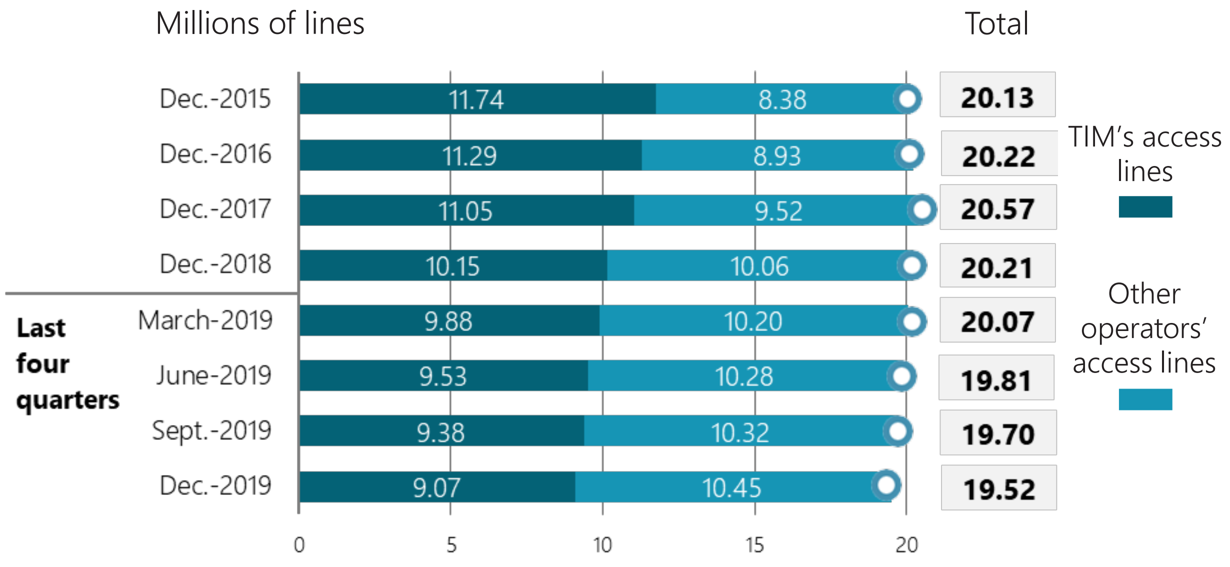
AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 1/2020

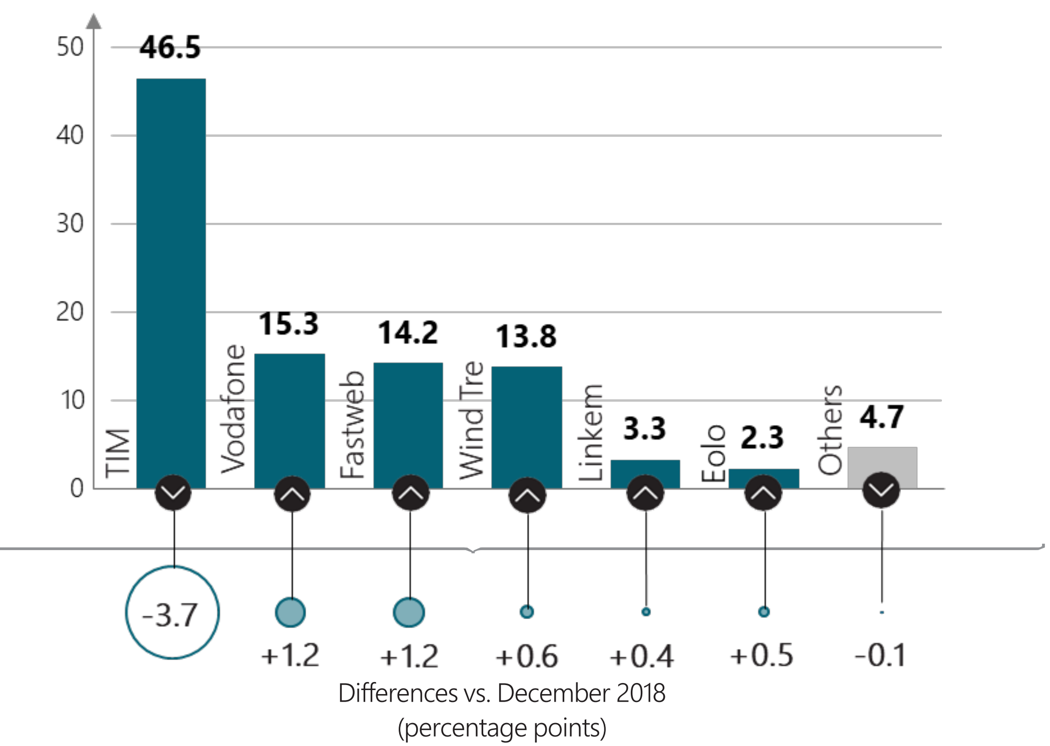
INDEX

The following figures are based on AGCOM's elaborations on firms' data and other sources (updated to December 2019). 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.



Note: TIM accesses, Full ULL, SLU, Vula, DSL Naked, WLR, Bitstream NGA, Fibra and FWA lines are included

MARKET SHARES (%)
DECEMBER 2019



Quarterly change (Sept.-2019 – Dec.-2019)	Annual change (Dec.-2018 – Dec.-2019)		
Total lines	Total lines	TIM	Other operators
-180 K accesses	**-695 K** accesses	**-1.078 M** accesses	**+383 K** accesses

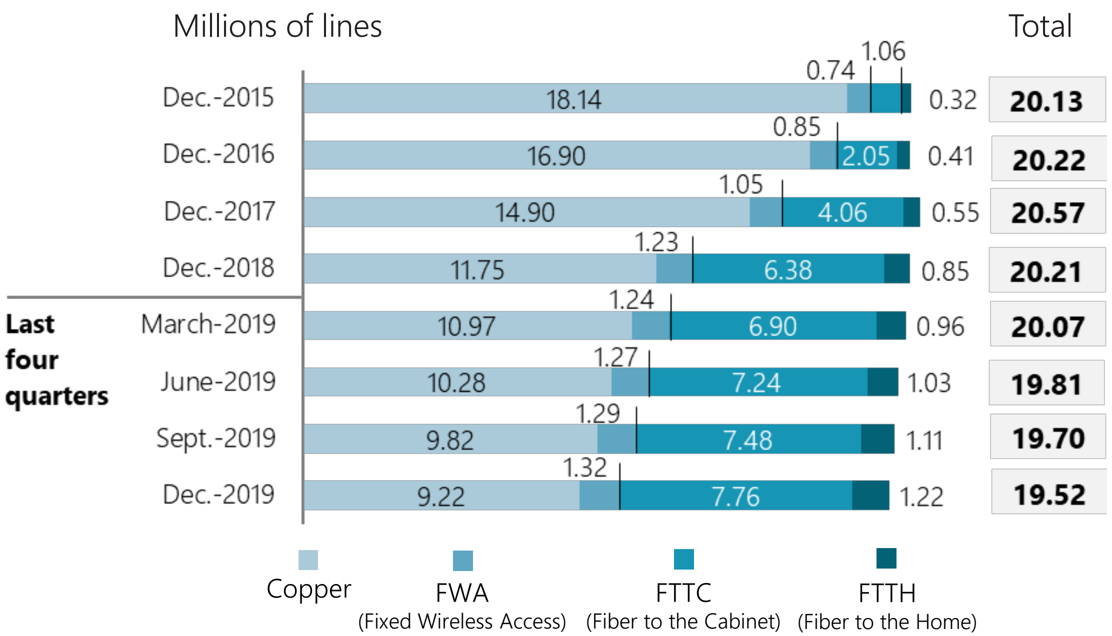
K = thousand
M = million

TIM's market share has dropped to **46,5%**

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

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

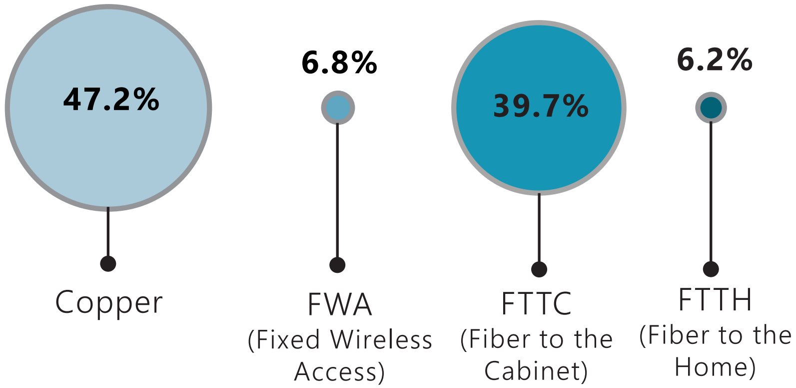
1.2: FIXED LINES: LINES BY INFRASTRUCTURE



	Quarterly change (Sept.-2019 – Dec.-2019) (no of lines in thousand)	Annual change (Dec.2018 – Dec.2019) (no of lines in thousand)
Totale lines:	-180 ↓	-695 ↓
Copper:	-603 ↓	-2,535 ↓
FWA (Fixed Wireless Access):	+29 ↑	+91 ↑
FTTC (Fiber to the Cabinet):	+281 ↑	+1.381 ↑
FTTH (Fiber to the Home):	+113 ↑	+368 ↑

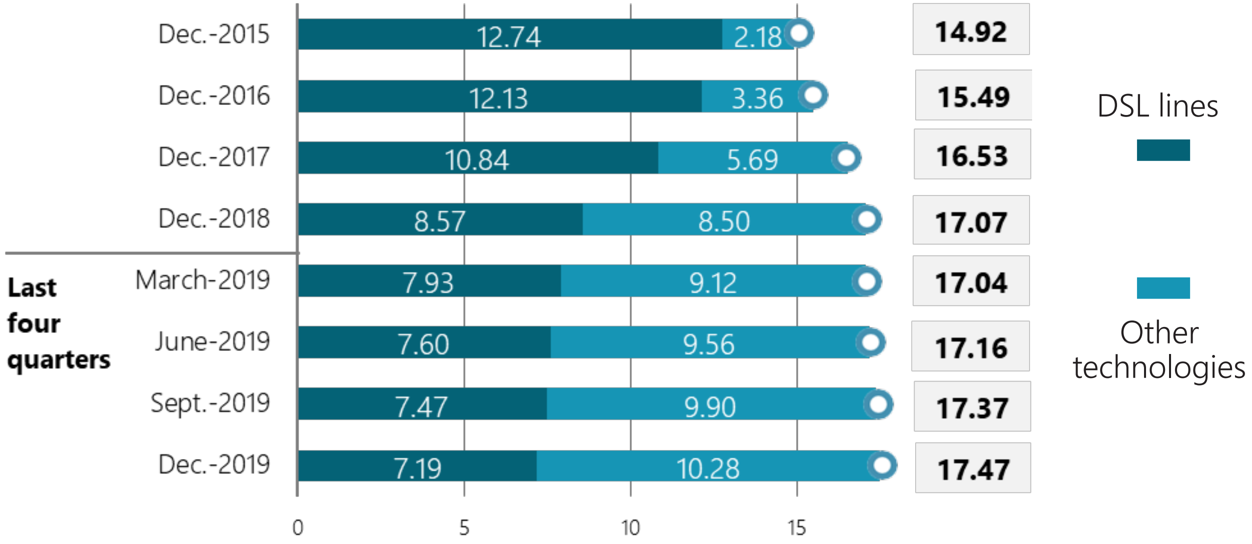
DISTRIBUTION OF FIXED ACCESS LINES BY INFRASTRUCTURE [%]

DECEMBER 2019



	Quarterly change (Sept.-2019 – Dec.-2019) (Δ %)	Annual change (Dec.2018 – Dec.2019) (Δ %)
Totale lines:	-0.9% ↓	-3.4% ↓
Copper:	-6.1% ↓	-21.6% ↓
FWA (Fixed Wireless Access):	+2.3% ↑	+7.3% ↑
FTTC (Fiber to the Cabinet):	+3.8% ↑	+21.7% ↑
FTTH (Fiber to the Home):	+10.2% ↑	+43.3% ↑

AGCOM



Quarterly change (Sept.-2019 – Dec.-2019)

Total lines

+97 K lines (+0.6%)

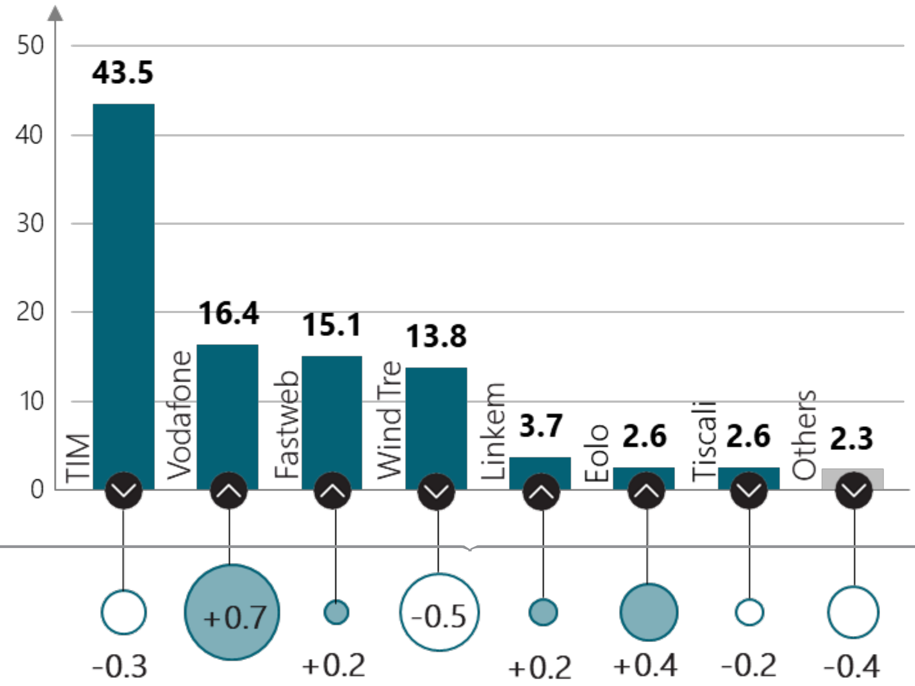
Annual change (Dec.-2018 – Dec.-2019)

Total lines	DSL lines	Other technologies
+401 K lines (+2.4 %)	**-1.383 M** lines (-16.1%)	**+1.785 M** lines (+21.0%)

K = thousand
M = million

MARKET SHARES (%)

DECEMBER 2019

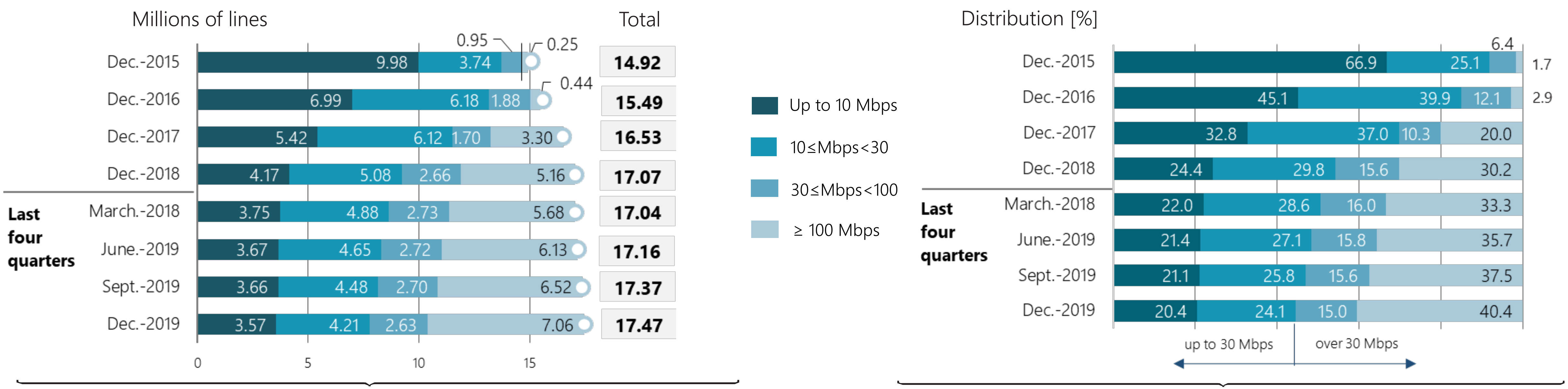


Differences vs. December 2018 (percentage points)

TIM's market share has decreased to **43.5%**

Vodafone's and **Fastweb**'s market share have increased

Wind Tre's market share has decreased



	Quarterly change (Sept.-2019 – Dec.-2019) (no of lines in thousand)		Quarterly change (Sept.-2019 – Dec.-2019) (Δ %)	Annual change (Dec.-2018 – Dec.-2019) (no of lines in thousand)		Annual change (Dec.-2018 – Dec.-2019) (Δ %)
Up to10 Mbps:	-96	↓	-2.6%	-597	↓	-14.3%
10≤Mbps<30:	-274	↓	-6.1%	-869	↓	-17.1%
30≤Mbps<100:	-76	↓	-2.8%	-34	↓	-1.3%
≥ 100 Mbps:	+543	↑	+8.3%	+1,902	↑	+36.9%
Total lines:	+97	↑	+0.6%	+401	↑	+2.4%

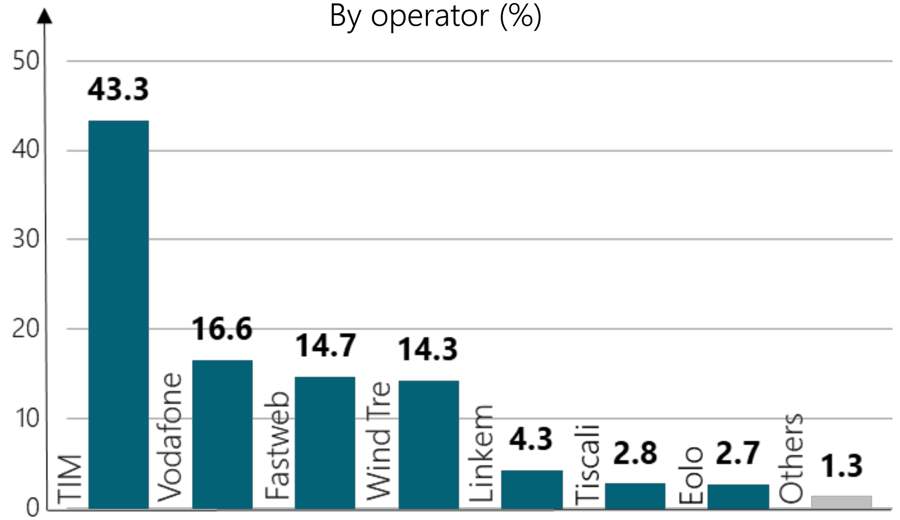
	Annual change (Dec.-2018 – Dec.-2019) (Δ percentage points)		4-Year change (Dec.-2015 – Dec.-2019) (Δ percentage points)	
Up to 10 Mbps:	-4 p.p	↓	-46.5 p.p	↓
10≤Mbps<30:	-5.7 p.p	↓	-1 p.p	↓
30≤Mbps<100:	- 0.6 p.p	↓	+8.7 p.p	↑
≥ 100 Mbps:	+10.2 p.p	↑	+38.8 p.p	↑

1.5: FIXED LINES: BROADBAND LINES BY TYPE OF CUSTOMER

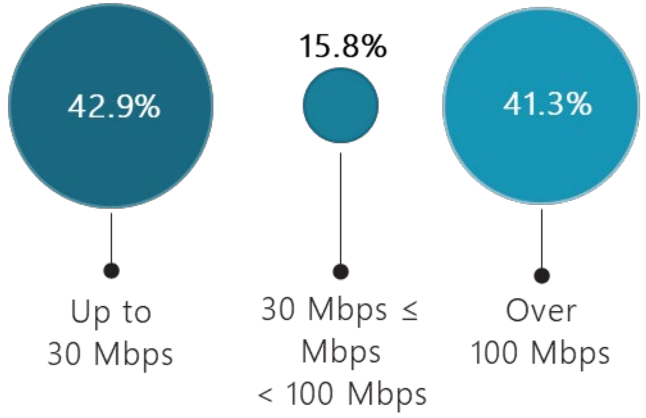
DECEMBER 2019

RESIDENTIAL CUSTOMER

By operator (%)

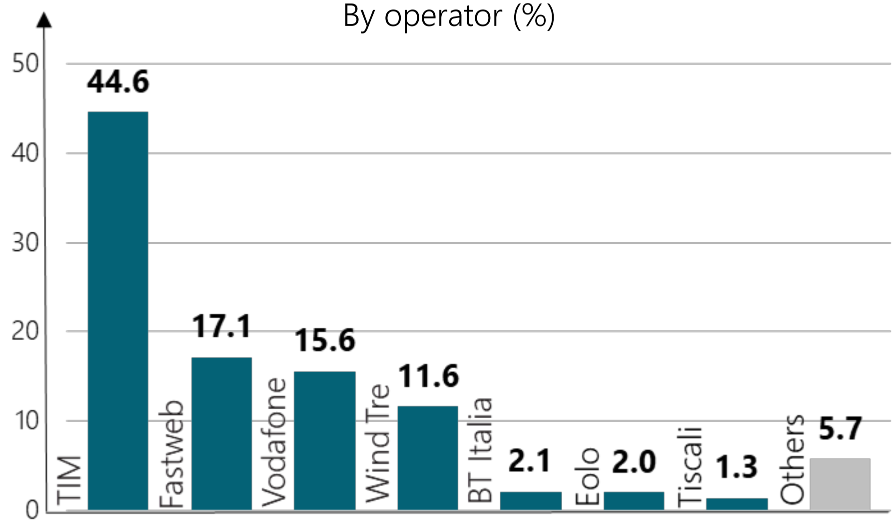


by marketed speed classes (%)

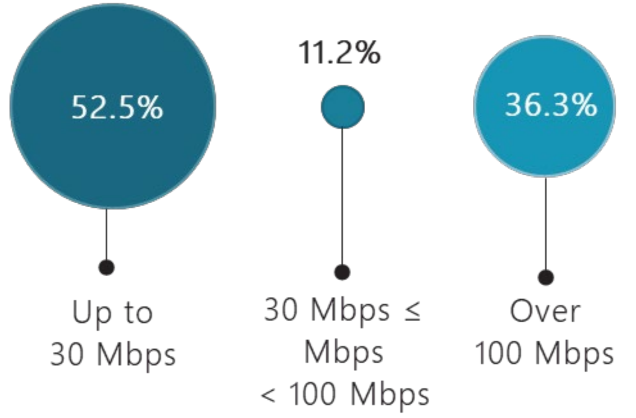


BUSINESS CUSTOMER

By operator (%)



by marketed speed classes (%)



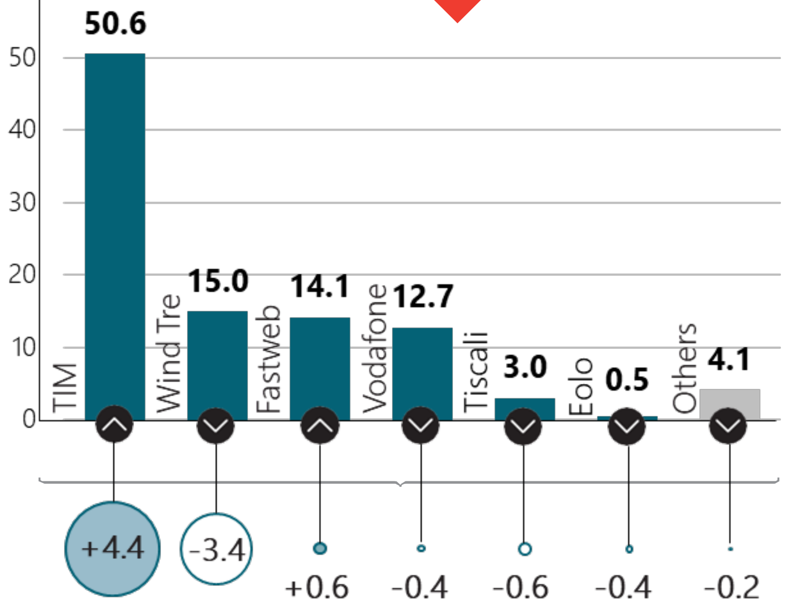
1.6: FIXED LINES: BROADBAND LINES BY MARKETED SPEED AND OPERATOR

DECEMBER 2019

UP TO 30 Mbps

Total lines: **7.78** million accesses

Annual change
December 2018 – December 2019
-15.9%

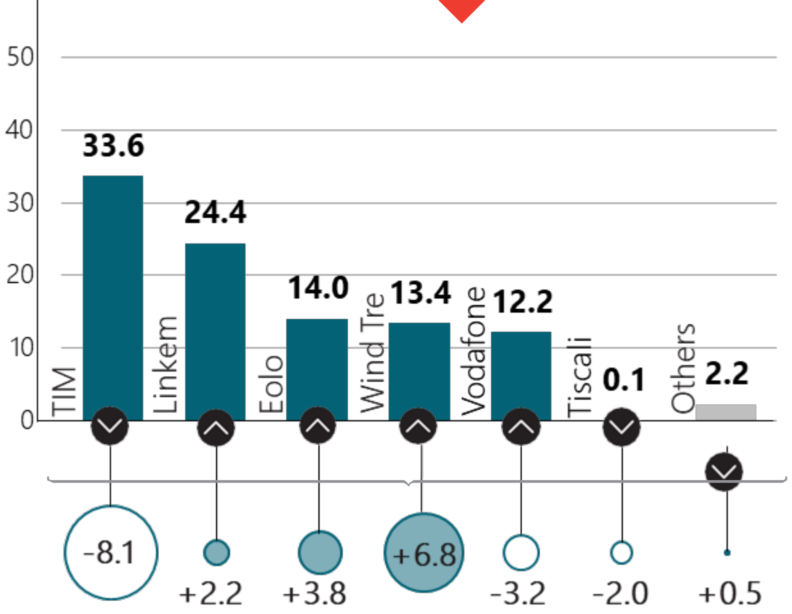


Differences vs. December 2018
(percentage points)

30 TO 100 Mbps

Total lines: **2.63** million accesses

Annual change
December 2018 – December 2019
-1.3%

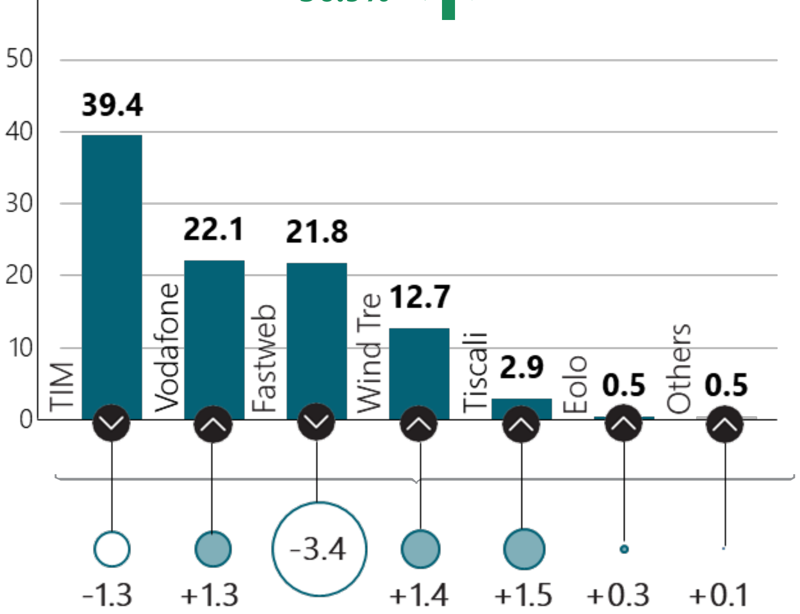


Differences vs. December 2018
(percentage points)

OVER 100 Mbps

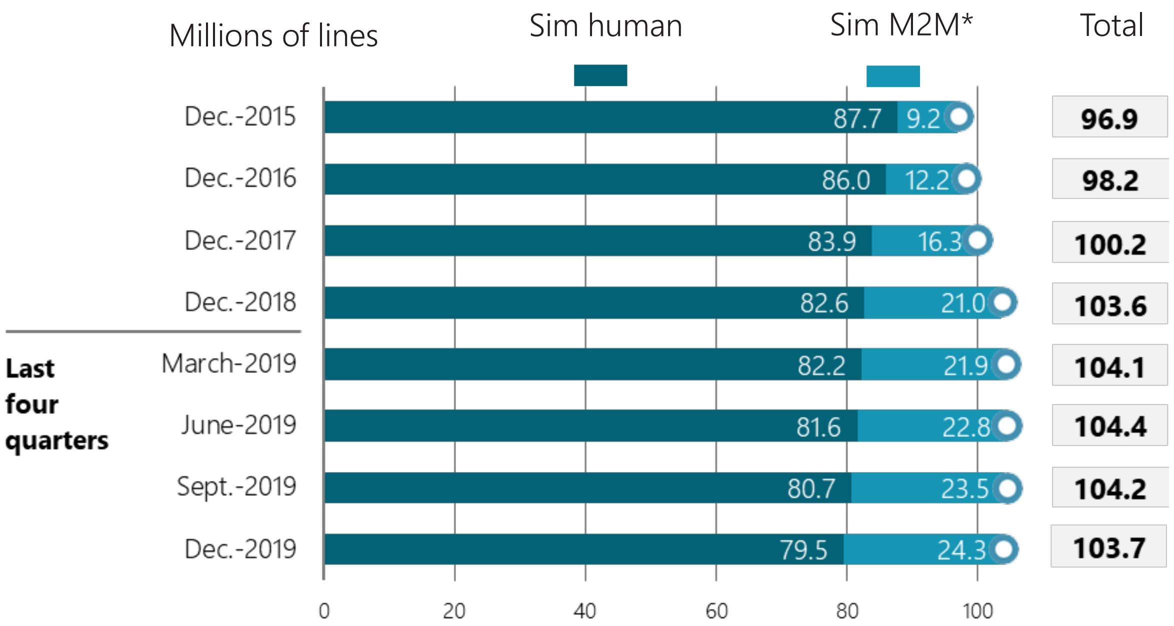
Total lines: **7.06** million accesses

Annual change
December 2018 – December 2019
+36.9%



Differences vs. December 2018
(percentage points)

1.7: MOBILE LINES: TOTAL SUBSCRIBERS



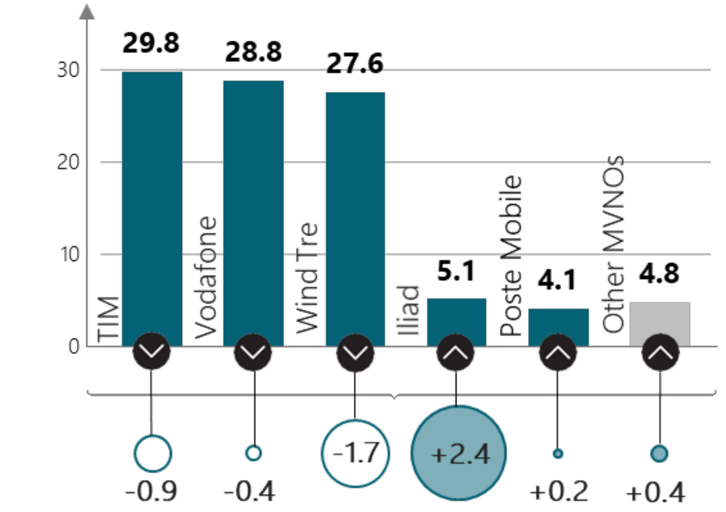
(*) Note: Machine-to-Machine sims are based on the technologies that enable devices and sensors or "things" (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

	Quarterly change (Sept.-2019 – Dec.-2019) (no of sim in thousand)		Quarterly change (Δ %)	Annual change (Dec.-2018 – Dec.-2019) (no of sim in thousand)		Annual change (Δ %)
Total sim cards:	-492	↓	-0.5%	+96	↑	+0.1%
Sim human:	-1,223	↓	-1.5%	-3,108	↓	-3.8%
Sim M2M:	+731	↑	+3.1%	+3,204	↑	+15.2%

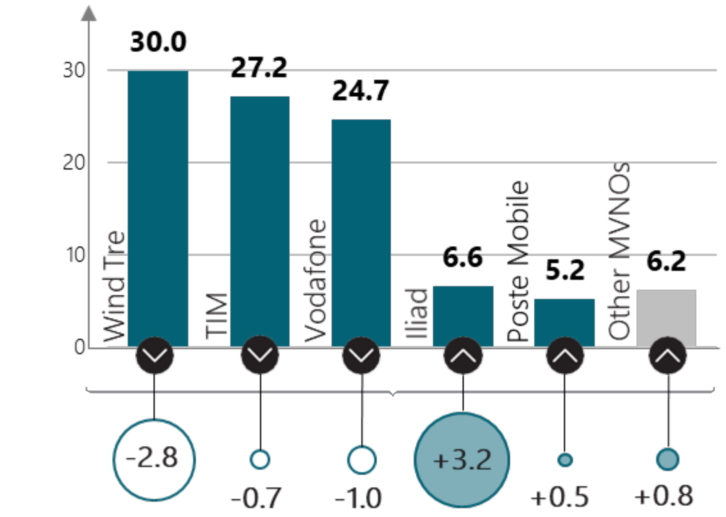
Note: the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho)

MARKET SHARES (%)

DECEMBER 2019



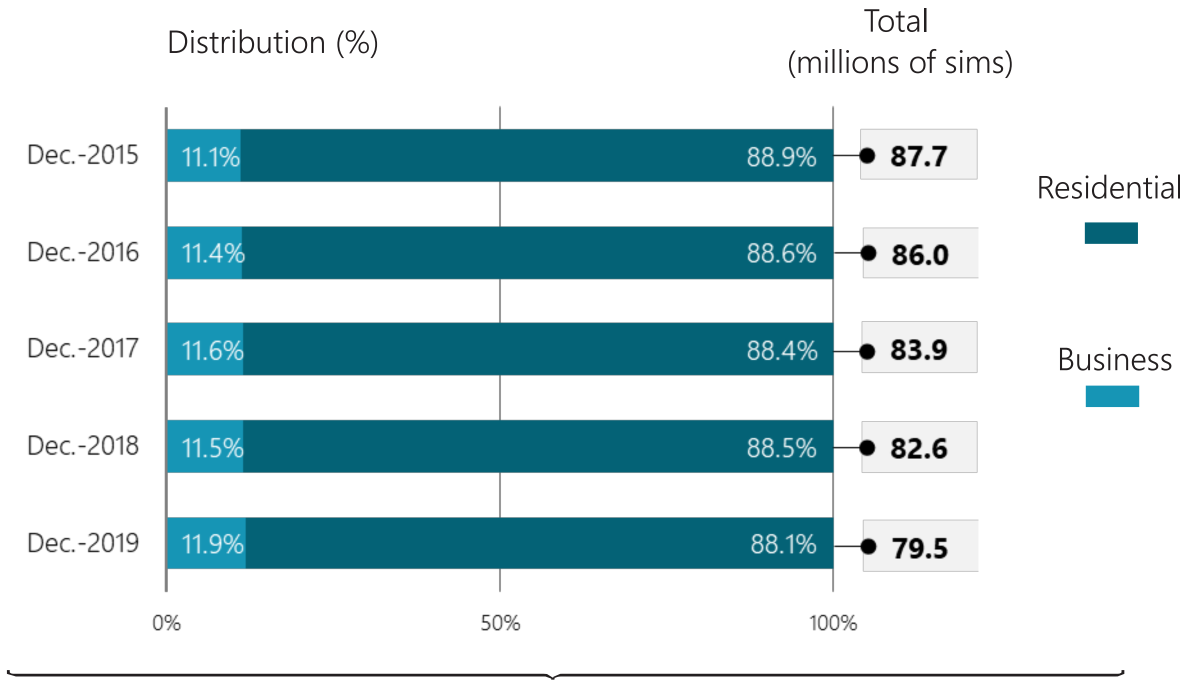
Differences vs. December 2018 (percentage points)



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

Differences vs. December 2018 (percentage points)

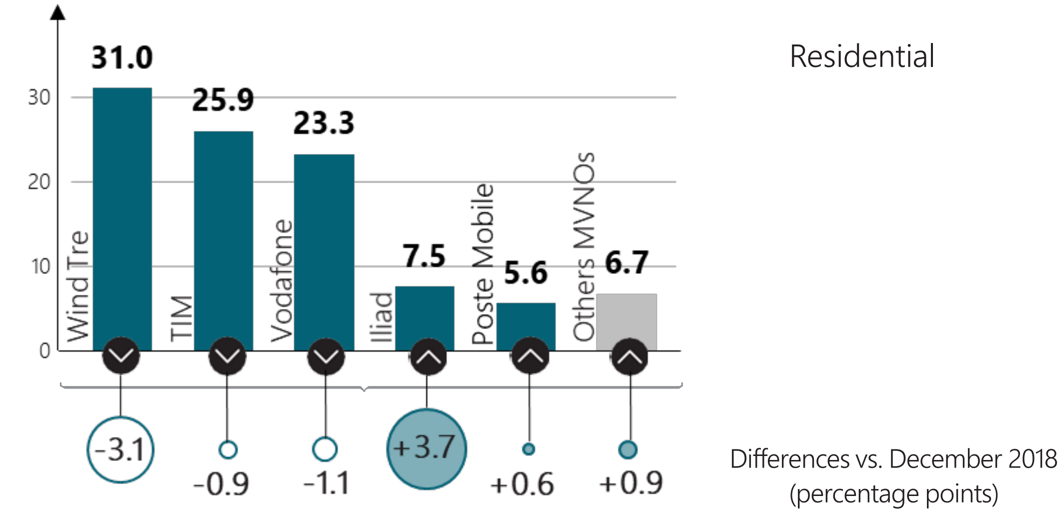
1.8: MOBILE LINES: SUBSCRIBERS BY TYPE OF CUSTOMER

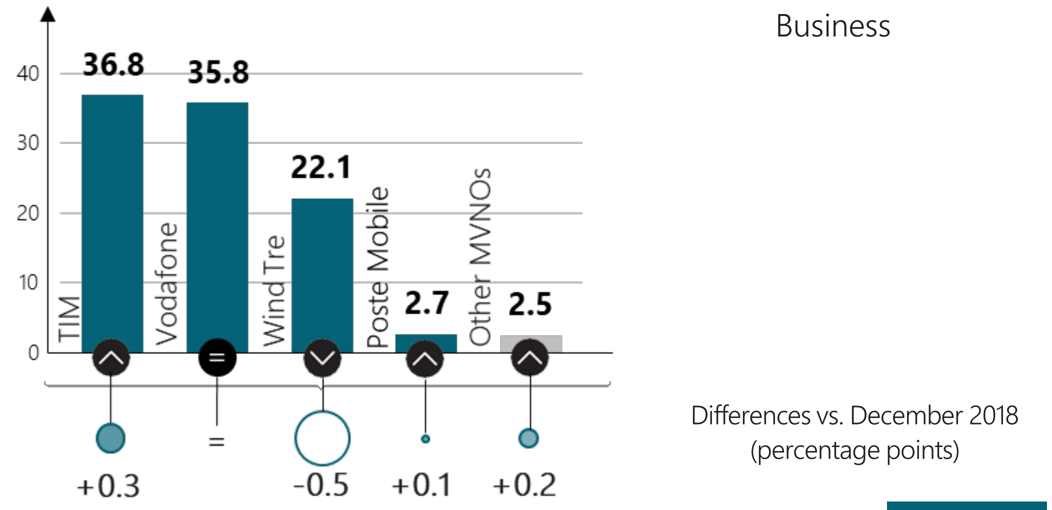


	Annual change (Dec.-2018 – Dec.-2019) (no of sim in thousand)		Annual change (Dec.-2018 – Dec.-2019) (Δ %)	4-Year change (Dec.-2015 – Dec.-2019) (no of sim in thousand)		4-Year change (Dec.-2015 – Dec.-2019) (Δ %)
Total human sim cards:	-3,108	↓	-3.8%	-8,210	↓	-9.4%
Residential sim card:	-3,010	↓	-4.1%	-7,918	↓	-10.2%
Business sim cards:	-98	↓	-1.0%	-292	↓	-3.0%

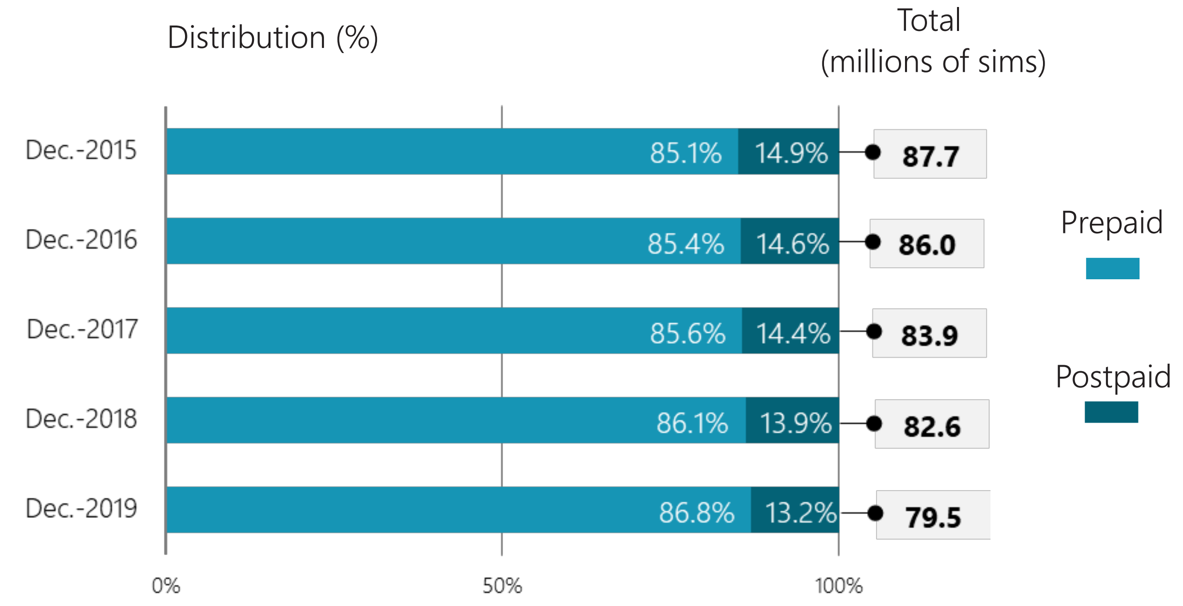
MARKET SHARES (%)

DECEMBER 2019





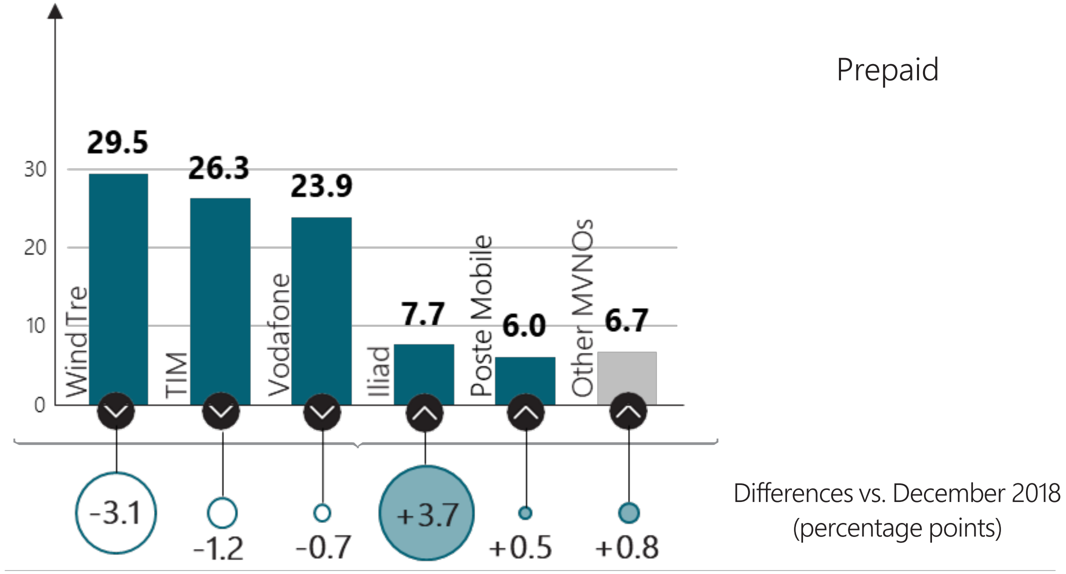
1.9: MOBILE LINES: SUBSCRIBERS BY TYPE OF CONTRACT

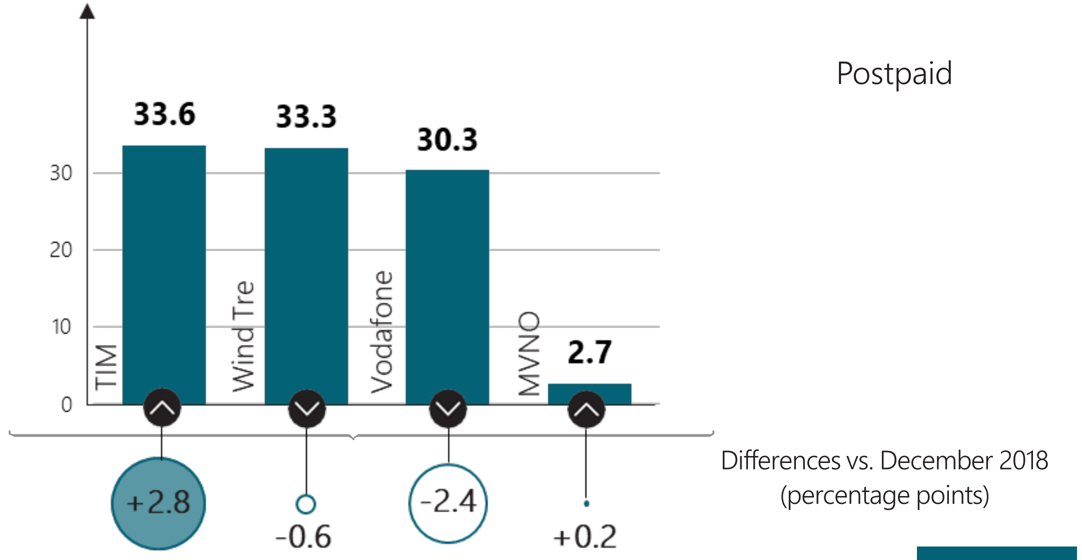


	Annual change (Dec.-2018 – Dec.-2019) (no of sim in thousand)		Annual change (Dec.-2018 – Dec.-2019) (Δ %)	4-Year change (Dec.-2015 – Dec.-2019) (no of sim in thousand)		4-Year change (Dec.-2015 – Dec.-2019) (Δ %)
Total human sim cards:	-3,108	↓	-3.8%	-8,210	↓	-9.4%
Prepaid sim cards:	-2,076	↓	-2.9%	-2,077	↓	-7.5%
Postpaid sim cards:	-1,032	↓	-9.0%	-2,588	↓	-19.8%

QUOTE DI MERCATO (%)

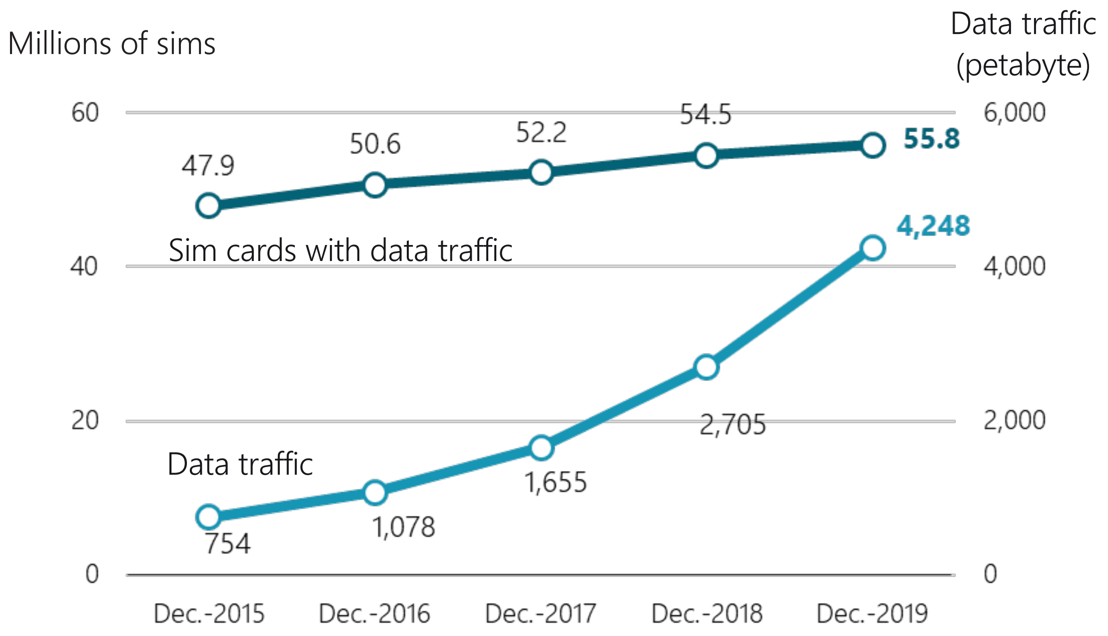
DICEMBRE 2019



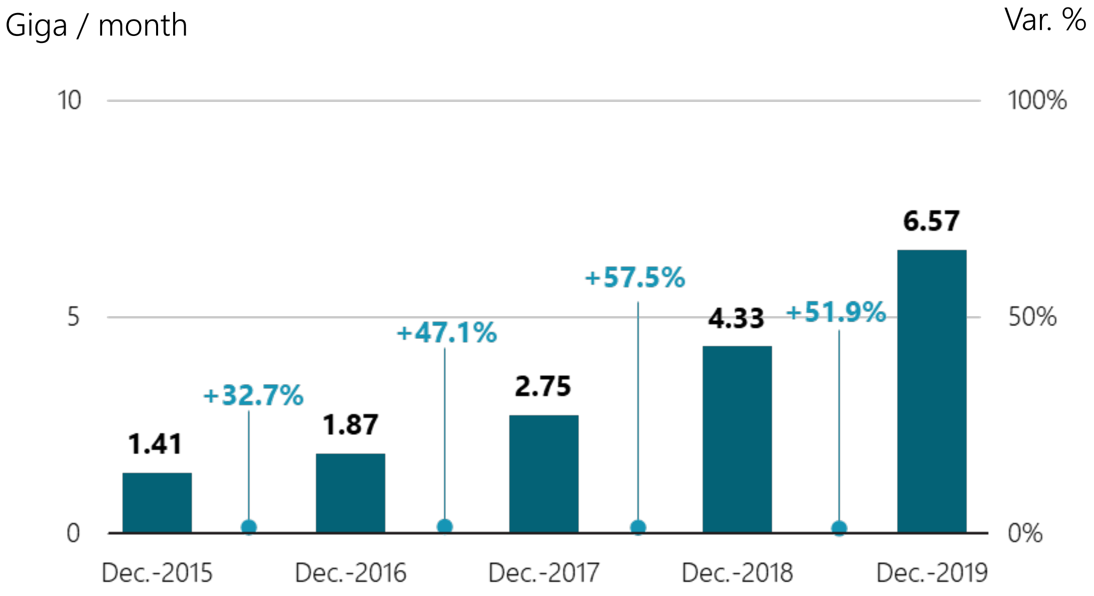


AGCOM

DATA TRAFFIC SINCE THE BEGINNING OF THE YEAR



TRFAFICO UNITARIO MENSILE



	Annual change (Dic.-2018 – Dic.-2019)			4-Year change (Dic.-2015 – Dic.-2019)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
SIM cards with data traffic:	+1,377	↑	+2.5%	+7,955	↑	+17%
	(petabyte)		(Δ %)	(petabyte)		(Δ %)
Data traffic:	+1,544	↑	+57%	+3,495	↑	+464%

4-Year change

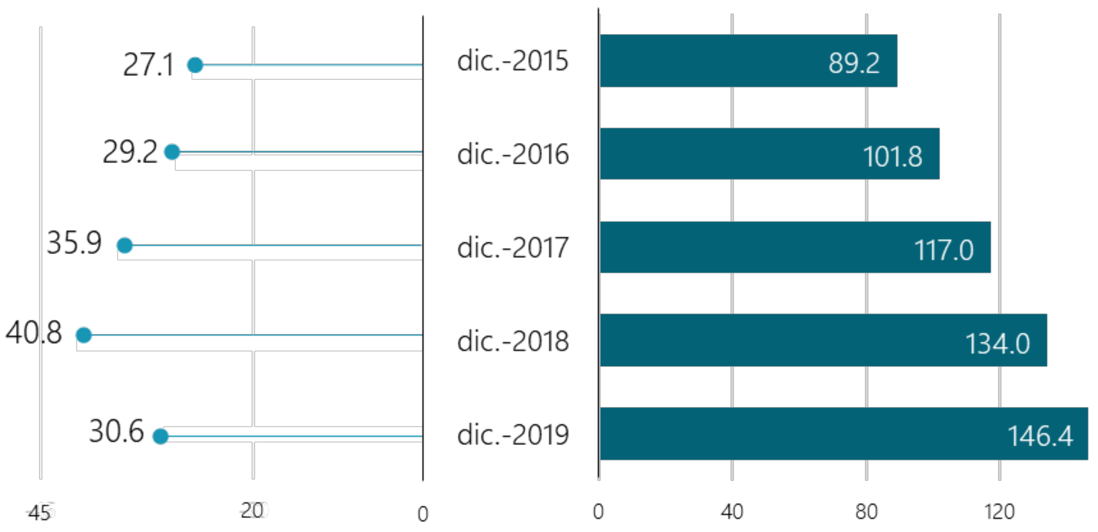
Dec.-2015 ↑ +367% (Δ %) Dec.-2019

1.41 GB/month → 6.57 GB/month

At the end of December 2019, the number of sim cards with data traffic has reached **70%** of the total human sim cards

1.11: Mobile lines: number portability

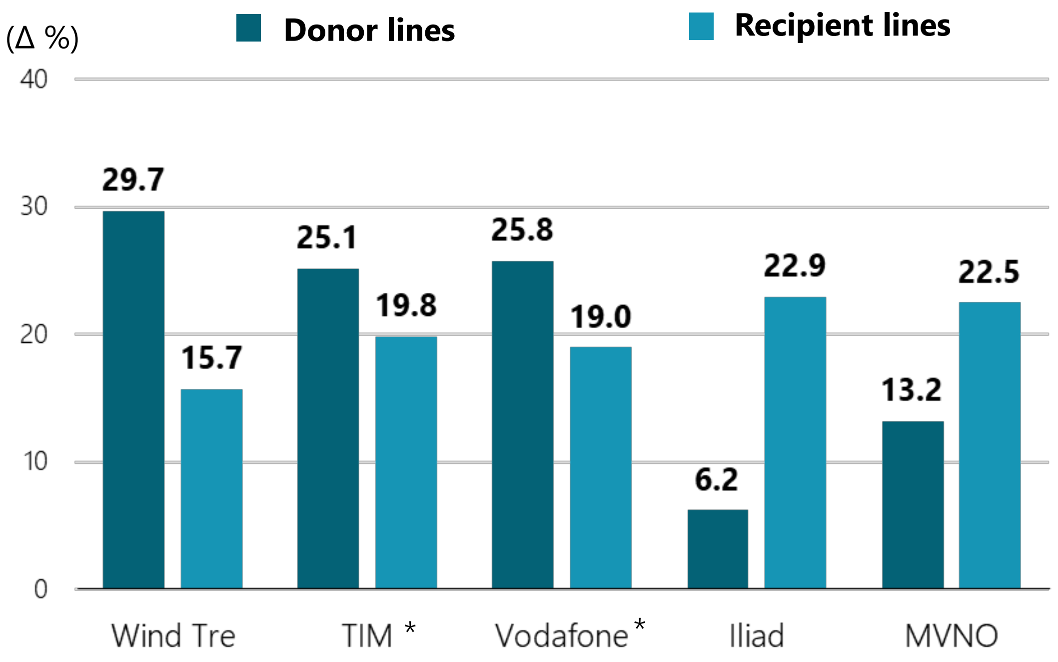
In 2019, there have been **12,4** million of Mobile Number Portability (MNP) opoerations



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

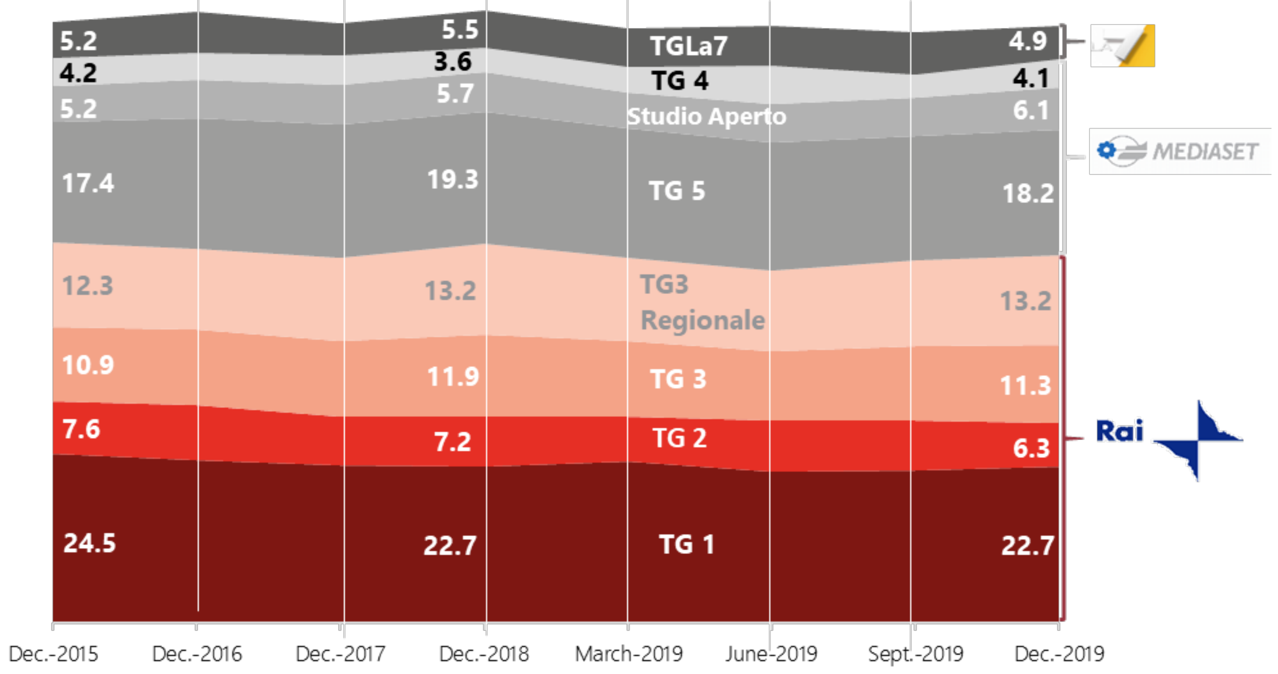
DECEMBER 2019



(*) **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)

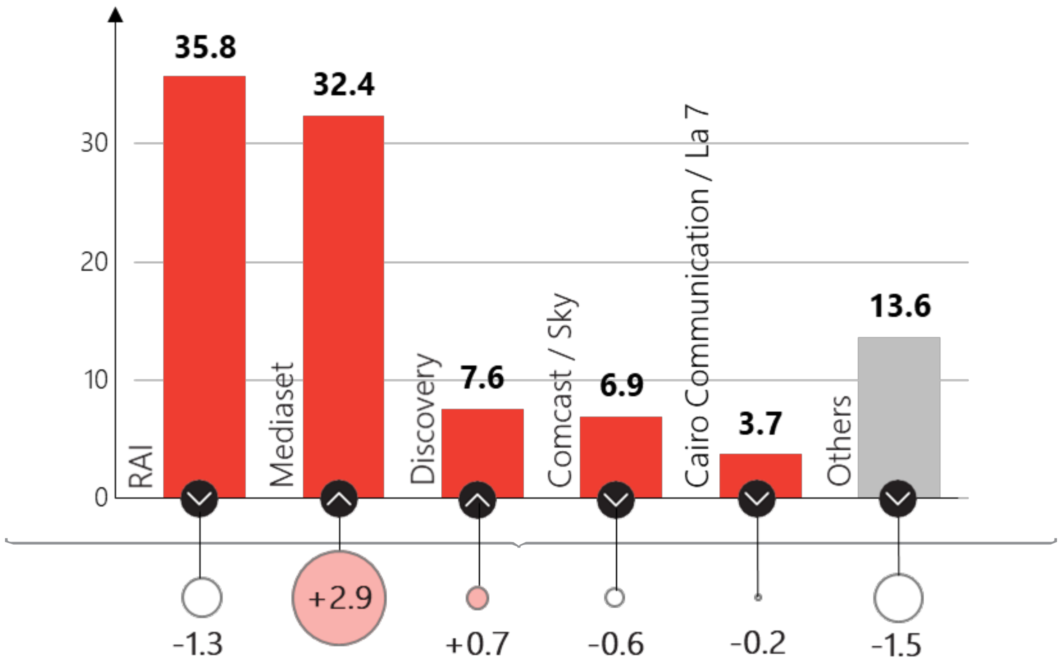
AUDIENCE OF THE MAIN EVENING NEWSCASTS (%)

AVERAGE DAY (December 2015 – December 2019)



MARKET SHARES (%)

DECEMBER 2019



Differences vs. December 2018
(percentage points)

Δ percentage points
(Dec.-2018 – Dec.-2019)

Rai		MEDIASET		La7	
Tg 1	⇆	Tg 5	-1.1 p.p. ↓	Tg La 7	-0.4 p.p. ↓
Tg 2	-1 p.p. ↓	Studio Aperto	+0.4 p.p. ↑		
Tg 3	-0.6 p.p. ↓	Tg 4	+0.5 p.p. ↑		
Tg 3 - Regionale	⇆				

Average daily television viewership

Newscasts	Broadcasters
Tg 1: **5 M** viewers	Rai: **3.8 M** viewers
Tg 5: **4 M** viewers	Mediaset: **3.4 M** viewers

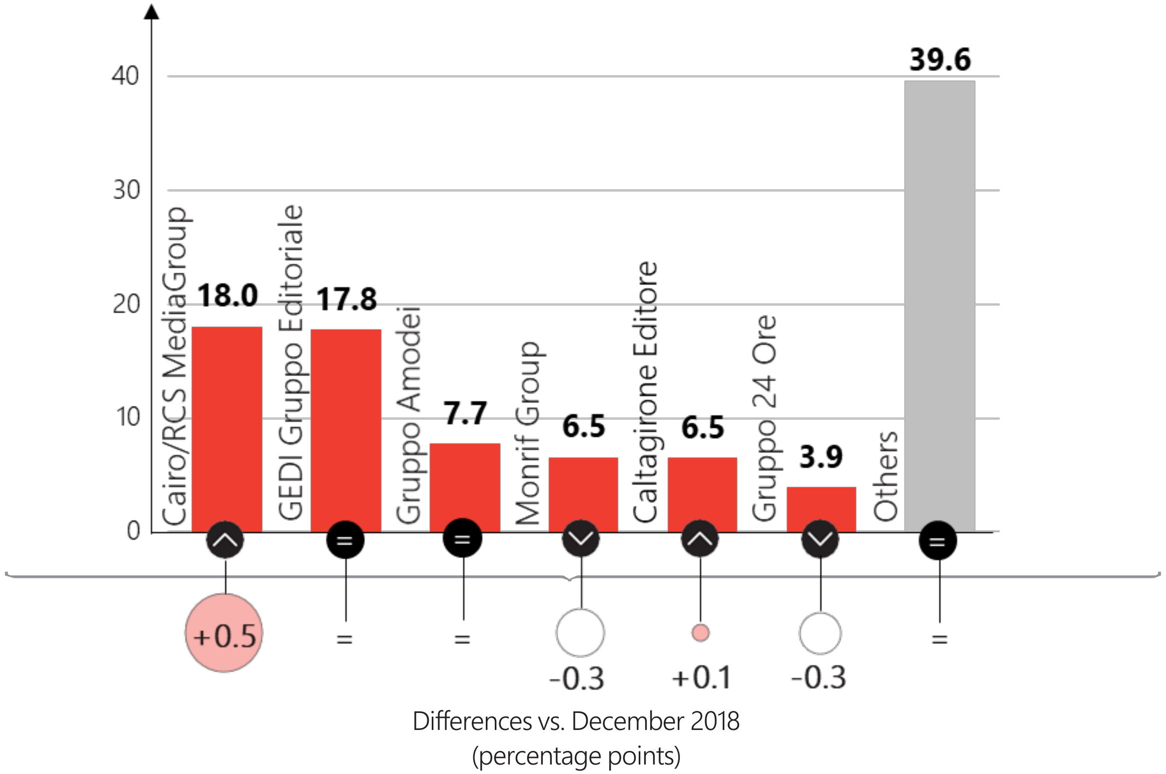
M = million

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

2.2: MEDIA: QUOTIDIANI

NEWSPAPERS' SALES BY EDITORIAL GROUPS (%)

DECEMBER 2019



Total copies sold in December 2019

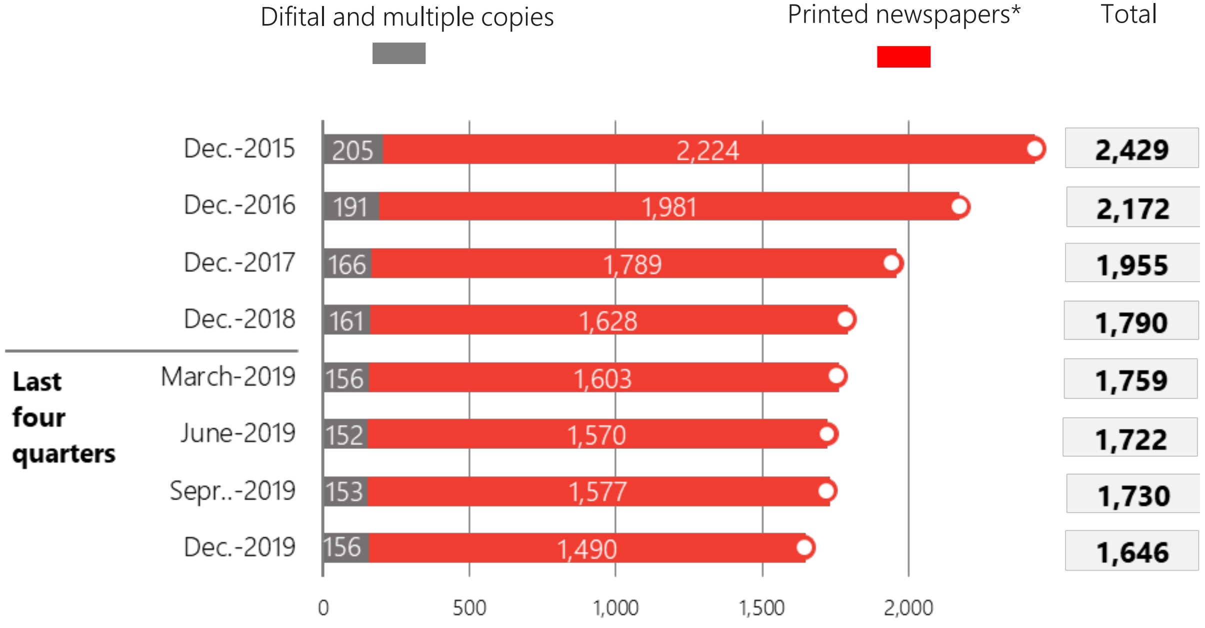
2,725,230

Annual change:
(Dec.-2018 – Dec.-2019)

- 8%

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

IN THOUSANDS - DECEMBER 2019



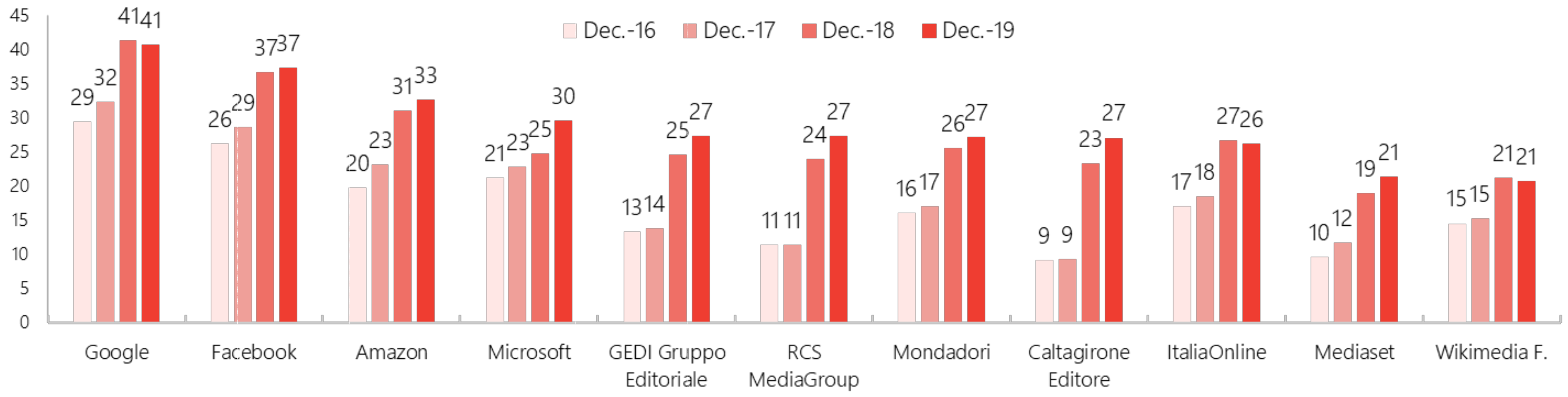
(*) Note: copies sold via distribution channels provided for by law

	Annual change (Dec.-2018 – Dec.-2019)	4-Year change (Dec.-2015 – Dec.-2019
Printed newspapers:	-8%	-33%
Digital and multiple copies: (represent 9.5 % of total sales)	-4%	-24%

Source: Agcom elaboration on data from ADS and IES

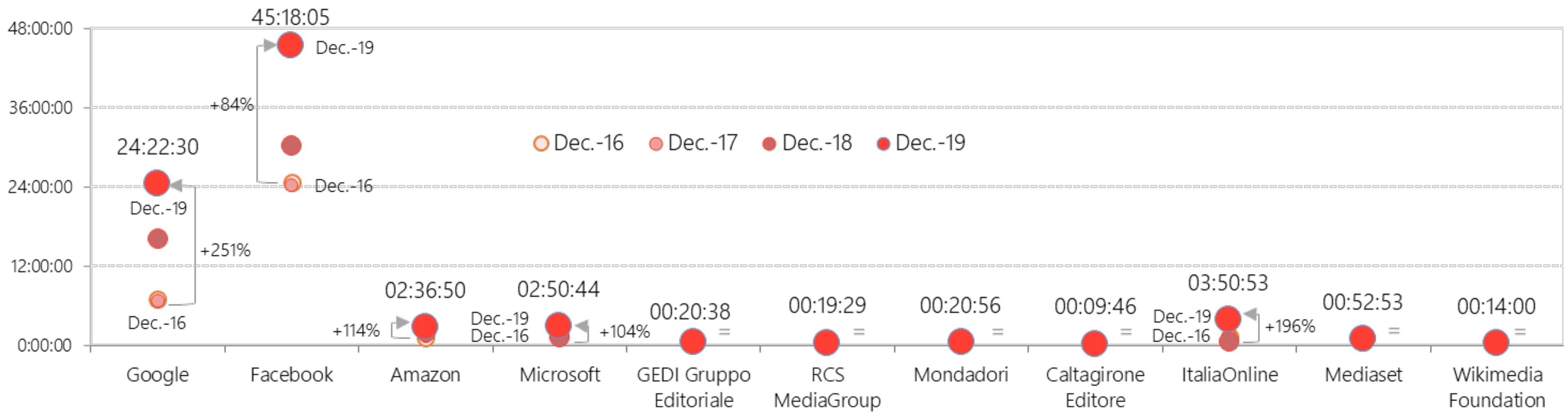
2.3: MEDIA INTERNET: ACTIVE USERS OF THE MAIN OPERATORS

AUDIENCE ON AN AVERAGE DAY (%) (DECEMBER 2016 – DECEMBER 2019)
IN MILLIONS



In December 2019, **42.5** million unique users connected to the internet

AVERAGE MONTHLY TIME SPENT ON WEBSITE BY VISITORS (DECEMBER 2016 – DECEMBER 2019)
(hh:mm:ss)



In December 2019, a total amount of **116** hours of surfing, on average, per person per month

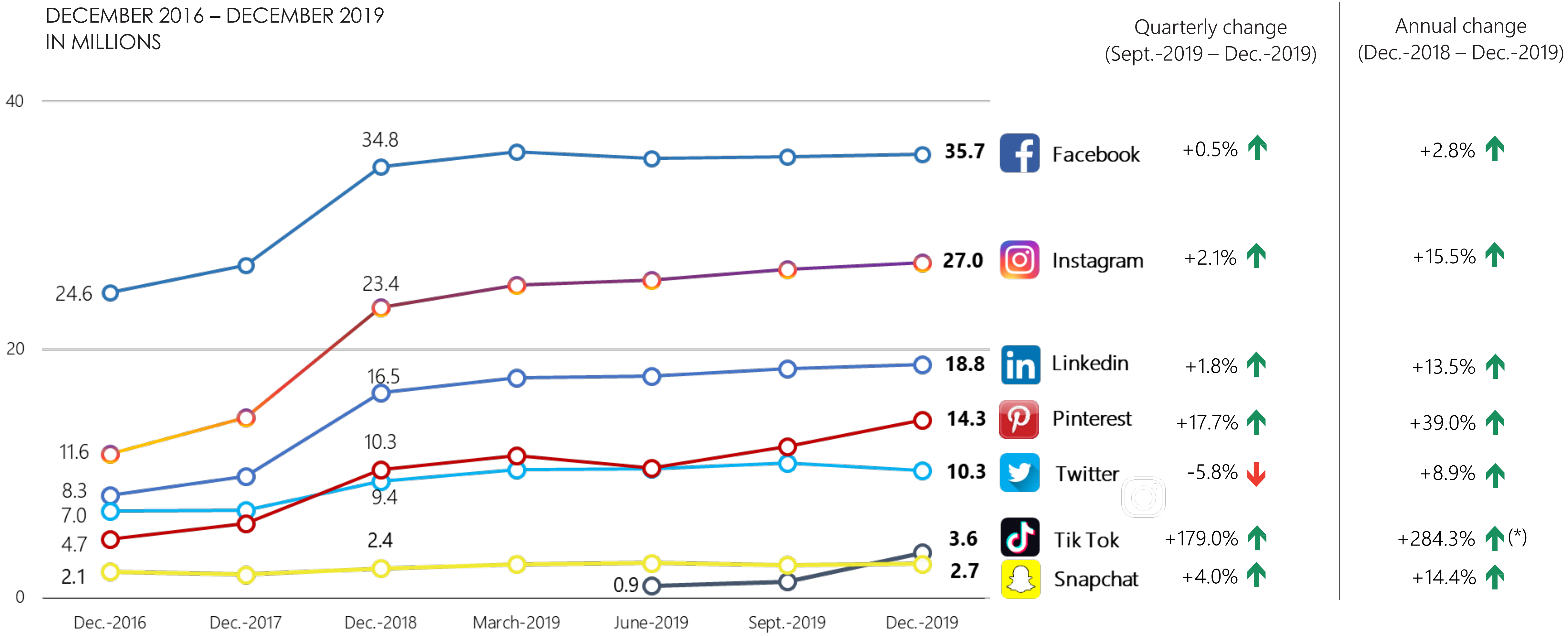
Note: in 2016 GEDI only includes the L'Espresso Group. Since March 2018, the Audiweb system has adopted a new methodology

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

AGCOM

MAIN SOCIAL NETWORKS USERS

DECEMBER 2016 – DECEMBER 2019
IN MILLIONS



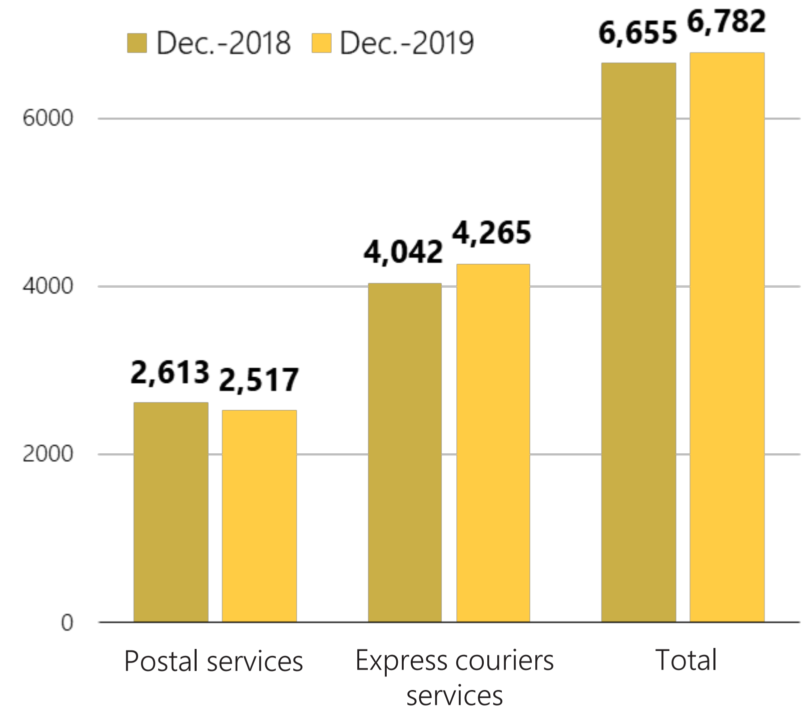
(*) **Note**: The growth of Tik Tok is on a half-yearly basis (June 2019).

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 €



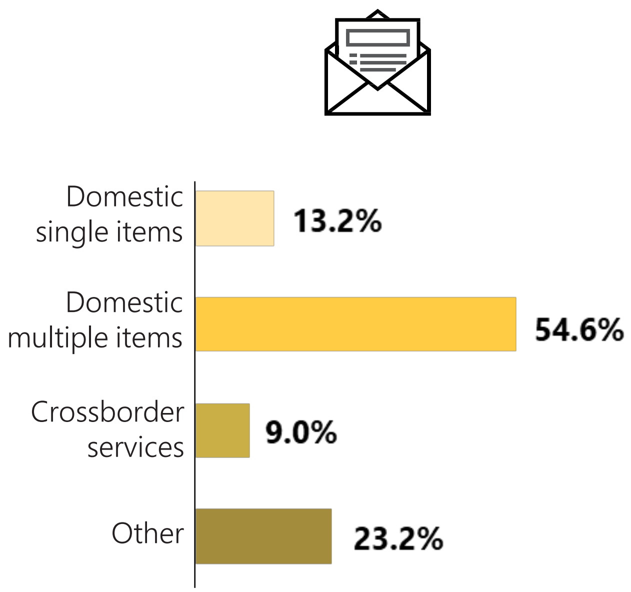
Annual change
(December 2018 - December 2019)

Postal services	Express couriers	Total
-3.7%	+5.5%	+1.9%

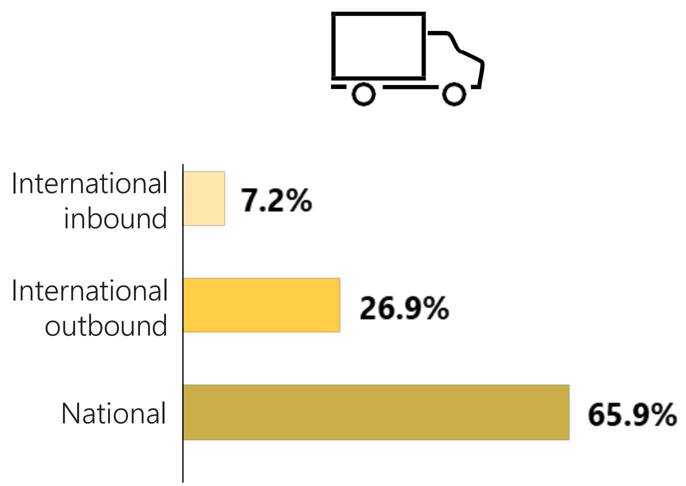
REVENUES BY SOURCE TYPE (%)

DECEMBER 2019

Postal services



Express couriers



Annual change
(December 2018 - December 2019)

Domestic single items	Domestic multiple items	Crossborder services	Other	International inbound	International outbound	National
-20.1%	-3.1%	+2.2%	+4.8%	+4.7%	+4.5%	+6.0%

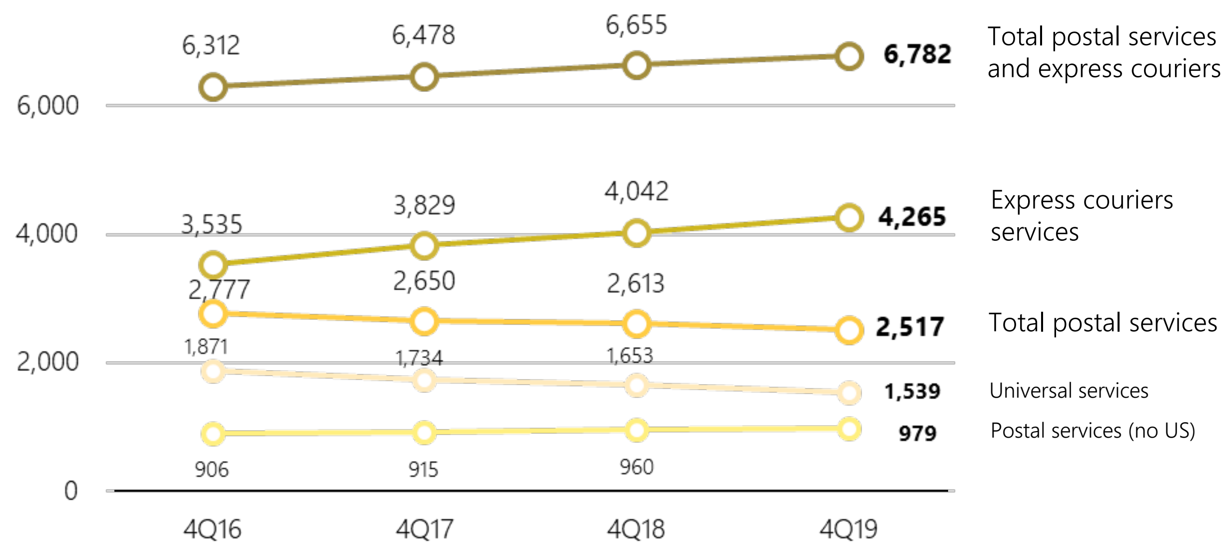
(*) **Note**: express couriers data do not include Amazon

3.2: POSTAL SERVICES AND EXPRESS COURIERS: REVENUES HISTORICAL TRENDS *

AGCOM

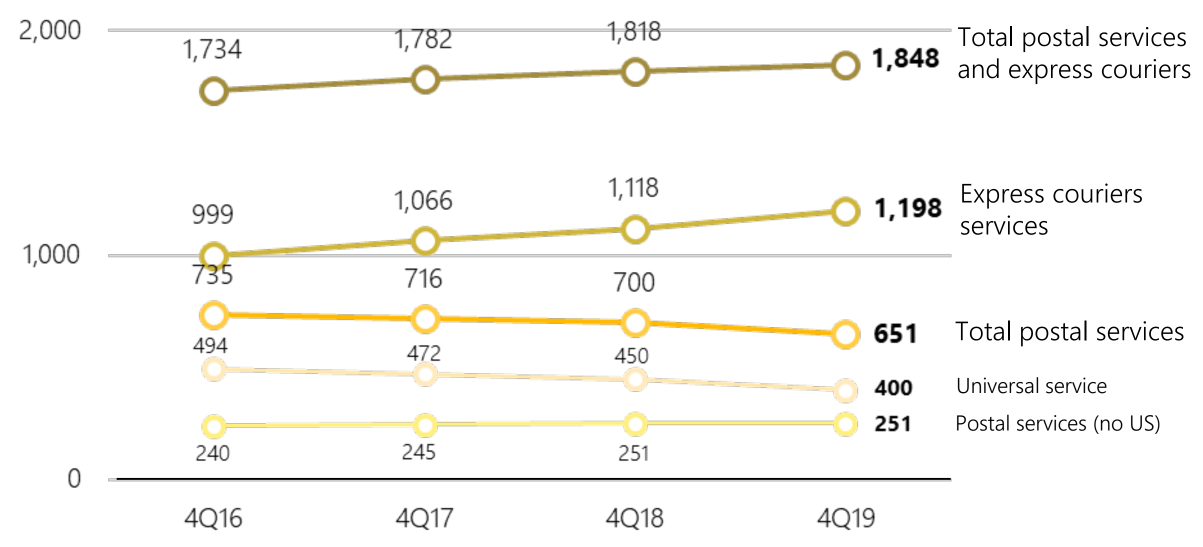
ON A YEARLY BASIS

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



	3-Year change (2016 - 2019)	Annual change (2018 - 2019)
Total Postal services:	-9.4% ↓	-3.7% ↓
- Postal services (no US):	+8.0% ↑	+1.9% ↑
- Universal service:	-17.8% ↓	-6.9% ↓
Express couriers:	+20.6% ↑	+5.5% ↑
Total postal services and express couriers:	+7.4% ↑	+1.9% ↑

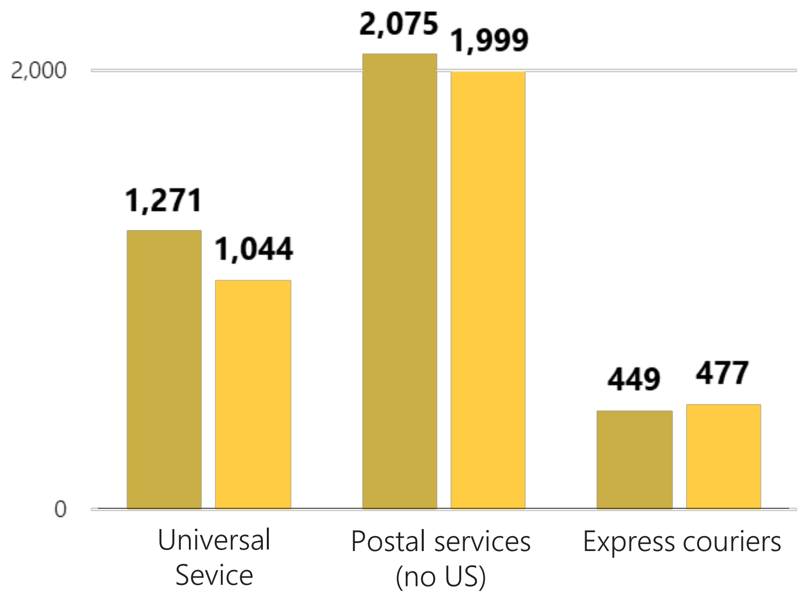
	3-Year change (2016 - 2019)	Annual change (2018 - 2019)
Total Postal services:	-11.4% ↓	-7.1% ↓
- Postal services (no US):	+4.4% ↑	=
- Universal service:	-19.1% ↓	-11.1% ↓
Express couriers:	+19.9% ↑	+7.2% ↑
Total postal services and express couriers:	+6.6% ↑	+1.7% ↑

(*) Note: express couriers data do not include Amazon

3.3: POSTAL SERVICES AND EXPRESS COURIERS: VOLUMES *

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS



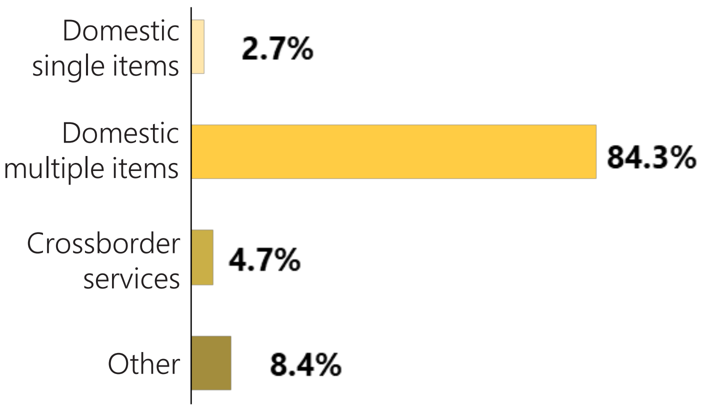
Annual change (December 2018 - December 2019)

-17.8%	-3.7%	+6.2%
Universal Sevice	Postal services (no US)	Express couriers

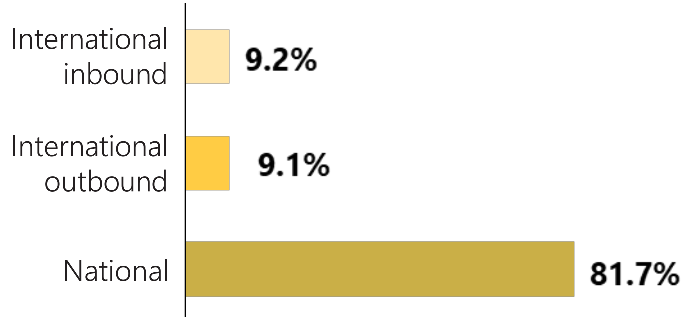
VOLUMES BY SOURCE TYPE (%)

DECEMBER 2019

Postal services



Express couriers



Annual change (December 2018 - December 2019)

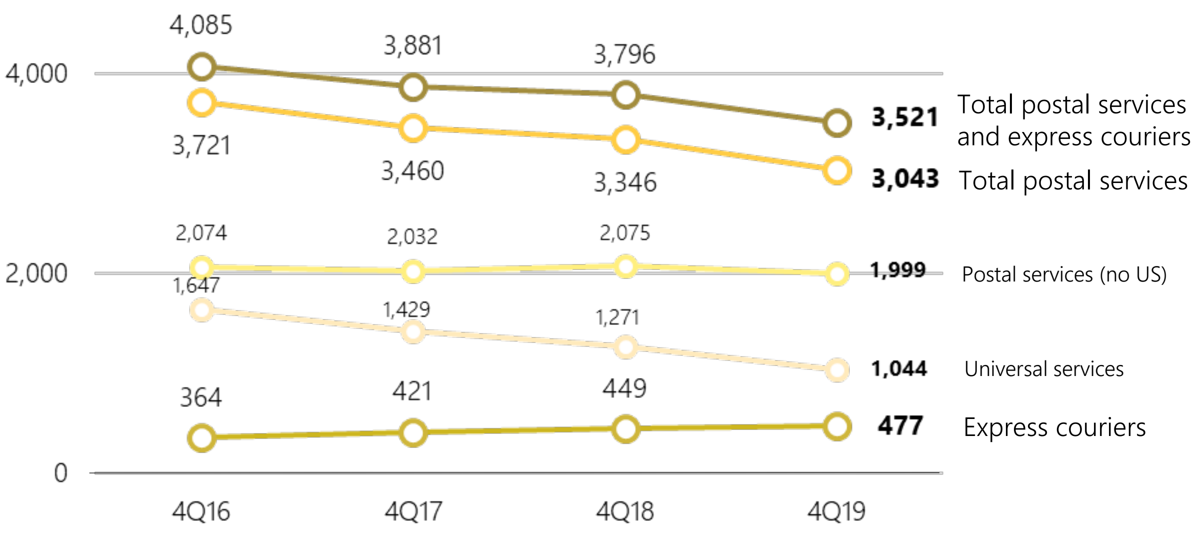
-50.8%	-7.6%	+2.6%	-3.9%	+2.9%	+4.8%	+6.7%
Domestic single items	Domestic multiple items	Crossborder services	Other	International inbound	International outbound	National

(*) **Note**: express couriers data do not include Amazon

3.4: POSTAL SERVICES AND EXPRESS COURIERS: VOLUMES HISTORICAL TRENDS *

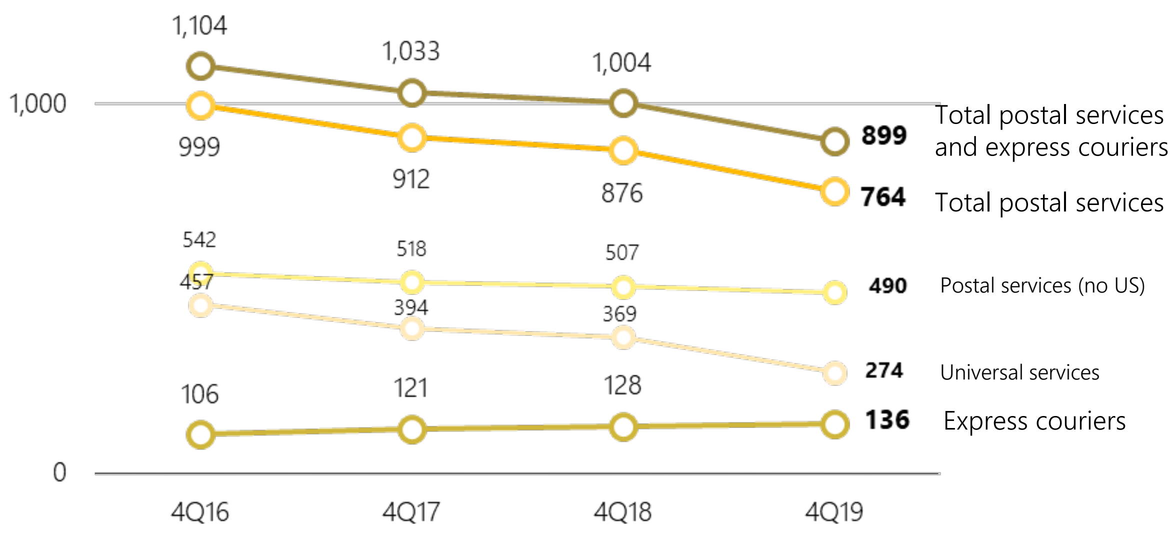
ON A YEARLY BASIS

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



	3-Year change (2016 - 2019)	Annual change (2018 - 2019)
Total postal services:	-18.2% ↓	-9.1% ↓
- Postal services (no US):	-3.6% ↓	-3.7% ↓
- Universal service:	-36.6% ↓	-17.8% ↓
Express couriers:	+31.1% ↑	+6.2% ↑
Total postal services and express couriers:	-13.8% ↓	-7.2% ↓

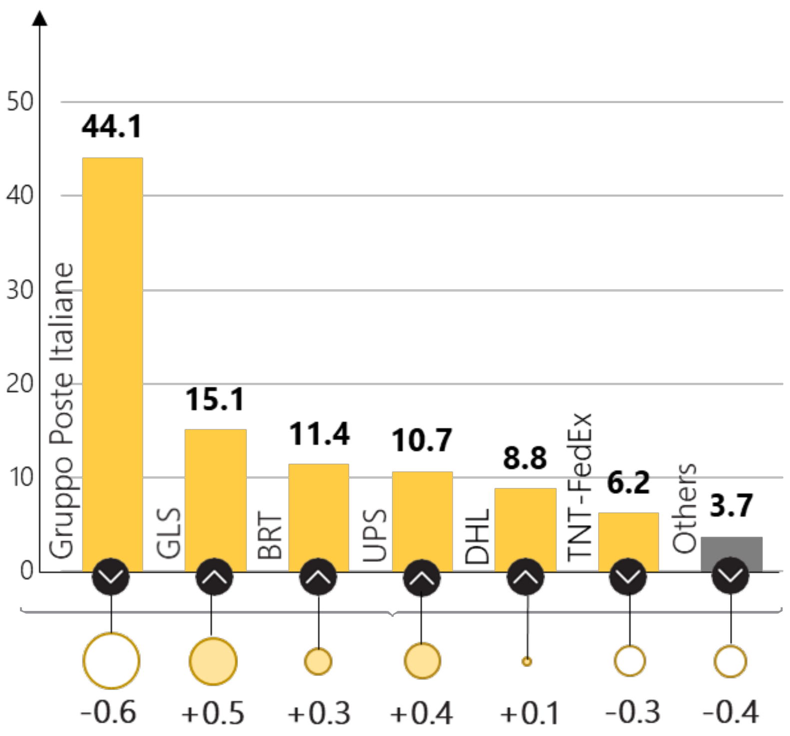
	3-Year change (2016 - 2019)	Annual change (2018 - 2019)
Total postal services:	-23.5% ↓	-12.8% ↓
- Postal services (no US):	-9.7% ↓	-3.4% ↓
- Universal service:	-39.9% ↓	-25.8% ↓
Express couriers:	+28.2% ↑	+5.6% ↑
Total postal services and express couriers:	-18.6% ↓	-10.4% ↓

(*) **Note**: express couriers data do not include Amazon

3.5: POSTAL SERVICES AND EXPRESS COURIERS: COMPETITIVE LANDSCAPE *

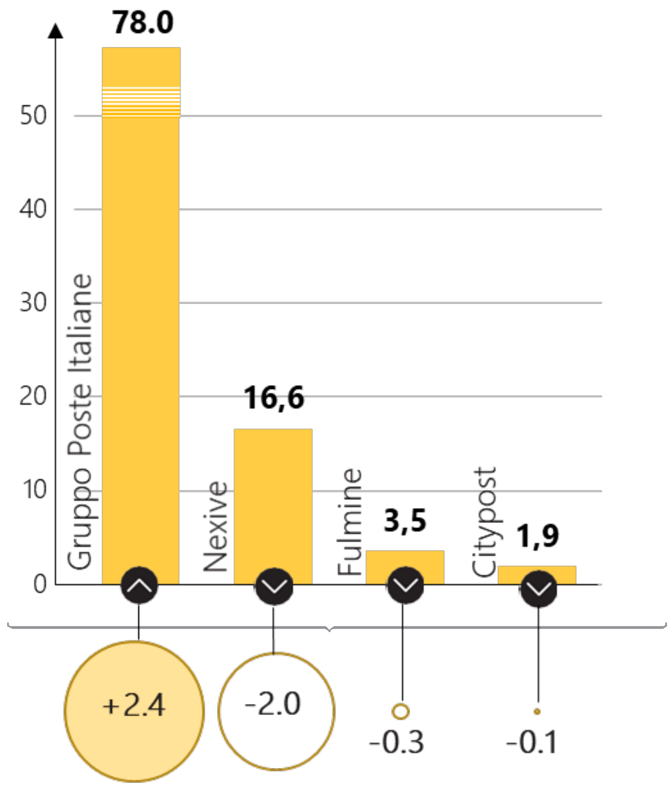
DECEMBER 2019

POSTAL SERVICES AND EXPRESS COURIERS



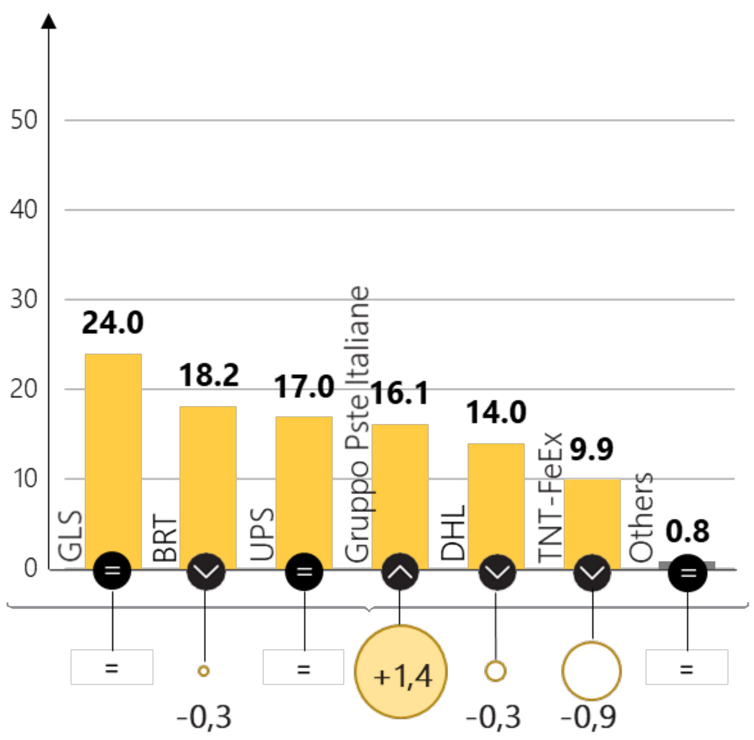
Differences vs. December 2018
(percentage points)

POSTAL SERVICES
not included in Universal service



Differences vs. December 2018
(percentage points)

EXPRESS COURIERS*

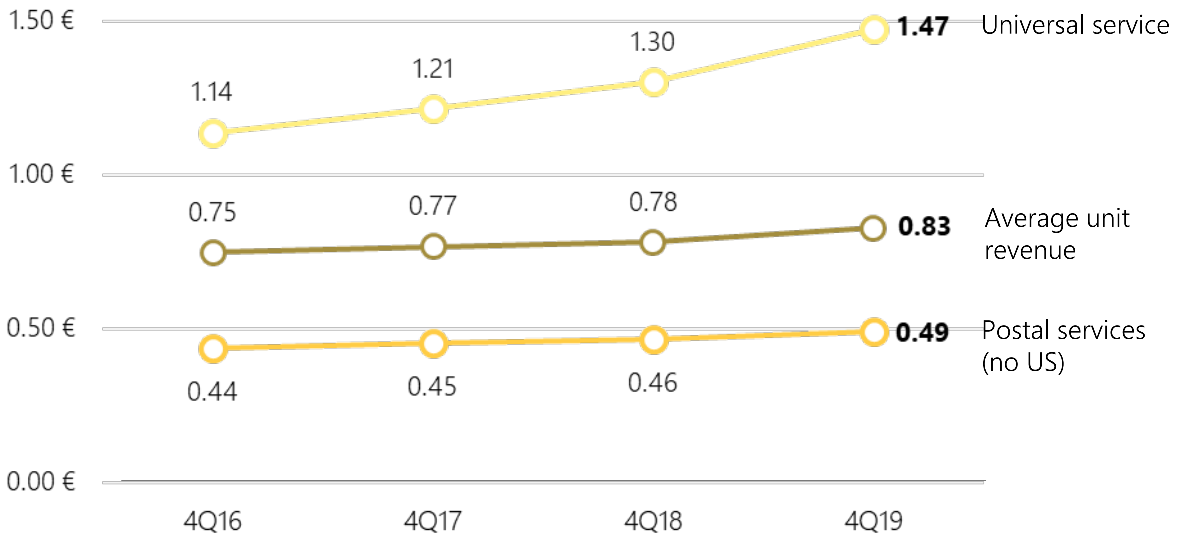


Differences vs. December 2018
(percentage points)

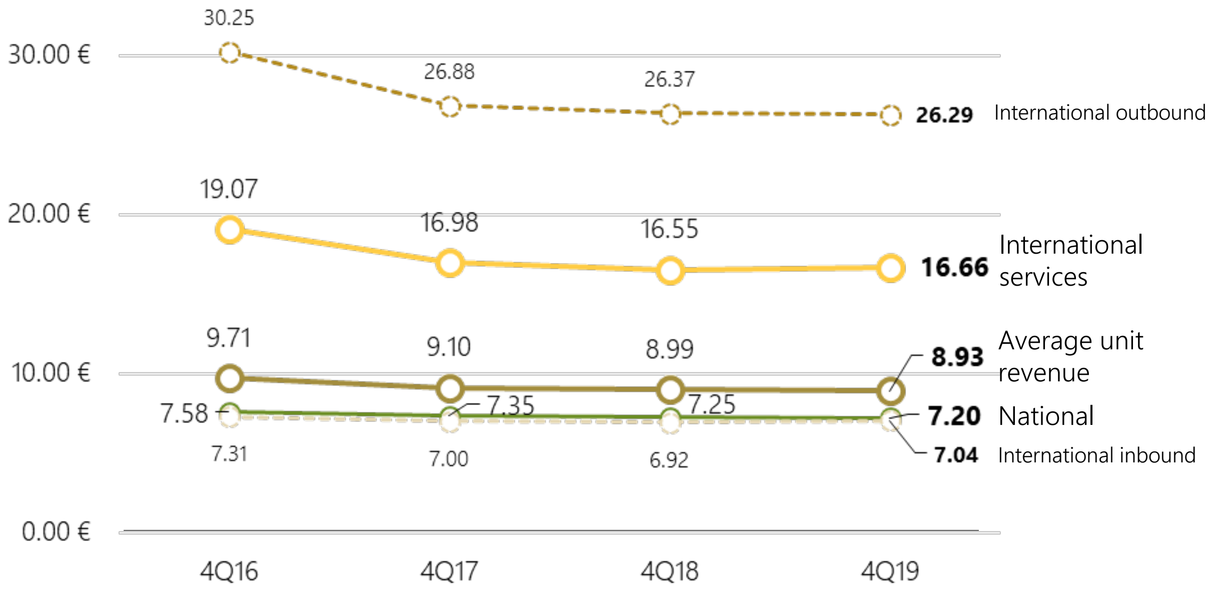
(*) **Note**: express couriers data do not include Amazon

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

POSTAL SERVICES



EXPRESS COURIERS

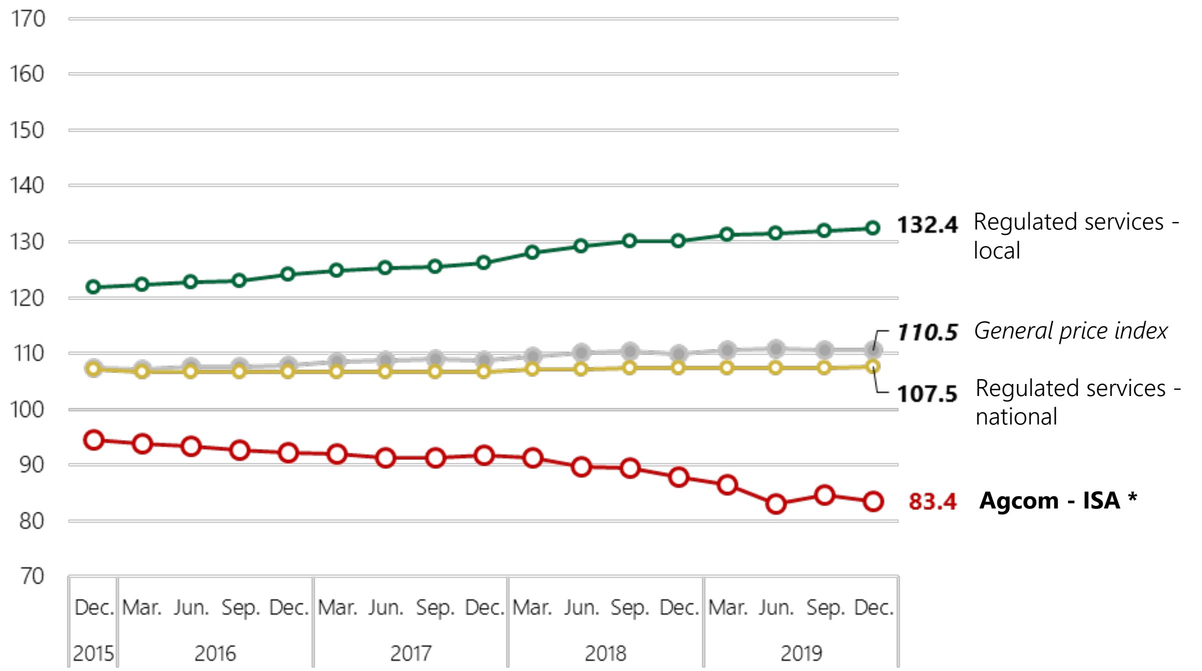


	3-Year change (2016 - 2019)	Annual change (2018 - 2019)
Average unit revenue:	+10.8% ↑	+5.9% ↑
Postal services (no US):	+12.1% ↑	+5.8% ↑
Universal service:	+29.7% ↑	+13.3% ↑

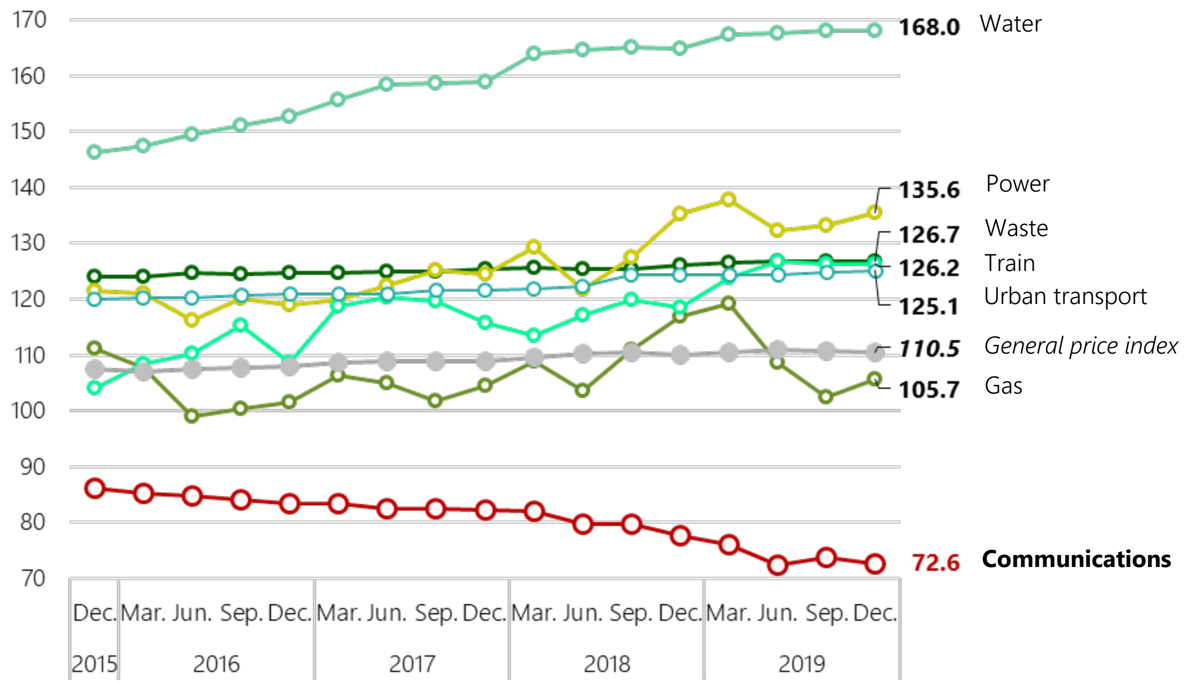
	3-Year change (2016 - 2019)	Annual change (2018 - 2019)
Average unit revenue:	-8% ↓	-0.7% ↓
International services:	-12.7% ↓	+0.7% ↑
- International inbound:	-3.7% ↓	+1.7% ↑
- International outbound:	-13.1% ↓	-0.3% ↓
National:	-5% ↓	-0.7% ↓

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

GENERAL PRICE INDEX



UTILITIES PRICE INDEX



Source: Agcom elaboration on data from Istat

	4-Year change	Annual change
ISA (Agcom summary price index):	-11.8% ↓	-5.0% ↓
General price index:	+2.9% ↑	+0.5% ↑
Regulated services - local:	+8.7% ↑	+1.7% ↑
Regulated services - national:	+0.4% ↑	+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).

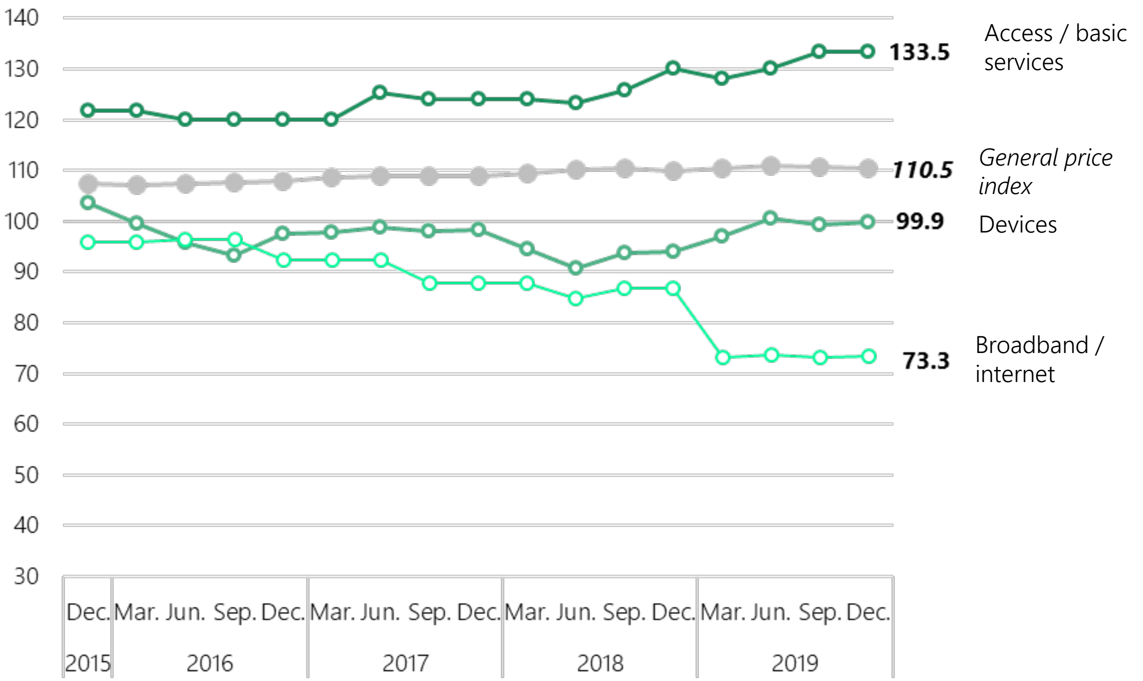
	4-Year change	Annual change
Water *(04.4.1)*:	+14.8% ↑	+1.9% ↑
Waste *(04.4.2)*:	+2.1% ↑	+0.6% ↑
Power *(04.5.1)*:	+11.7% ↑	+0.3% ↑
Gas *(04.5.2)*:	-4.9% ↓	-9.5% ↓

	4-Year change	Annual change
Train *(07.3.1)*:	+21.2% ↑	+6.4% ↑
Urban transport *(07.3.2.1.1)*:	+4.2% ↑	+0.6% ↑
Communications *(08)*:	-15.7% ↓	-6.6% ↓

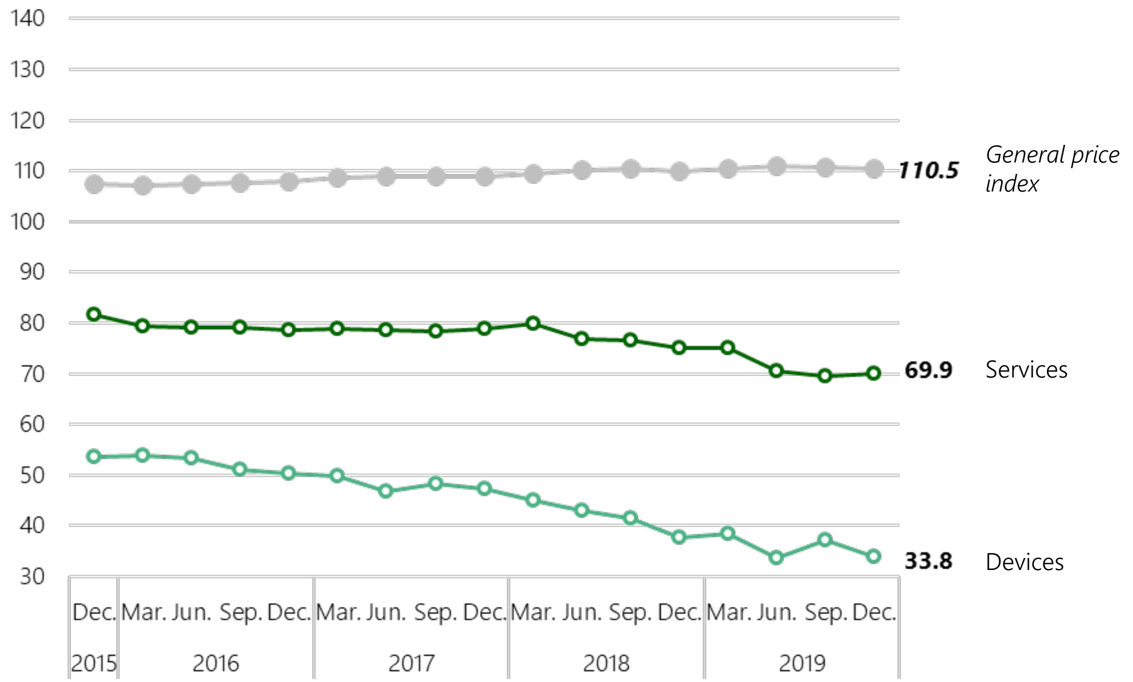
(COICOP - Classification of Individual Consumption by Purpose)

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

FIXED TELEPHONY PRICE INDICES



MOBILE TELEPHONY PRICE INDICES



Fonte: Istat ed elaborazioni Agcom

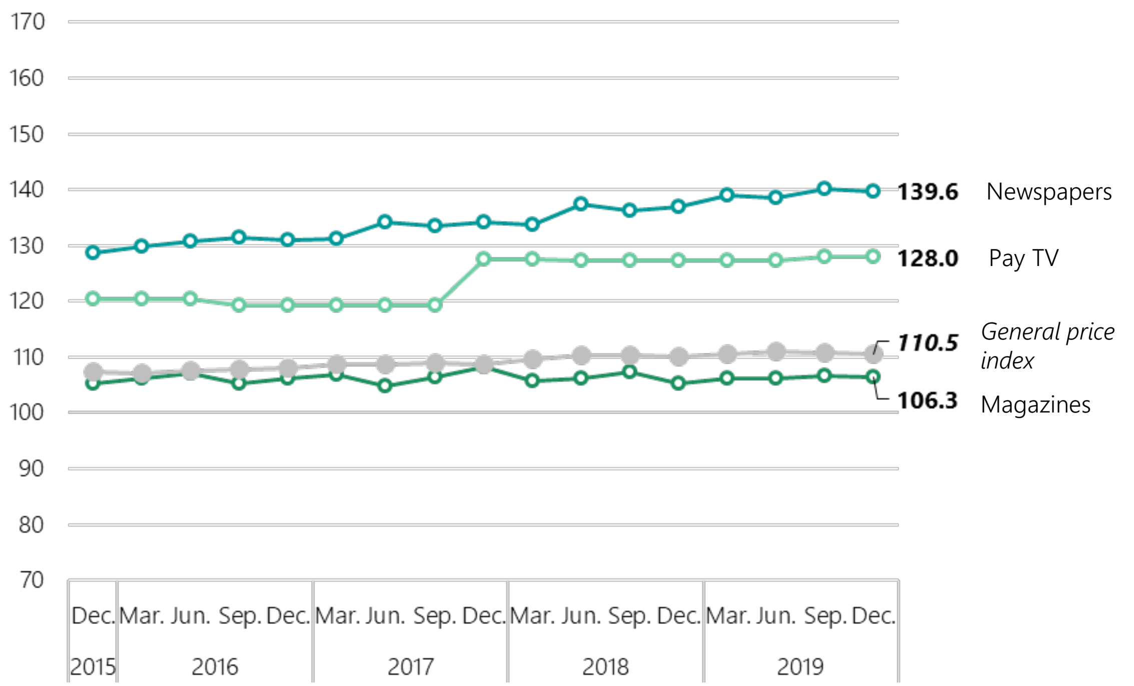
	4-Year change	Annual change
Access / basic services *(08.3.0.1)*:	**+9.6%**	**+2.5%**
Devices *(08.2.0.1)*:	**-3.7%**	**+6.3%**
Broadband / internet *(08.3.0.3.0.01)*:	**-23.6%**	**-15.7%**

	4-Year change	Annual change
Servces *(08.3.0.2)*:	**-14.3%**	**-6.9%**
Devices *(08.2.0.2)*:	**-36.8%**	**-10.3%**

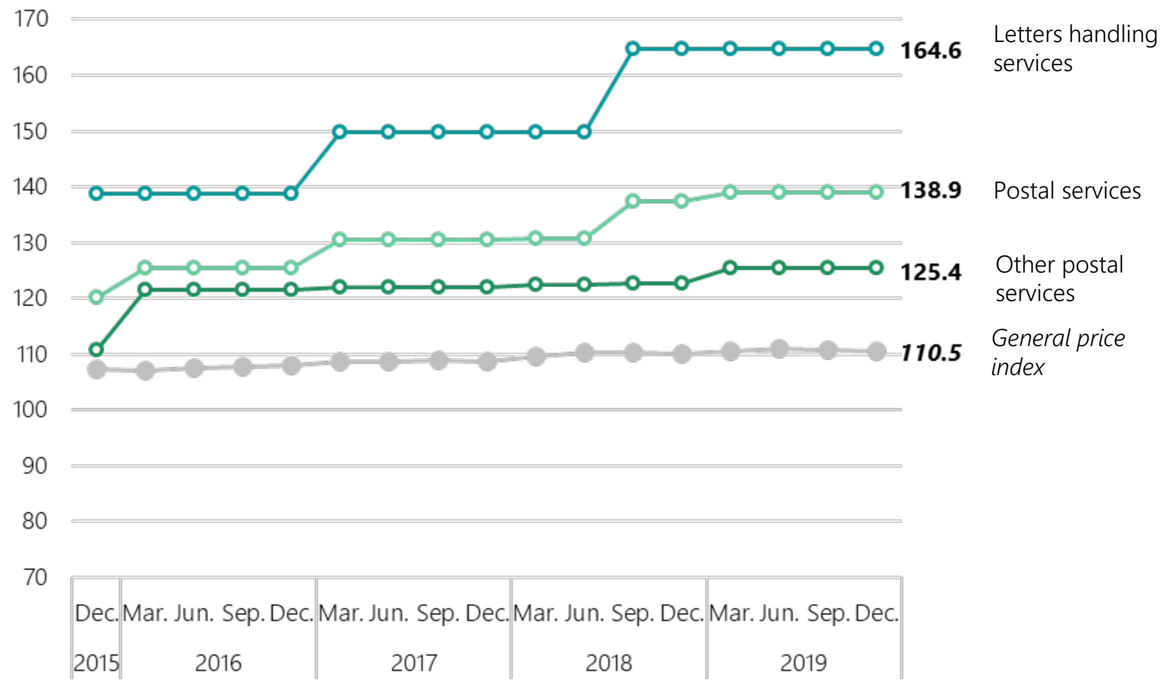
(COICOP - Classification of Individual Consumption by Purpose)

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)*:	**+8.6%** ↑	**+1.9%** ↑
Pay TV *(09.4.2.3.0.02)*:	**+6.4%** ↑	**+0.5%** ↑
Magazines *(09.5.2.2.0)*:	**+1.0%** ↑	**+0.9%** ↑

	4-Year change	Annual change
Postal services *(08.1)*:	**+15.6%** ↑	**+1.2%** ↑
Letters handling services *(08.1.0.1.0.00)*:	**+18.7%** ↑	=
Other postal services *(08.1.0.9.0.00)*:	**+13.3%** ↑	**+2.3%** ↑

(COICOP codes - Classification of Individual Consumption by Purpose)

AGCOM

1-Year change %

Dec. 2018 - Dec. 2019

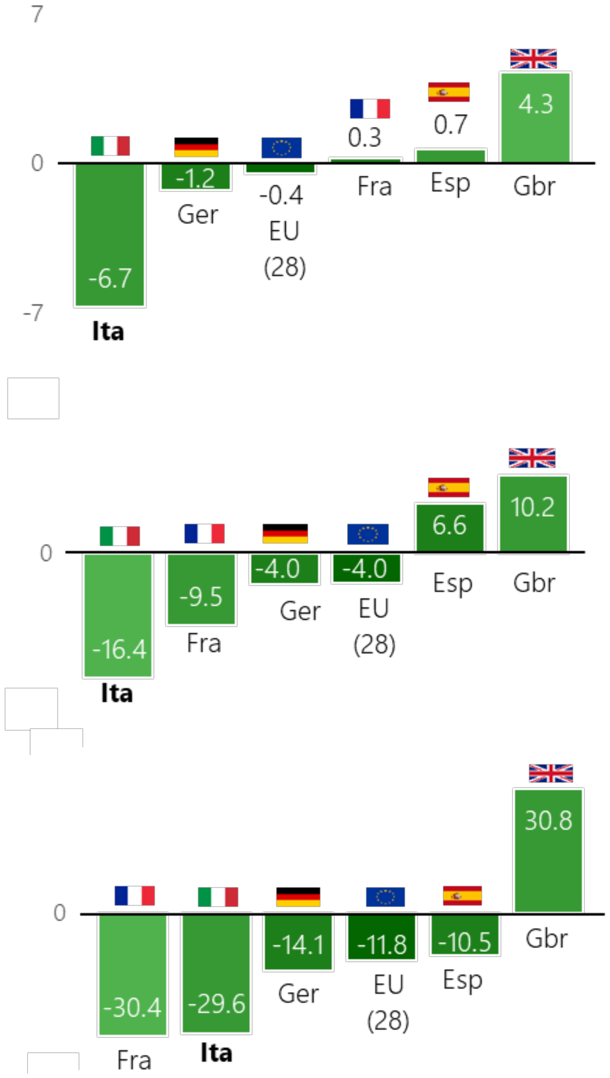
5-Year change %

Dec. 2014 - Dec. 2019

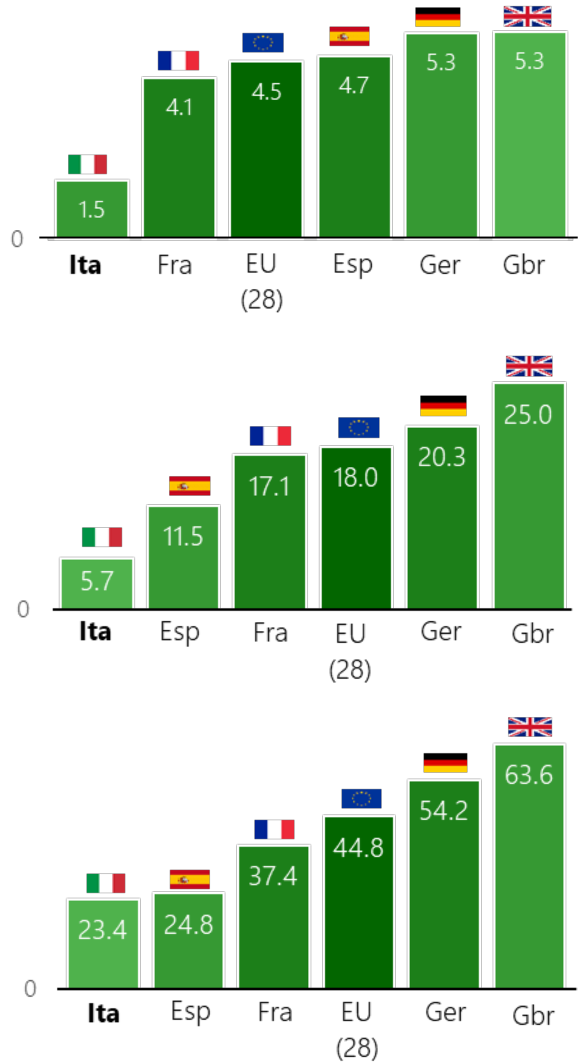
10-Year change %

dic. 2009 - dic. 2019

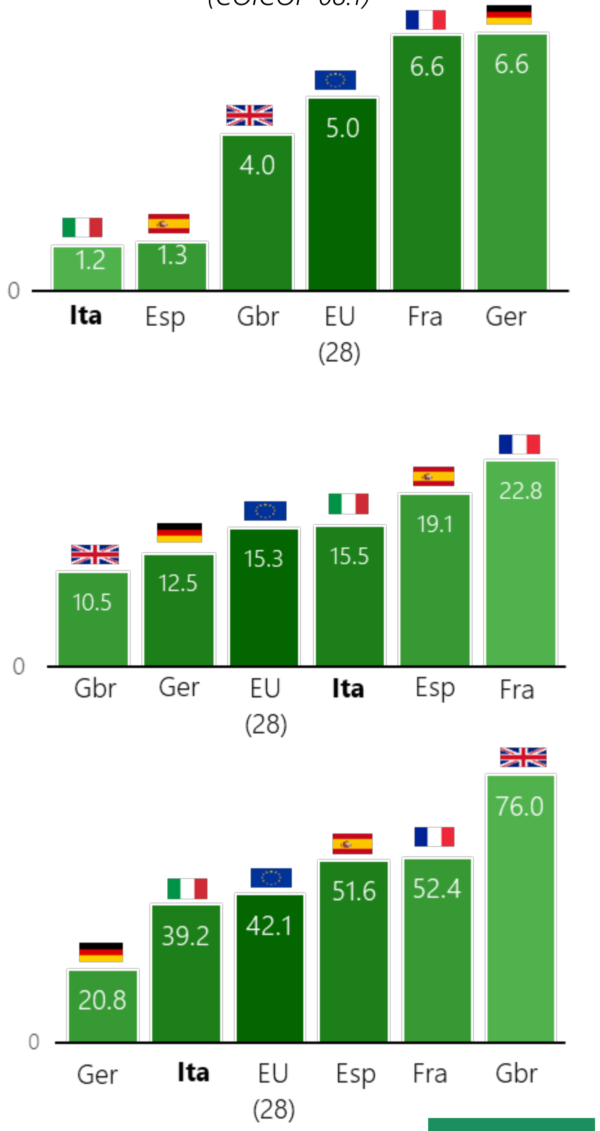
TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)



QUOTIDIANI E PERIODICI
(COICOP 09.5.2)



POSTAL SERVICES
(COICOP 08.1)



AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

N. 1/2020

Servizio Economico Statistico
ses@agcom.it

Roma
Via Isonzo 21/b -00198

Napoli
Centro Direzionale Isola B5 -80143