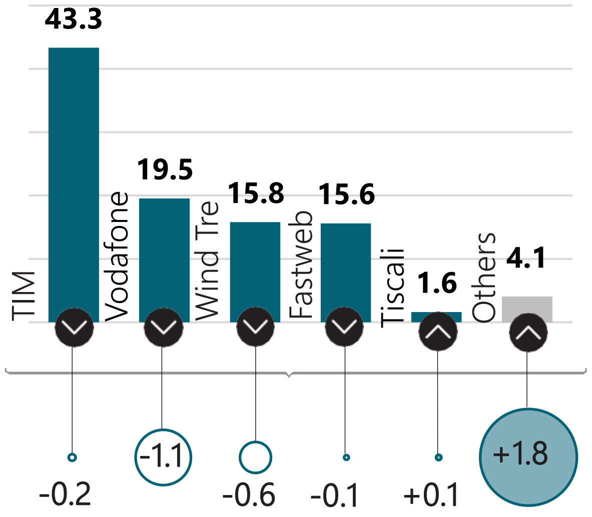
Annual change
(Dec. 2020 – Dec. 2021)
+10.7% ↑



FTTC

Total lines: **10.22** million access

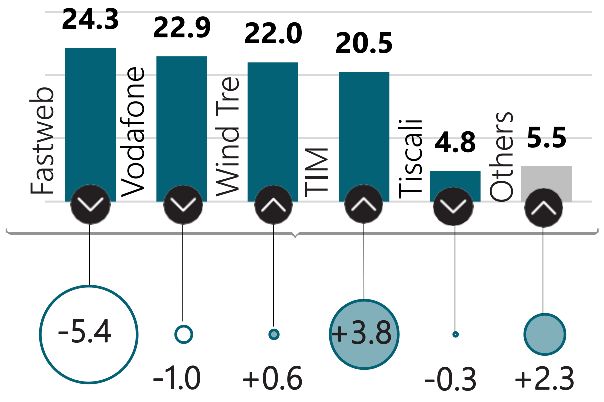
Annual change
(Dec. 2020 – Dec. 2021)
+10.2% ↑



FTTH

Total lines: **2.65** million access

Annual change
(Dec. 2020 – Dec. 2021)
+43.3% ↑

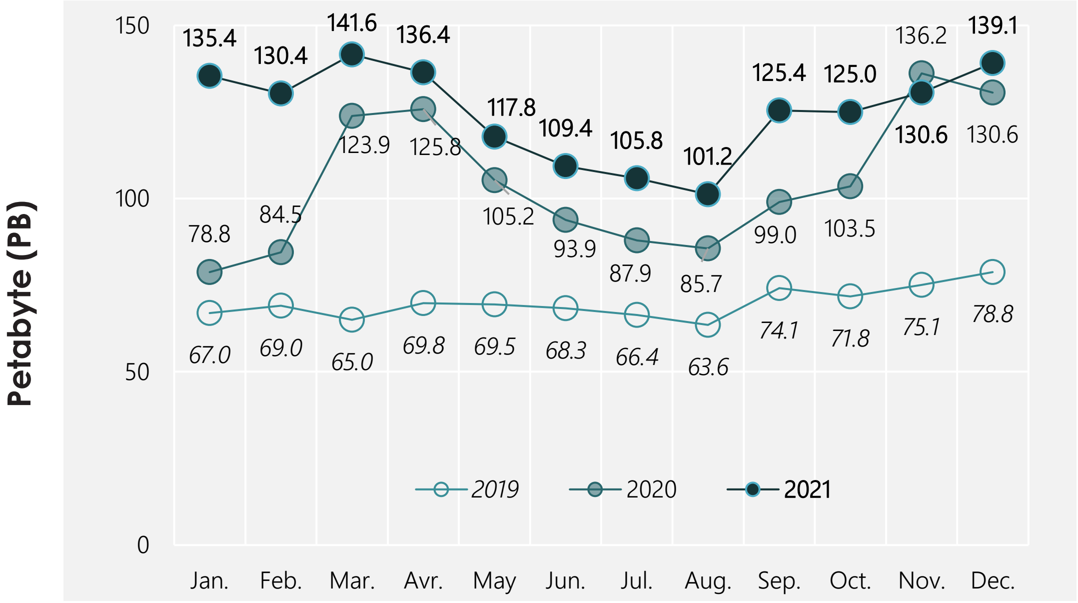


Differences vs. Dec. 2020
(percentage points)

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..

1.5 FIXED NETWORK: DAILY DATA TRAFFIC (download + upload) (1/2)

DAILY TOTAL AVERAGE TRAFFIC



① **Yeraly average values comparison**

(Jan.- Dec. 2019) → (Jan.- Dec. 2020) → (Jan.- Dec. 2021)

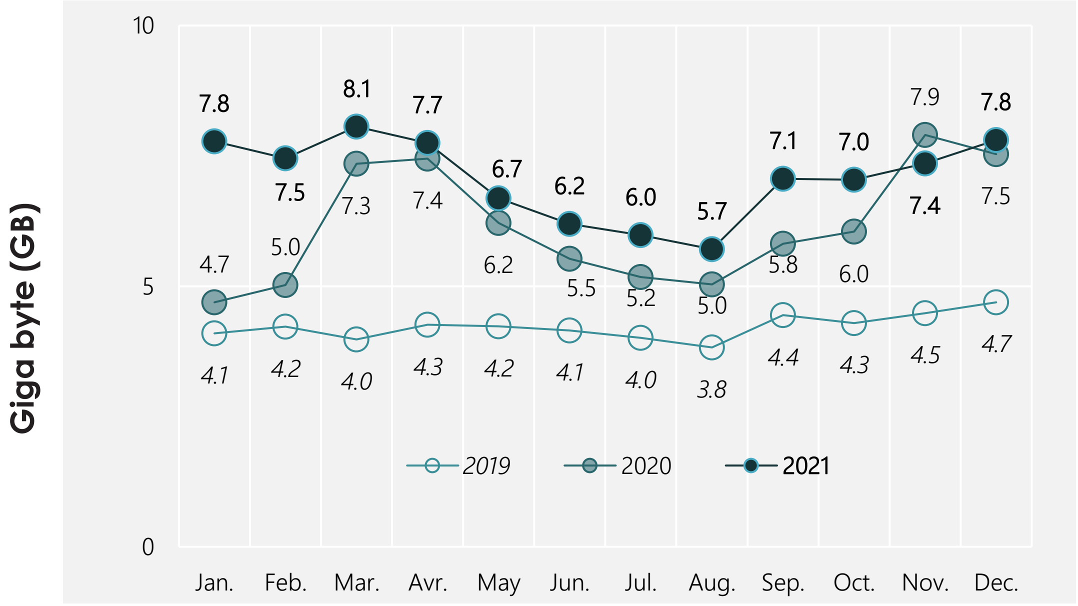
69.8 PB **+49.8%** 104.6 PB **+19.3%** 124.8 PB

+78.7%

② **Quarterly comparison**
(change in %)

	YoY 2019/2020	 2020/2021	Whole period 2019/2021
January - March	+43.4	+41.7	+103.1
Avril - June	+56.5	+11.9	+75.1
July – September	+33.6	+21.9	+62.9
October - December	+63.9	+6.7	+74.9

DAILY AVERAGE TRAFFIC PER BROADBAND LINE



① **Yearly average values comparison**

(Jan.- Dec. 2019) → (Jan.- Dec. 2020) → (Jan.- Dec. 2021)

4.2 GB **+45.6%** 6.2 GB **+14.9%** 7.1 GB

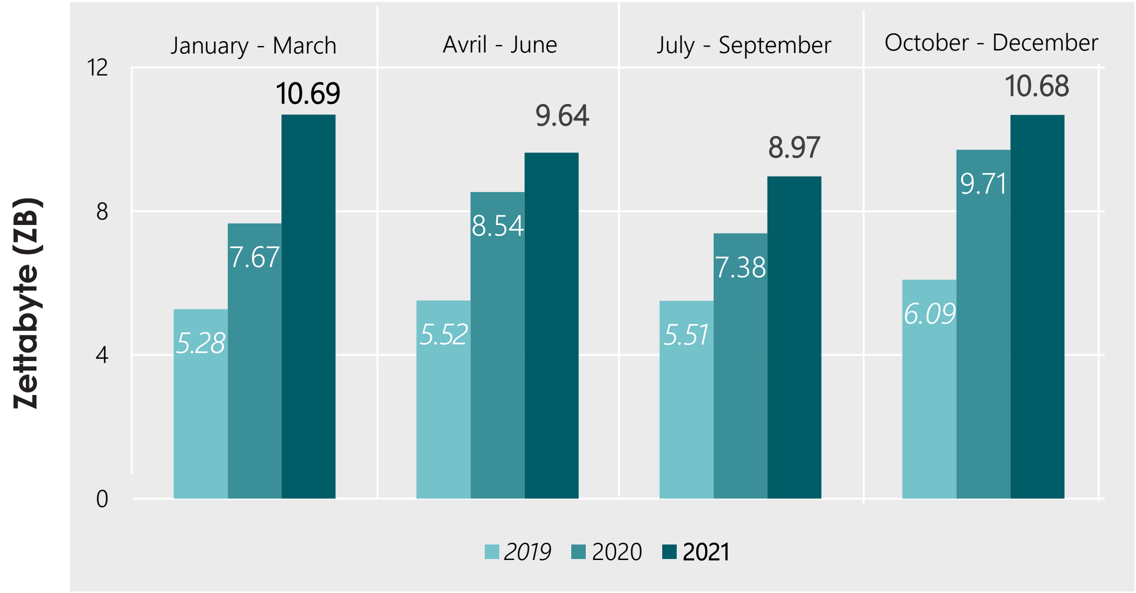
+67.3%

② **Quarterly comparison**
(change in %)

	YoY 2019/2020	 2020/2021	Whole period 2019/2021
January - March	+39.3	+36.3	+89.8
Avril - June	+51.8	+7.5	+63.1
July – September	+30.4	+17.0	+52.6
October - December	+59.3	+3.4	+64.8

1.6 FIXED NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD (2/2)

DOWNLOAD



① **Yearly average values comparison**

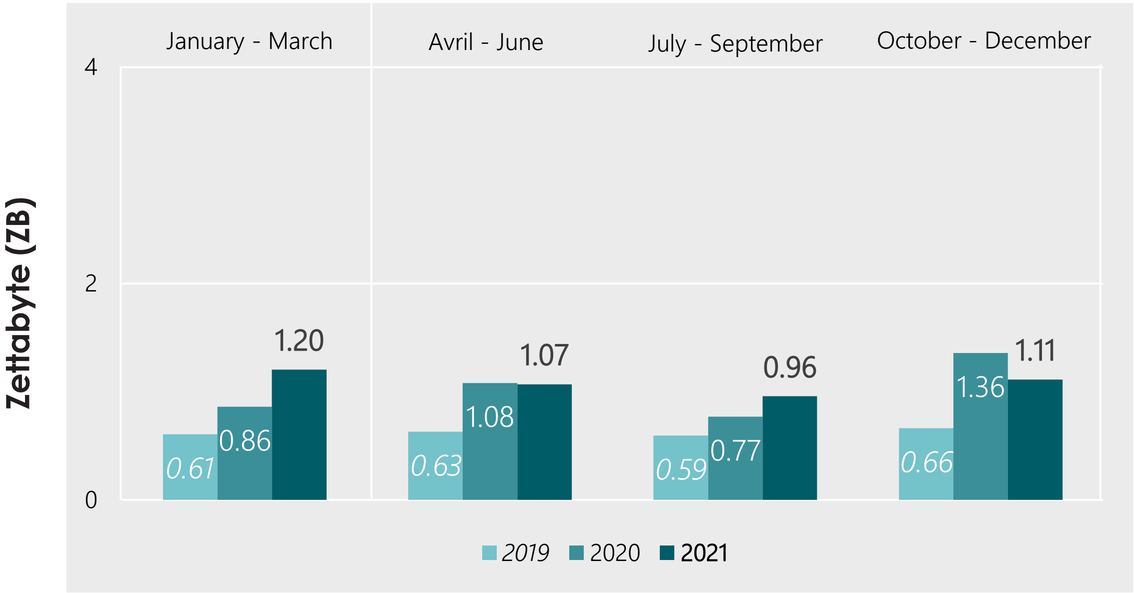
(Jan.- Dec. 2019) 22.40 ZB → +48.7% → (Jan.- Dec. 2020) 33.31 ZB → +20.0% → (Jan.- Dec. 2021) 39.98 ZB

+78.5%

② **Quarterly comparison (change in %)**

	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	+45.3	+39.4	+102.6
Avril - June	+54.8	+12.8	+74.6
July – September	+34.0	+21.5	+62.8
October - December	+59.4	+10.0	+75.3

UPLOAD



① **Yearly average values comparison**

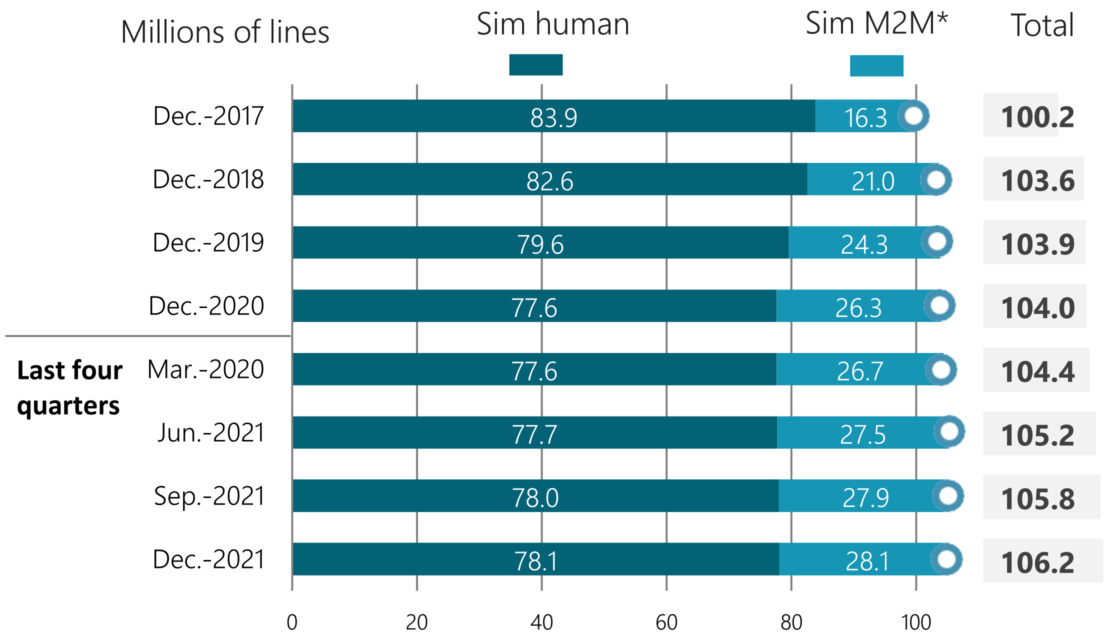
(Jan.- Dec. 2019) 2.49 ZB → +63.5% → (Jan.- Dec. 2020) 4.08 ZB → +7.7% → (Jan.- Dec. 2021) 4.39 ZB

+76.1%

② **Quarterly comparison (change in %)**

	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	+42.1	+39.9	+98.9
Avril - June	+71.5	-0.6	+70.5
July – September	+29.4	+26.2	+63.5
October - December	+105.2	-16.6	+71.8

1.7 MOBILE NETWORK: 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

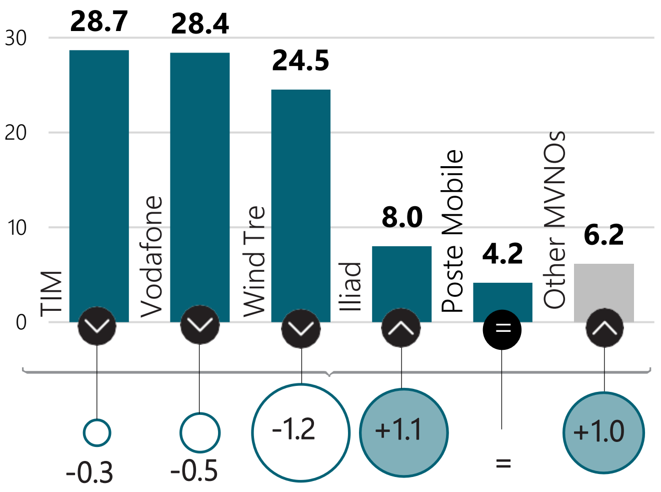
	Quarterly change (Sep. 2021 – Dec. 2021)			Annual change (Dec. 2020 – Dec. 2021)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
Total sim cards:	+356	↑	+0.3	+2,223	↑	+2.1
Sim human:	+127	↑	+0.2	+487	↑	+0.6
Sim M2M:	+229	↑	+1.8	+1,736	↑	+6.6

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 (%)

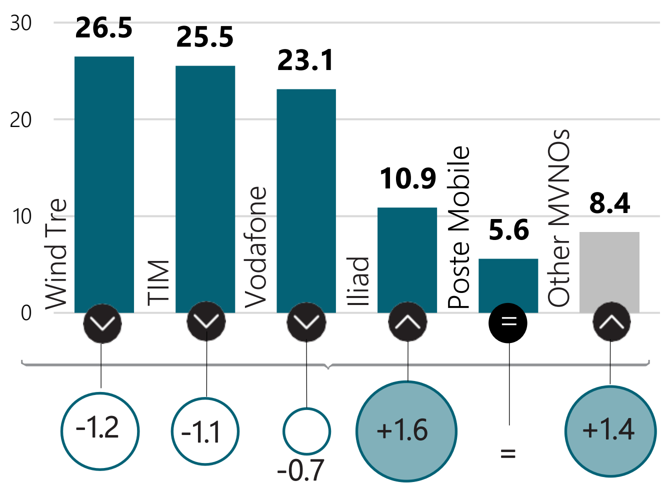
DECEMBER 2021

Sim: total



Differences vs. Dec. 2020 (percentage points)

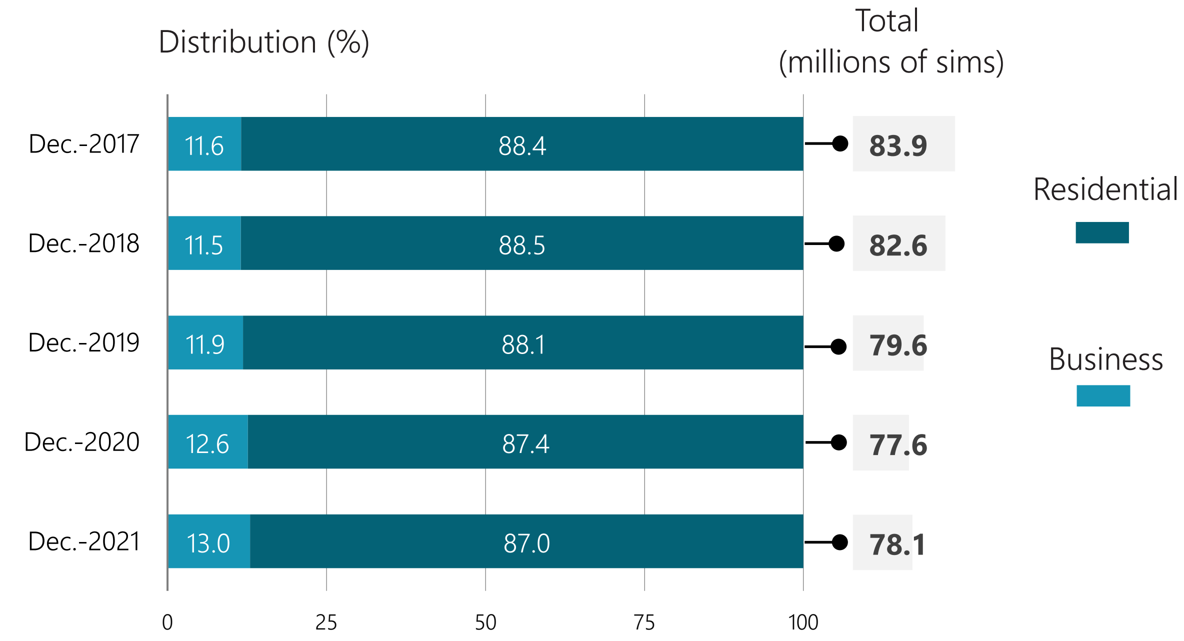
Sim: human*



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

Differences vs. Dec. 2020 (percentage points)

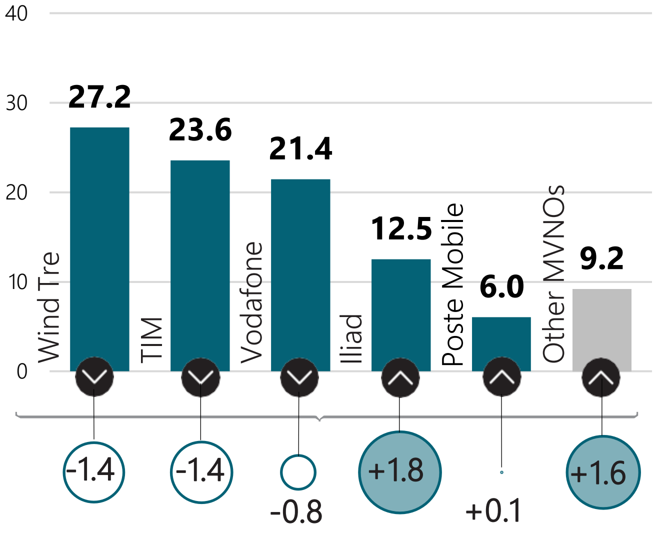
1.8 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



	Annual change (Dec. 2020 – Dec. 2021)			4-Year change (Dec. 2017 – Dec. 2021)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
Total human sim cards:	+487	↑	+0.6	-5,754	↓	-6.9
Residential sim card:	+169	↑	+0.2	-6,178	↓	-8.3
Business sim cards:	+318	↑	+3.2	+424	↑	+4.4

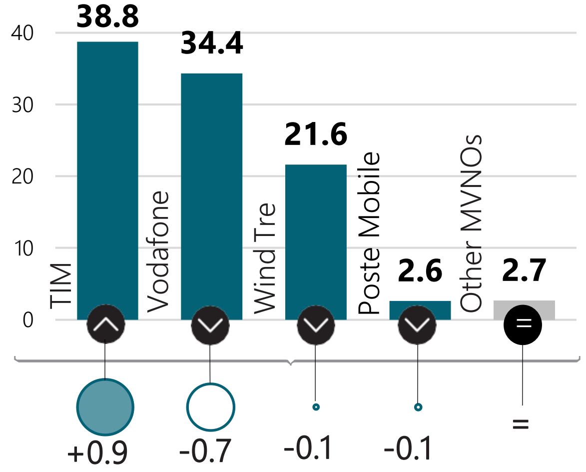
MARKET SHARES (%)

DECEMBER 2021



Residential

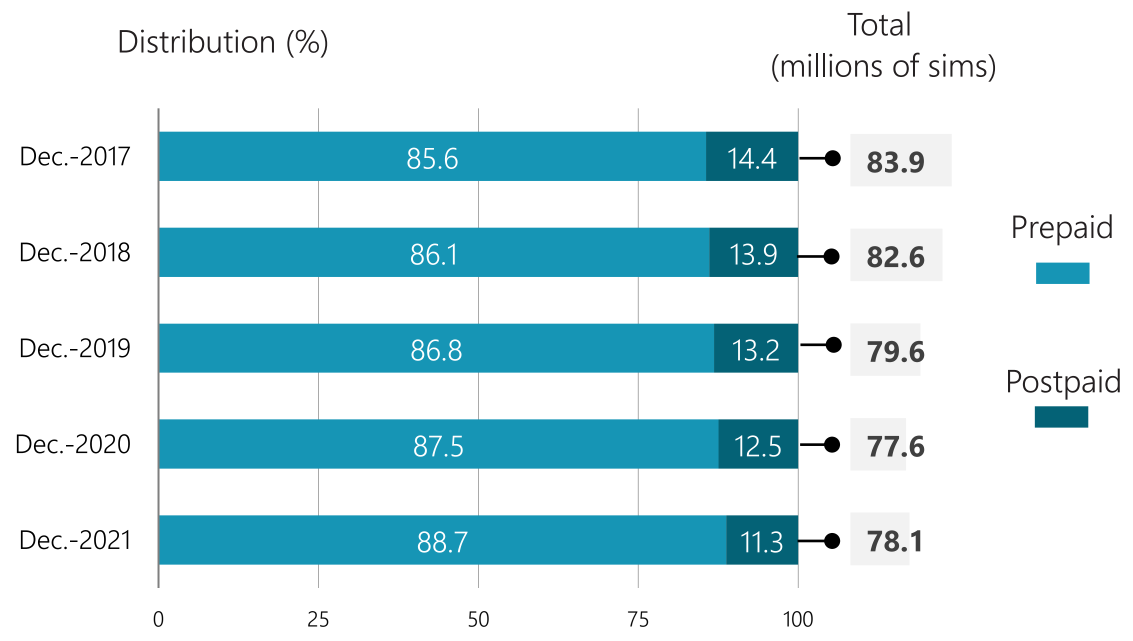
Differences vs. Dec. 2020 (percentage points)



Business

Differences vs. Dec. 2020 (percentage points)

1.9 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT

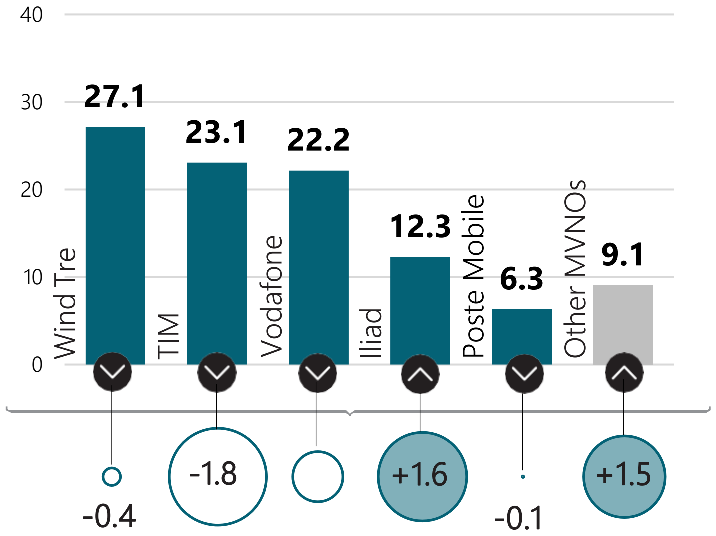


	Annual change (Dec. 2020 – Dec. 2021)			4-Year change (Dec. 2017 – Dec. 2021)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
Total human sim cards:	+487	↑	+0.6	-5,754	↓	-6.9
Prepaid sim cards:	+1,351	↑	+2.0	-2,451	↓	-3.4
Postpaid sim cards:	-864	↓	-8.9	-3,303	↓	-27.3

MARKET SHARES (%)

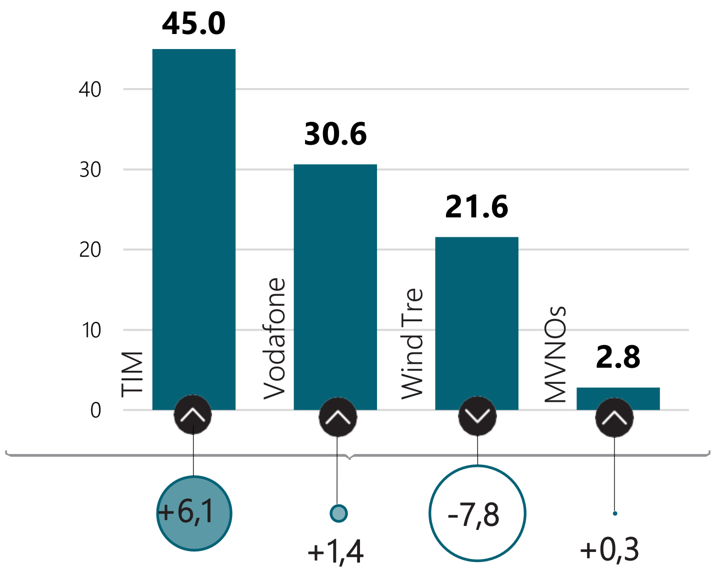
DECEMBER 2021

Prepaid



Differences vs. Dec. 2020 (percentage points)

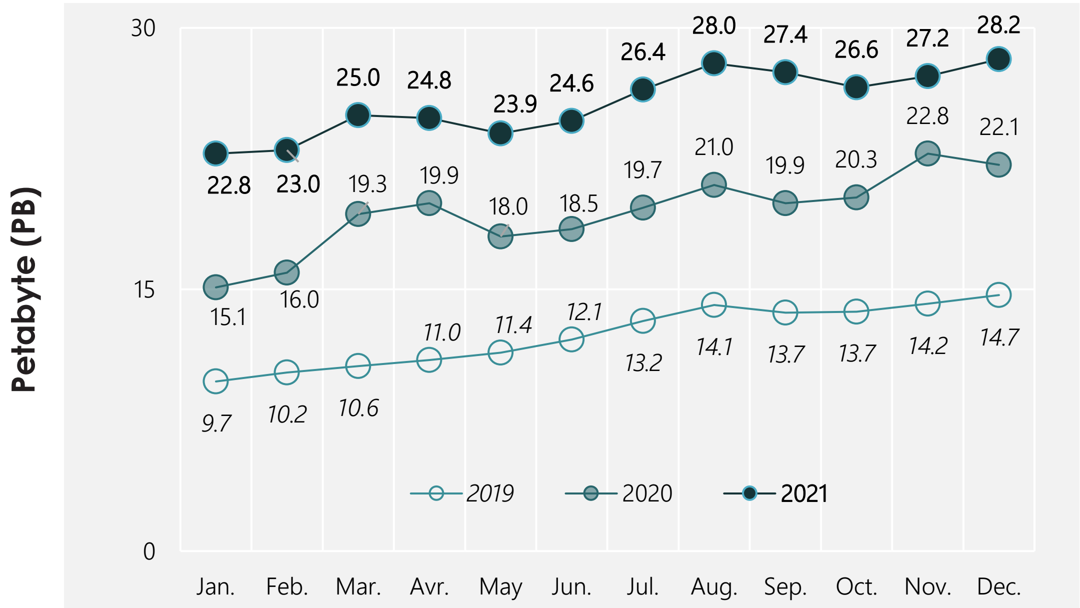
Postpaid



Differences vs. Dec. 2020 (percentage points)

1.10 MOBILE NETWORK: DAILY DATA TRAFFIC (download + upload) (1/2)

DAILY TOTAL AVERAGE TRAFFIC



① **Yearly average values comparison**

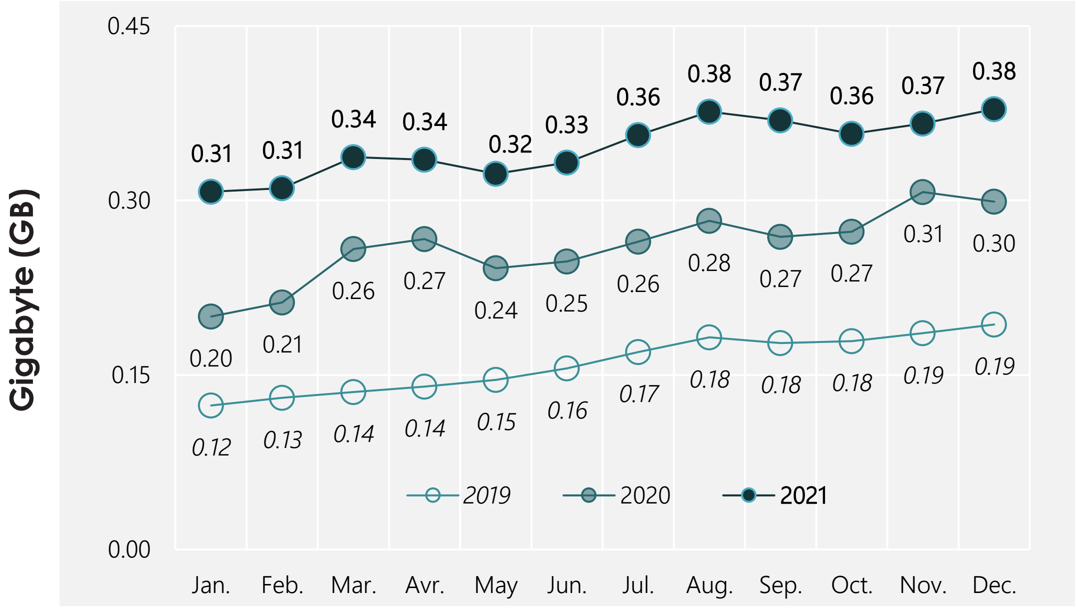
(Jan.- Dec. 2019) 12.4 PB → +56.5% → (Jan.- Dec. 2020) 19.4 PB → +32.4% → (Jan.- Dec. 2021) 25.7 PB

(Jan.- Dec. 2019) → (Jan.- Dec. 2021) +107.2%

② **Quarterly comparison (change in %)**

	YoY 2019/2020	 2020/2021	Whole period 2019/2021
January - March	+65.0	+40.3	+131.6
Avril - June	+63.6	+30.1	+112.9
July – September	+48.0	+35.0	+99.8
October - December	+53.0	+25.9	+92.6

DAILY AVERAGE TRAFFIC PER SIM «HUMAN»



① **Yearly average values comparison**

(Jan.- Dec. 2019) 0.16 GB → +62.8% → (Jan.- Dec. 2020) 0.26 GB → +32.8% → (Jan.- Dec. 2021) 0.35 GB

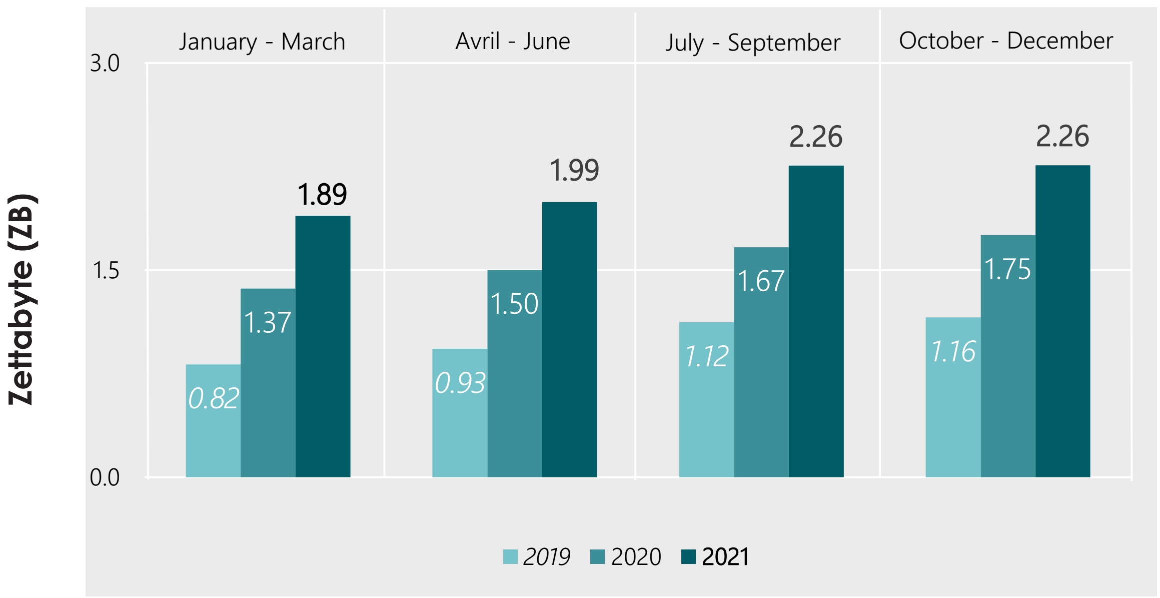
(Jan.- Dec. 2019) → (Jan.- Dec. 2021) +116.3%

② **Quarterly comparison (change in %)**

	YoY 2019/2020	 2020/2021	Whole period 2019/2021
January - March	+72.4	+42.5	+145.6
Avril - June	+71.3	+31.0	+124.4
July – September	+54.0	+35.0	+108.0
October - December	+57.5	+24.9	+96.7

1.11 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD (2/2)

DOWNLOAD



① **Yeraly average values comparison**

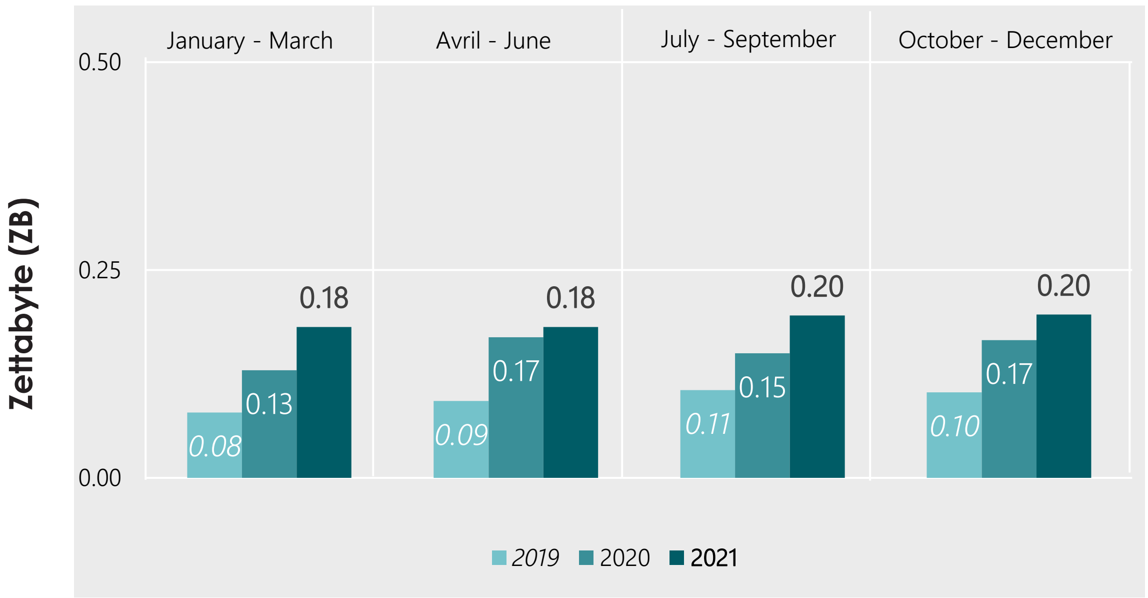
(Jan.- Dec. 2019) 4.04 ZB → **+56.4%** → (Jan.- Dec. 2020) 6.32 ZB → **+33.0%** → (Jan.- Dec. 2021) 8.40 ZB

(Jan.- Dec. 2019) → (Jan.- Dec. 2021) **+108.0%**

② **Quarterly comparison (change in %)**

	YoY 2019/2020	 2020/2021	Whole period 2019/2021
January - March	+67.1	+38.7	+131.7
Avril - June	+61.7	+32.7	+114.5
July – September	+48.6	+35.4	+101.2
October - December	+52.2	+26.8	+93.0

UPLOAD



① **Yearly average values comparison**

(Jan.- Dec. 2019) 0.38 ZB → **+62.0%** → (Jan.- Dec. 2020) 0.62 ZB → **+22.3%** → (Jan.- Dec. 2021) 0.75 ZB

(Jan.- Dec. 2019) → (Jan.- Dec. 2021) **+98.1%**

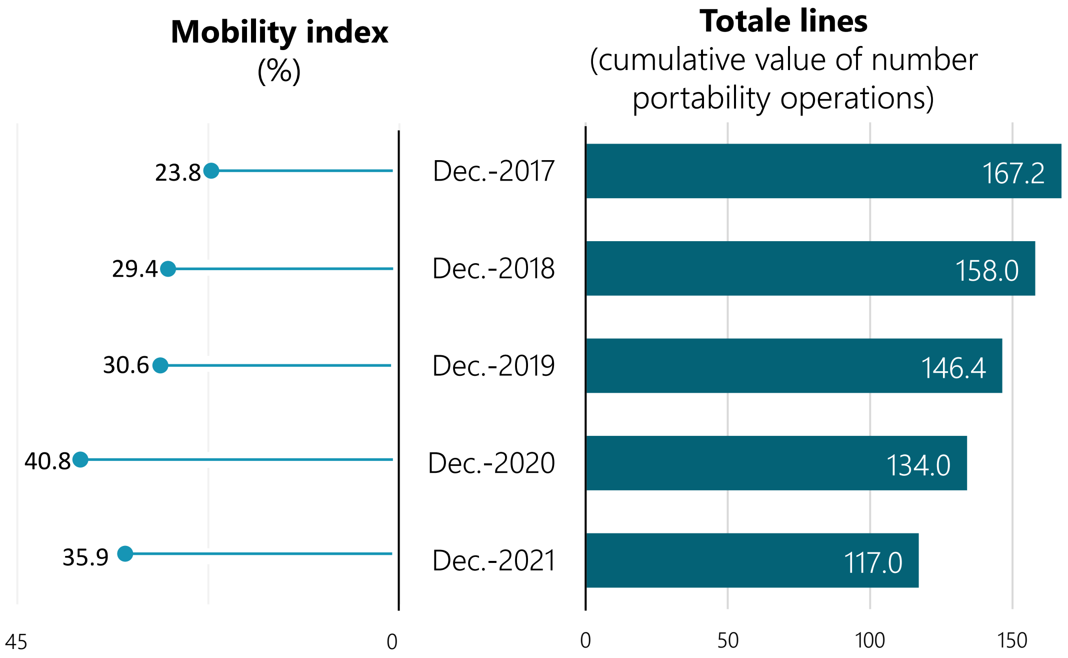
② **Quarterly comparison (change in %)**

	YoY 2019/2020	 2020/2021	Whole period 2019/2021
January - March	+64.4	+40.1	+130.6
Avril - June	+83.3	+7.3	+96.6
July – September	+41.7	+30.3	+84.7
October - December	+61.8	+16.4	+88.3

1.13 MOBILE NETWORK: NUMBER PORTABILITY

In one year (Dec. 2020 – Dec. 2021), there have been

9.9 million of Mobile Number Portability (MNP) operations



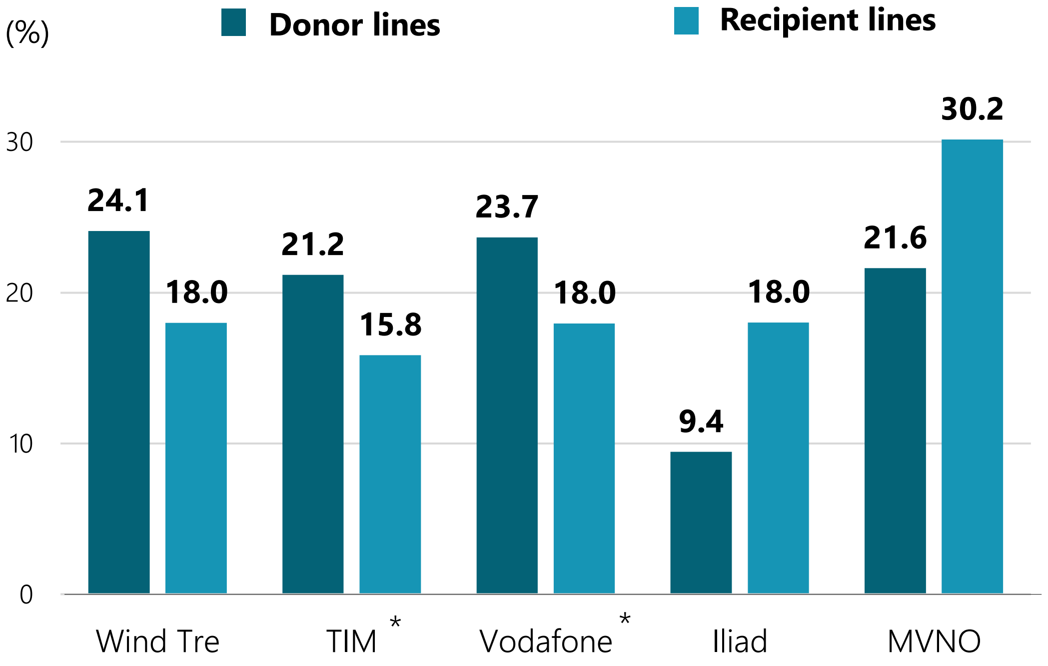
Mobility index
(%)

Totale lines
(cumulative value of number portability 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)

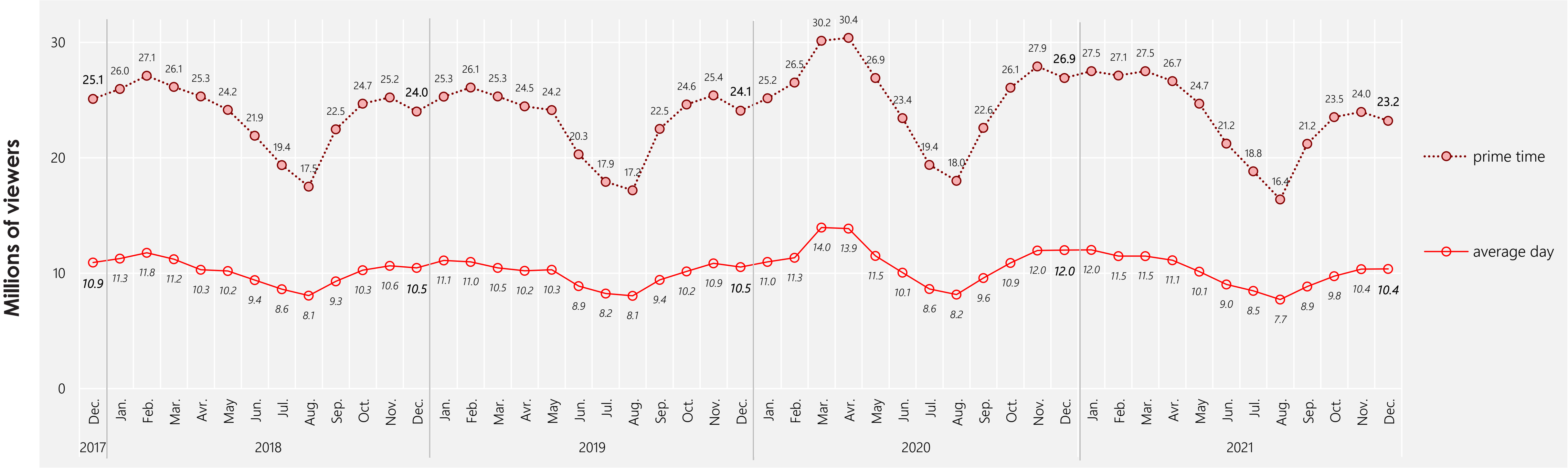
DECEMBER 2021



(*) 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)

2.1 TELEVISION (DVB-T E SAT): TOTAL AUDIENCE OF NATIONAL BROADCASTER

DECEMBER 2017 - 2021

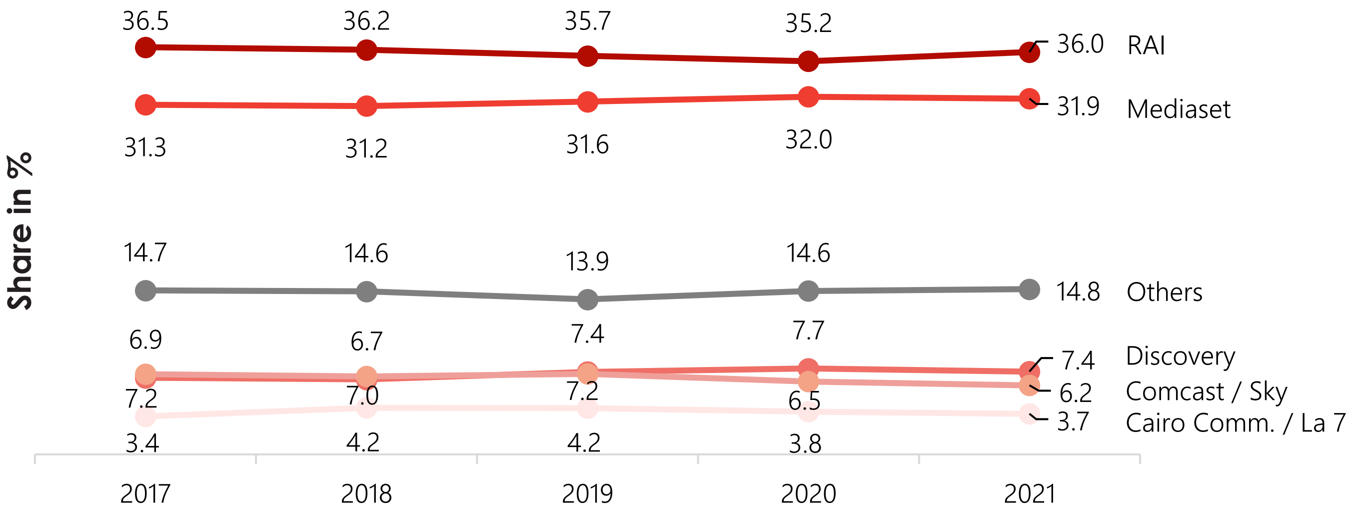


Change in the number of viewers	(2018)	→	(2019)	→	(2020)	→	(2021)	
Prime time audience (Time slot: 20:30 – 22.30)	23.62 M	↓ **-2.2%**	23.11 M	↑ **+9.3%**	25,26 M	↓ **-7.2%**	23.45 M	↓ **-0.7%**
Average daily audience (Time slot: whole day)	10.12 M	↓ **-1.7%**	9.94 M	↑ **+11.4%**	11,08 M	↓ **-9.3%**	10.05 M	↓ **-0.7%**

Source: Agcom elaboration on data from Auditel

2.2 TELEVISION (DVB-T E SAT): LEADING TV BROADCASTERS BY AUDIENCE SHARE

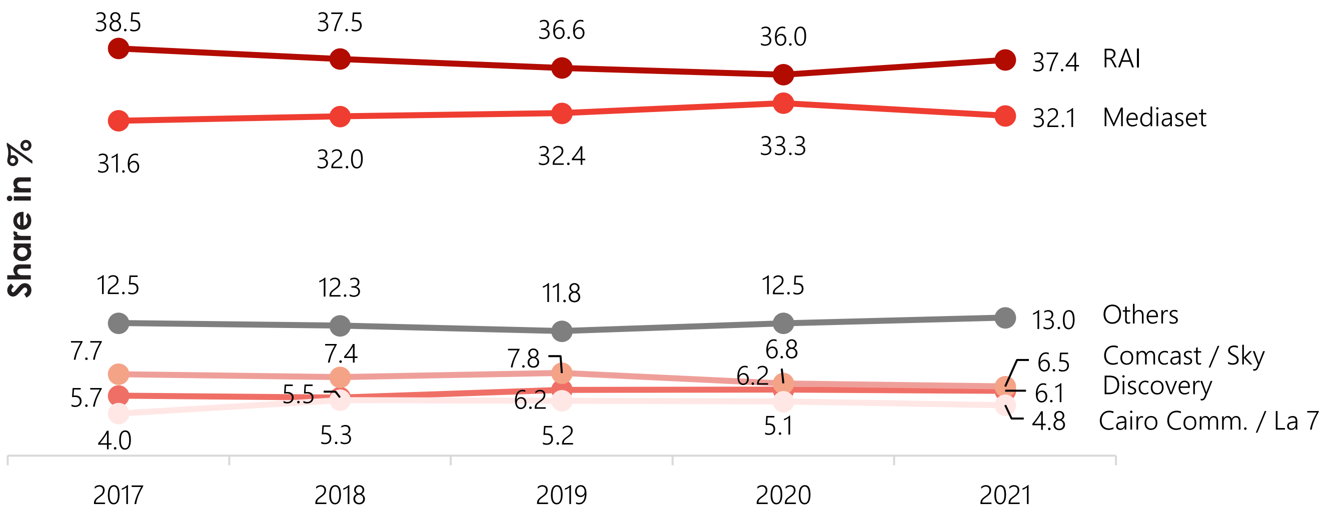
Average daily audience



Percentage point change

	Annual Dec. 2020 – Dec. 2021	Period Dec. 2017 – Dec. 2021
RAI	+0.8	-0.4
Mediaset	-0.2	+0.5
Discovery	-0.3	+0.6
Comcast / Sky	-0.3	-1.0
Cairo Comm. / La 7	-0.2	+0.2
Altri	+0.2	+0.1

Prime time audience



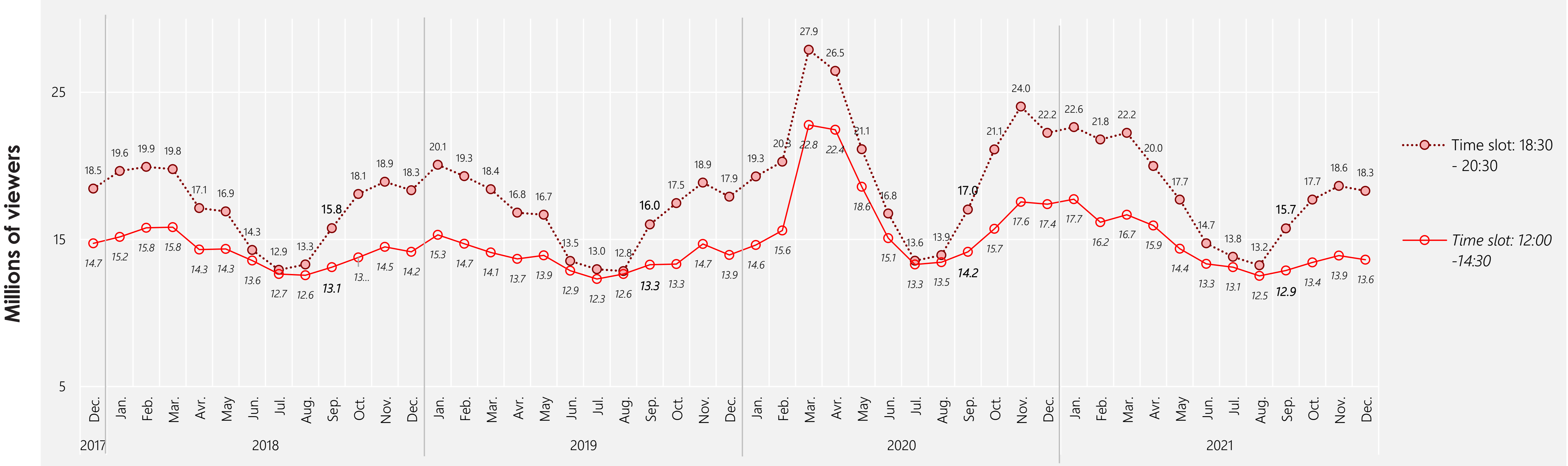
Percentage point change

	Annual Dec. 2020 – Dec. 2021	Period Dec. 2017 – Dec. 2021
RAI	+1.4	-1.1
Mediaset	-1.2	+0.5
Discovery	-0.1	+0.5
Comcast / Sky	-0.3	-1.2
Cairo Comm. / La7	-0.3	+0.8
Altri	+0.5	+0.1

Source: Agcom elaboration on data from Auditel

2.3 TELEVISION (DVB-T E SAT): TOTAL AUDIENCE OF THE MAIN NATIONAL NEWS PROGRAMS*

DECEMBER 2017 - 2021



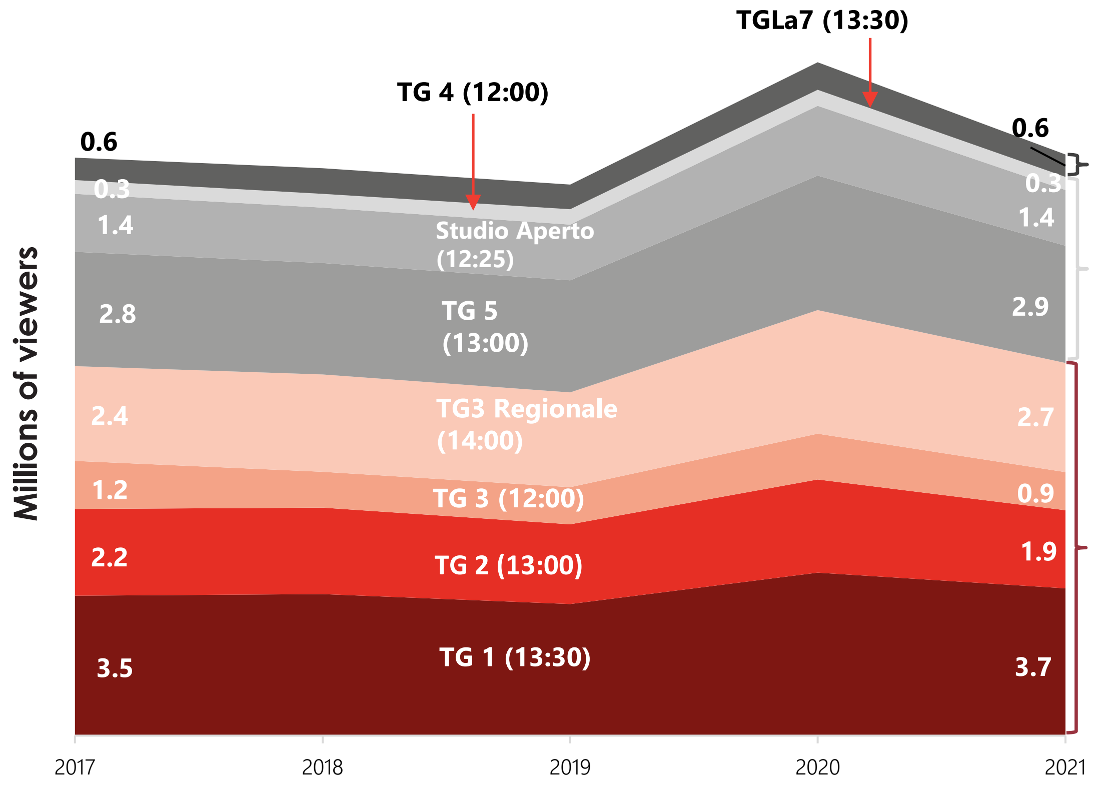
Change in the number of viewers	(2018)	→	(2019)	→	(2020)	→	(2021)	
Time slot: 18:30 – 20.30	17.10 M	↓ **-2.3%**	16,71 M	↑ **+21.6%**	20.33 M	↓ **-11.4%**	18.01 M	↑ **+5.3%**
Time slot: 12:00 – 14:30	14.13 M	↓ **-2.8%**	13,73 M	↑ **+22.3%**	16.79 M	↓ **-13.7%**	14.48 M	↑ **+2.5%**

* **Total audience**: is the sum of the number of listeners on the average day of the reference month for the editions of the news in the time slots considered. Therefore, the audience of those who watch one or more news programmes in the same time slots is considered.

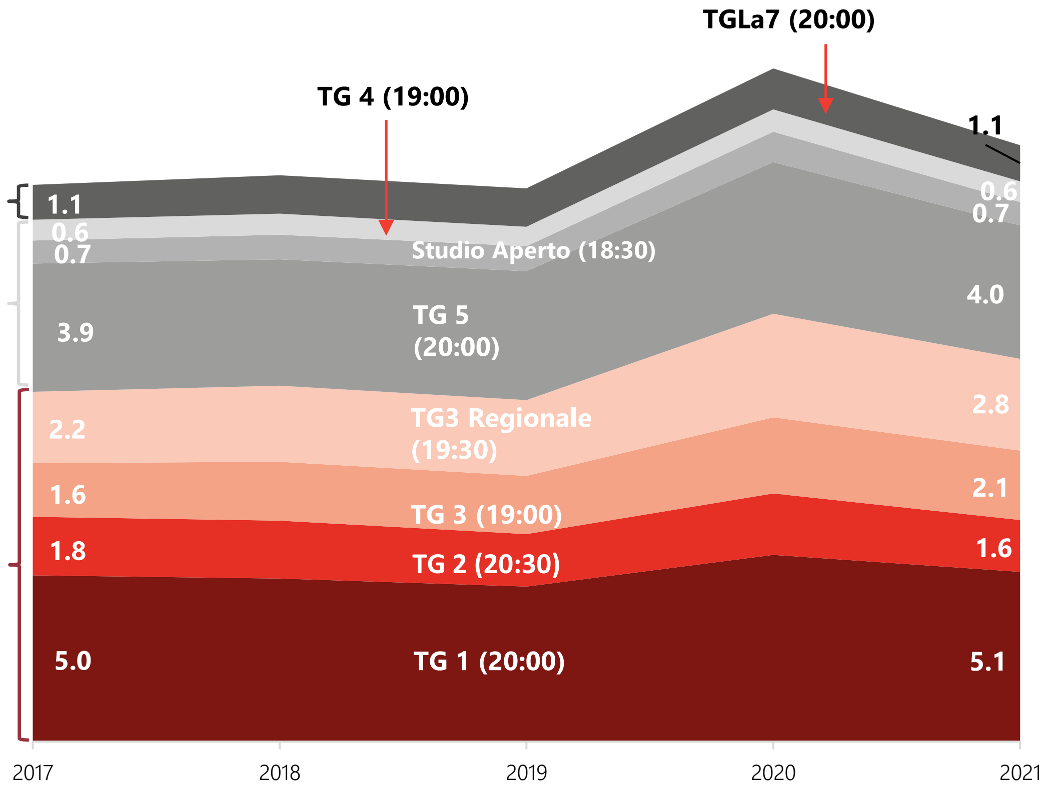
Source: Agcom elaboration on data from Auditel

2.4 TELEVISION (DVB-T E SAT): AVERAGE MONTHLY AUDIENCE OF MAIN NATIONAL NEWS PROGRAMS

TIME SLOT: 12:00 – 14:30



TIME SLOT: 18:30 – 20:30



Change in thousands (Jan. – Dec. 2020 vs. Jan. – Dec. 2021)

Rai

Tg 1 (13:30 edition)	-389	↓
Tg 2 (13:00 edition)	-373	↓
Tg 3 (12:00 edition)	-196	↓
Tg 3 – Regionale (14:00 edition)	-363	↓

MEDIASET

Tg 5 (13:00 edition)	-436	↓
Tg 4 (12:00 edition)	-75	↓
Studio Aperto (12:25 edition)	-351	↓

LA7

Tg La 7 (13:30 edition)	-124	↓

Change in thousands (Jan. – Dec. 2020 vs. Jan. – Dec. 2021)

Rai

Tg 1 (20:00 edition)	-516	↓
Tg 2 (20:30 edition)	-286	↓
Tg 3 (19:00 edition)	-212	↓
Tg 3 – Regionale (19:30 edition)	-344	↓

MEDIASET

Tg 5 (20:00 edition)	-557	↓
Tg 4 (19:00 edition)	-53	↓
Studio Aperto 18:30 edition)	-210	↓

LA7

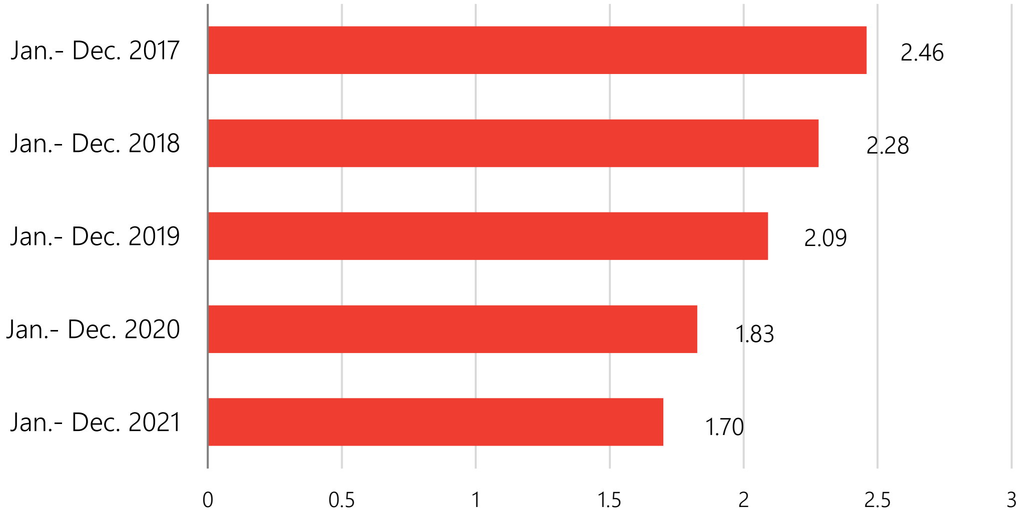
Tg La 7 (20:00 edition)	-134	↓

Source: Agcom elaboration on data from Auditel

2.5 NEWSPAPERS: DAILY COPIES SOLD SINCE THE BEGINNING YEAR (1/2)

CUMULATIVE SALES

(copies sold in millions)



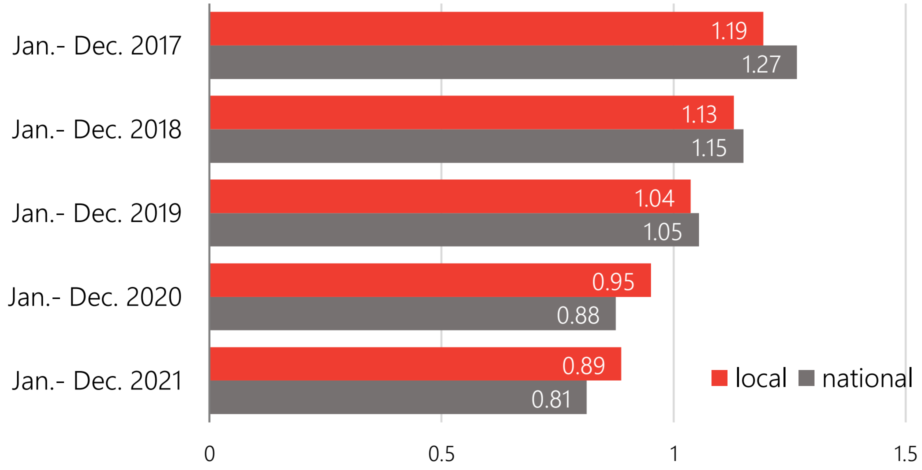
Change in %

	(Annual change)		(4-Year change)	
Total copies:	**-6.9**	↓	**-30.9**	↓
Paper copies:	**-8.8**	↓	**-34.8**	↓
Digital copies:	**+8.1**	↑	**+15.0**	↑
National newspapers copies:	**-7.1**	↓	**-35.8**	↓
Local newspapers copies:	**-6.7**	↓	**-25.6**	↓

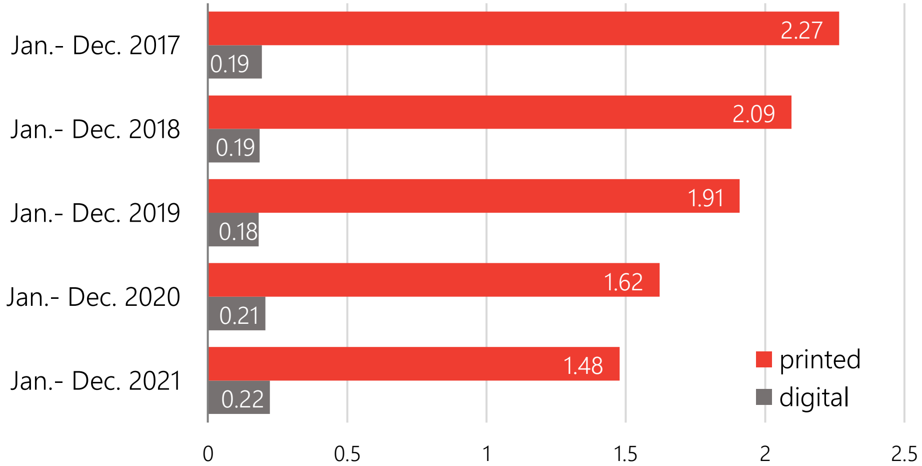
CUMULATIVE SALES BY TYPOLOGY

(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



PAPER vs. DIGITAL COPIES



Source: Agcom elaboration on data from ADS

2.6 NEWSPAPERS: DAILY COPIES SOLD SINCE THE BEGINNING YEAR (2/2)

PAPER COPIES BY NEWSPAPER MACRO-CATEGORY

(copies sold in thousands)

		2017	2018	2019	2020	2021
National newspapers	General press - Top 5	722	661	608	525	472
	Other general press	154	149	137	133	120
	Business	102	92	80	67	58
	Sport	301	269	243	158	153
Local newspapers	Top 10	450	420	390	353	329
	Other	536	504	451	385	346

Change in %		(2020 - 2021)	(2017 – 20201)
National newspapers	General press Top 5	-10,2	-34,7
	Other general press	-9,7	-22,3
	Business	-13,5	-43,1
	Sports	-3,0	-49,3
Local newspapers	Top 10	-6,9	-26,9
	Other	-10,0	-35,4

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in thousands)

		2017	2018	2019	2020	2021
National newspapers	General press - Top 5	79	74	75	83	95
	Other general press	13	15	17	26	31
	Business	51	46	40	35	29
	Sport	10	9	8	7	6
Local newspapers	Top 10	17	16	17	23	26
	Other	23	25	25	32	35

Variazione in %		(2020 - 2021)	(2017 – 20201)
Testate nazionali	General press Top 5	+14,2	+19,5
	Other general press	+20,1	+142,4
	Business	-18,0	-43,6
	Sports	-7,4	-35,5
Testate locali	Top 10	+14,7	+55,4
	Other	+10,3	+50,5

Newspapers categories

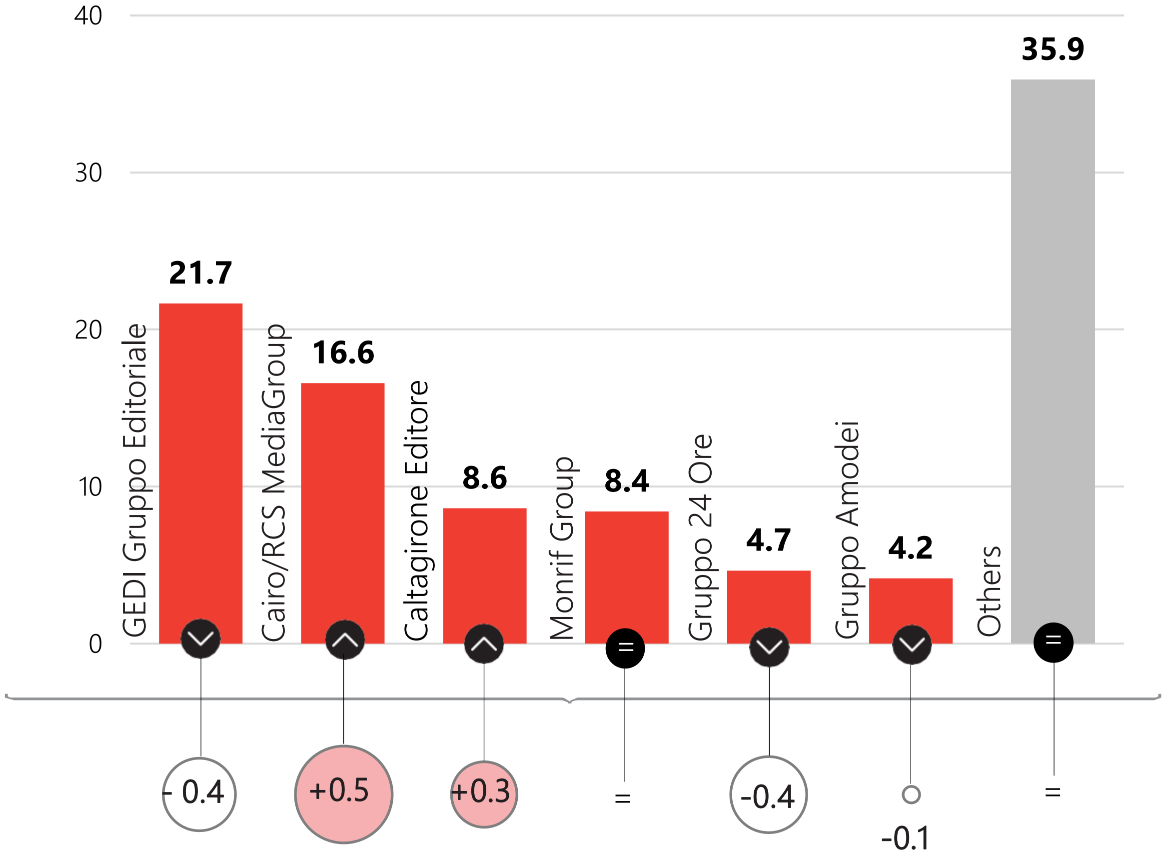
- National general press newspapers – Top 5: in terms of total sales in 2021: Avvenire, Corriere della sera, Messaggero, La Repubblica, La Stampa
- Other national general press: Il Fatto quotidiano, Il Giornale, Libero, Il Manifesto, Il Tempo, La Verità
- National sports newspapers: Corriere dello Sport, Gazzetta dello sport, Tuttosport
- National business newspapers: Italia Oggi, Il Sole 24 Ore
- Local newspapers – Top 10: in terms of total sales in 2021: L'Arena, Dolomiten, L'Eco di Bergamo, Il Gazzettino, Il Giornale di Brescia, Il Messaggero Veneto, La Nazione, Il Resto del Carlino, Il Tirreno, L'Unione Sarda
- Other local newspapers: remaining local newspapers considered by ADS

Source: Agcom elaboration on data from ADS

2.7 NEWSPAPERS: VOLUME SALES AND SHARES BY MAIN PUBLISHING GROUPS

DISTRIBUTION OF TOTAL COPIES SOLD SINCE THE BEGINNING OF THE YEAR BY PUBLISHING GROUPS (%)

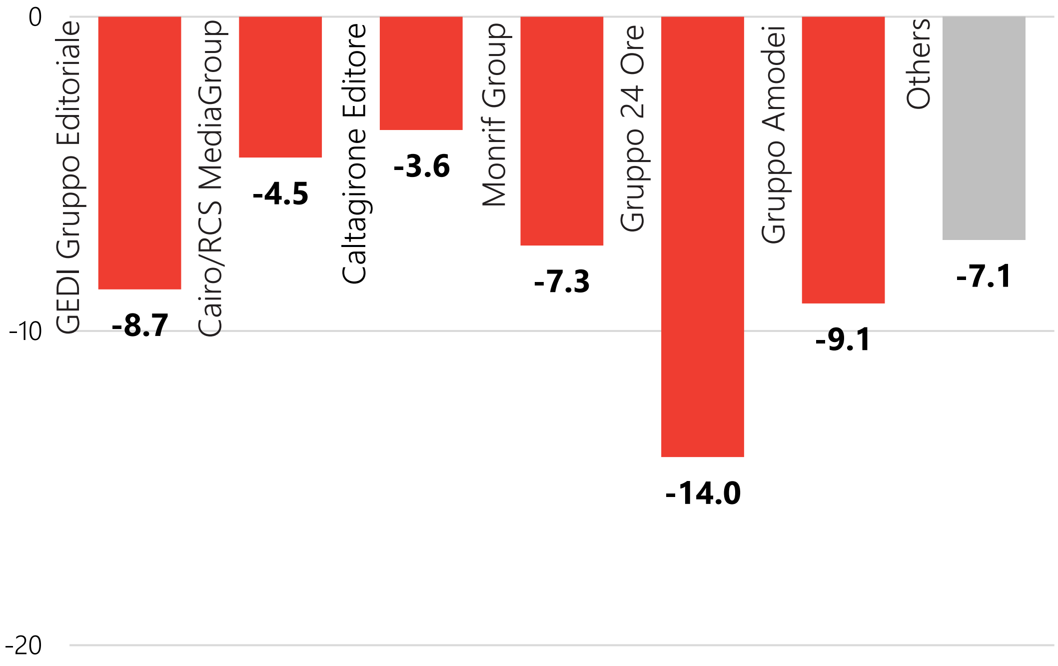
JANUARY - DECEMBER 2021



Difference vs. Gen. – Dec. 2020
(punti percentuali)

CHANGE IN TOTAL COPIES SOLD (%)

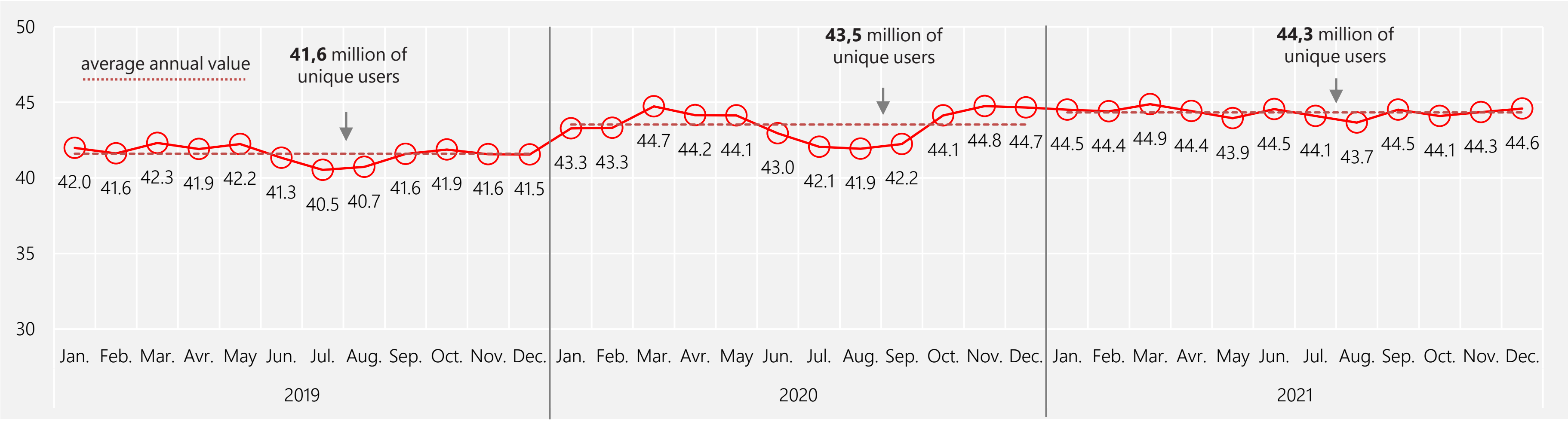
Difference vs. Jan. – Dec. 2020



Source: Agcom elaboration on data from ADS

2.8 PLATFORMS: WEBSITES/APP UNIQUE USERS

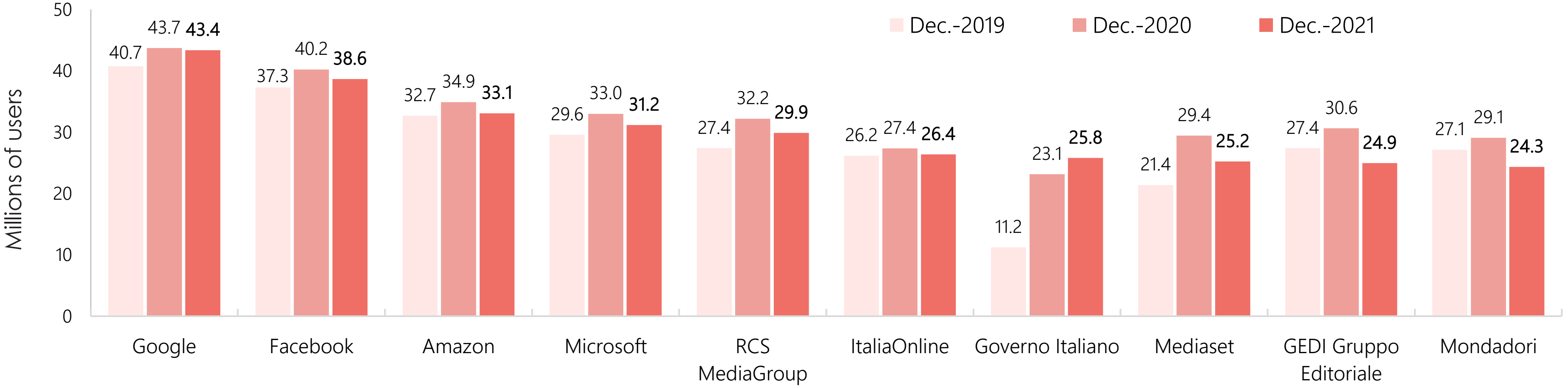
UNIQUE USERS IN MILLIONS (January 2019 – December 2021)



44.6 million unique users logged on to the internet in December 2021 (**-71** thousand compared to December 2020)

Approximately **59** total hours spent, on average, by each user surfing the Internet in December 2021

UNIQUE USERS OF THE MAIN OPERATORS (Parent*)



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

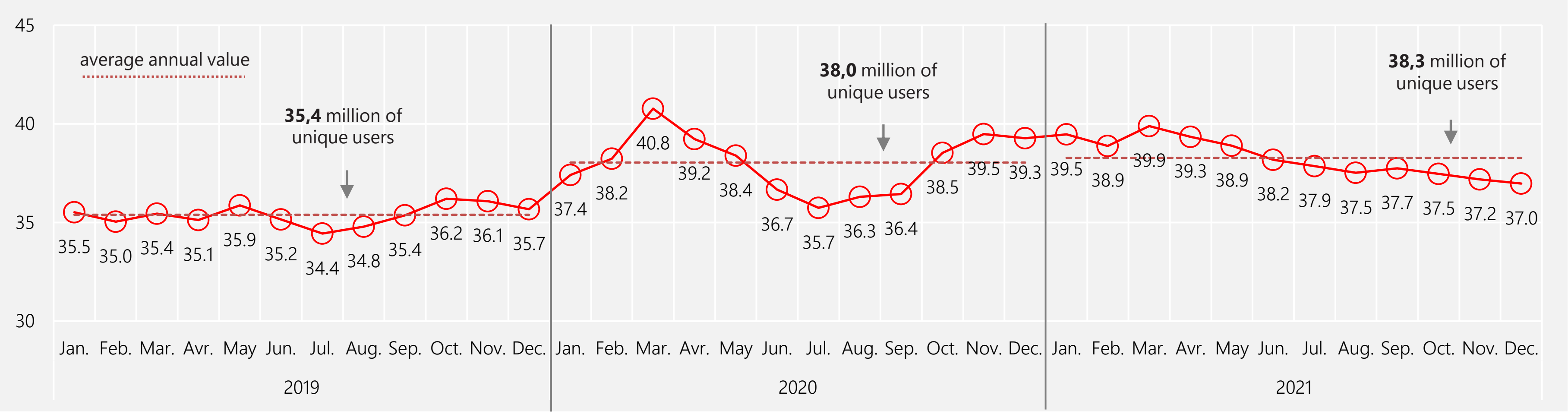
* **Parent** is defined as a group of domains and URLs that are owned by a specific company, its subsidiaries or business units. In addition, a Parent may also be represented by an organisation, government agency, private group, corporation or other institution, which has controlling interests in each domain and URL in the group.

Source: Agcom elaboration on data from Audiweb

2.9 PLATFORMS: GENERAL PRESS WEBSITE/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

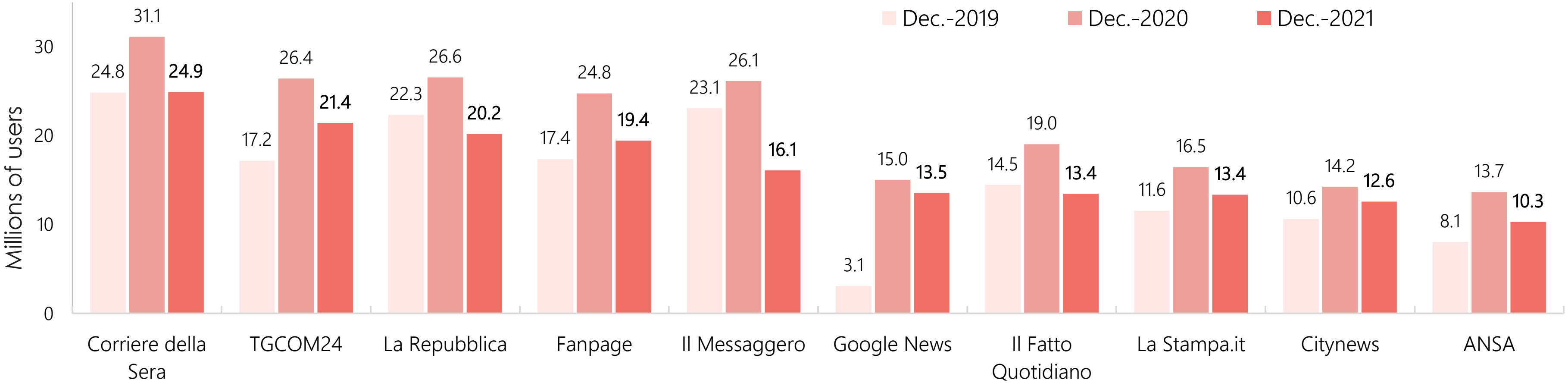
(January 2019 – DECEMBER 2021)



37 million unique users logged on to the generalist news sites/APPs in December 2021 (**-2.3** million users compared to December 2020)

About **1 hour** spent, on average, by each user browsing general news websites/APPs in December 2021

UNIQUE USERS OF THE MAIN WEBSITES



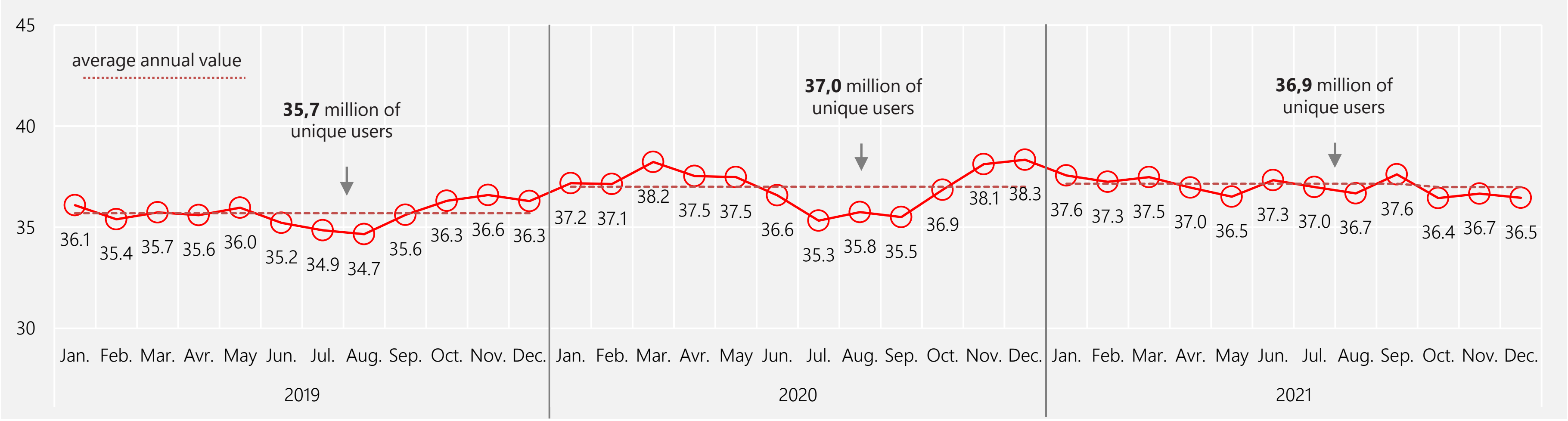
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

Source: Agcom elaboration on data from Audiweb
(Values referring to the category: «Current Event & Global News»)

2.10 PLATFORMS: E-COMMERCE WEBSITE/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

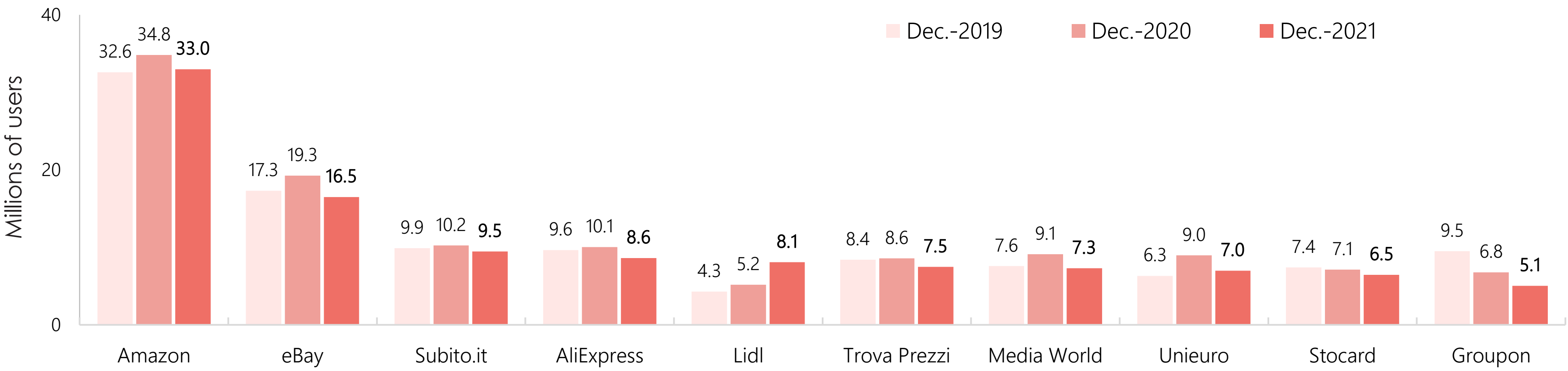
(January 2019 – DECEMBER 2021)



36.5 million unique users logged on to e-commerce sites/APPs in December 2021 (**-1.88** million users compared to December 2020)

2 hours and 50 minutes spent, on average, by each user browsing e-commerce websites/APPs in December 2021

UNIQUE USERS OF THE MAIN WEBSITES



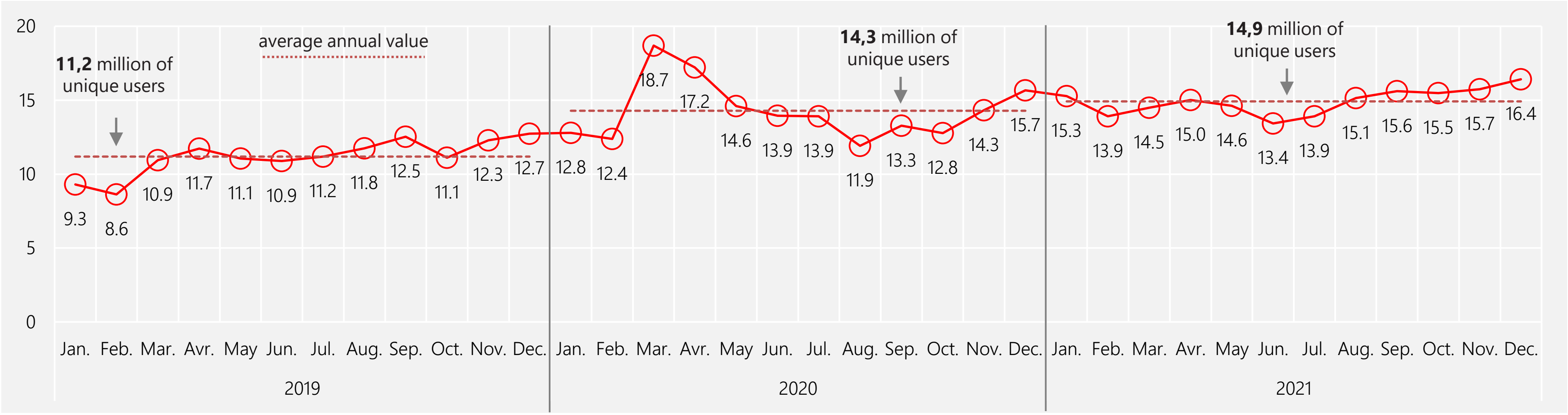
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

Source: Agcom elaboration on data from Audiweb

(Averages values referring to the category: «Multi-category Commerce»)

2.11 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

UNIQUE USERS IN MILLIONS (January 2019 – DECEMBER 2021)



11,2 million of unique users

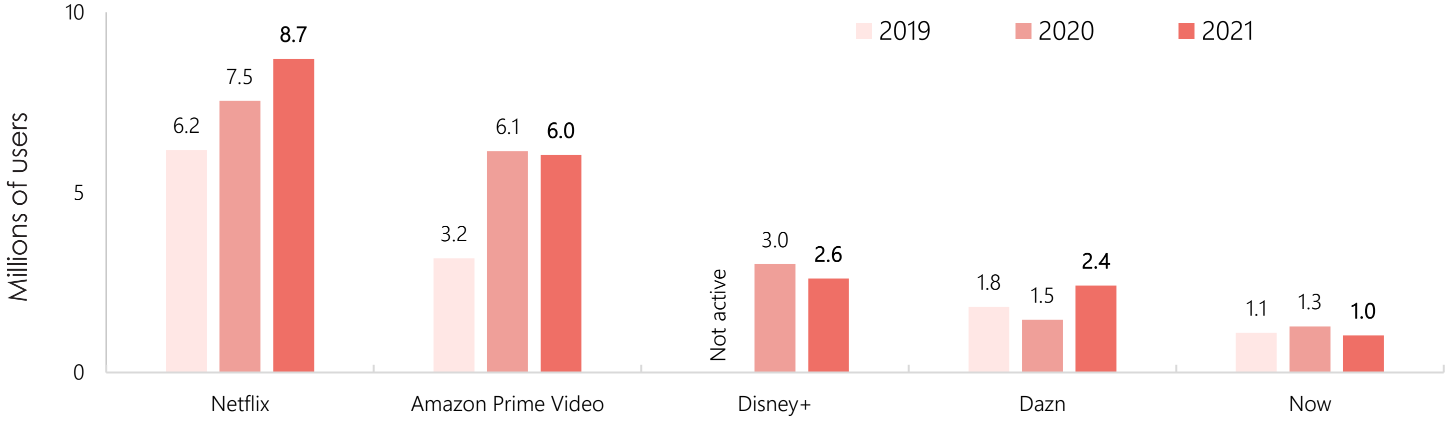
average annual value

14,3 million of unique users

14,9 million of unique users

16.4 million unique users logged on to video-on-demand sites/APPs in December 2021 (**+750** thousand compared to 2020)

UNIQUE USERS OF THE MAIN PLATFORMS* (annual average)



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

Source: Agcom elaboration on data from Comscore

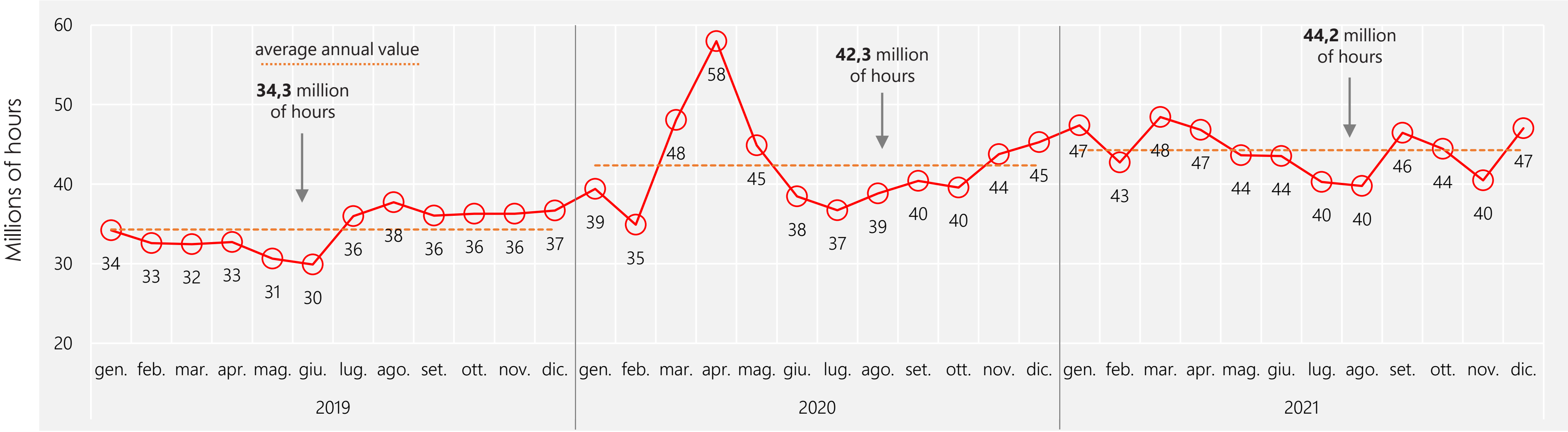
(The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy: Netflix; Primevideo.com (Amazon); Nowtv.it (Sky); Timvision.it (TIM); Disney digital (Disney); Dazn.com (Dazn); Chili.com (Chili); Google Play Movies &TV (Google); Apple TV (Apple); RAKUTEN.TV (Rakuten))

The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

* Note: platforms with more than 1 million unique uisers and with an average time spent more than 2 minute are represented

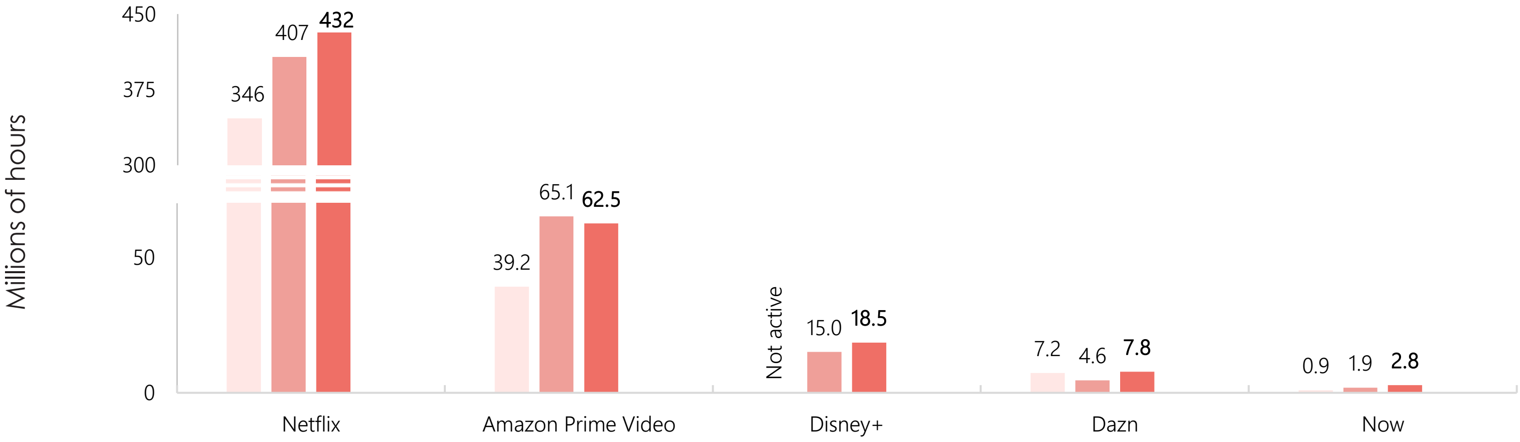
2.12 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT (in millions of hours) (January 2019 – December 2021)



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 52 minute** in December 2021

MAIN PLATFORMS – TOTAL HOURS SPENT* (in millions of hours)



Source: Agcom elaboration on data from Comscore
(The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy: Netflix; Primevideo.com (Amazon); Nowtv.it (Sky); Timvision.it (TIM); Disney digital (Disney); Dazn.com (Dazn); Chili.com (Chili); Google Play Movies &TV (Google); Apple TV (Apple); RAKUTEN.TV (Rakuten))

The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

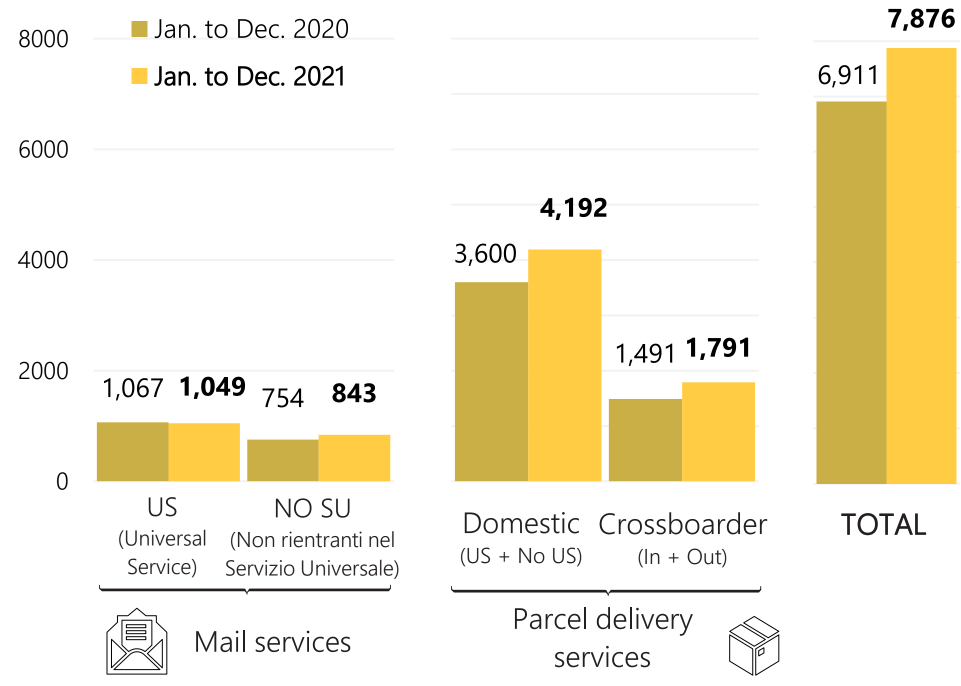
* Note: platforms with more than 1 million unique uisers and with an average time spent more than 2 minute are represented

Source: Agcom elaboration on data from Comscore

3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



↑ **+3.9**

↑ **+17.5**

↑ **+14.0**

Total

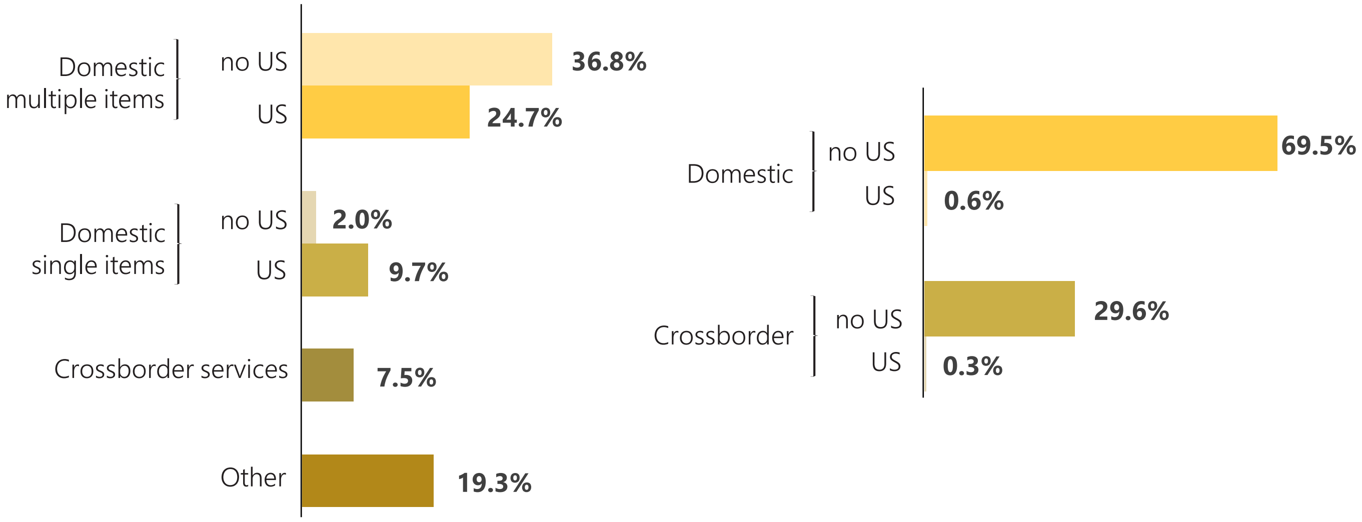
Annual change in %
(Dec. 2020 – Dec. 2021)

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

January to December 2021

Mail services

Parcel delivery services



Annual change in %
(Dec. 2020 – Dec. 2021)

↑ **+9.1**
Domestic multiple items

↓ **-7.8**
Domestic single items

↓ **-16.8**
Crossborder services

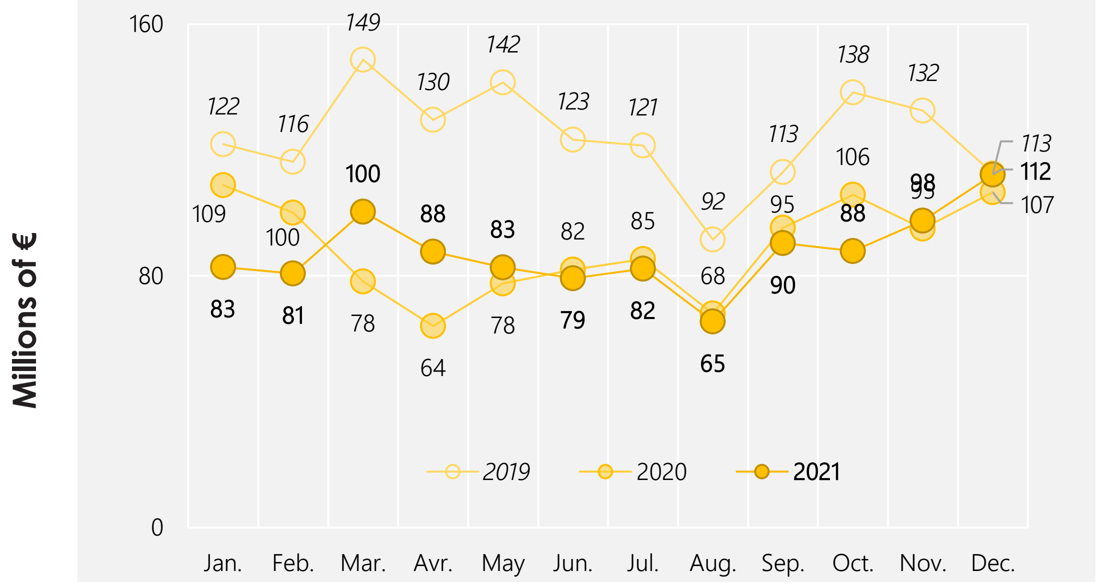
↑ **+6,4**
Other

↑ **+16.5**
Domestic

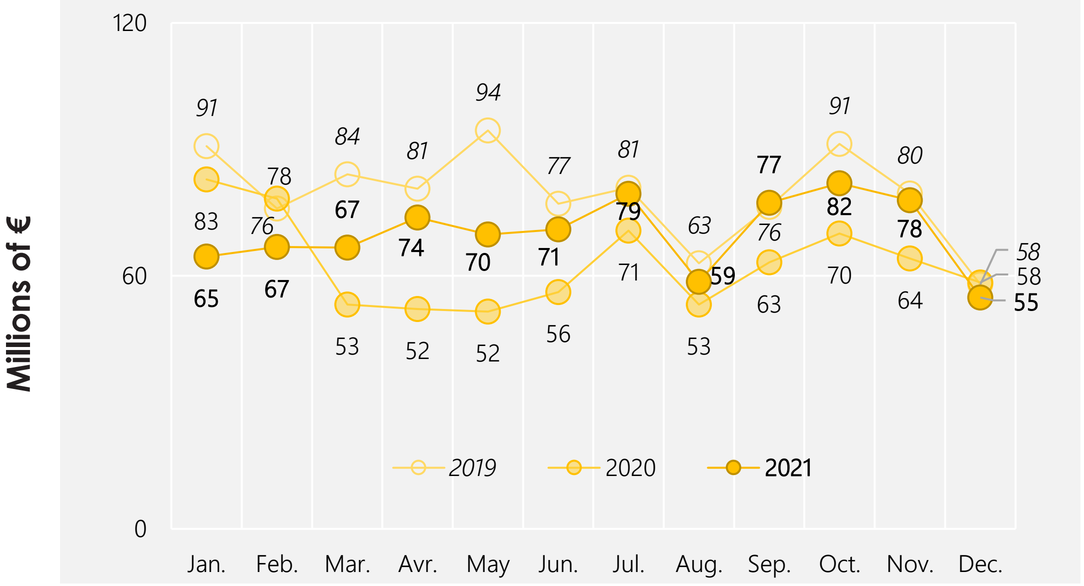
↑ **+20.2**
Crossborder

3.2: POSTAL SERVICES: MONTHLY MAIL SERVICES REVENUES (US/NO US)

UNIVERSAL SERVICE (US)



OTHER SERVICES (NO US)



① **Cumulative values since the beginning of the year (4Q)**

	(2019)		(2020)		(2021)	
millions of €	1,491	→ -28.4%	1,067	→ -1.6%	1.049	
						2019 → 2021: -29.6%

② **Quarterly comparison (change in %)**

	YoY 2019/2020	YoY 2020/2021	Whole period 2019/2021
January - March	-25.8	-8.1	-31.8
Avril - June	-43.3	+11.6	-36.7
July – September	-23.7	-4.2	-26.9
October - December	-19.8	-3.2	-22.4

① **Cumulative values since the beginning of the year (4Q)**

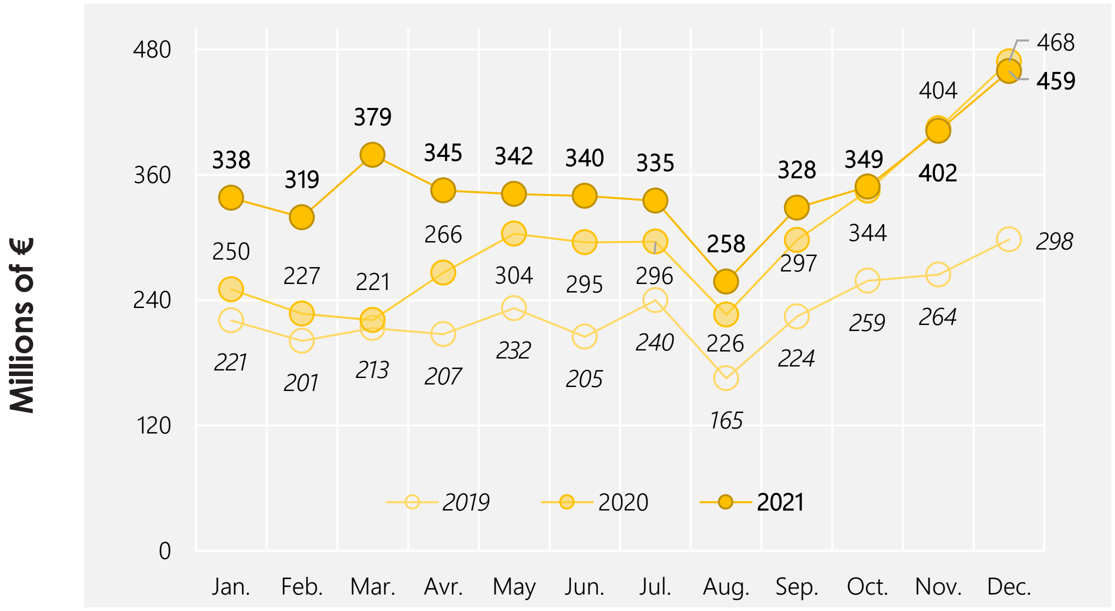
	(2019)		(2020)		(2021)	
millions of €	843	→ -20.8%	754	→ +11.8%	952	
						2019 → 2021: -11.5%

② **Quarterly comparison (change in %)**

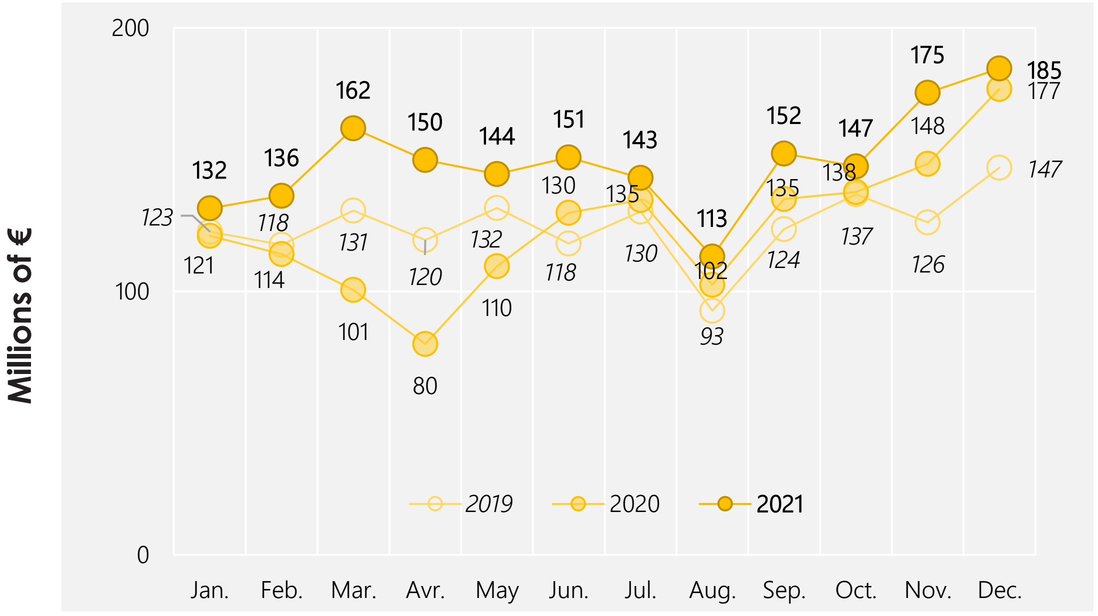
	YoY 2019/2020	YoY 2020/2021	Whole period 2019/2021
January - March	-14.5	-7.6	-21.0
Avril - June	-36.6	+34.3	-14.9
July – September	-15.0	+15.1	-2.2
October - December	-15.8	+11.5	-6.2

3.3: POSTAL SERVICES: MONTHLY PARCEL SERVICES REVENUES (DOMESTIC/CROSSBORDER)

DOMESTIC



CROSSBORDER



①

Cumulative values since the beginning of the year (4Q)

mln. of €

(2019) 2,729 → **+31.9%** → (2020) 3,600 → **+16.5%** → (2021) 4,192

2019 → 2021: **+53.6%**

②

Quarterly comparison (change in %)

	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	+10.0	+48.3	+63.2
Avril - June	+34.3	+18.6	+59.3
July – September	+30.2	+12.4	+46.3
October - December	+48.3	-0.6	+47.4

①

Cumulative values since the beginning of the year (4Q)

mln. of €

(2019) 1,497 → **-0.4%** → (2020) 1,491 → **+20.2%** → (2021) 1,791

2019 → 2021: **+19.6%**

②

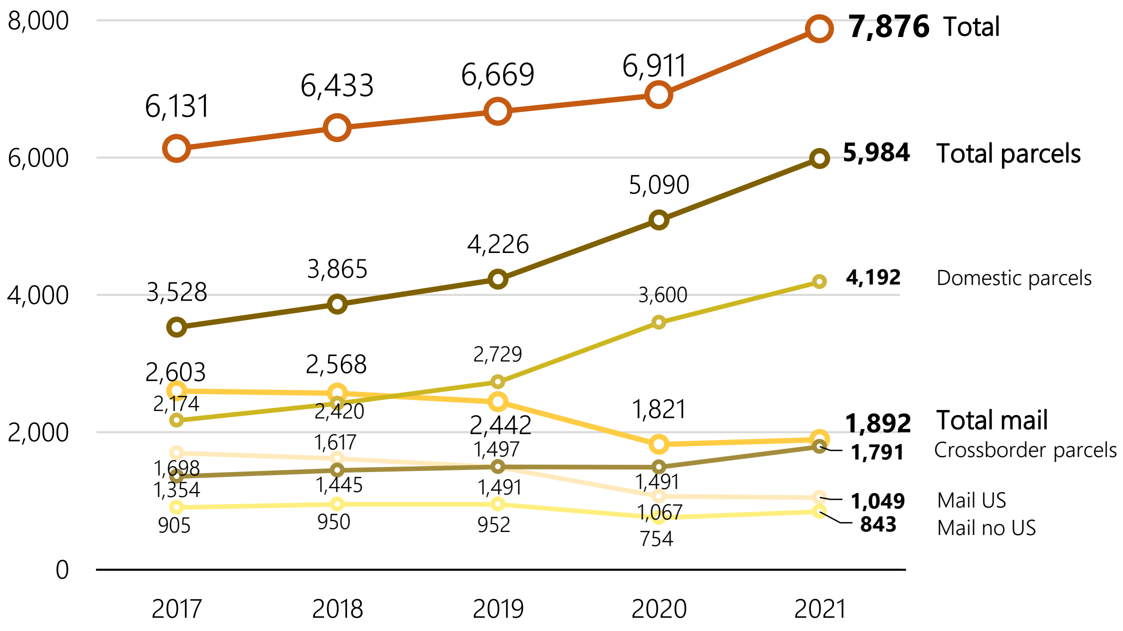
Quarterly comparison (change in %)

	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	-9.5	+28.0	+15.9
Avril - June	-13.5	+39.4	+20.6
July – September	+7.3	+9.8	+17.9
October - December	+13.0	+9.6	+23.8

3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

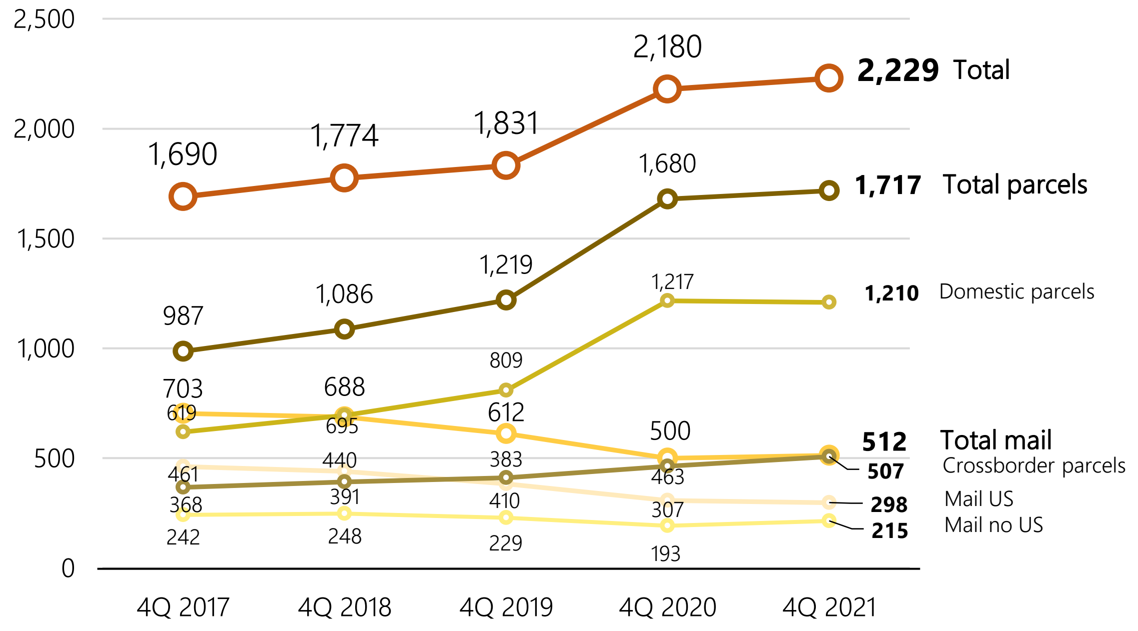
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



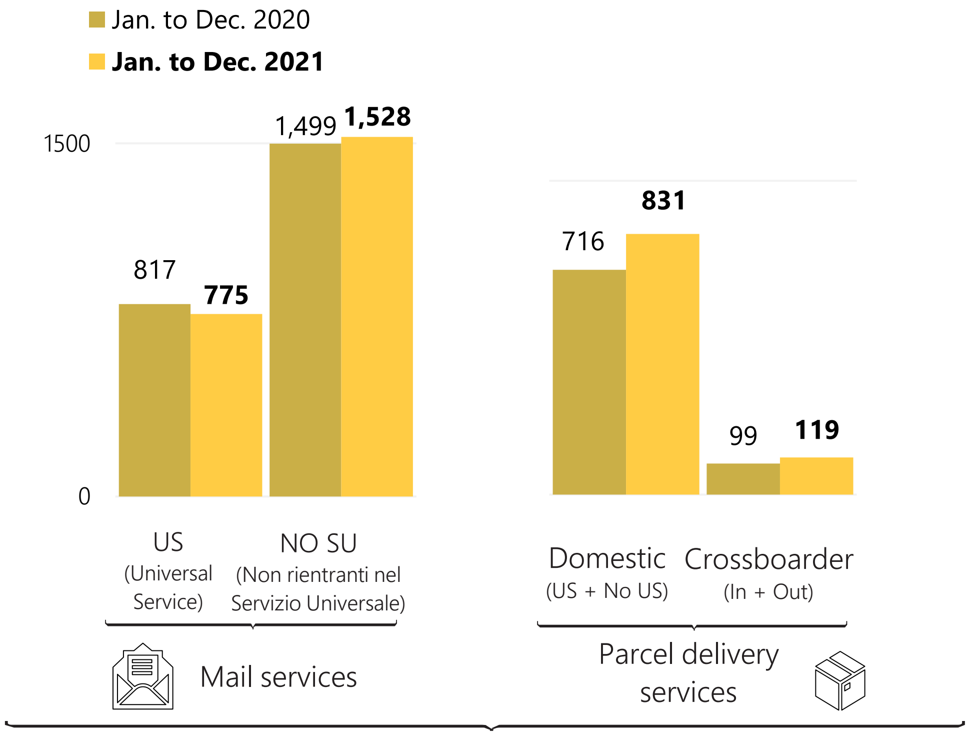
	Change in %			
	(2017 – 2021)		(2020 – 2021)	
Total:	**+28.4**	↑	**+14.0**	↑
Mail services:	**-27.3**	↓	**+3.9**	↑
- Universal Service:	-38.2	↓	-1.6	↓
- No Universal Service:	-6.8	↓	+11.8	↑
Parcel delivery services:	**+69.6**	↑	**+17.5**	↑
- Domestic:	+92.8	↑	+16.5	↑
- Crossborder:	+32.3	↑	+20.2	↑

	Change in %			
	(4Q 2017 – 4Q 2021)		(4Q 2020 – 4Q 2021)	
Total:	**+31.9**	↑	**+2.3**	↑
Mail services:	**-27.2**	↓	**+2.5**	↑
- Universal Service:	-35.5	↓	-3.2	↓
- No Universal Service:	-11.4	↓	+11.5	↑
Parcel delivery services:	**+74.0**	↑	**+2.2**	↑
- Domestic:	+95.3	↑	-0.6	↓
- Crossborder:	+38.1	↑	+9.6	↑

3.5: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS



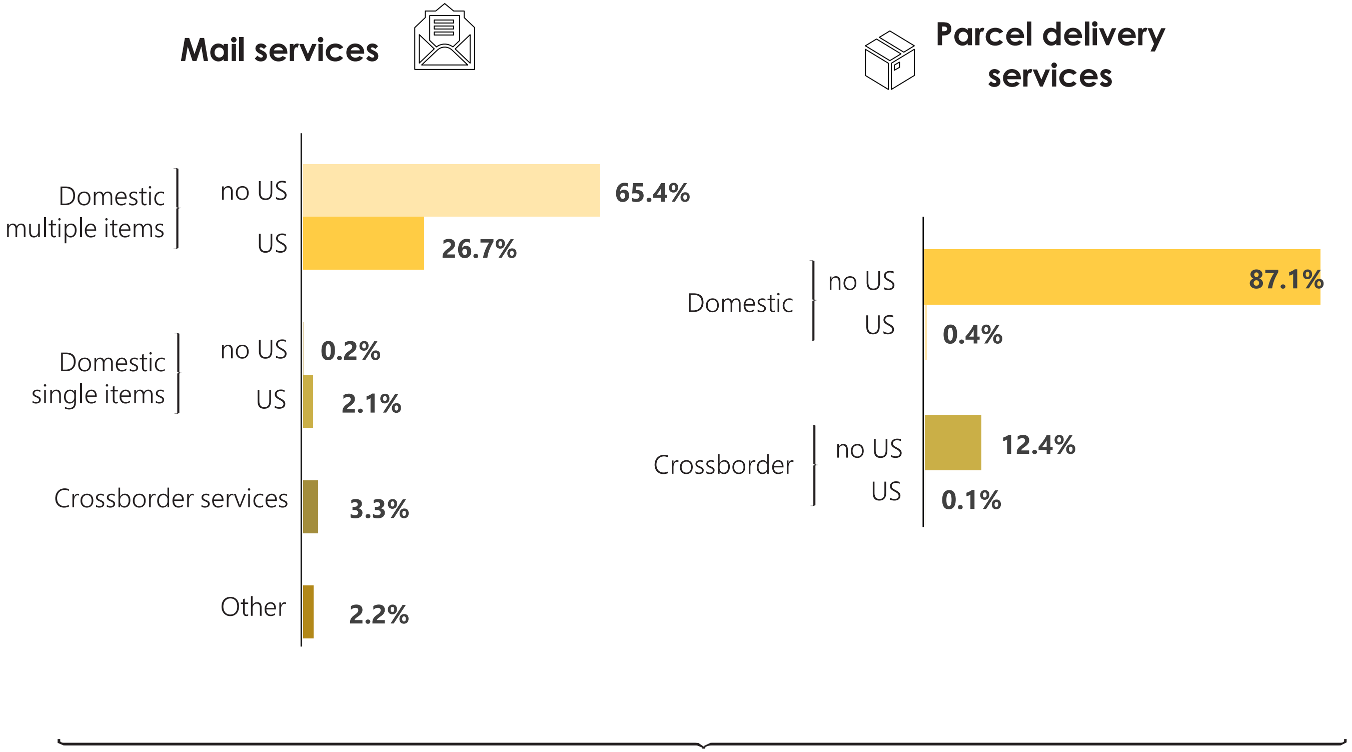
↓ **-0.6**

↑ **+16.4**

Annual change in %
(Dec. 2020 – Dec. 2021)

VOLUMES BY SOURCE TYPE (%)

January to December 2021

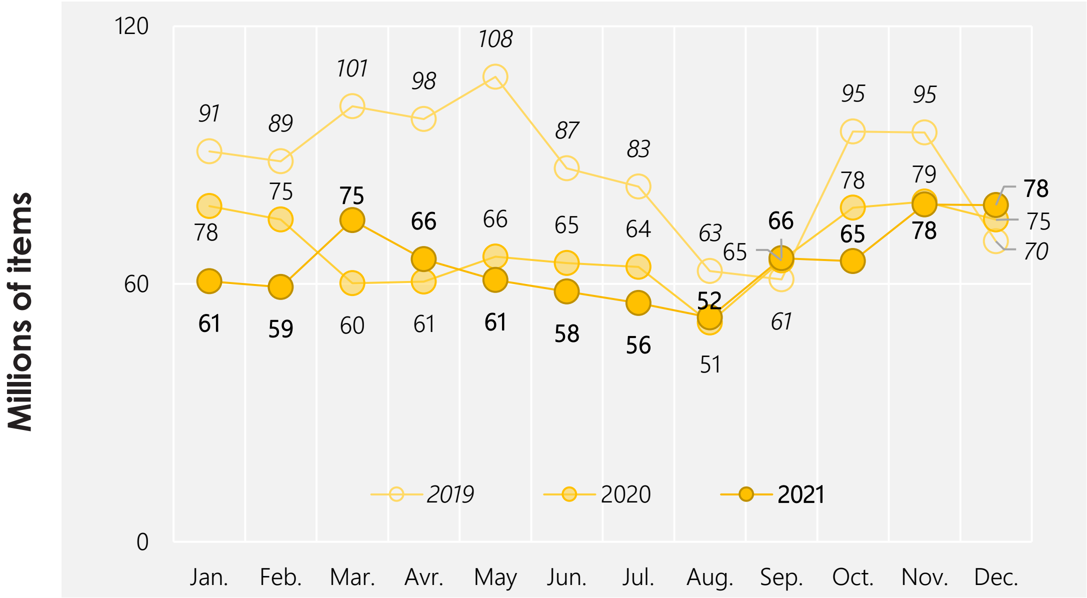


Annual change in %
(Dec. 2020 – Dec. 2021)

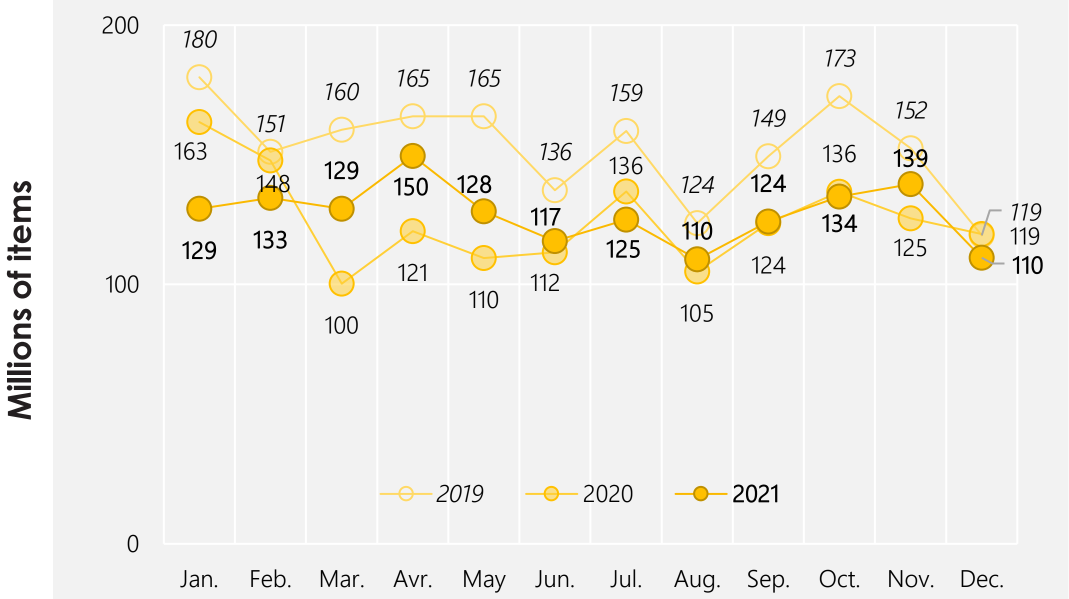
↑	↓	↓	↓	↑	↑
+0.6	**-7.1**	**-21.7**	**-0.6**	**+16.0**	**+19.2**
Domestic multiple items	Domestic single items	Crossborder services	Other	Domestic	Crossborder

3.6: SERVIZI POSTALI: POSTAL SERVICES: MONTHLY MAIL SERVICES VOLUMES (US/NO US)

UNIVERSAL SERVICE



OTHER SERVICES (NO US)



① **Cumulative values since the beginning of the year (3Q)**

millions of items (2019) 775 → -21.5% → (2020) 817 → -5.1% → (2021) 1,042

-25.6%

② **Quarterly comparison (change in %)**

	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	-24.0	-8.7	-30.6
Avril - June	-34.7	-3.6	-37.0
July – September	-12.7	-3.7	-15.9
October - December	-11.0	-4.2	-14.8

① **Cumulative values since the beginning of the year (3Q)**

millions of items (2019) 1,833 → -18.2% → (2020) 1,499 → +1.9% → (2021) 1.528

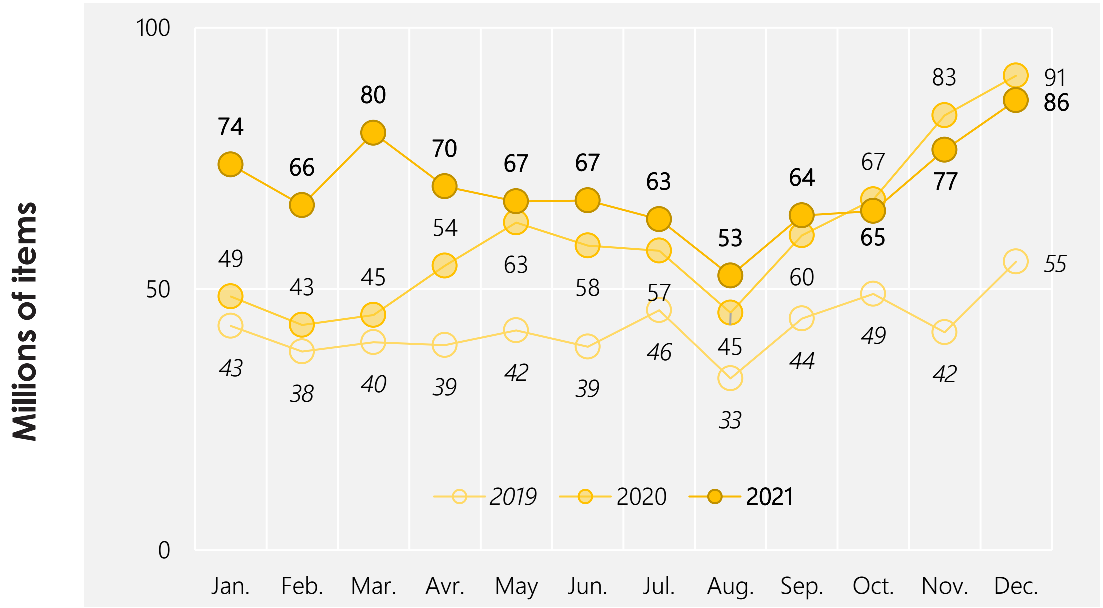
-16.6%

② **Quarterly comparison (change in %)**

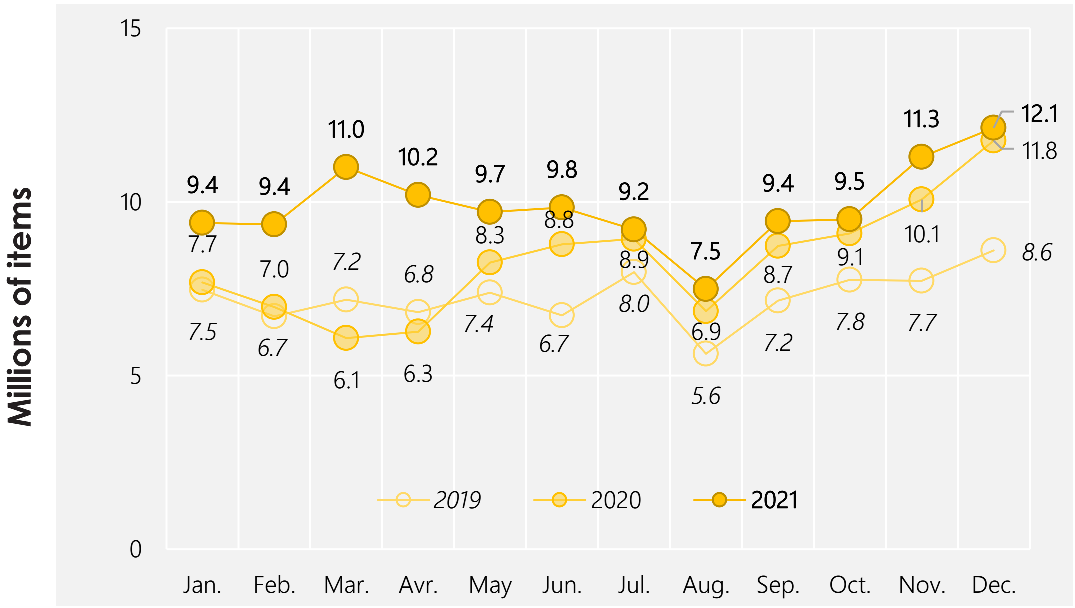
	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	-16.3	-4.6	-20.2
Avril - June	-26.4	+15.0	-15.4
July – September	-15.7	-1.5	-17.0
October - December	-14.3	+0.6	-13.8

3.7: POSTAL SERVICES: MONTHLY PARCEL SERVICES VOLUMES (DOMESTIC/CROSSBORDER)

DOMESTIC



CROSSBORDER



DOMESTIC

① **Cumulative values since the beginning of the year (3Q)**

	(2019)		(2020)		(2021)
millions of items	510	→ +40.4%	716	→ +16.0%	831

510 → 831: +62.8%

② **Quarterly comparison (change in %)**

	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	+13.2	+60.8	+82.0
Avril - June	+45.9	+15.9	+69.1
July – September	+32.4	+10.3	+46.1
October - December	+65.2	-5.6	+55.9

CROSSBORDER

① **Cumulative values since the beginning of the year (3Q)**

	(2019)		(2020)		(2021)
millions of items	87	→ +14.1%	69	→ +24.9%	86

87 → 86: +35.8%

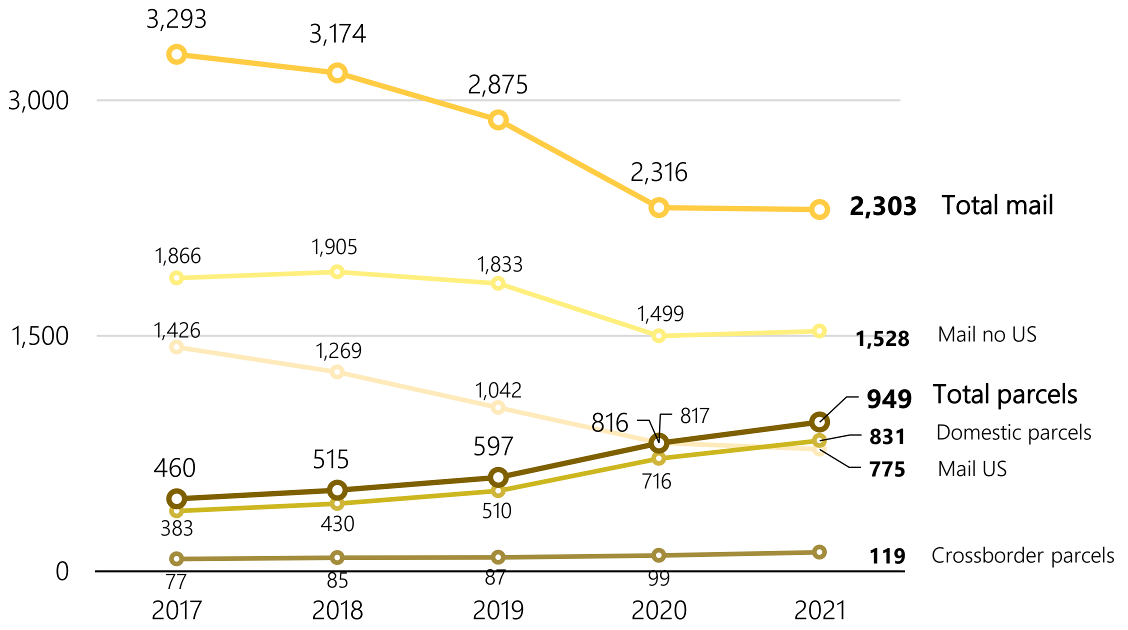
② **Quarterly comparison (change in %)**

	YoY		Whole period
	2019/2020	2020/2021	2019/2021
January - March	-3.0	+43.5	+39.2
Avril - June	+11.2	+27.7	+42.0
July – September	+18.1	+6.6	+25.9
October - December	+28.4	+6.5	+36.7

3.8: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

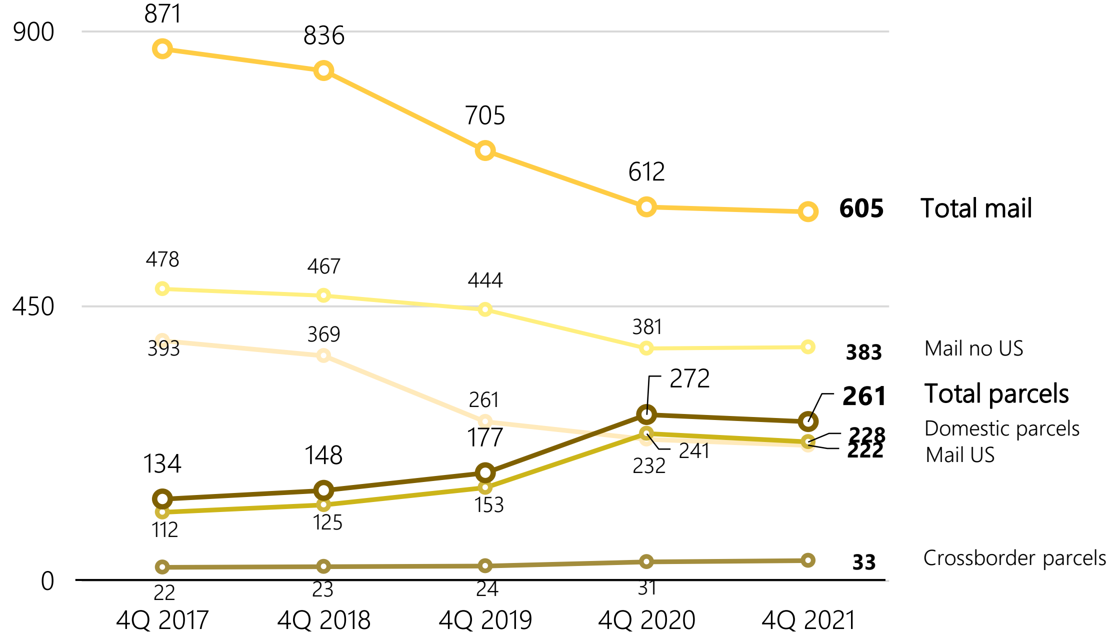
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



Change in %

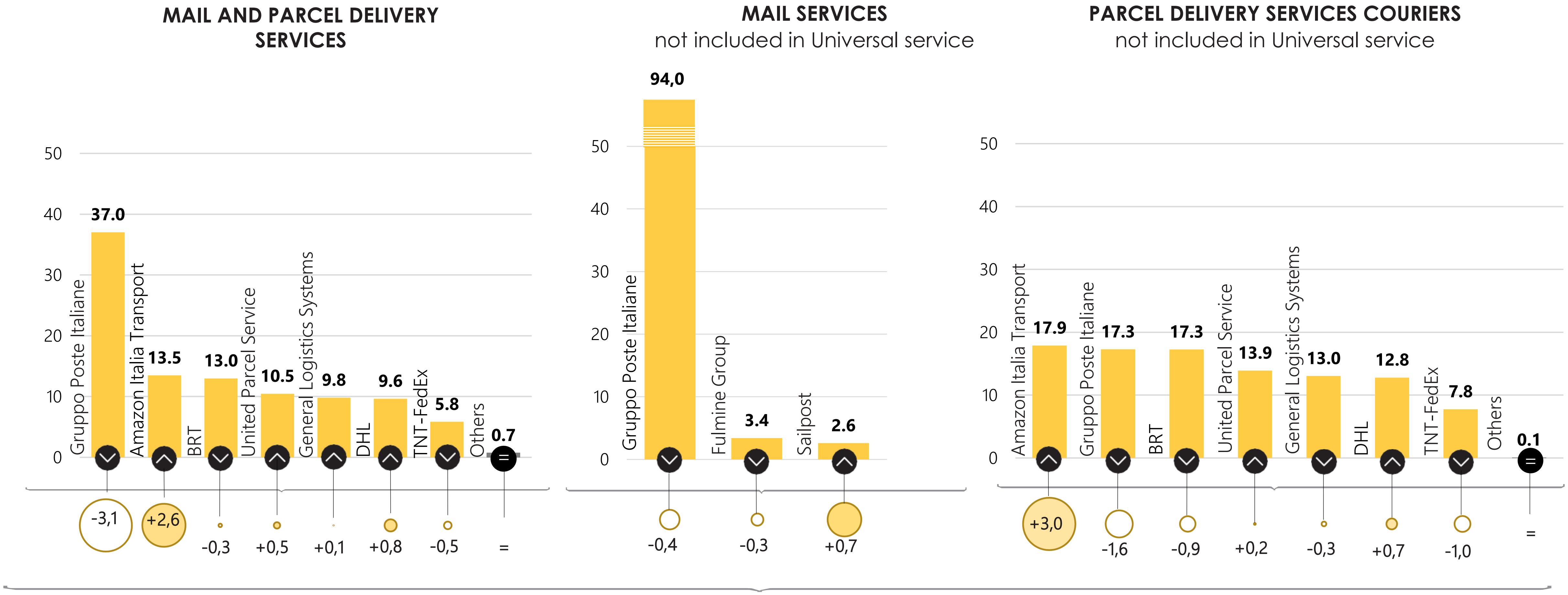
	(2017 – 2021)	(2020 – 2021)
Mail services:	**-30.0** ↓	**-0.6** ↓
- Universal Service:	-45.6 ↓	-5.1 ↓
- No Universal Service:	-18.1 ↓	+1.9 ↑
Parcel delivery services:	**+106.4** ↑	**+16.4** ↑
- Domestic:	+117.0 ↑	+16.0 ↑
- Crossborder:	+53.6 ↑	+19.2 ↑

Change in %

	(4Q 2017 – 4Q 2021)	(4Q 2020 – 4Q 2021)
Mail services:	**-30.6** ↓	**-1.2** ↓
- Universal Service:	-43.5 ↓	-4.2 ↓
- No Universal Service:	-19.9 ↓	+0.6 ↑
Parcel delivery services:	**+94.5** ↑	**-4.2** ↓
- Domestic:	+103.1 ↑	-5.6 ↓
- Crossborder:	+50.5 ↑	+6.5 ↑

3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

DECEMBER 2021 – (IN % OF REVENUES)



MAIL AND PARCEL DELIVERY SERVICES

MAIL SERVICES not included in Universal service

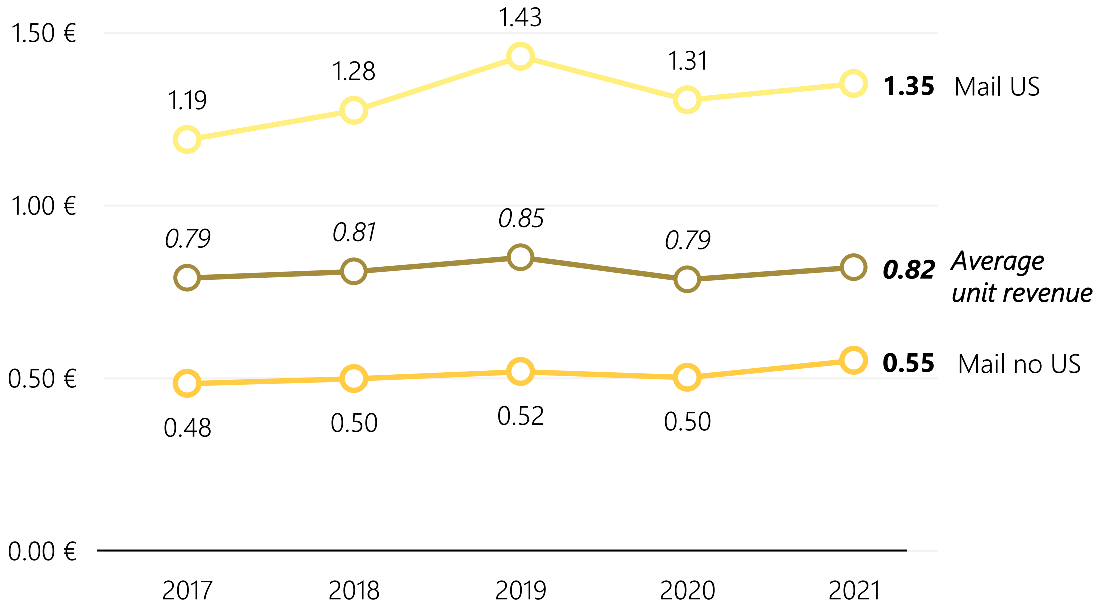
PARCEL DELIVERY SERVICES COURIERS not included in Universal service

Differences vs. Dec. 2020
(percentage points)

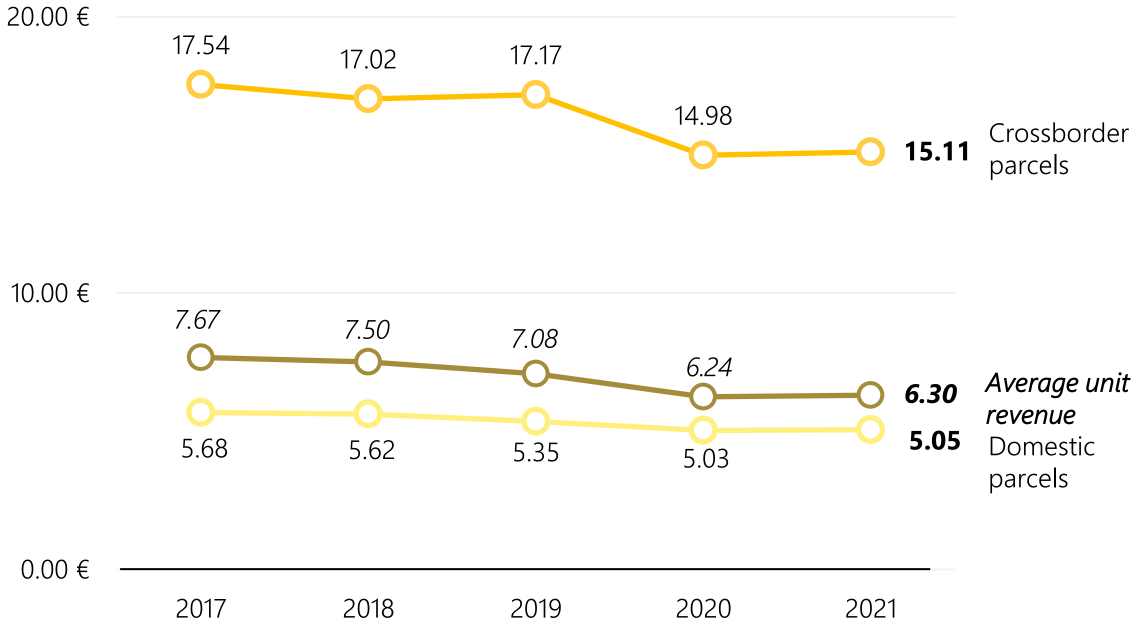
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group, Nexive Group S.r.l. and SDA Express Courier S.p.A.

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

MAIL SERVICES



PARCELS DELIVERY SERVICES

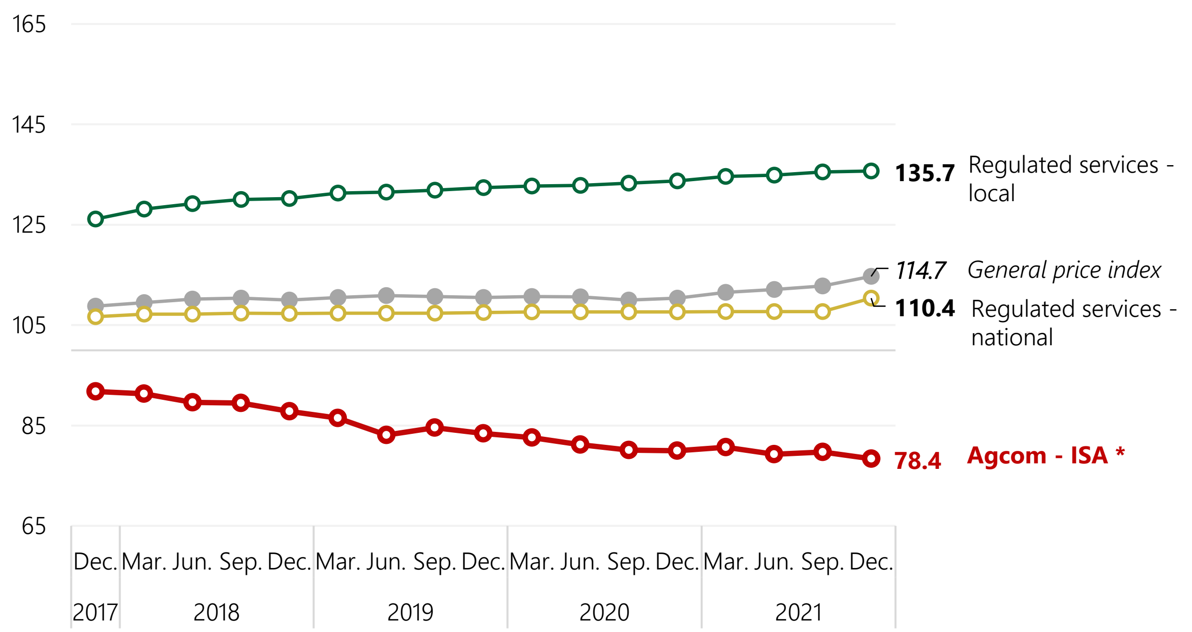


	Change in %			
	(2017 – 2021)		(2020 – 2021)	
Average unit revenue:	**+3.9**	↑	**+4.5**	↑
- Mail US:	+13.6	↑	+3.7	↑
- Mail no US:	+13.8	↑	+9.7	↑

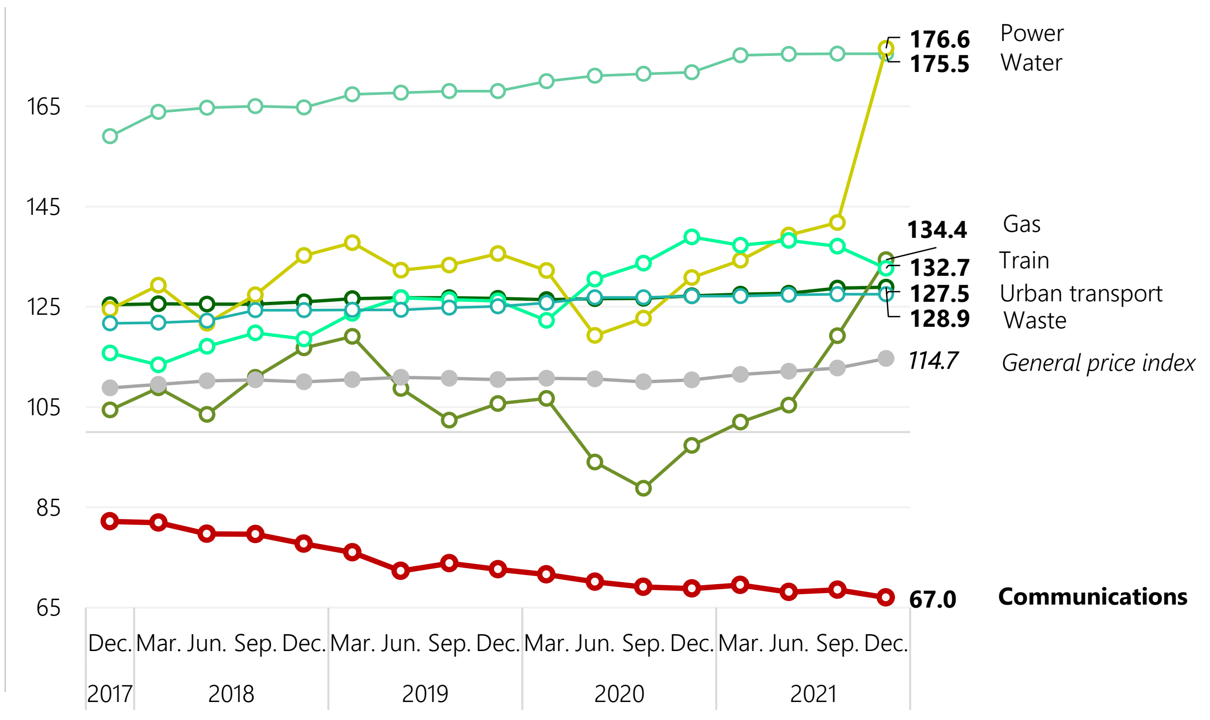
	Change in %			
	(2017 – 2021)		(2020 – 2021)	
Average unit revenue:	**-17.8**	↓	**+1.0**	↑
Crossborder parcels:	-13.9	↓	+0.8	↑
- US:	*-10.1*	↓	*-1.4*	↓
- No US:	*-13.7*	↓	*+0.8*	↑
Domestic parcels:	-11.6	↓	+0.4	↑
- US:	*+0.9*	↑	*+3.6*	↑
- No US:	*-11.2*	↓	*+0.5*	↑

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

	Change in %	
	4-Year	YoY
ISA (Agcom summary price index):	-14.6 ↓	-2.0 ↓
General price index:	+5.4 ↑	+3.9 ↑
Regulated services - local:	+7.6 ↑	+1.5 ↑
Regulated services - national:	+3.5 ↑	+2.6 ↑

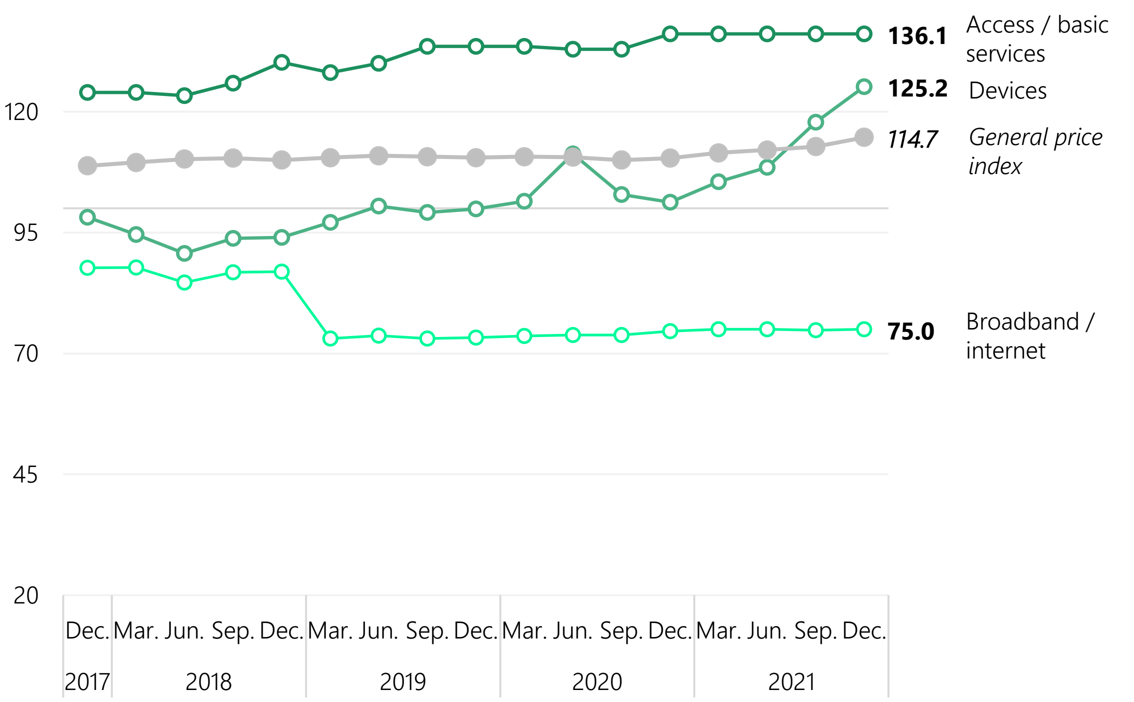
(*) **Note**: The ISA («Indice Sintetico Agcom») price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (for a total of 10 items).

	Change in %			Change in %	
	4-Year	YoY		4-Year	YoY
Water *(04.4.1)*:	+10.4 ↑	+2.2 ↑	Train *(07.3.1)*:	+14.6 ↑	-4.5 ↓
Waste *(04.4.2)*:	+2.8 ↑	+1.3 ↑	Urban transport *(07.3.2.1.1)*:	+4.8 ↑	+0.3 ↑
Power *(04.5.1)*:	+41.8 ↑	+35.0 ↑	**Communications** *(08)*:	-18.5 ↓	-2.6 ↓
Gas *(04.5.2)*:	+28.7 ↑	+38.1 ↑			

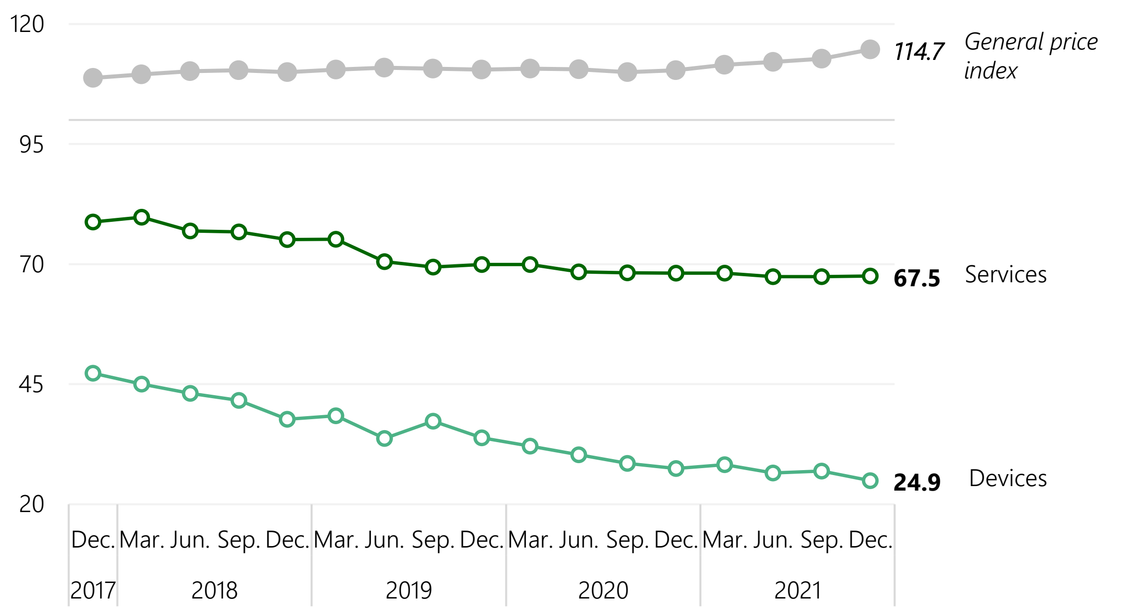
(COICOP - Classification of Individual Consumption by Purpose)

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

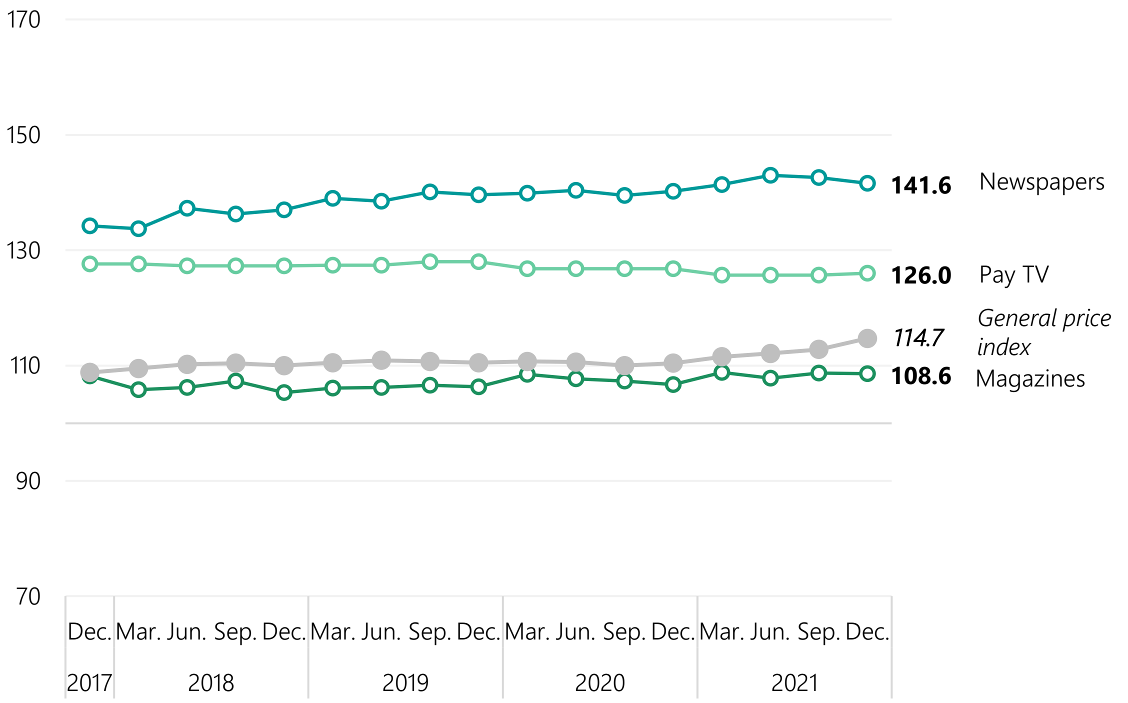
	Change in %	
	4-Year	YoY
Access / basic services *(08.3.0.1)*:	**+9.8** ↑	=
Devices *(08.2.0.1)*:	**+27.5** ↑	**+23.6** ↑
Broadband / internet *(08.3.0.3.0.01)*:	**-14.5** ↓	**+0.5** ↑

	Change in %	
	4-Year	YoY
Servces *(08.3.0.2)*:	**-14.3** ↓	**-0.9** ↓
Devices *(08.2.0.2)*:	**-47.4** ↓	**-9.1** ↓

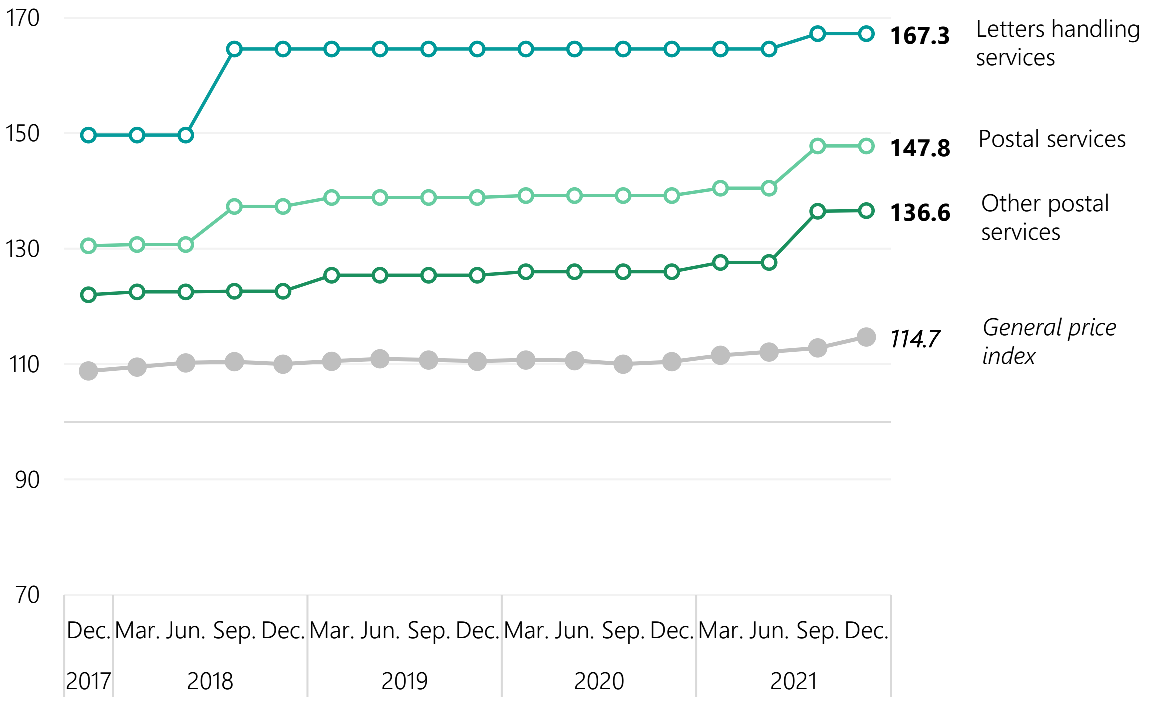
(COICOP - Classification of Individual Consumption by Purpose)

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

	Change in %	
	4-Year	YoY
Newspapers *(09.5.2.1.0)*:	**+5.5** ↑	**+1.0** ↑
Pay TV *(09.4.2.3.0.02)*:	**-1.3** ↓	**-0.6** ↓
Magazines *(09.5.2.2.0)*:	**+0.4** ↑	**+1.8** ↑

	Change in %	
	4-Year	YoY
Postal services *(08.1)*:	**+13.3** ↑	**+6.2** ↑
Letters handling services *(08.1.0.1.0.00)*:	**+11.8** ↑	**+1.6** ↑
Other postal services *(08.1.0.9.0.00)*:	**+12.0** ↑	**+8.4** ↑

(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

Source: Agcom elaboration on data from Eurostat

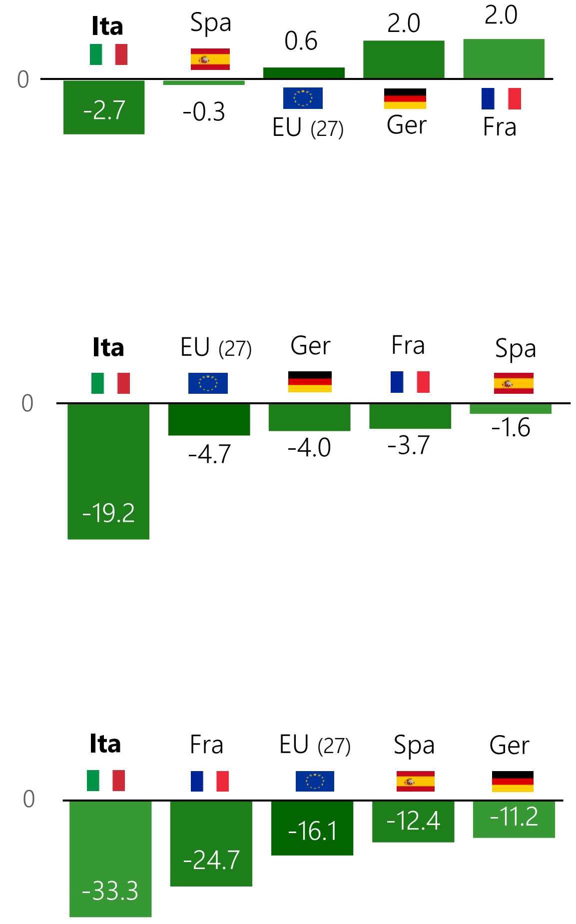
1-Year change %
Dec. 2020
-
Dec. 2021

5-Year change %
Dec. 2016
-
Dec. 2021

10-Year change %
Dec. 2011
-
Dec. 2021

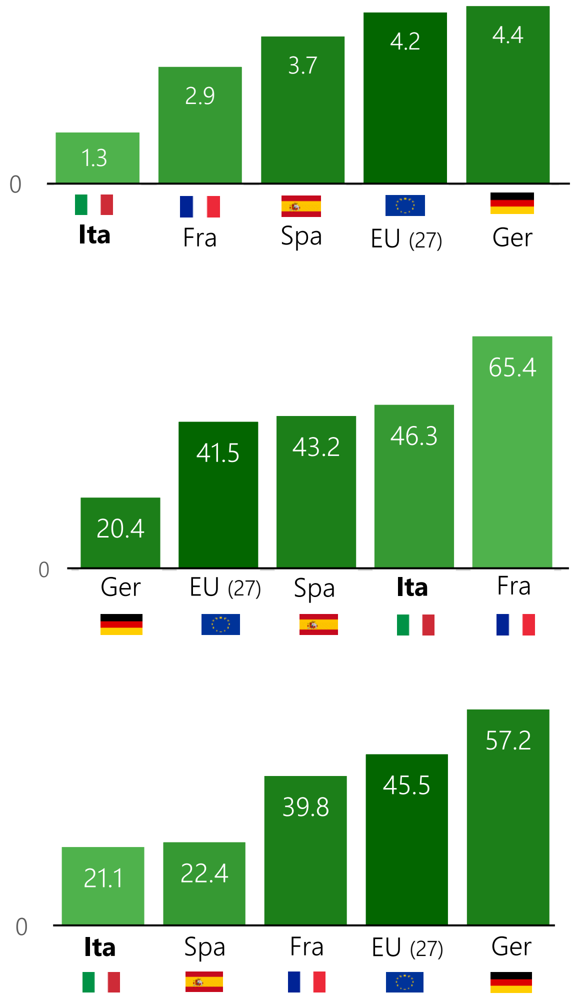
TLC – SERVICES AND EQUIPMENTS

(COICOP 08.2 - 08.3)



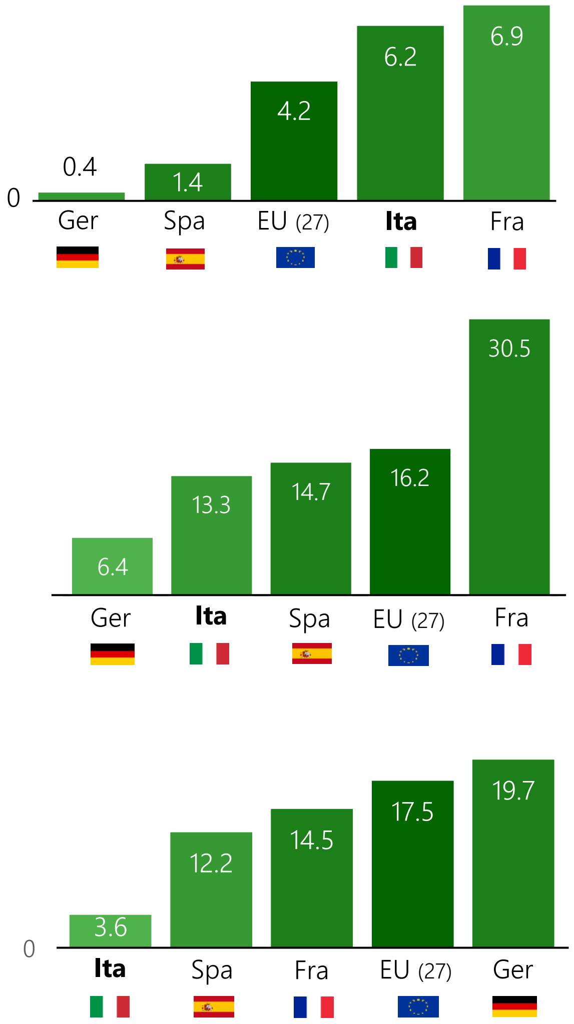
NEWSPAPERS AND MAGAZINES

(COICOP 09.5.2)



POSTAL SERVICES

(COICOP 08.1)



AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 1/2022

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