AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 1/2021

INDEX

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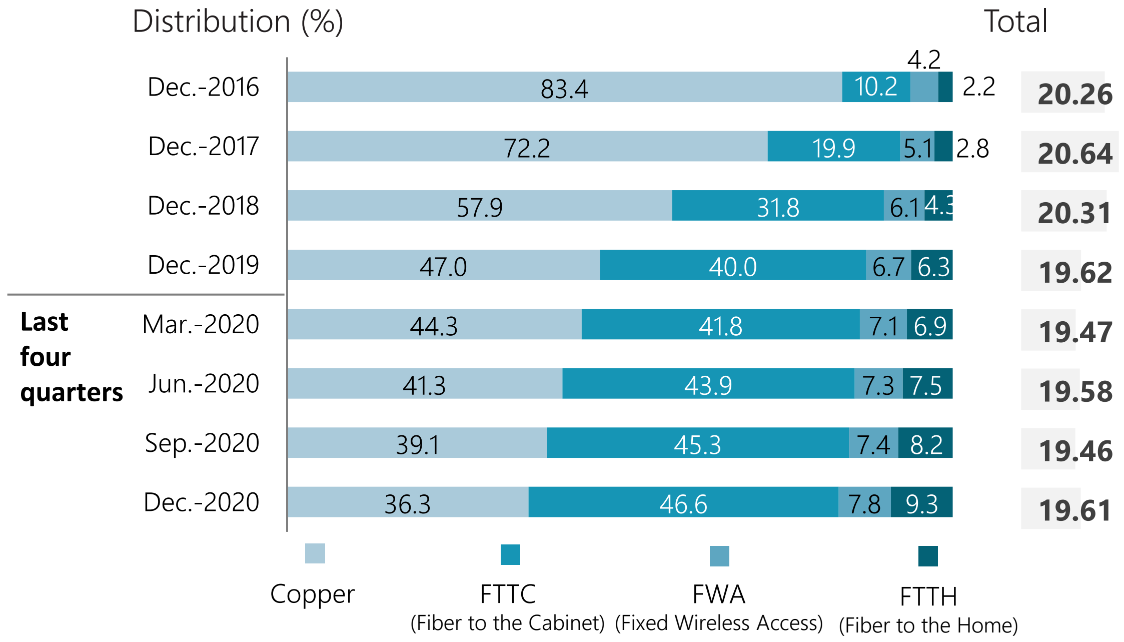
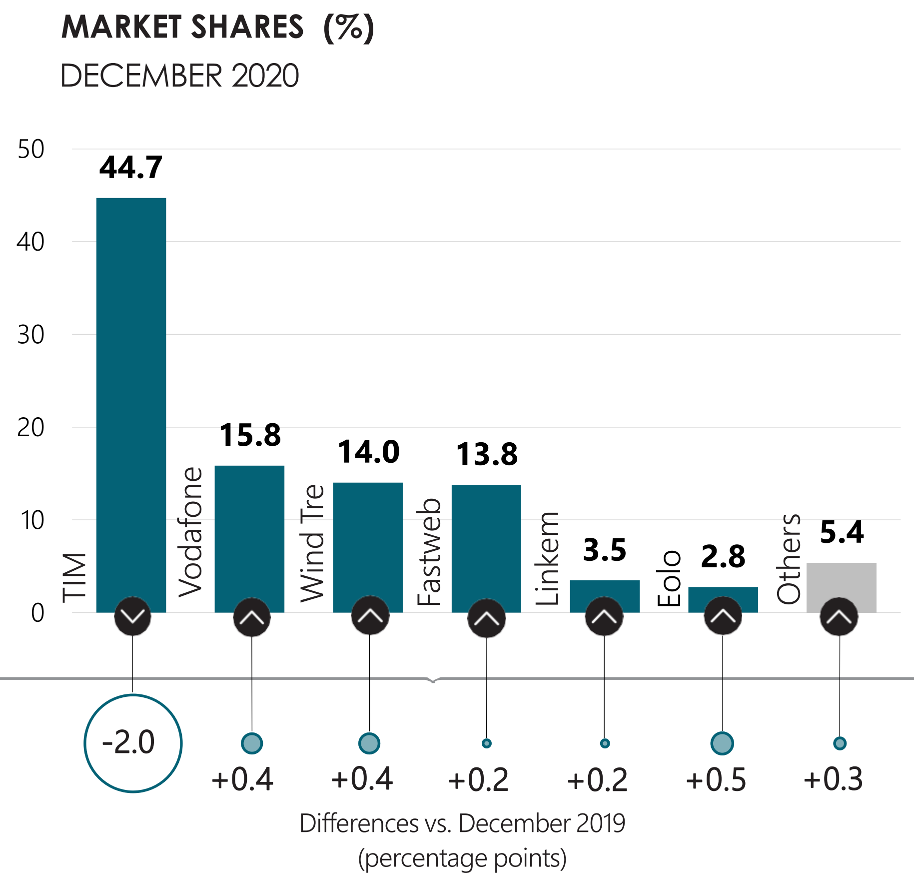
The following figures are based on AGCOM's elaborations on firms' data and other sources (updated to December 2020). Due to changes in firms' accounting methods, some figures cannot be compared directly with those reported in previous issues. Percentages may not total 100 due to rounding.

1.1: FIXED LINES: TOTAL LINES





Total lines	(no of lines)	(Δ %)
Quarterly change (September 2020 – December 2020)	**+144 K** accesses	-0.7% ↓
Annual change (December 2019 – December 2020)	**-9 K** accesses	-2.0% ↓
4-Year change (December 2016 – December 2020)	**-653 K** accesses	-3.9% ↓

Distribution
(Δ 2019-2020) percentage points

Copper:	-10.7	↓
FWA:	+1.1	↑
FTTC:	+6.6	↑
FTTH:	+3.0	↑

↓ **TIM**'s market share has dropped to **44.7%**

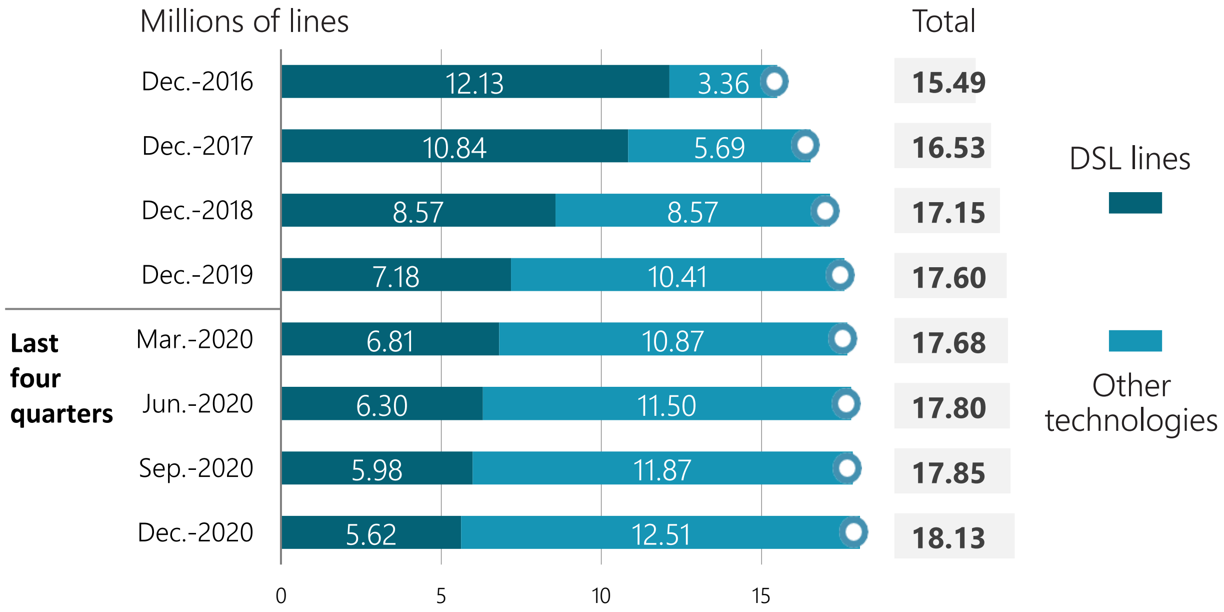
↑ The market shares of **Vodafone**, **Wind Tre** and **Fastweb** has increased

↑ **Other operators**, as a whole, have increased their market share

K = thousand

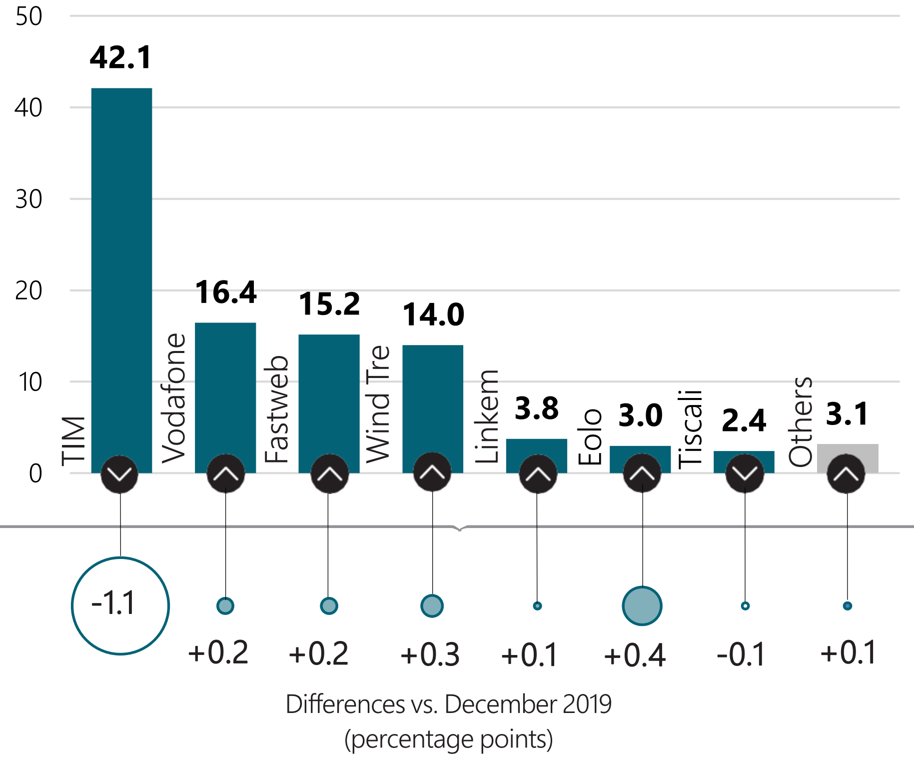
Note: Due to changes in firms' accounting methods and methodological refinements introduced by the Authority, the total number of fixed lines is not directly comparable with previous versions

1.2: FIXED LINES: BROADBAND AND ULTRABROADBAND LINES



MARKET SHARES (%)

DECEMBER 2020



Quarterly change (Sept. 2020 – Dec. 2020)	Annual change (Dec. 2019 – Dec. 2020)		
Total lines	Total lines	DSL lines	Other technologies
↑	↑	↓	↑
+274 K lines (+0.3%)	**+533 K** lines (+2.1 %)	**-1.563 M** lines (-19.5%)	**+2.096 M** lines (+18.3%)

K = thousand
M = million

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

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

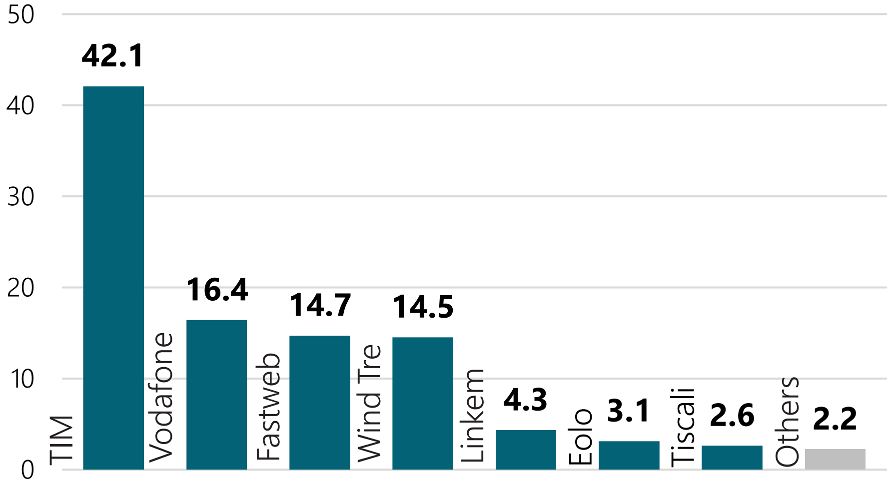
Other operators, as a whole, have increased their market share

DECEMBER 2020

by operator (%)

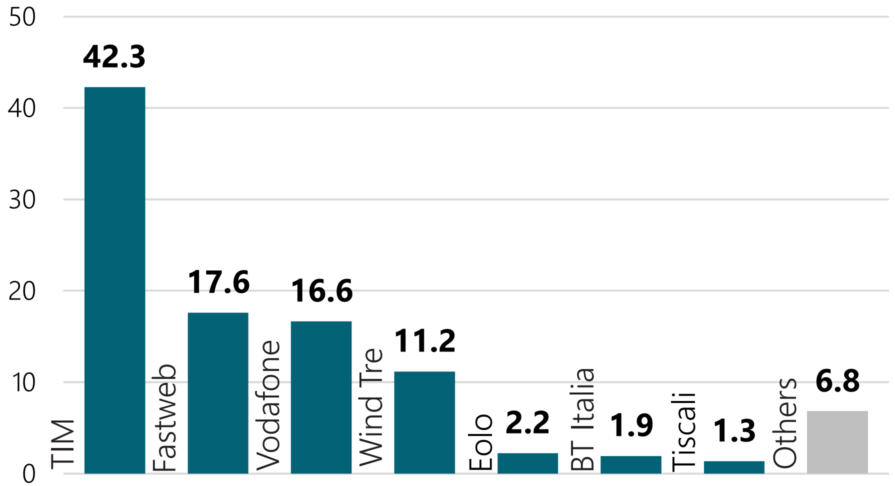
RESIDENTIAL CUSTOMERS

Total lines: **15.312** million lines

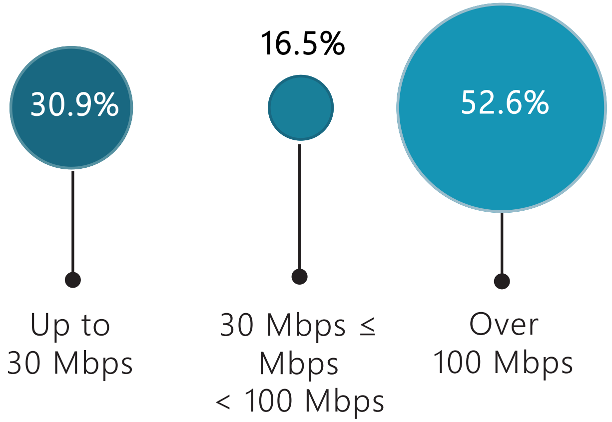


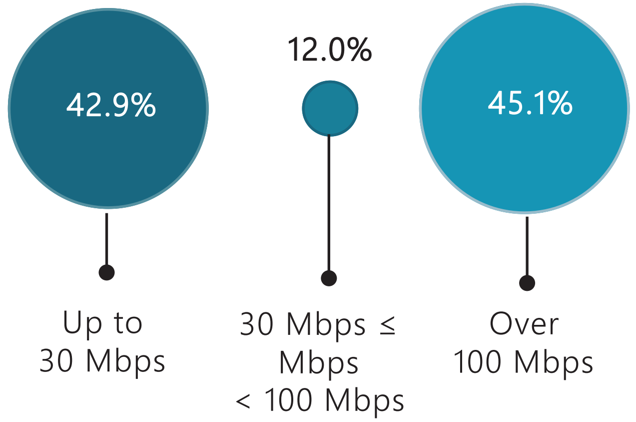
BUSINESS CUSTOMERS

Total lines: **2.816** million lines



by marketed speed classes (%)



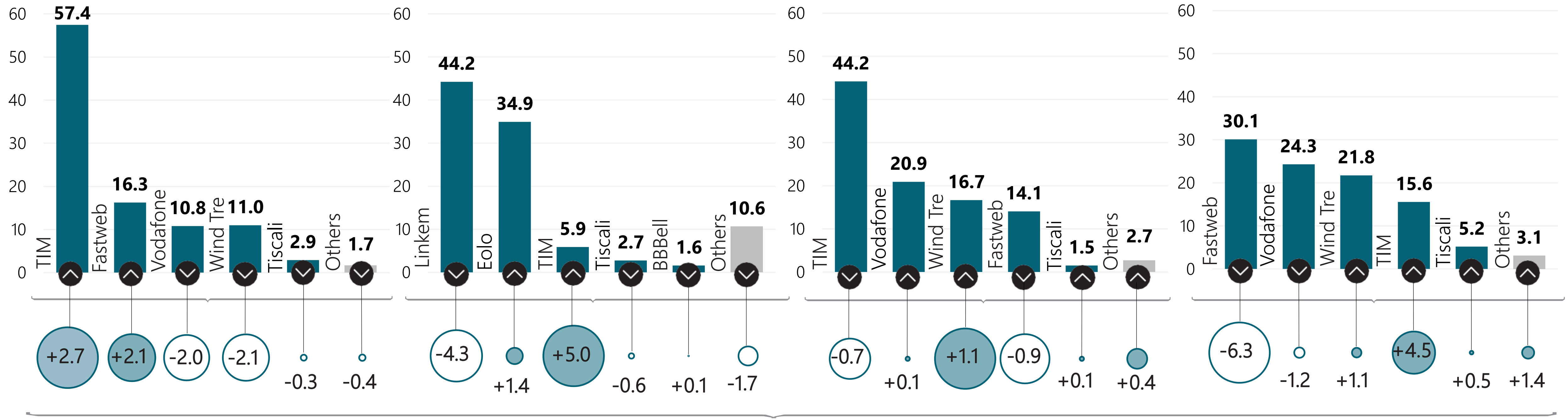


1.4: FIXED LINES: BROADBAND AND ULTRABROADBAND LINES BY TECHNOLOGY AND OPERATORS

AGCOM

DECEMBER 2020

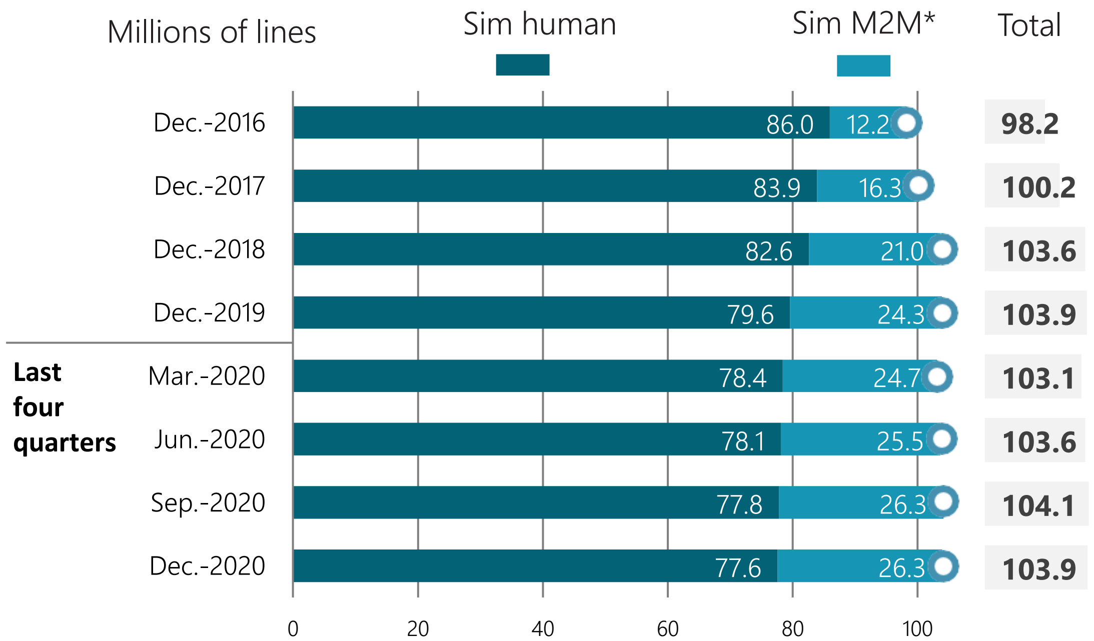
DSL	FWA	FTTC	FTTH
Total lines: **5.62** million accesses	Total lines: **1.54** million access	Total lines: **9.13** million access	Total lines: **1.82** million access
Annual change Dec. 2019 – Dec. 2020	Annual change Dec. 2019 – Dec. 2020	Annual change Dec. 2019 – Dec. 2020	Annual change Dec. 2019 – Dec. 2020
-21.8%	**+16.3%**	**+16.4%**	**+48.6%**



Differences vs. December 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..

1.5: 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

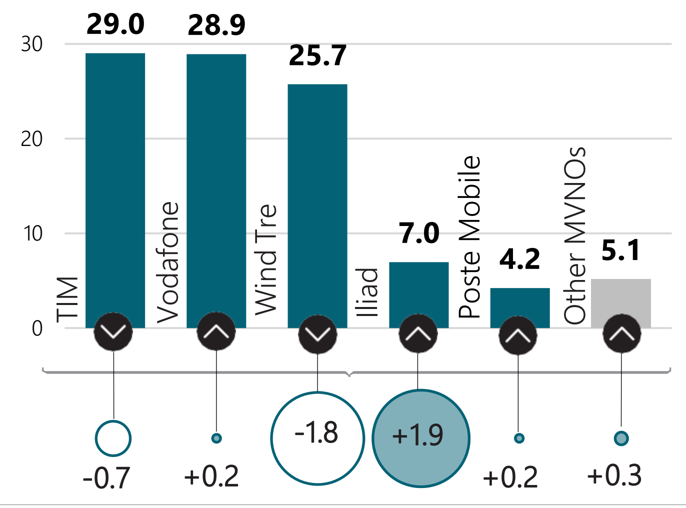
	Quarterly change (Sept. 2020 – Dec. 2020) (no of sim in thousand)		Quarterly change (Δ %)	Annual change (Dec. 2019 – Dec. 2020) (no of sim in thousand)		Annual change (Δ %)
Total sim cards:	-182	↓	-0.2%	+75	↑	+0.1%
Sim human:	-216	↓	-0.3%	-2,016	↓	-2.5%
Sim M2M:	+34	↑	+0.1%	+2,091	↑	+8.6%

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 (%)

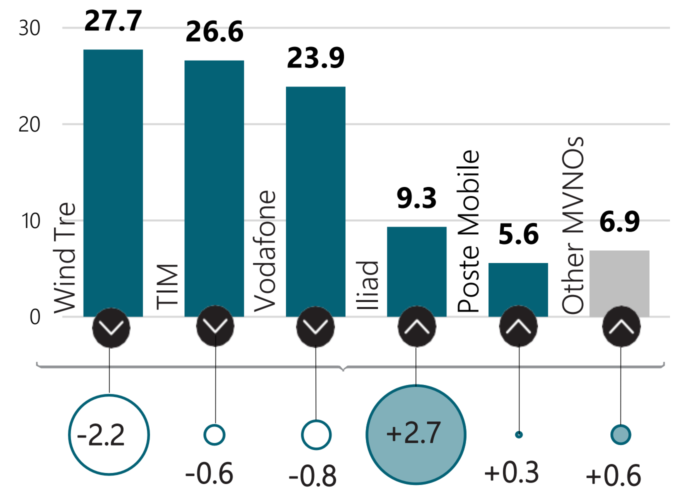
DECEMBER 2020

Sim total



Differences vs. December 2019 (percentage points)

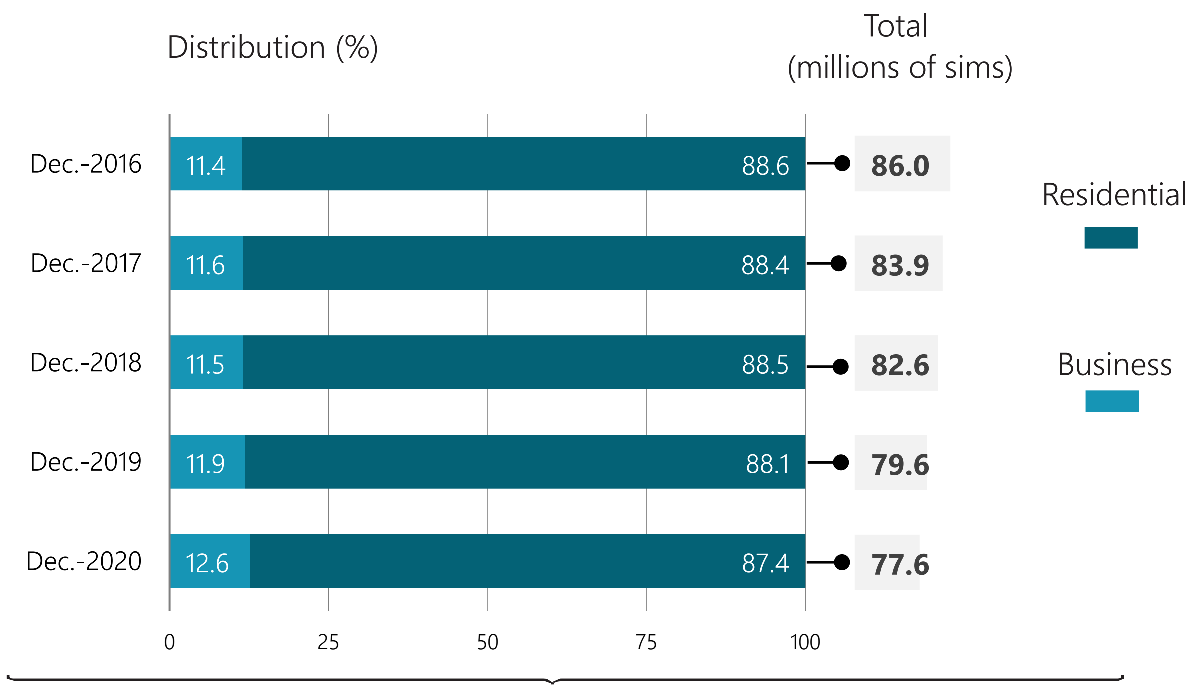
Sim human*



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

Differences vs. December 2019 (percentage points)

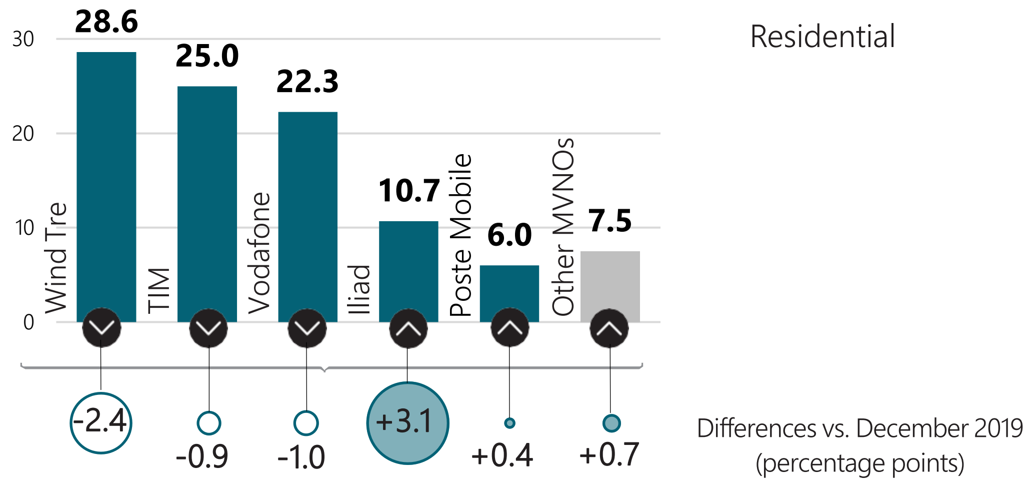
1.6: MOBILE LINES: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)

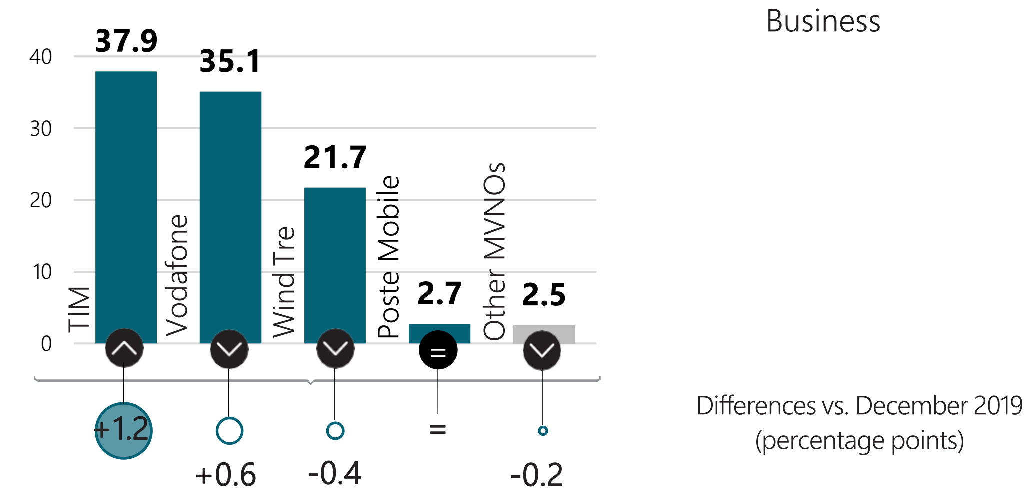


	Annual change (Dec. 2019 – Dec. 2020) (no of sim in thousand)	Annual change (Δ %)	4-Year change (Dec. 2016 – Dec. 2020) (no of sim in thousand)	4-Year change (Δ %)
Total human sim cards:	-2,016	-2.5%	-8,375	-9.7%
Residential sim card:	-2,389	-3.4%	-8,416	-11.0%
Business sim cards:	+373	+4.0%	+41	+0.4%

MARKET SHARES (%)

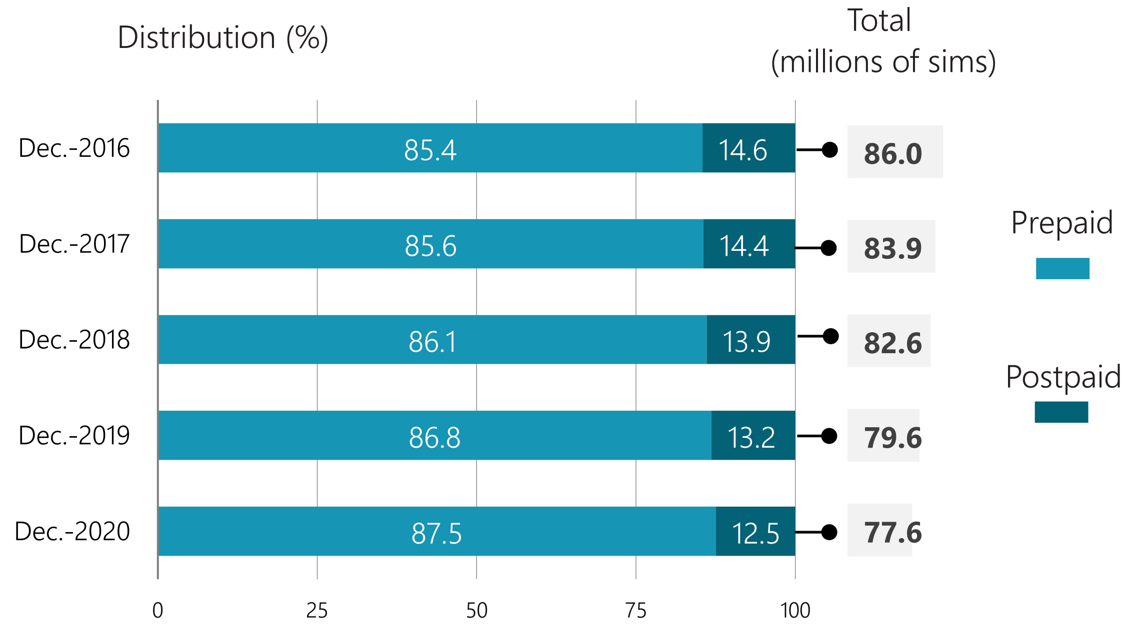
DECEMBER 2020





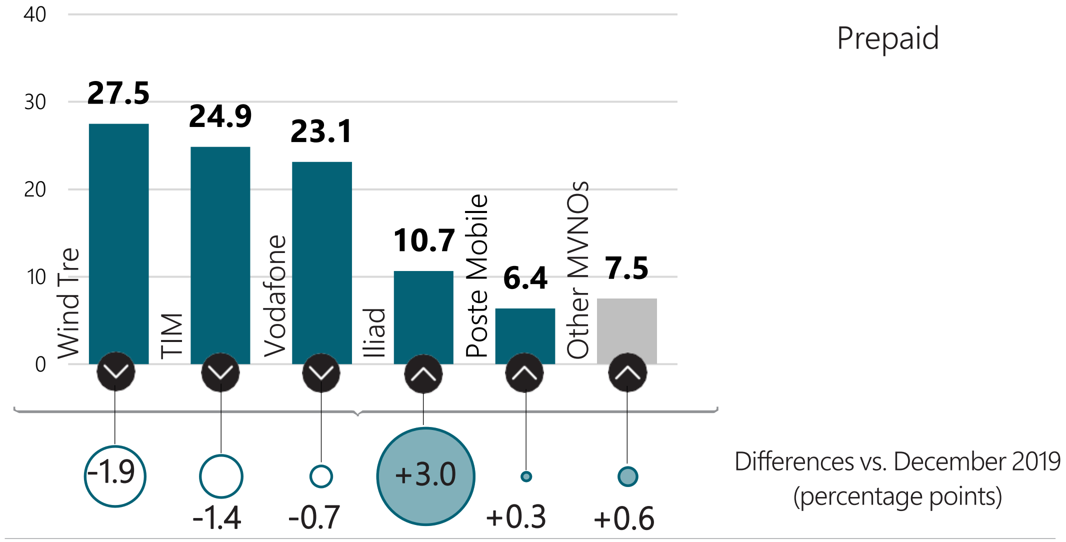
SES SERVIZIO ECONOMICO STATISTICO

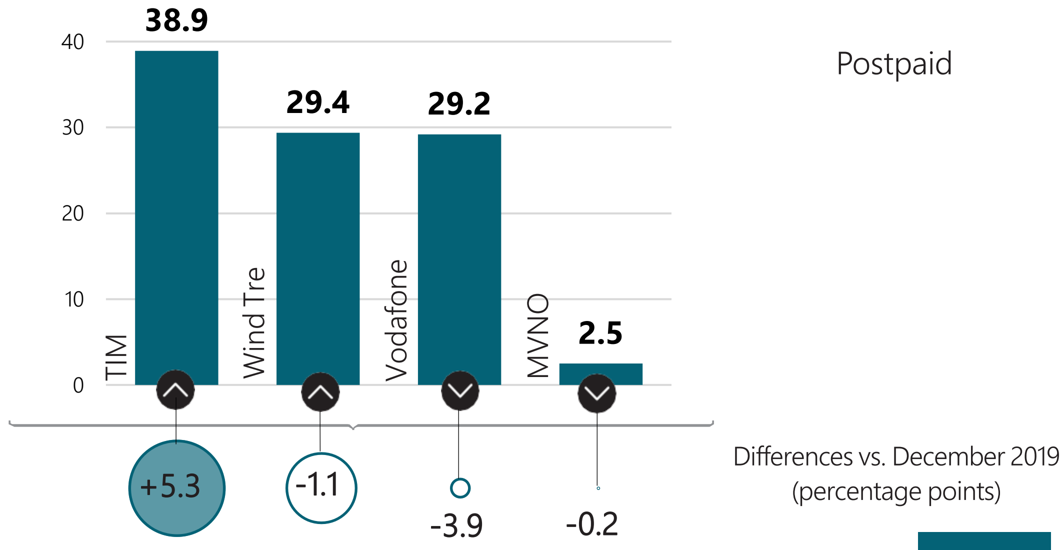
1.7: MOBILE LINES: SUBSCRIBERS BY TYPE OF CONTRACT



	Annual change (Dec. 2019 – Dec. 2020) (no of sim in thousand)	Annual change (Δ %)	4-Year change (Dec. 2016 – Dec. 2020) (no of sim in thousand)	4-Year change (Δ %)
Total human sim cards:	-2,016	-2.5%	-8,375	-9.7%
Prepaid sim cards:	-1,205	-1.7%	-5,516	-7.5%
Postpaid sim cards:	-811	-7.7%	-2,858	-22,8%

MARKET SHARES (%)
DECEMBER 2020





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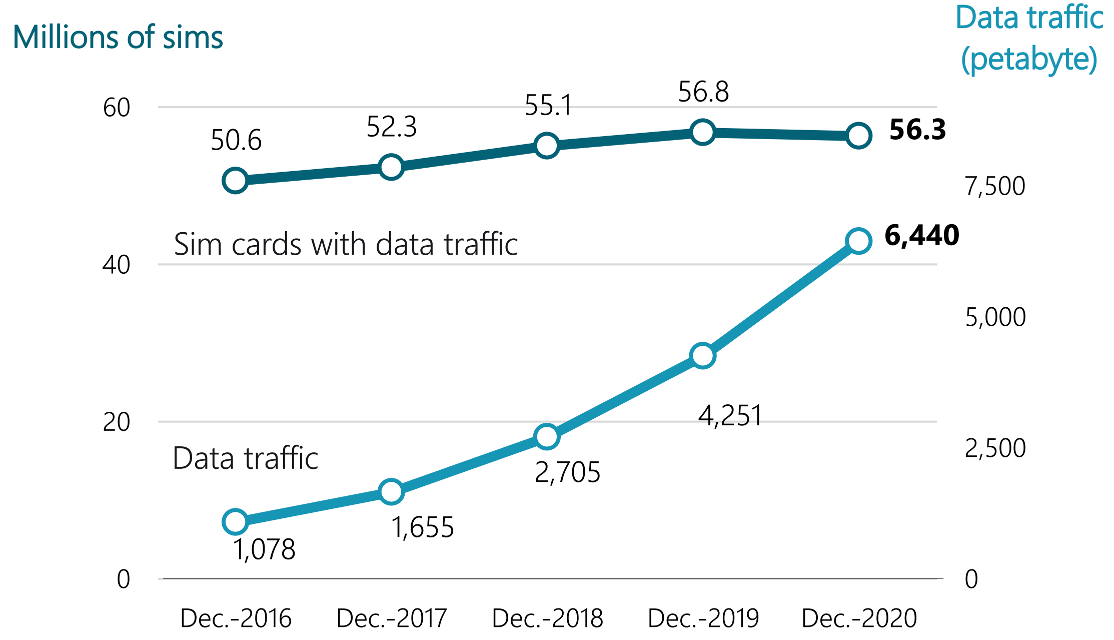
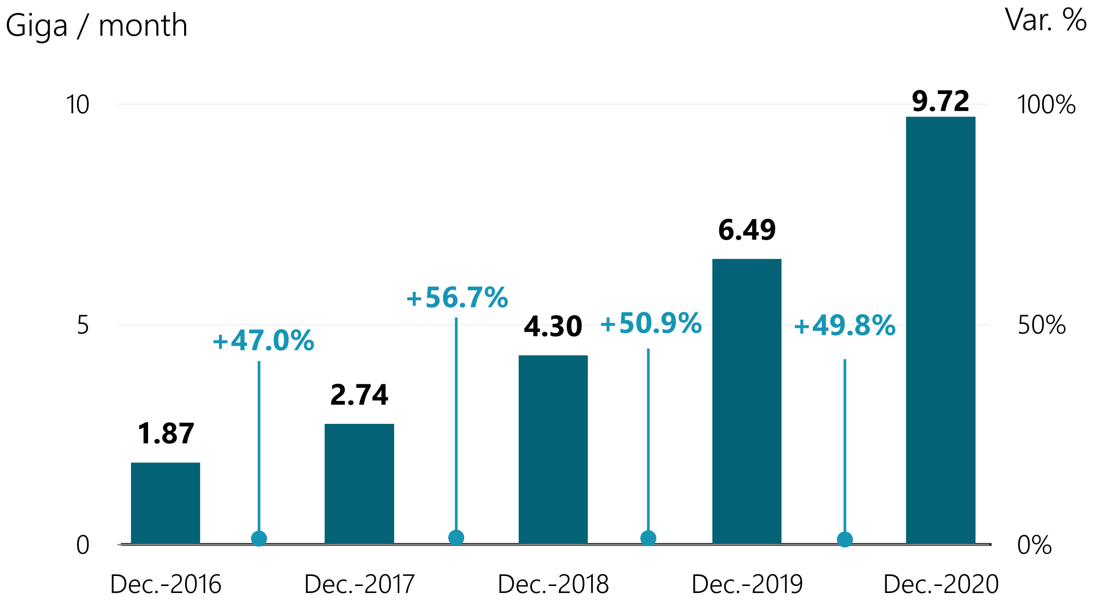
DATA TRAFFIC SINCE THE BEGINNING OF THE YEAR



	Annual change (Dec. 2019 – Dec. 2020)		4-Year change (Dec. 2016 – Dec. 2020)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
SIM cards with data traffic:	-433	-0.8%	+5,714	+11.3%
	(petabyte)	(Δ %)	(petabyte)	(Δ %)
Data traffic:	+2,188	+51.5%	+5,362	+497,5%

AVERAGE MONTHLY CONSUMPTION

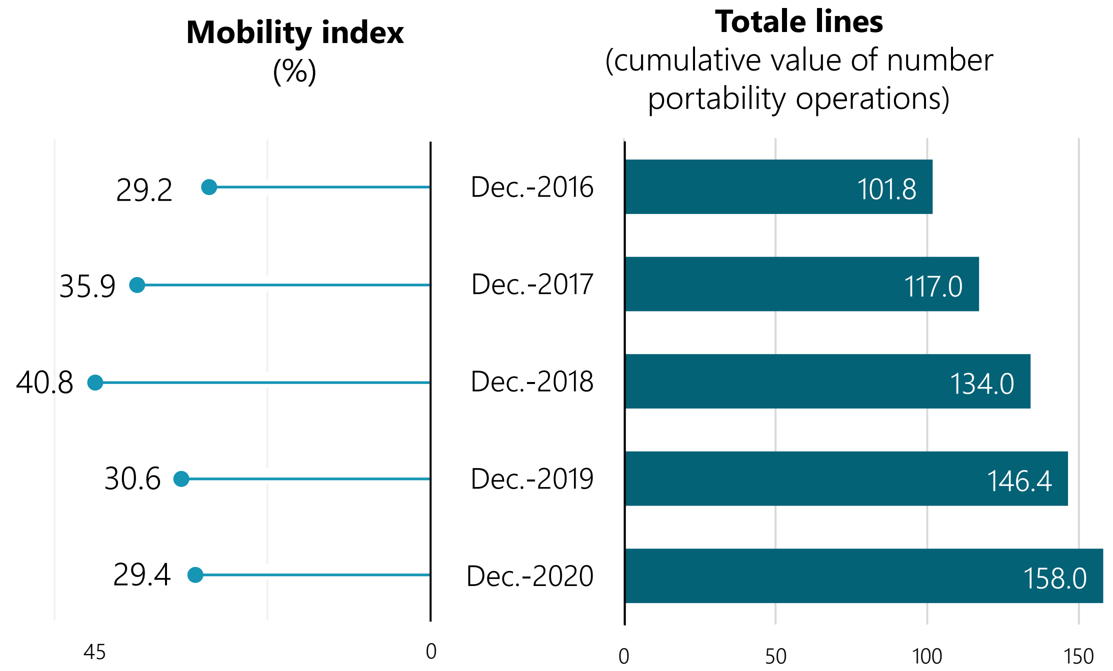


Dec. 2016	+420.5% (Δ %)	Dec. 2020
1.87 GB/month	→	**9.72** GB/month

At the end of December 2020, the number of sim cards with data traffic has reached **72.6%** 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

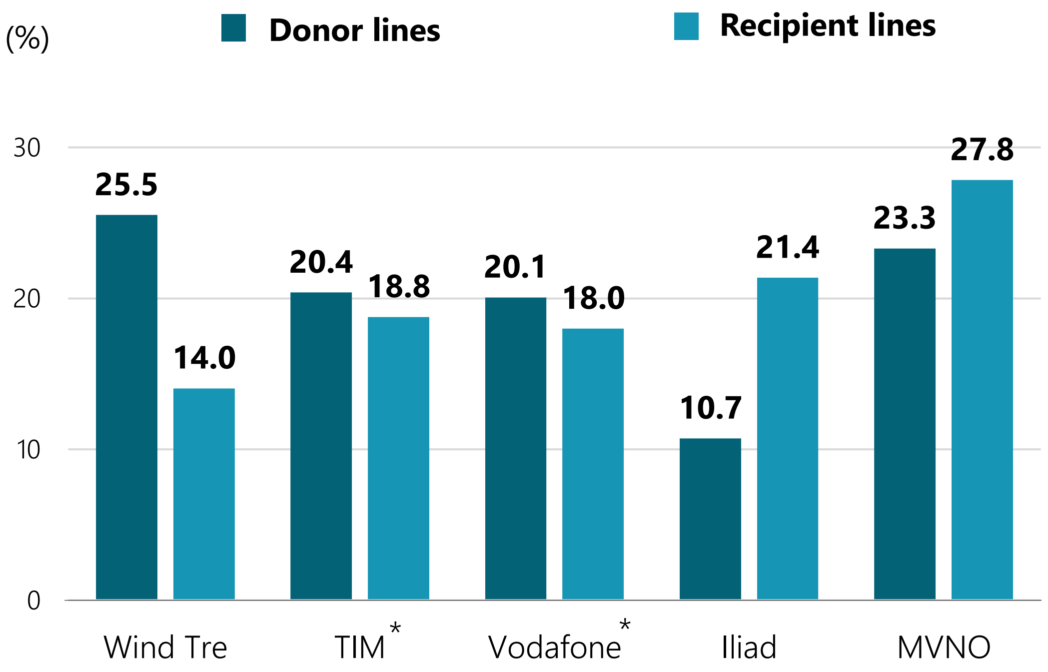
In one year (December 2019 – December 2020), there have been **11.6** million of Mobile Number Portability (MNP) operations



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)

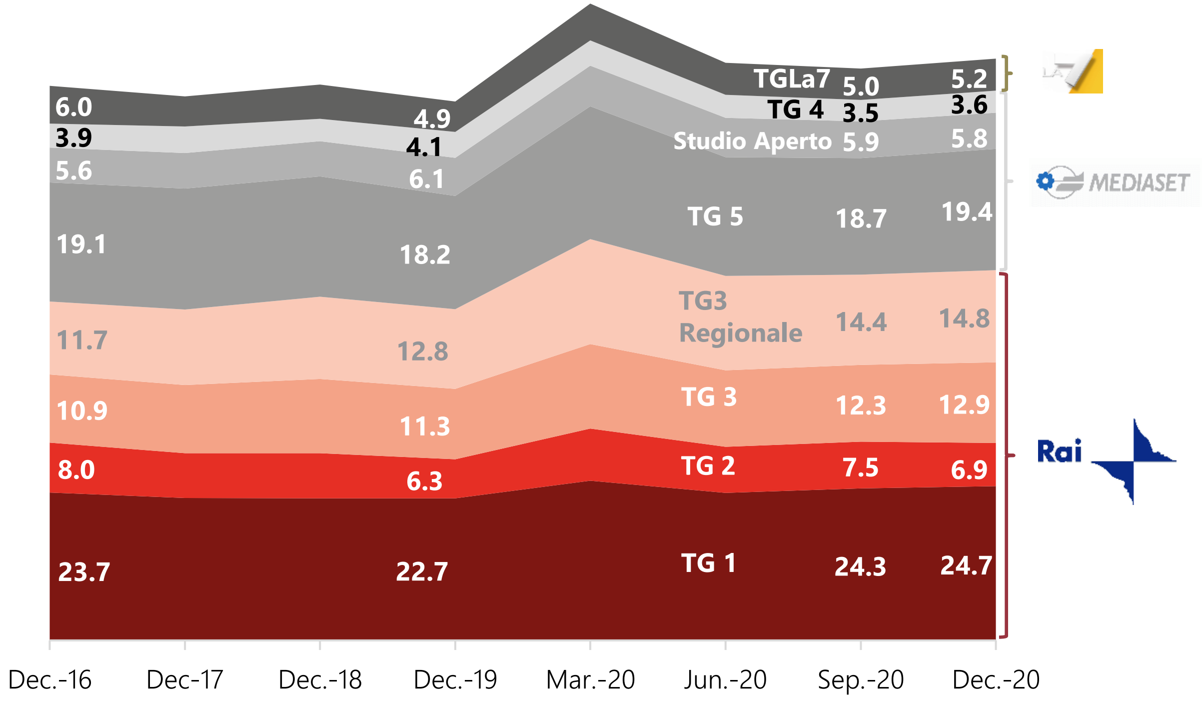
DECEMBER 2020



(*) 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 (December 2016 – December 2020)

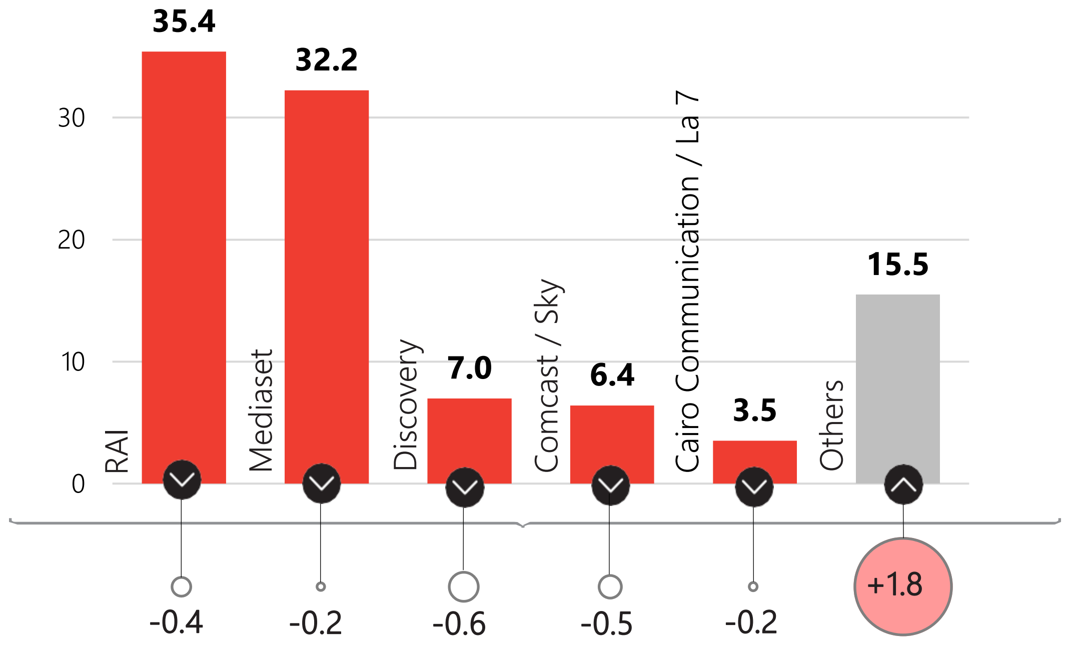


Δ percentage points (December 2019 – December 2020)

Rai		Mediaset		La 7	
Tg 1	+2.0 p.p. ↑	Tg 5	+1.2 p.p. ↑	Tg La 7	+0.3 p.p. ↑
Tg 2	+0.7 p.p. ↑	Studio Aperto	-0.3 p.p. ↓		
Tg 3	+1.6 p.p. ↑	Tg 4	-0.6 p.p. ↓		
Tg 3 - Regionale	+2.0 p.p. ↑				

MARKET SHARES (%)

DECEMBER 2020



Differences vs. December 2019 (percentage points)

Average daily television viewership

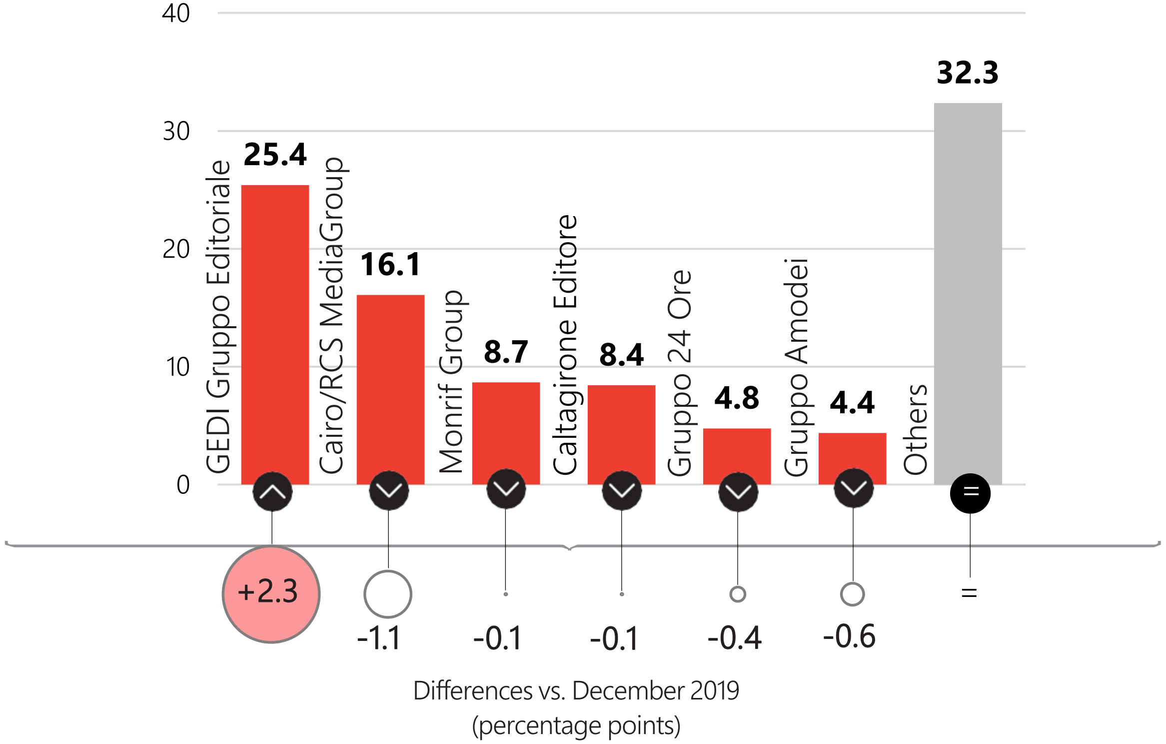
Newscasts	Broadcasters
Tg 1: **6.2 M** viewers	Rai: **4.2 M** viewers
Tg 5: **4.9 M** viewers	Mediaset: **3.9 M** viewers

M = million

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

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

DECEMBER 2020



Total copies sold in December 2020

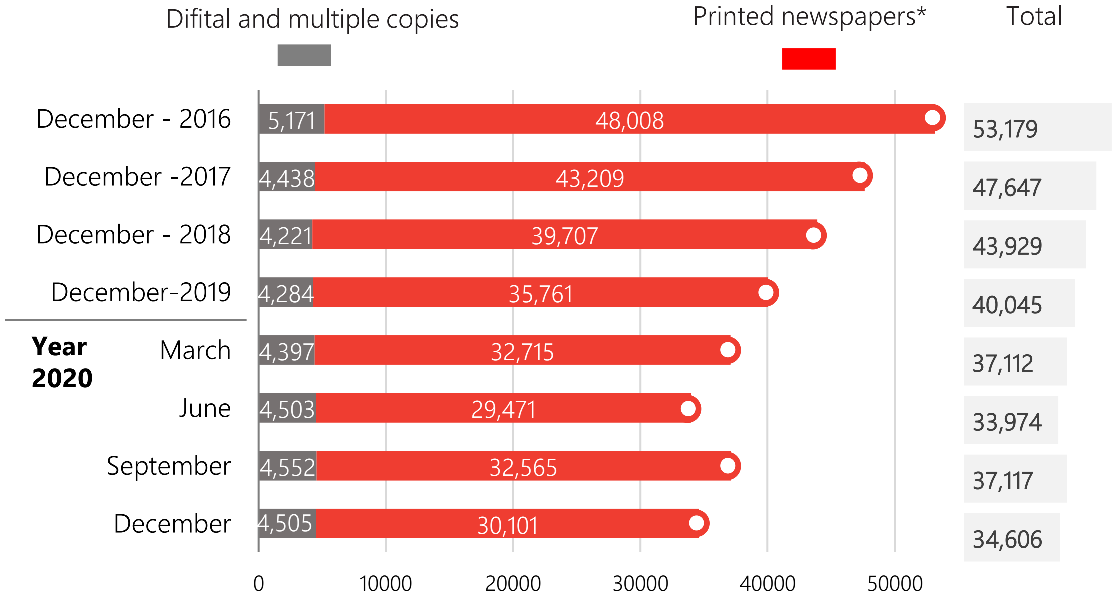
51,147,917

Annual change:
(December 2019 – December 2020)

- 14%

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

IN THOUSANDS – DECEMBER 2020



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

	Annual change (Dec. 2019 – Dec. 2020)	4-Year change (Dec. 2016 – Dec. 2020)
Printed newspapers:	-16%	-37%
Digital and multiple copies: (represent 13 % of total sales)	+5%	-13%

(*) **Note**: During the last quarter of 2020, GEDI completed the sale of the business unit of the magazines Il Tirreno, La Gazzetta di Modena, La Gazzetta di Reggio, La Nuova Ferrara to the company SAE Srl. The data shown refer to the ownership configuration of the subjects prior to this operation.

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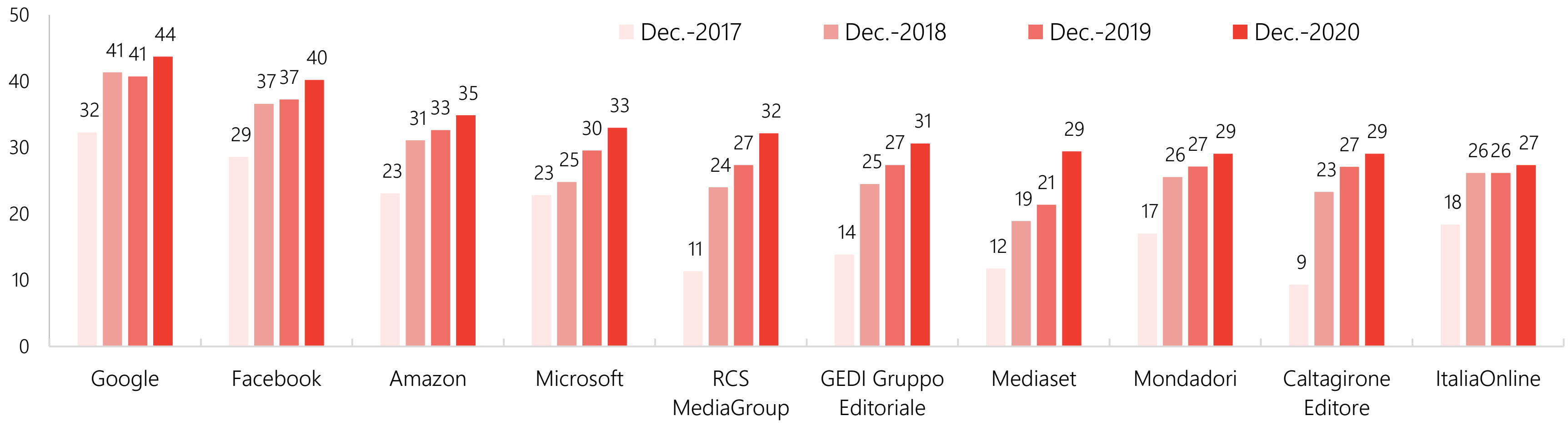
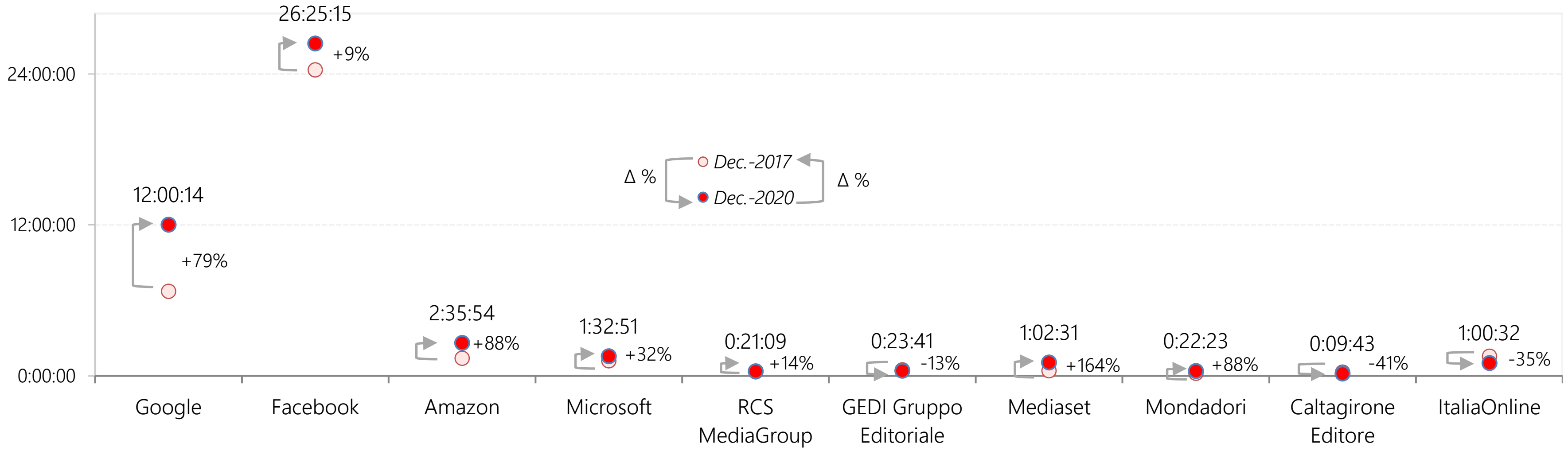
AUDIENCE ON AN AVERAGE DAY (%) (DECEMBER 2017 – DECEMBER 2020)
IN MILLIONS



In December 2020, **45** million unique users connected to the internet

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



In December 2020, a total amount of **66** hours of surfing, on average, per person per month

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

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

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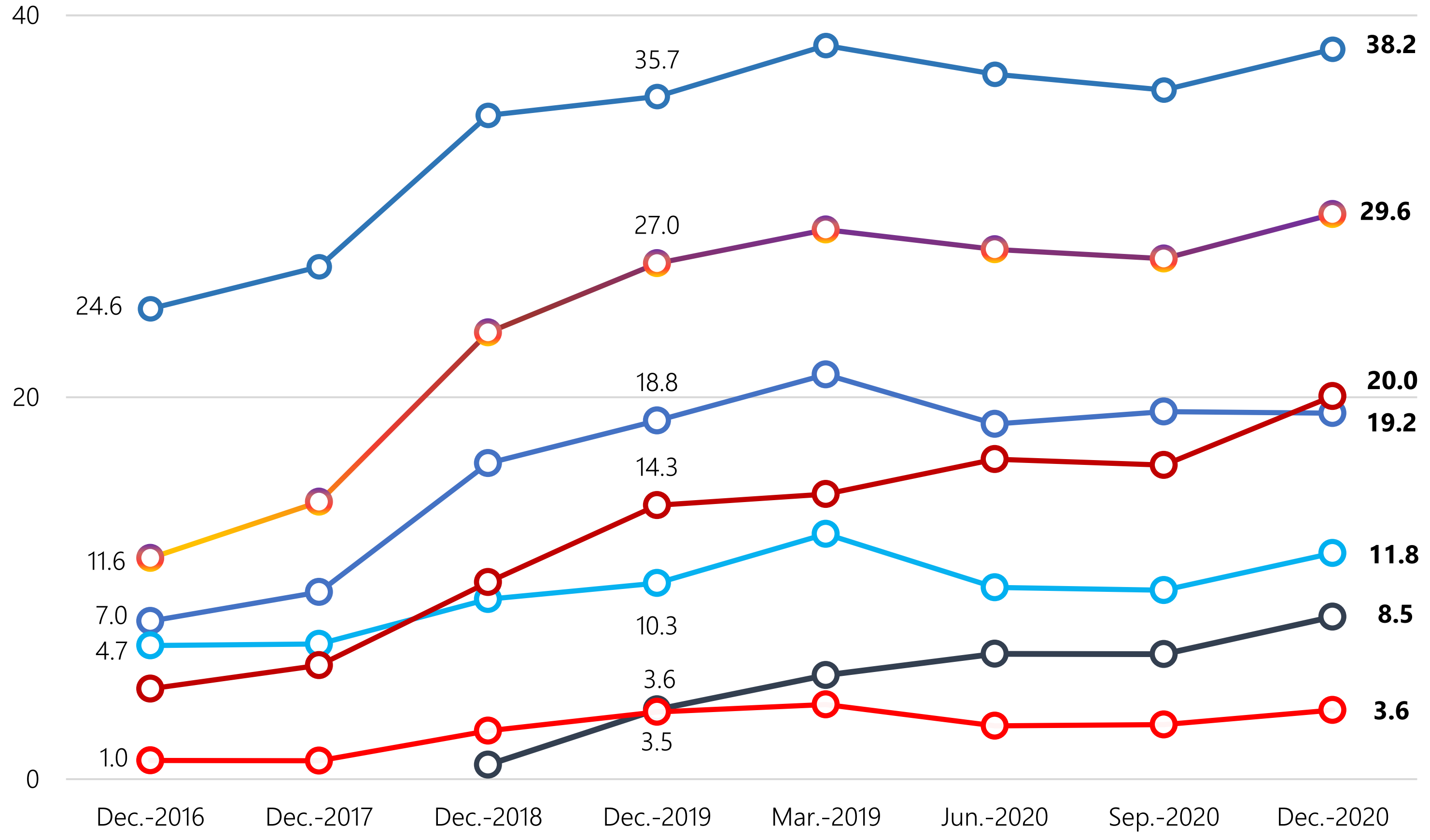
MAIN SOCIAL NETWORKS USERS

DECEMBER 2017 – DECEMBER 2020
IN MILLIONS



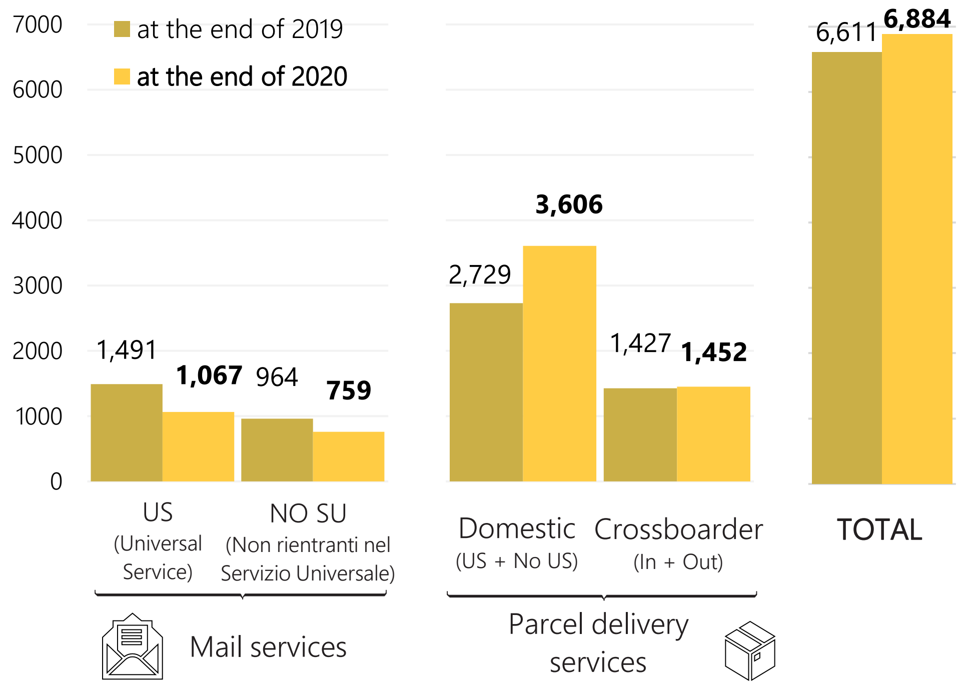
	Quarterly change (Sept. 2020 – Dec. 2020)	Annual change (Dec. 2019 – Dec. 2020)
Facebook	+5,9% ↑	+6,9% ↑
Instagram	+8,6% ↑	+9,5% ↑
Pinterest	+21.9% ↑	+39.8% ↑
Linkedin	-0.4% ↓	+2.0% ↑
Twitter	+19.6% ↑	+15.4% ↑
TikTok	+30.0% ↑	+133% ↑
Reddit	+26.7% ↑	+3,0% ↑

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

3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



Annual change
(Dec. 2019 – Dec. 2020)

-25.6% (Mail services)

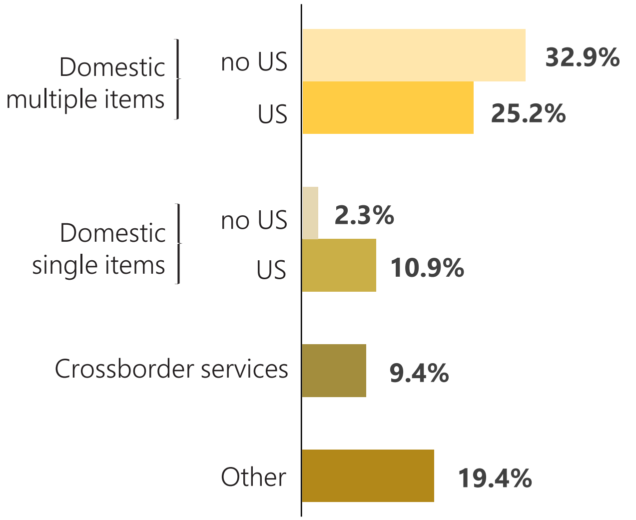
+21.7% (Parcel delivery services)

+4.1%
Total

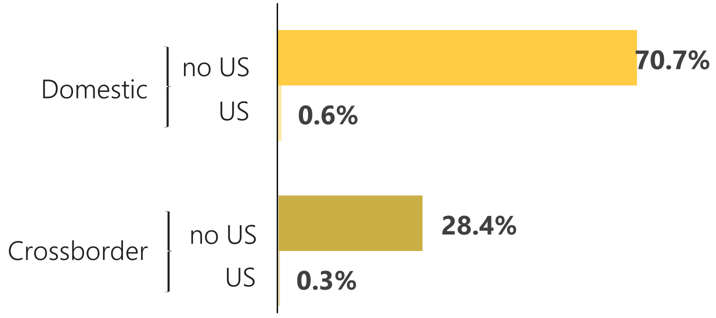
REVENUES BY SOURCE TYPE SINCE THE BEGINNING OF THE YEAR (%)

DECEMBER 2020

Mail services



Parcel delivery services



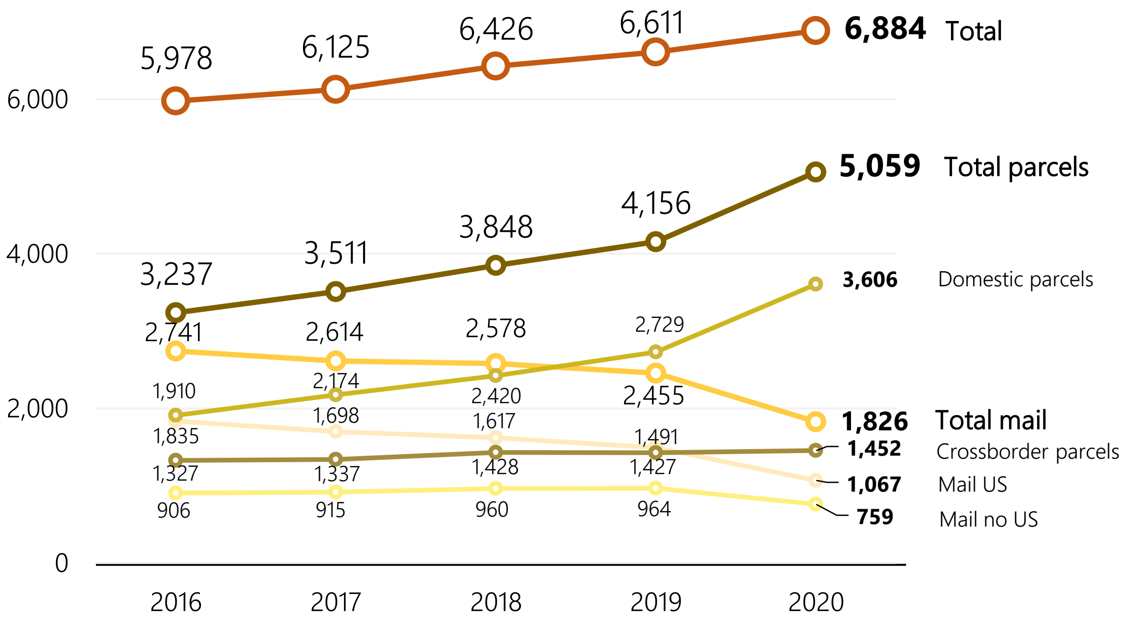
Annual change
(Dec. 2019 – Dec. 2020)

-22.2%	-25.9%	-24.9%	-34.5%	+32.1%	+1.8%
Domestic multiple items	Domestic single items	Crossborder services	Other	Domestic	Crossborder

3.2: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

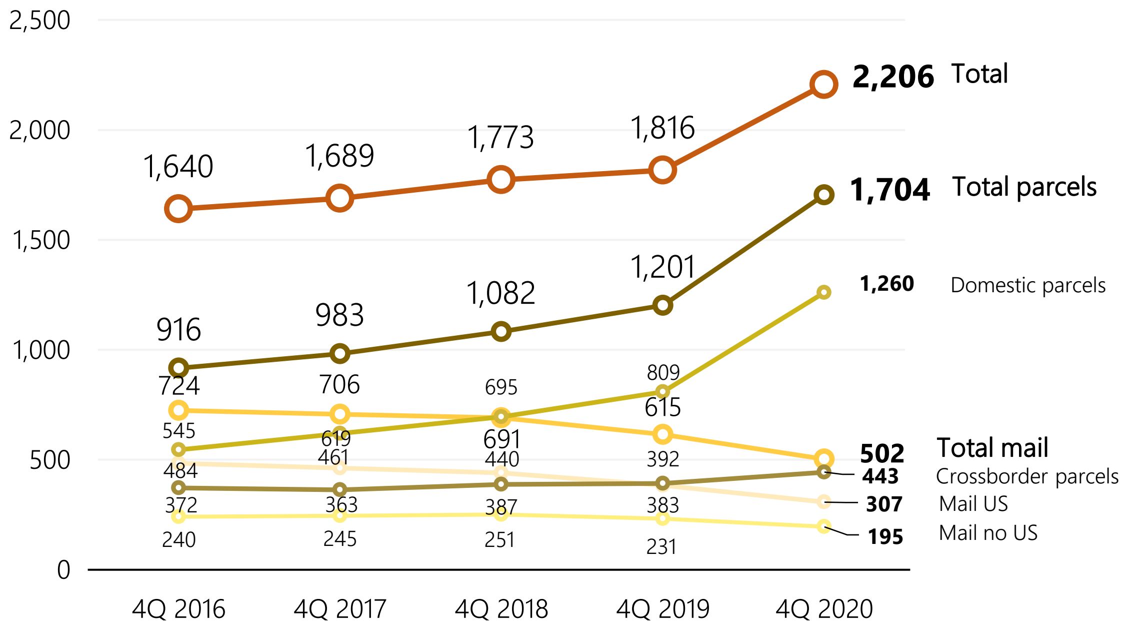
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €

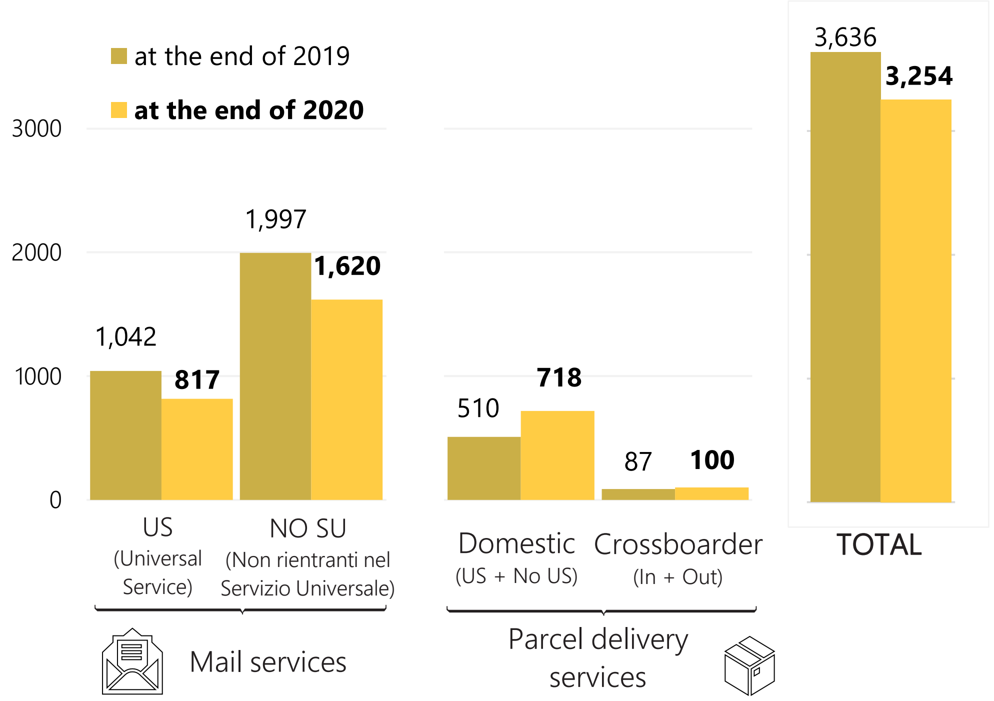


	Change (2016 – 2020)	Change (2019 – 2020)
Total:	**+15.2%**	**+4.1%**
Mail services:	**-33.4%**	**-25.6%**
- Universal Service:	-41.9%	-28.4%
- No Universal Service:	-16.2%	-21.3%
Parcel delivery services:	**+56.3%**	**+21.7%**
- Domestic:	+88.8%	+32.1%
- Crossborder:	+9.4%	+1.8%

	Change (4Q 2016 – 4Q 2020)	Change (4Q 2019 – 4Q 2020)
Total:	**+34.5%**	**+21.5%**
Mail services:	**-30.6%**	**-18.3%**
- Universal Service:	-36.5%	-19.8%
- No Universal Service:	-18.9%	-15.8%
Parcel delivery services:	**+86.0%**	**+41.8%**
- Domestic:	+131.5%	+55.8%
- Crossborder:	+19.3%	+13.0%

3.3: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR
MILLIONS OF UNITS



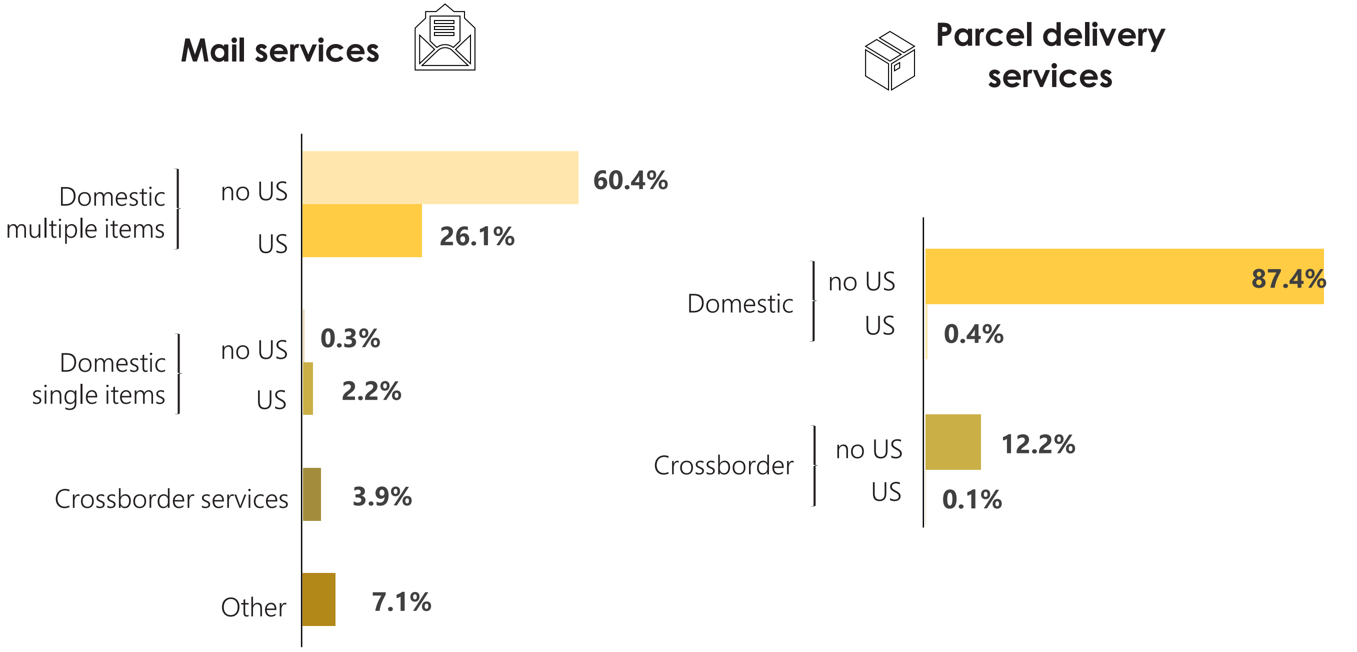
Annual change
(Dec. 2019 – Dec. 2020)

-19.8%

+36.9%

-10.5%
Total

VOLUMES BY SOURCE TYPE (%)
DECEMBER 2020



Annual change
(Dec. 2019 – Dec. 2020)

-17.6%
Domestic multiple items

-30.7%
Domestic single items

-32.9%
Crossborder services

-30.9%
Other

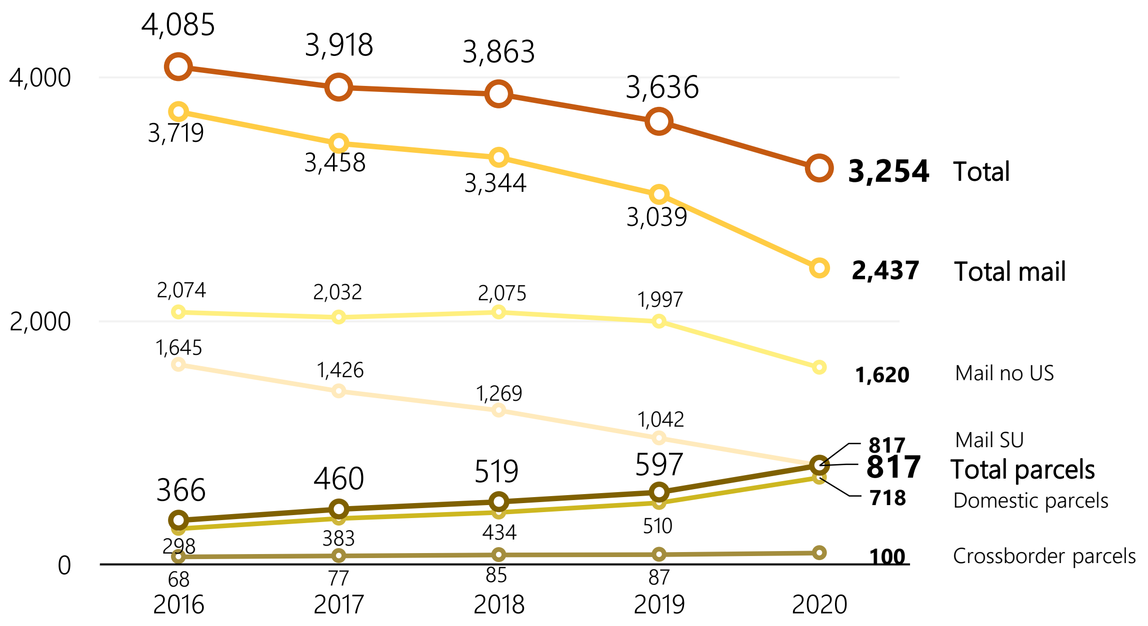
+40.6%
Domestic

+14.7%
Crossborder

3.4: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

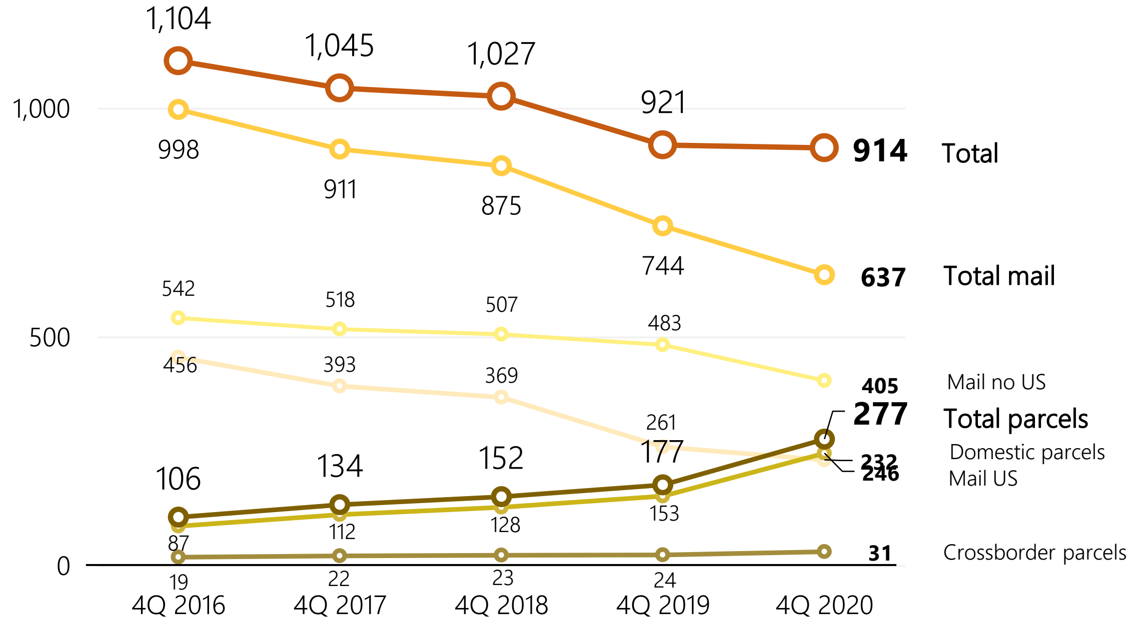
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

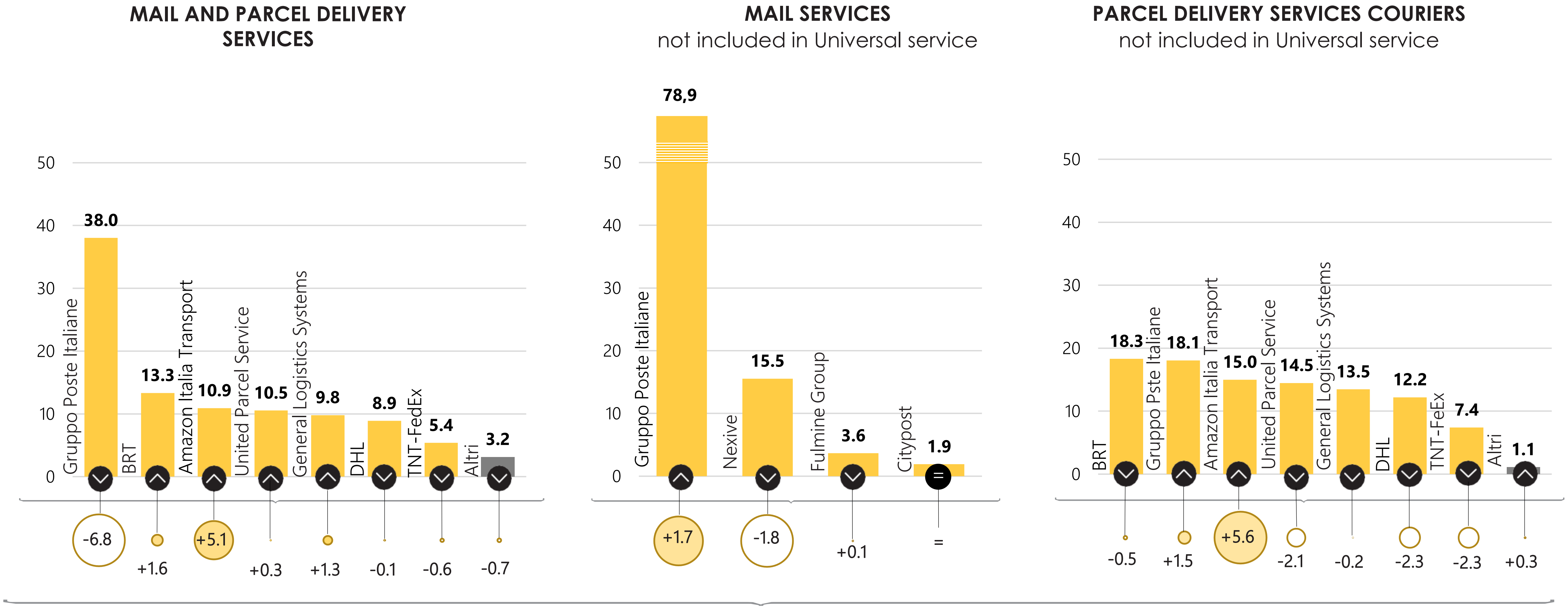
MILLIONS OF UNITS



	Change (2016 – 2020)	Change (2019 – 2020)
Total:	**-20.3%**	**-10.5%**
Mail services:	**-34.5%**	**-19.8%**
- Universal Service:	-50.3%	-21.5%
- No Universal Service:	-21.9%	-18.9%
Parcel delivery services:	**+132.2%**	**+36.9%**
- Domestic:	+140.7%	+40.6%
- Crossborder:	+46.8%	+14.7%

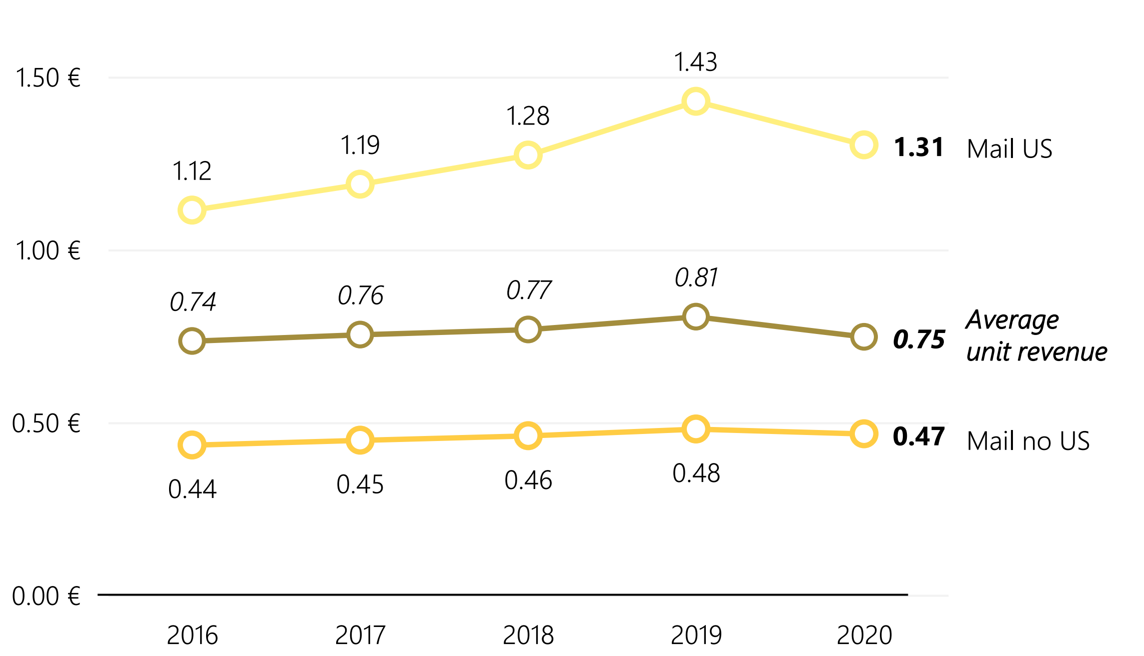
	Change (4Q 2016 – 4Q 2020)	Change (4Q 2019 – 4Q 2020)
Total:	**-17.2%**	**-0.7%**
Mail services:	**-36.2%**	**-14.4%**
- Universal Service:	-49.2%	-11.0%
- No Universal Service:	-25.3%	-16.2%
Parcel delivery services:	**+160.7%**	**+56.7%**
- Domestic:	+182.9%	+61.2%
- Crossborder:	+60.5%	+28.4%

DECEMBER 2020

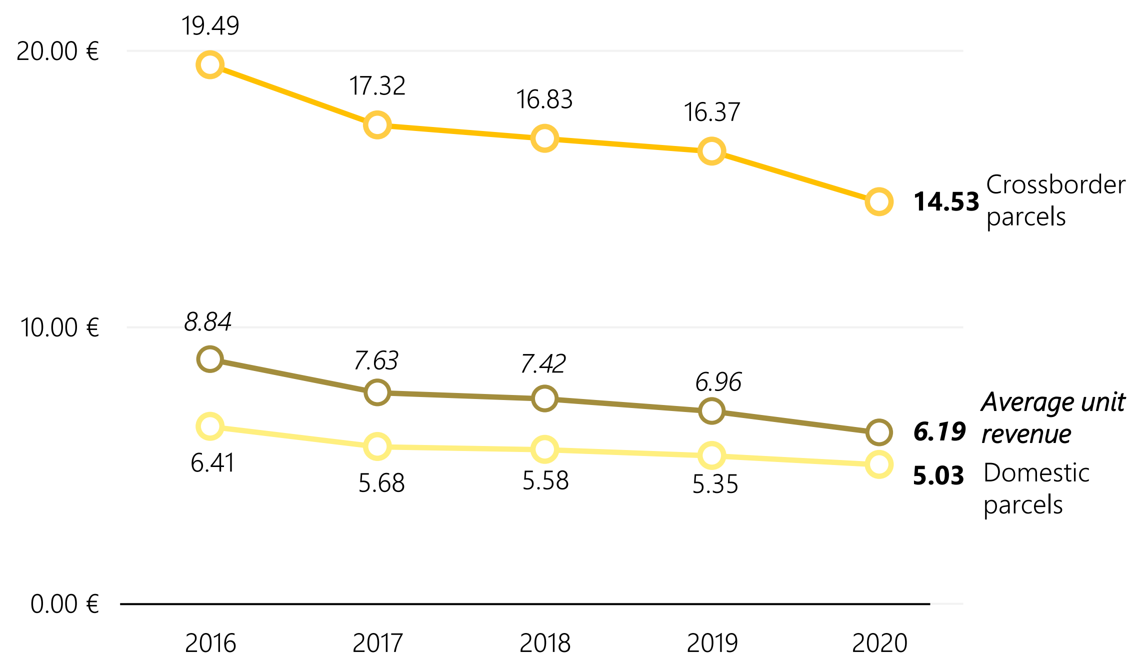


Differences vs. December 2019
(percentage points)

MAIL SERVICES



PARCELS DELIVERY SERVICES

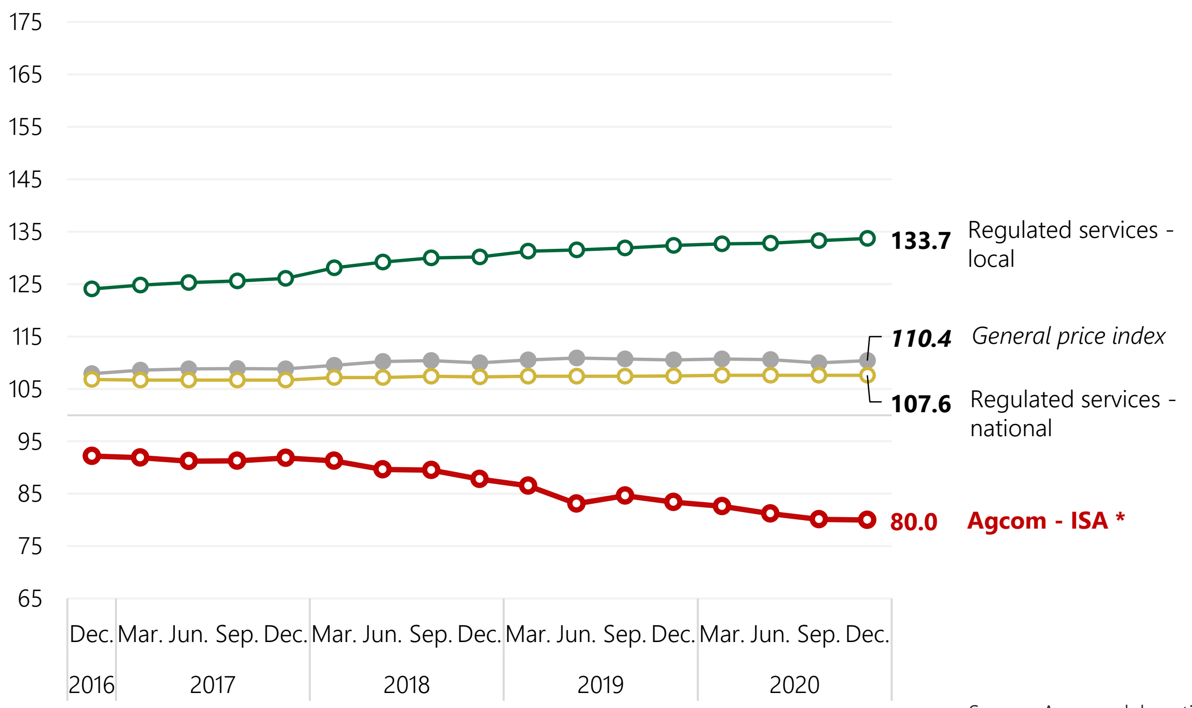


	Change (2016 – 2020)	Change (2019 – 2020)
Average unit revenue:	+1.7%	-7.3%
- Mail US:	+17.0%	-8.8%
- Mail no US:	+7.3%	-3.0%

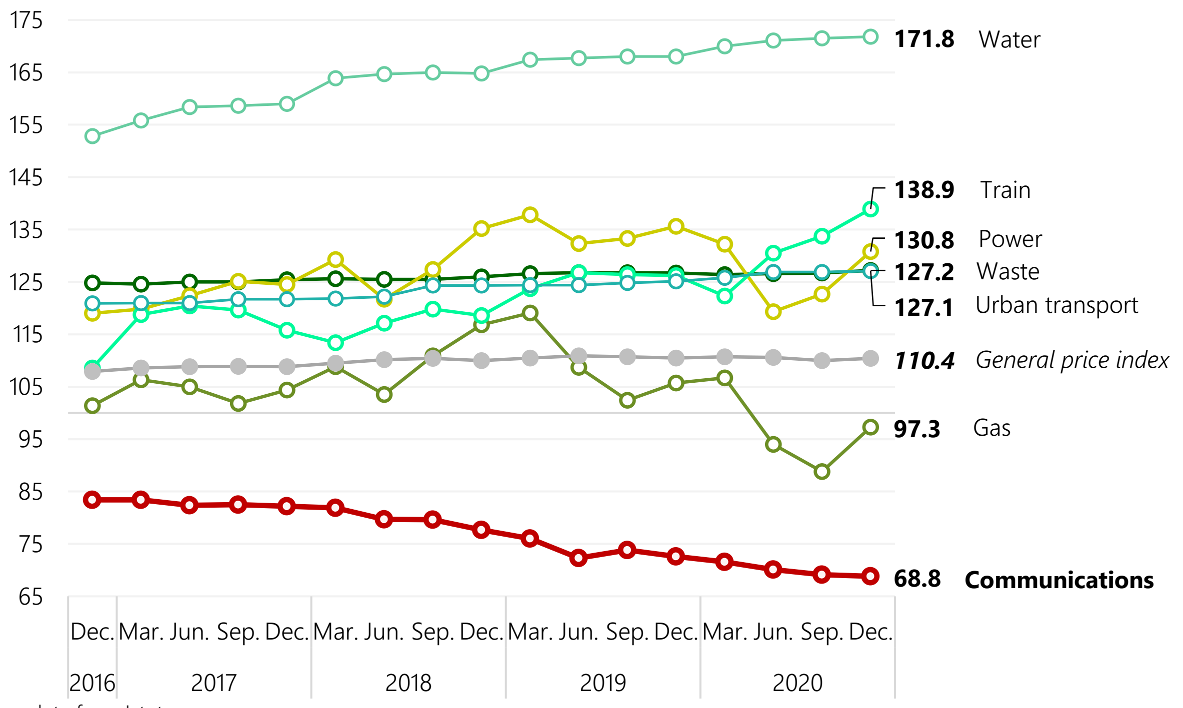
	Change (2016 –2020)	Change (2019 – 2020)
Average unit revenue:	-30.0%	-11.1%
Crossborder parcels:	-25.4%	-11.2%
- US:	*-16.3%*	*+0.0%* =
- No US:	*-25.3%*	*-11.2%*
Domestic parcels:	-21.6%	-6.0%
- US:	*-2.5%*	*-6.5%*
- No US:	*-21.7%*	*-6.0%*

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):	-13.2% ↓	-4.1% ↓
General price index:	+2.3% ↑	-0.1% ↓
Regulated services - local:	+7.7% ↑	+1.0% ↑
Regulated services - national:	+0.7% ↑	+0.1% ↑

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

	4-Year change	Annual change
Water *(04.4.1)*:	+12.4% ↑	+2.3% ↑
Waste *(04.4.2)*:	+1.9% ↑	+0.4% ↑
Power *(04.5.1)*:	+9.9% ↑	-3.5% ↓
Gas *(04.5.2)*:	-4.0% ↓	-7.9% ↓

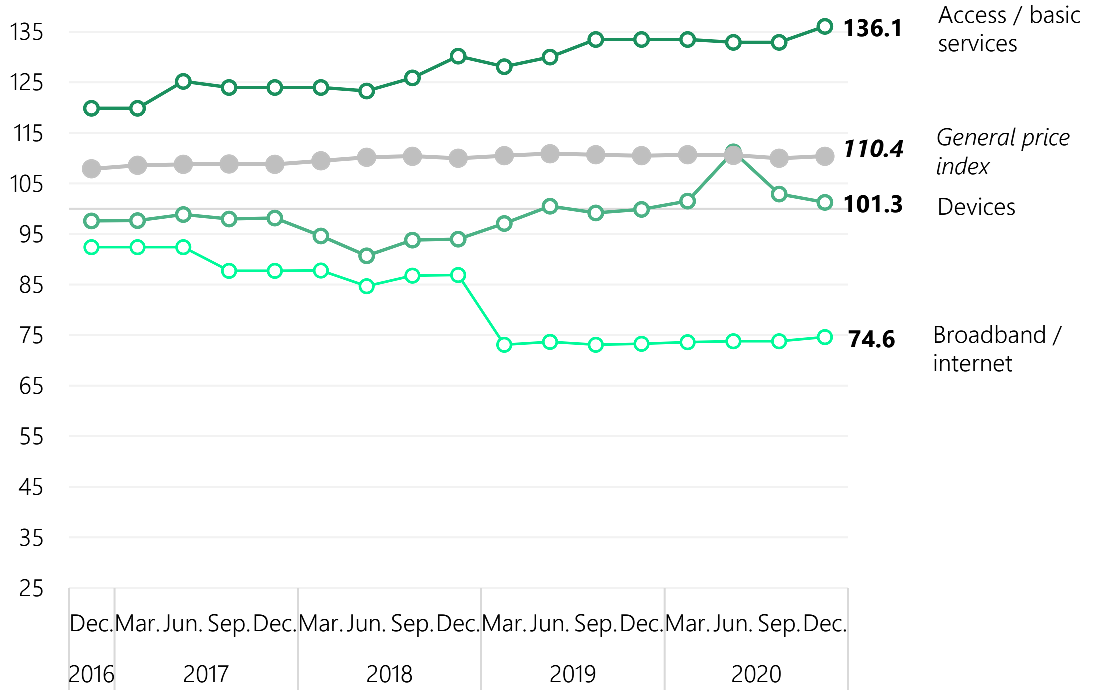
	4-Year change	Annual change
Train *(07.3.1)*:	+27.9% ↑	+10.1% ↑
Urban transport *(07.3.2.1.1)*:	+5.1% ↑	+1.6% ↑
Communications *(08)*:	-17.5% ↓	-5.2% ↓

(COICOP - Classification of Individual Consumption by Purpose)

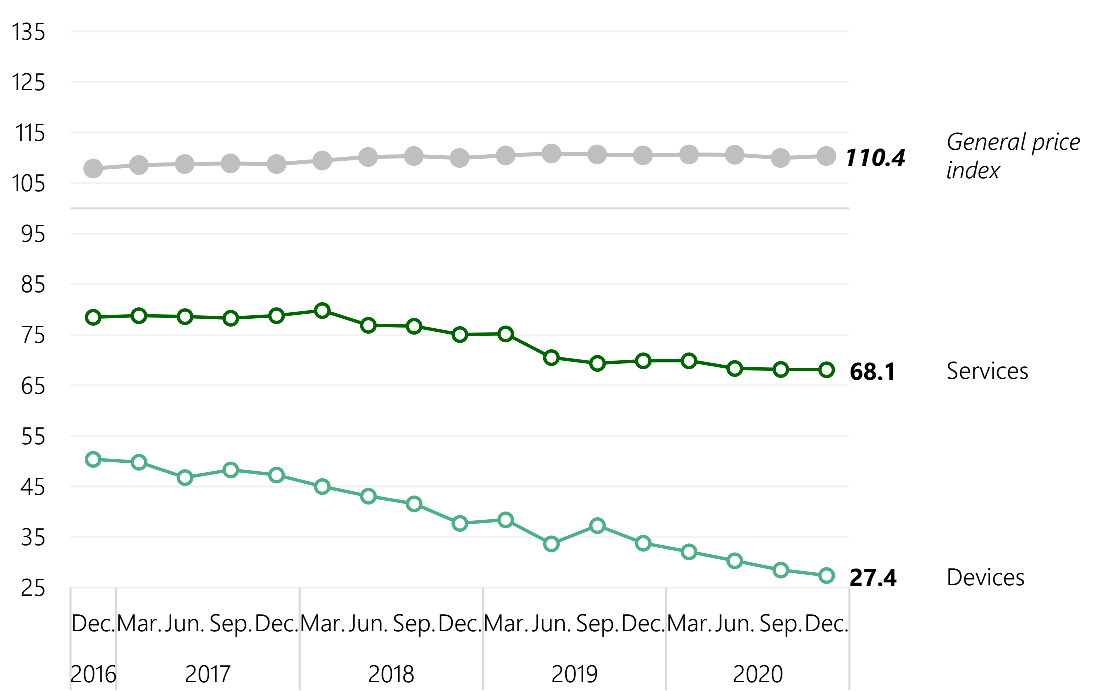
SES SERVIZIO ECONOMICO STATISTICO

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

FIXED TELEPHONY PRICE INDICES



MOBILE TELEPHONY PRICE INDICES



Source: Agcom elaboration on data from Istat

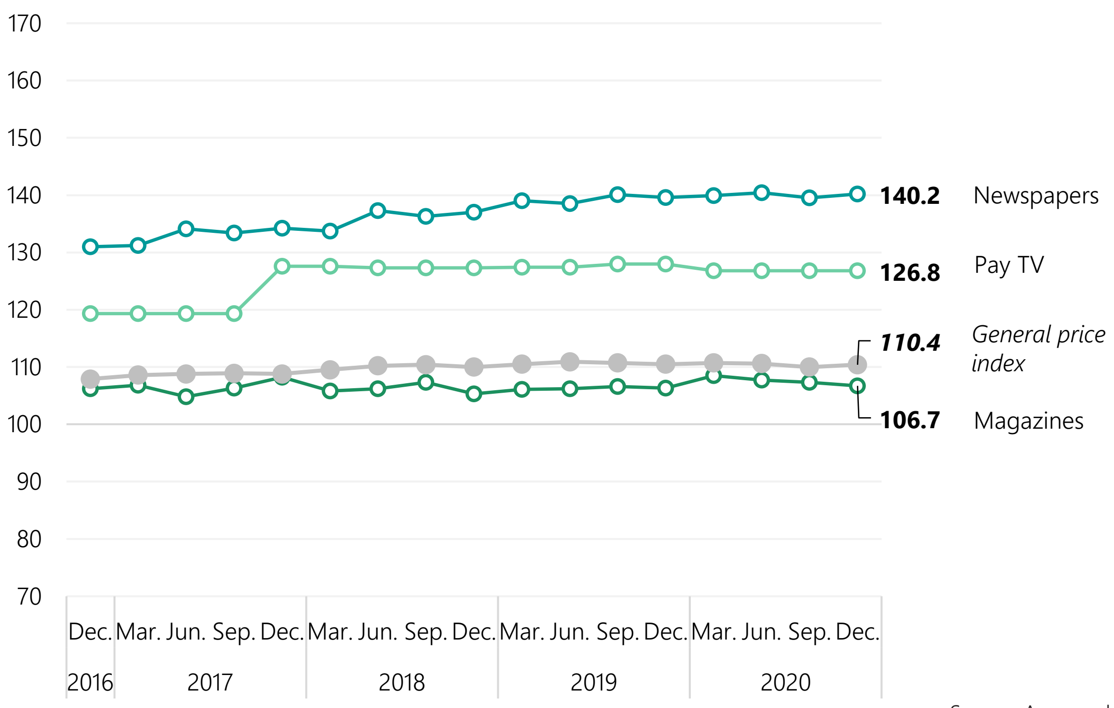
	4-Year change	Annual change
Access / basic services *(08.3.0.1)*:	**+13.5%** ↑	**+1.9%** ↑
Devices *(08.2.0.1)*:	**+3.8%** ↑	**+1.4%** ↑
Broadband / internet *(08.3.0.3.0.01)*:	**-19.3%** ↓	**+1.8%** ↑

	4-Year change	Annual change
Servces *(08.3.0.2)*:	**-13.2%** ↓	**-2.6%** ↓
Devices *(08.2.0.2)*:	**-45.6%** ↓	**-18.9%** ↓

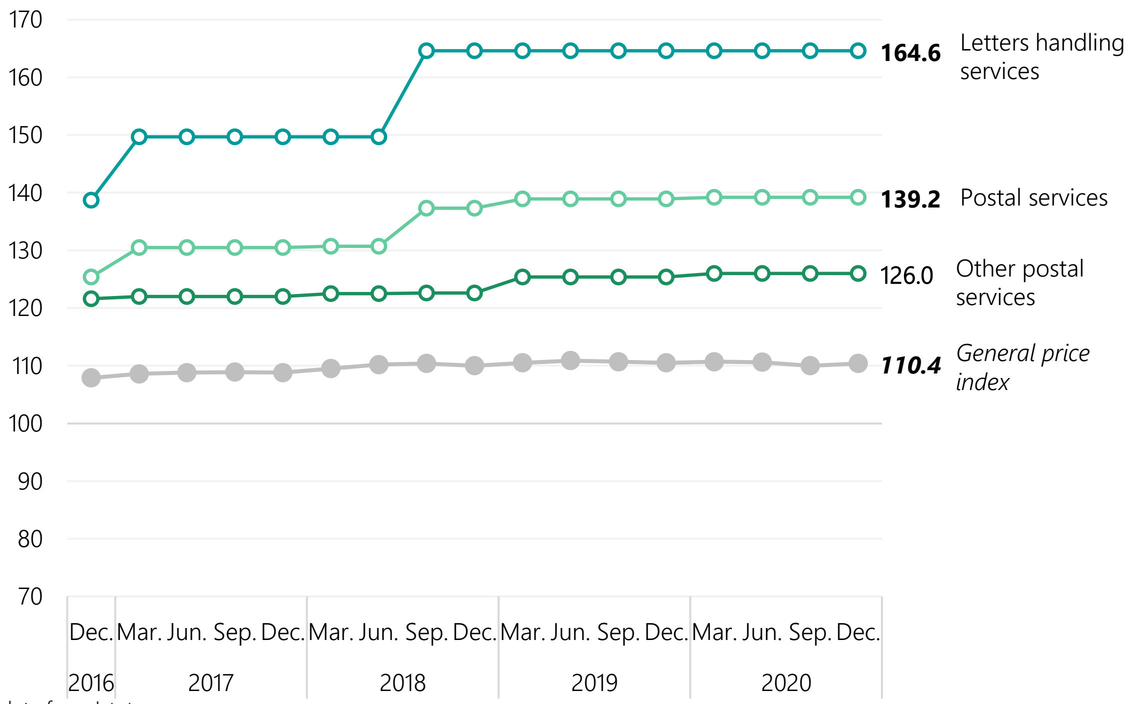
(COICOP - Classification of Individual Consumption by Purpose)

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

NEWSPAPERS, MAGAZINES, TV PRICE INDICES



POSTAL SERVICES PRICE INDEX



Source: Agcom elaboration on data from Istat

	4-Year change	Annual change
Newspapers *(09.5.2.1.0)*:	**+7.0%** ↑	**+0.4%** ↑
Pay TV *(09.4.2.3.0.02)*:	**+6.3%** ↑	**-0.9%** ↓
Magazines *(09.5.2.2.0)*:	**+0.5%** ↑	**+0.4%** ↑

	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

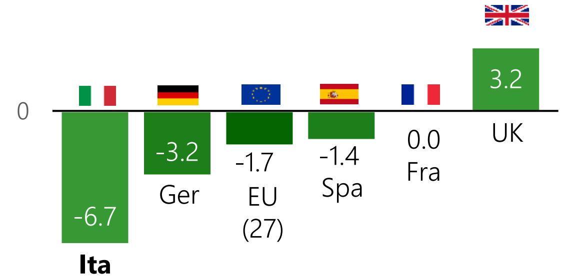
TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)

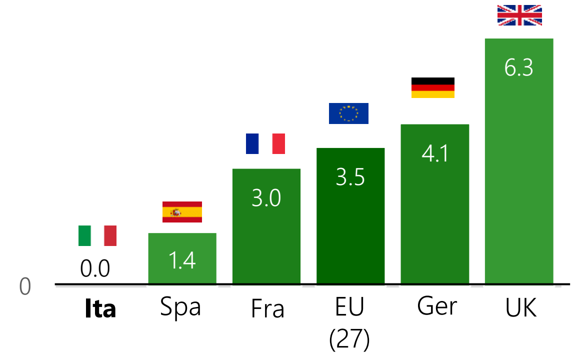
NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)

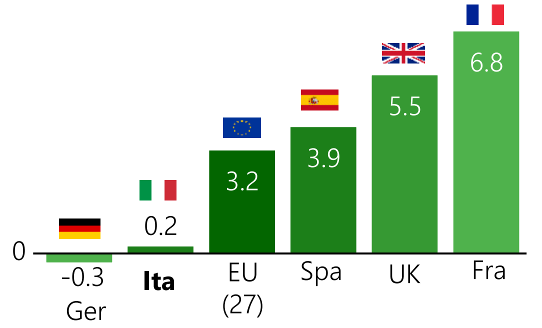
POSTAL SERVICES
(COICOP 08.1)

1-Year change %

Dec. 2019 - Dec. 2020

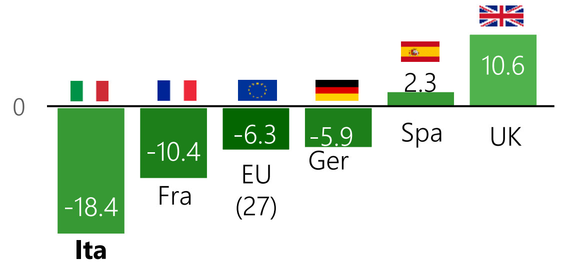


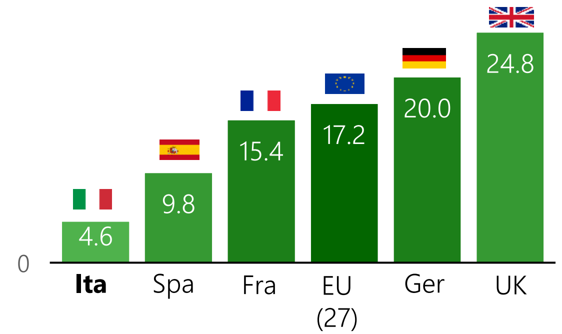


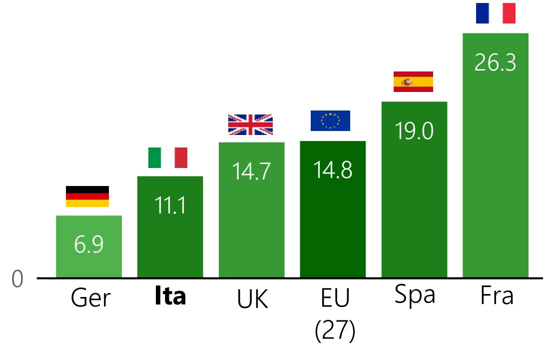


5-Year change %

Dec. 2015 - Dec. 2020

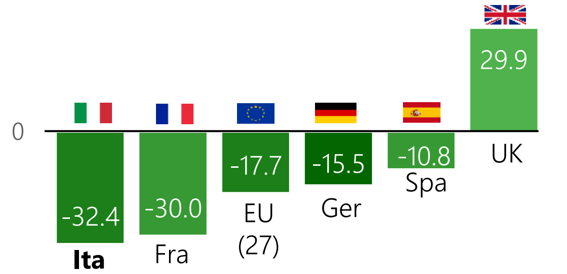


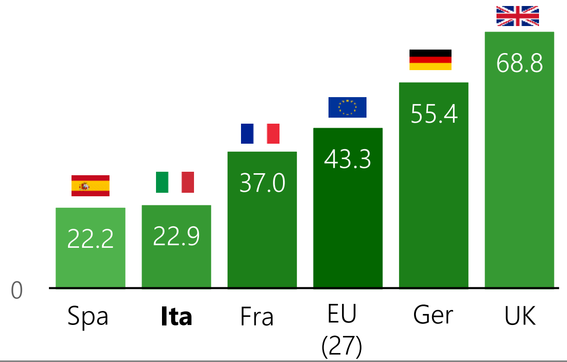


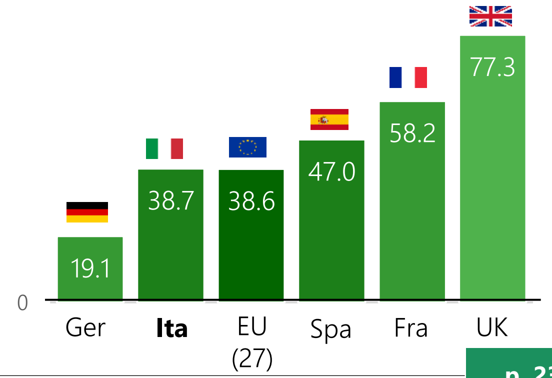


10-Year change %

Dec. 2010 - Dec. 2020







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AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 1/2021

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