



AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2021



01 ELECTRONIC COMMUNICATIONS

Fixed lines

- 1.1 Total lines
- 1.2 Broadband and ultrabroadband lines
- 1.3 Broadband and ultrabroadband lines by technology and operators
- 1.4 Daily data traffic (download+upload) (1/2)
- 1.5 Data traffic in download and upload (2/2)

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- 1.7 Subscribers by type of customer
- 1.8 Subscribers by type of contract
- 1.9 Data traffic historical trends (1/3)
- 1.10 Daily data traffic (download+upload) (2/3)
- 1.11 Data traffic in download and upload (3/3)
- 1.12 Number portability

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- 2.2 Leading TV broadcasters by audience share
- 2.3 Total audience of the main national news programs
- 2.4 Average monthly audience of main national news programs

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- 3.8 Volumes historical trends

Market

- 3.9 Competitive landscape
- 3.10 Per-unit revenues historical trends in €

04 COMMUNICATION SERVICES' PRICES

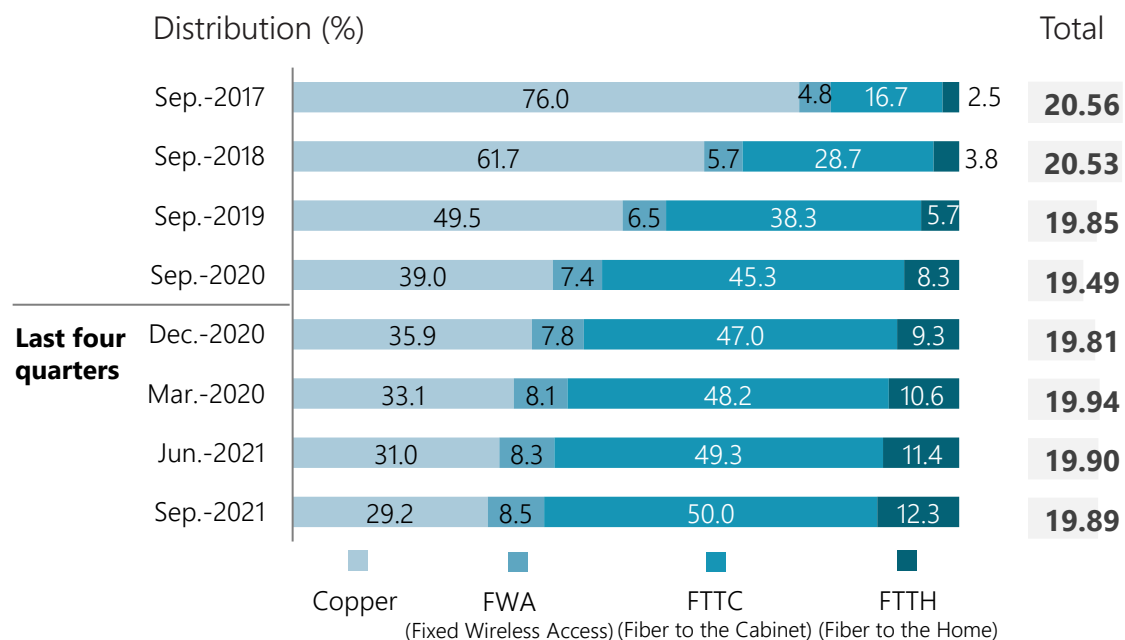
- 4.1 Harmonised consumer price index and other utilities price indices
- 4.2 Mobile and fixed telephony price indices
- 4.3 Daily newspapers, magazines, TV and postal services price indices
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The **Communication Markets Monitoring System** is a quarterly publication 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 Sep. 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.

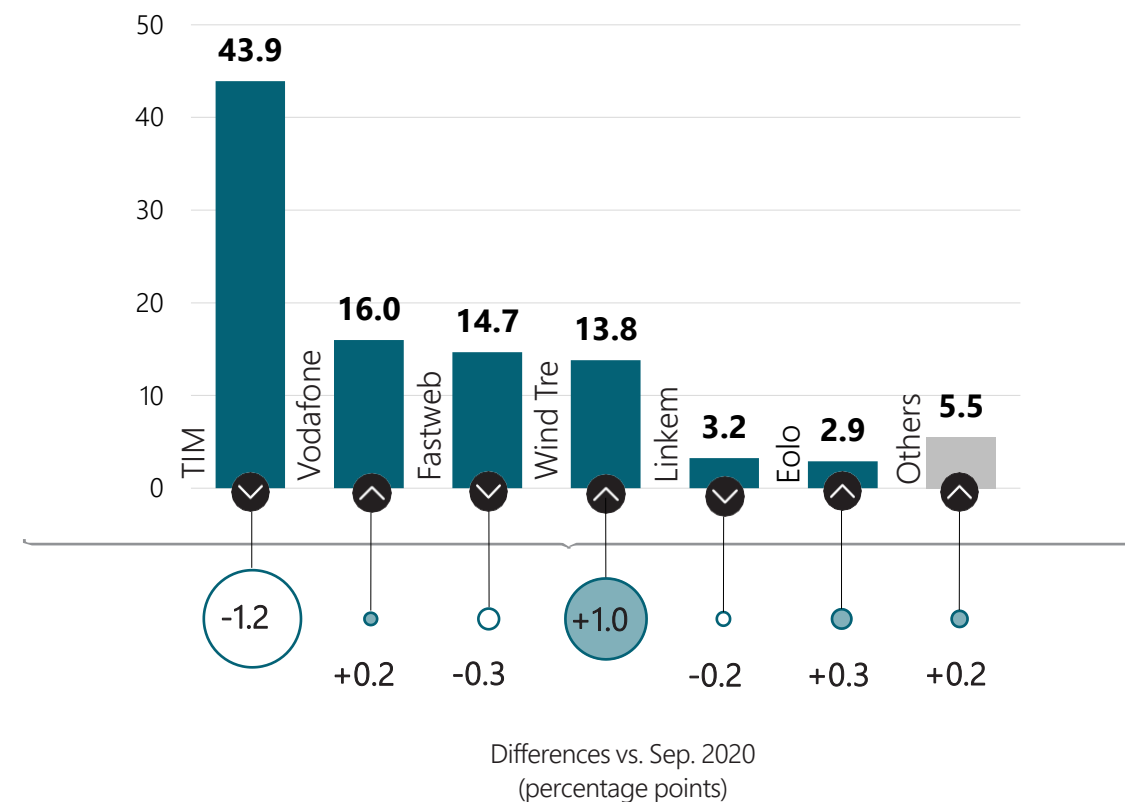
1.1 FIXED NETWORK: TOTAL LINES



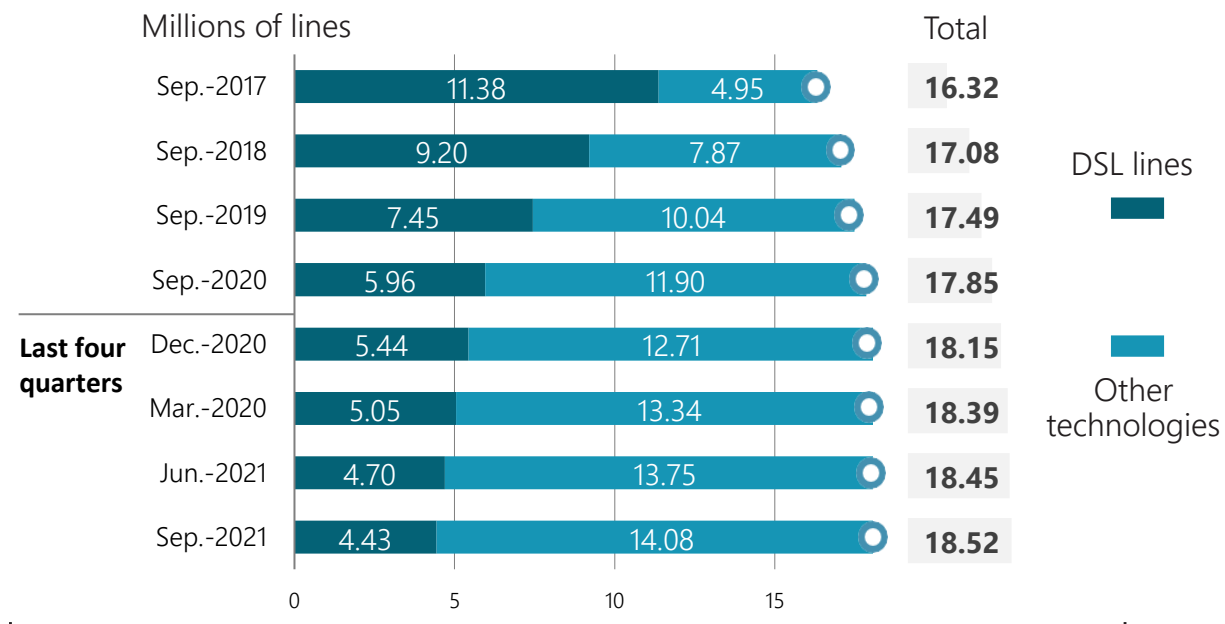
Total lines	(no. of lines)	(Δ %)	Distribution (Δ 2020-2021) percentage points
Quarterly change (Jun. 2021 – Sep. 2021)	-13 K accesses	-0.1 ↓	Copper: -9.8 ↓
Annual change (Sep. 2020 – Sep. 2021)	+400 K accesses	+2.1 ↑	FWA: +1.1 ↑
			FTTC: +4.7 ↑
4-Year change (Sep. 2017 – Sep. 2021)	-669 K accesses	-3.3 ↓	FTTH: +4.0 ↑

MARKET SHARES (%)

SEPTEMBER 2021



1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES



Quarterly change
(Jun. 2021 – Sep. 2021)

Total lines



+68 K
lines
(+0.4%)

Annual change
(Sep. 2020 – Sep. 2021)

Total lines



+660 K
lines
(+3.7 %)

DSL lines



-1.524 M
lines
(-25.6%)

Other technologies

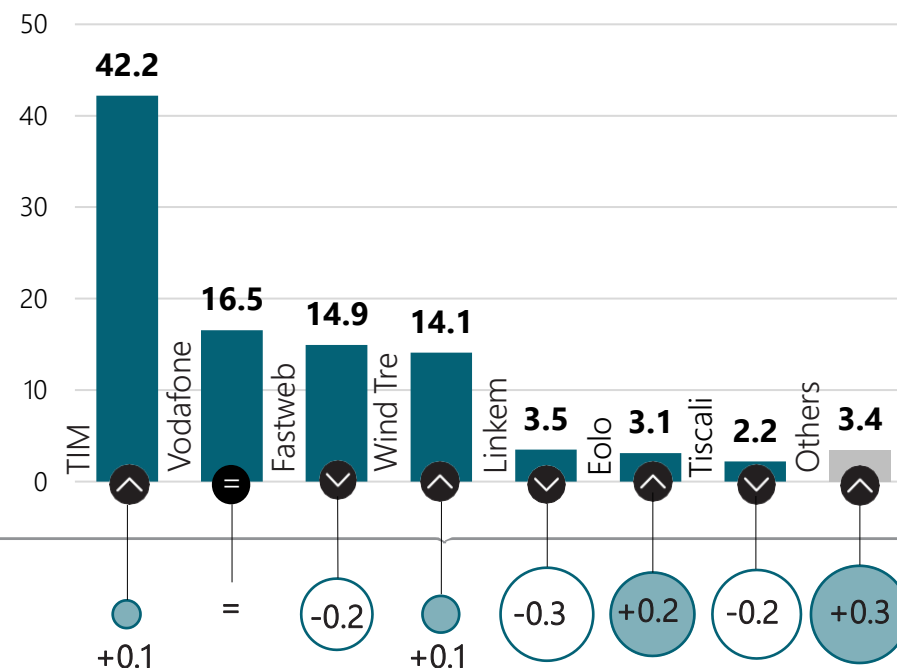


+2.184 M
lines
(+18.4%)

K = thousand
M = million

MARKET SHARES (%)

SEPTEMBER 2021



Differences vs. Sep. 2020
(percentage points)

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

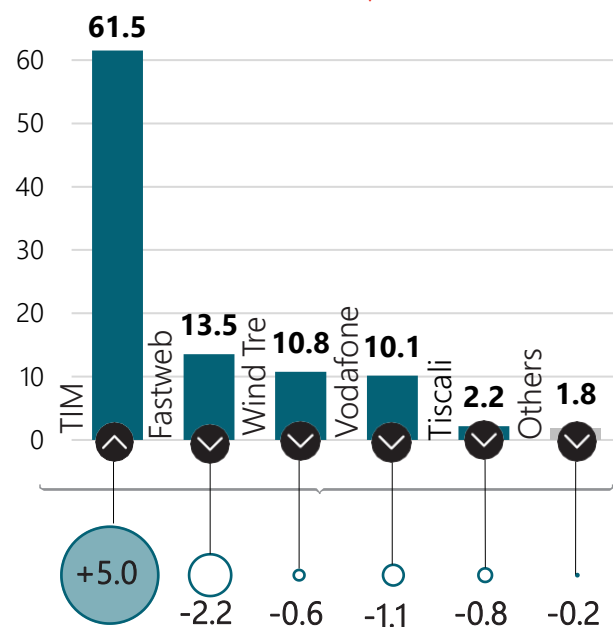
SEPTEMBER 2021

DSL

Total lines: **4.43** million accesses

Annual change
(Sep. 2020 – Sep. 2021)

-25.6% ↓

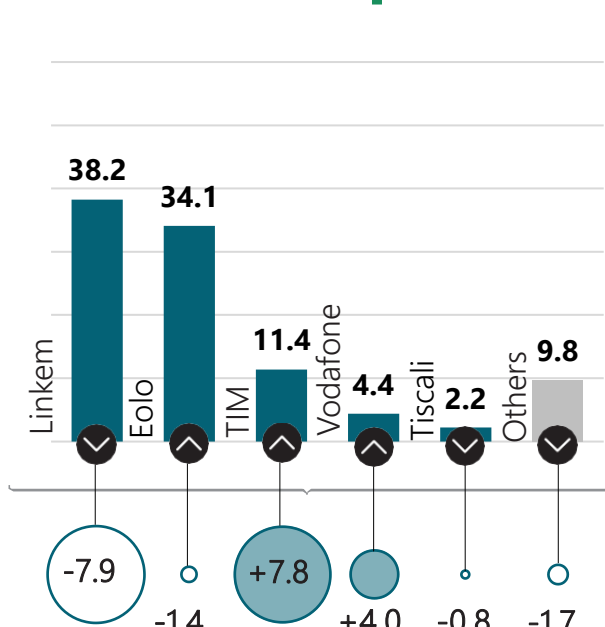


FWA

Total lines: **1.68** million access

Annual change
(Sep. 2020 – Sep. 2021)

+16.6% ↑

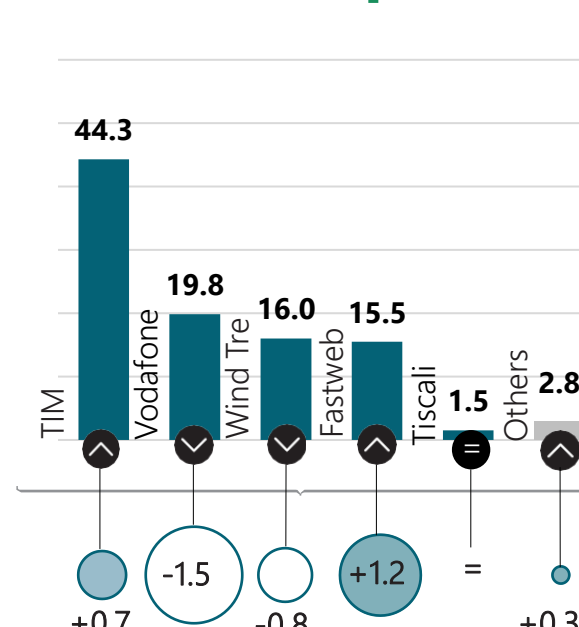


FTTC

Total lines: **9.95** million access

Annual change
(Sep. 2020 – Sep. 2021)

+12.7% ↑

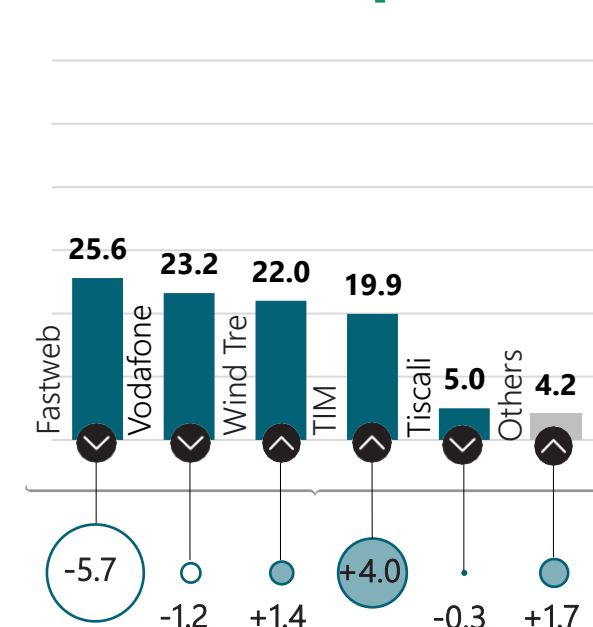


FTTH

Total lines: **2.44** million access

Annual change
(Sep. 2020 – Sep. 2021)

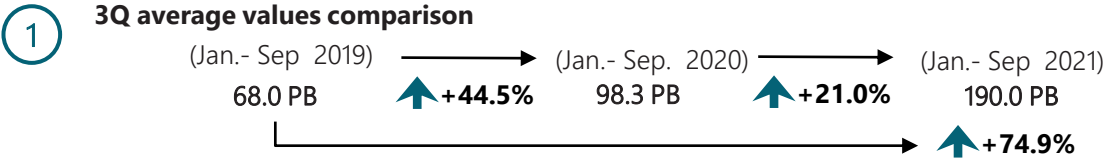
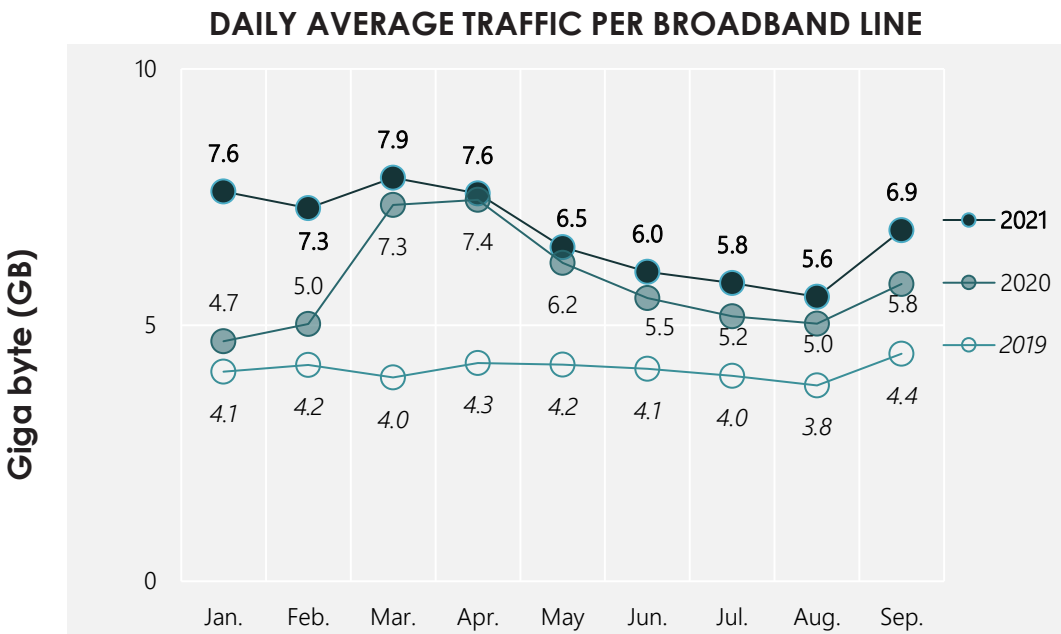
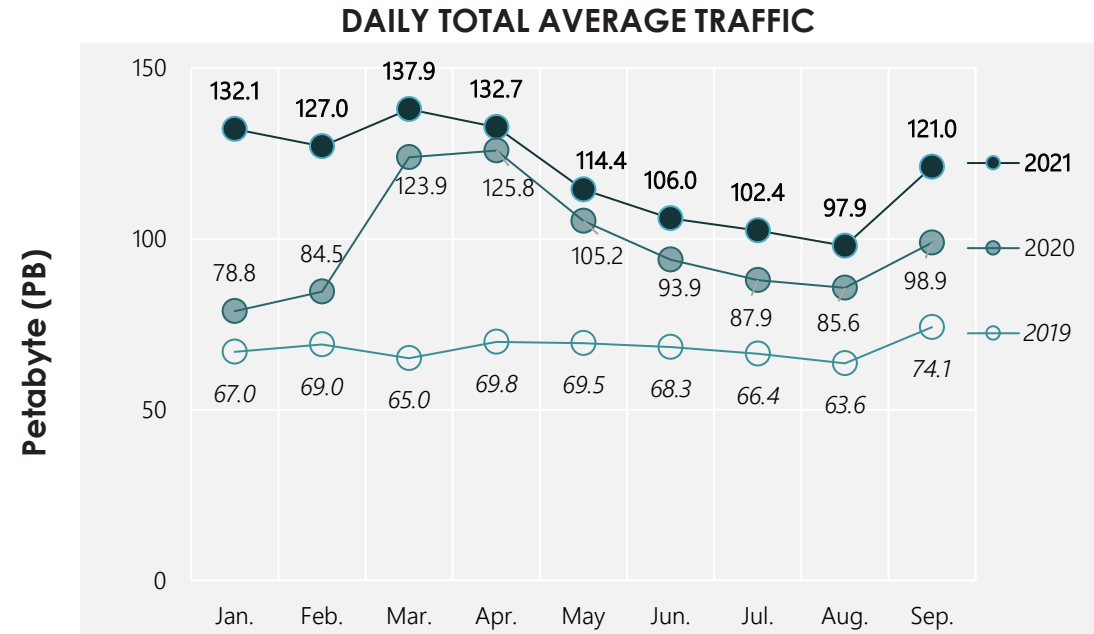
+51.2% ↑



Differences vs. Sep. 2020
(percentage points)

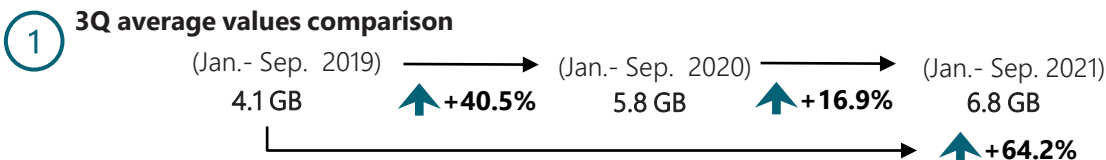
Note: elaborations based on data provided by companies in the context of the preparation of European reporting A few thousand lines allocated by the companies in the categories "Other non-NGA" and "Other NGA" are excluded from the analysis..

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



2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+17.7	+67.7	+97.3
February	+22.4	+50.3	+84.0
March	+90.5	+11.4	+112.1
April	+80.3	+5.4	+90.1
May	+51.5	+8.7	+64.7
June	+37.4	+12.9	+55,1
July	+32.5	+16.5	+54.4
August	+34.7	+14.4	+54.0
September	+33.4	+22.4	+63.3

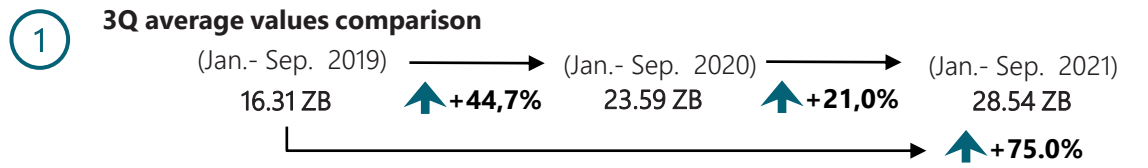
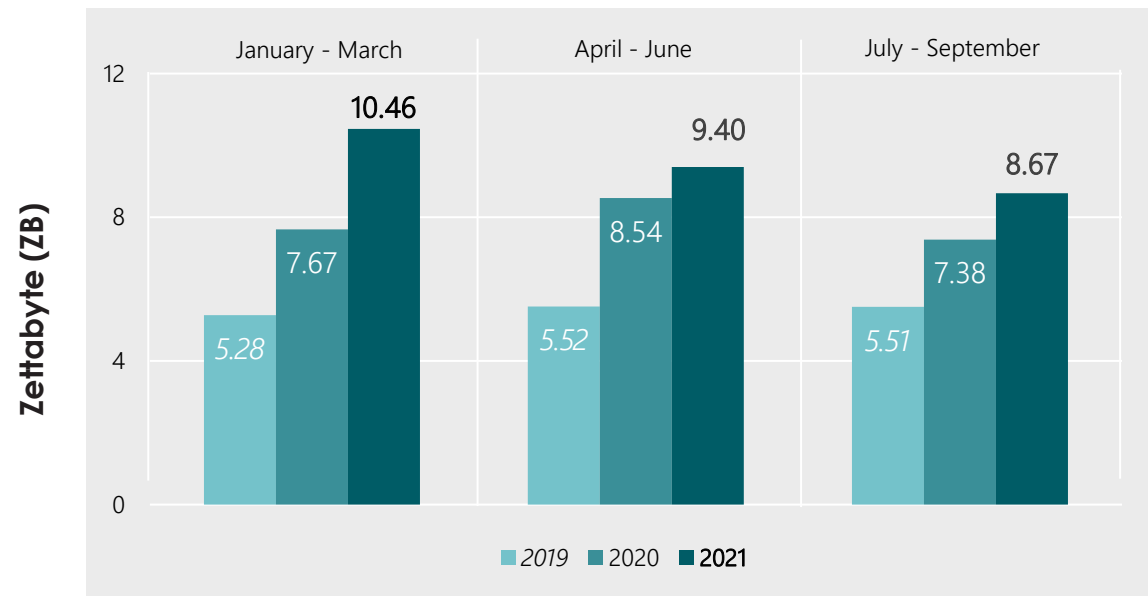


2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+14.5	+62.3	+85.9
February	+18.9	+45.1	+72.5
March	+84.7	+7.2	+98.1
April	+74.8	+1.7	+77.8
May	+47.0	+5.0	+54.3
June	+33.2	+9.2	+45.5
July	+28.9	+12.6	+45.2
August	+31.5	+10.4	+45.2
September	+30.7	+18.1	+54.3

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

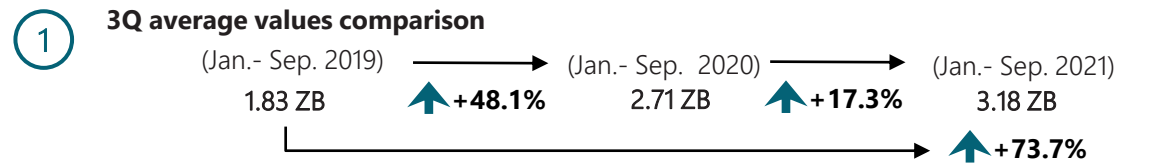
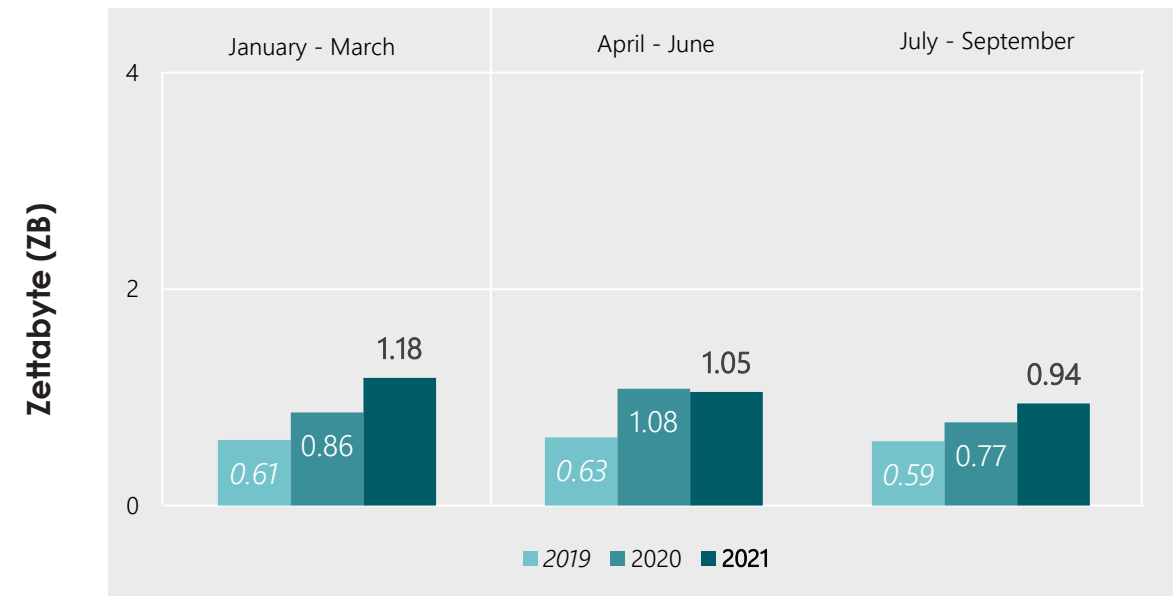
DOWNLOAD



2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+18.6	+67.9	+99.1
February	+27.4	+44.4	+84.0
March	+89.9	+11.2	+111.2
April	+77.1	+7.3	+90.0
May	+50.4	+9.7	+65.1
June	+36.5	+14.2	+55.9
July	+32.5	+16.3	+54.1
August	+35.4	+13.7	+54.0
September	+34.0	+21.9	+63.3

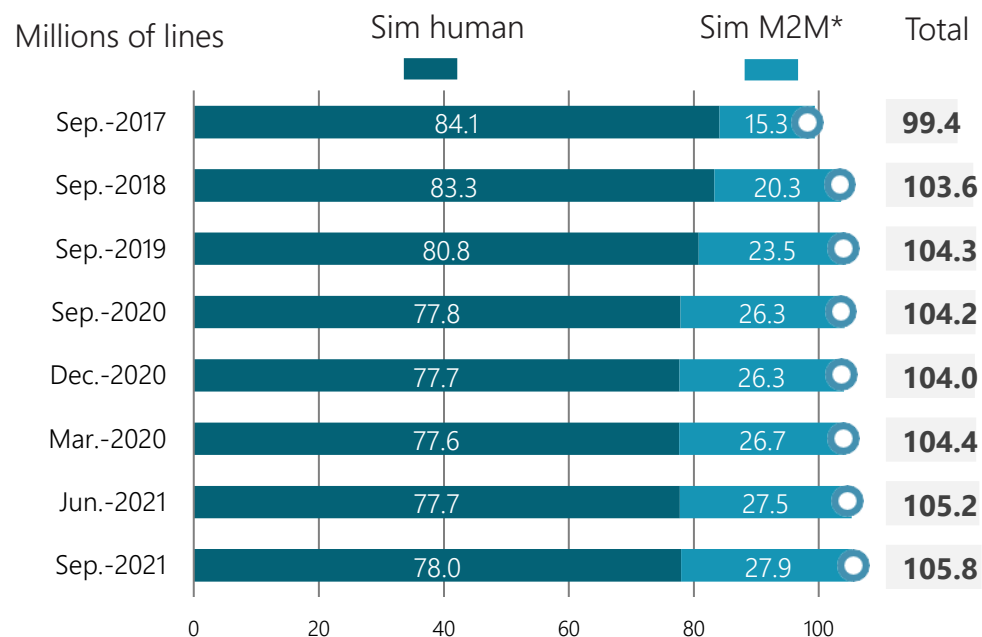
UPLOAD



2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+10.2	+65.7	+82.6
February	+21.3	+51.7	+84.0
March	+95.6	+12.6	+120.2
April	+108.2	-8.2	+91.0
May	+61.0	+0.2	+61.3
June	+44.7	+2.3	+48.1
July	+32.5	+18.3	+56.8
August	+28.0	+20.7	+54.4
September	+27.8	+28.0	+63.5

1.6 MOBILE NETWORK: TOTAL SUBSCRIBERS



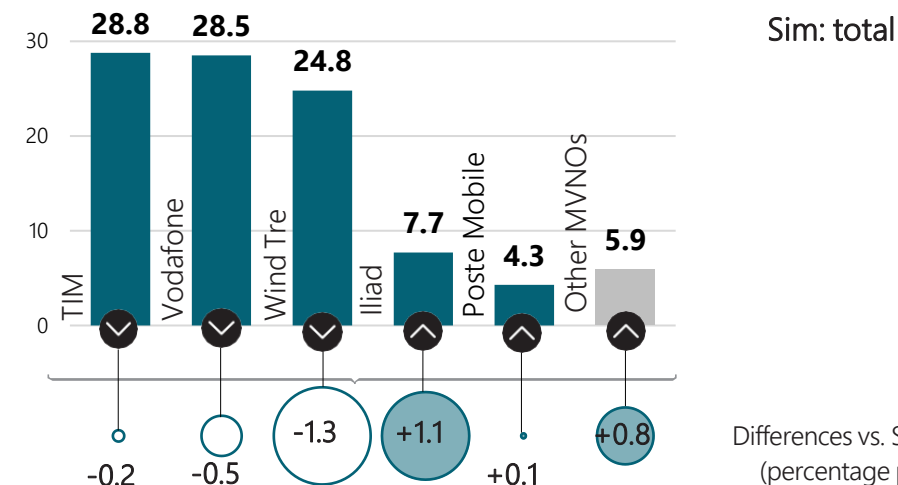
(*) **Note:** Machine-to-Machine sims are based on the technologies that enable devices and sensors or “things” (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

	Quarterly change (Jun. 2021 – Sep. 2021)		Annual change (Sep. 2020 – Sep. 2021)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
Total sim cards:	+607	↑ +0.6	+1,688	↑ +1.6
Sim human:	+245	↑ +0.3	+147	↑ +0.2
Sim M2M:	+362	↑ +1.3	+1,541	↑ +5.9

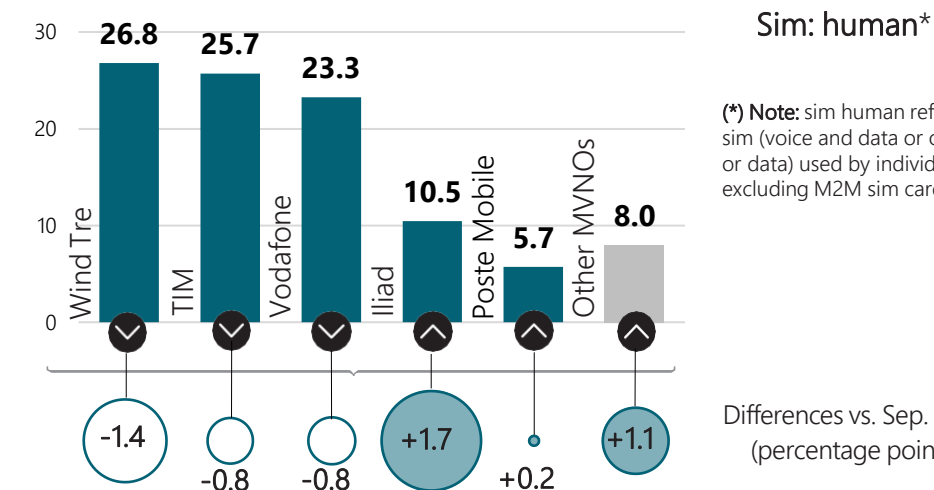
Note: the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho)

MARKET SHARES (%)

SEPTEMBER 2021



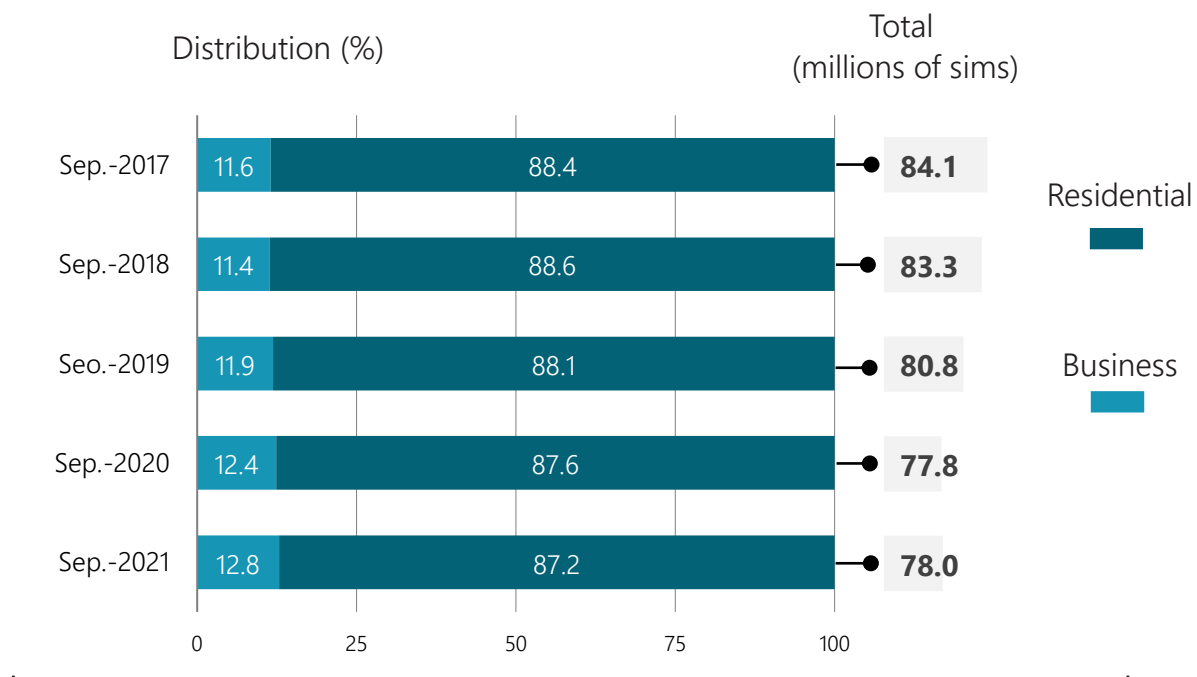
Differences vs. Sep. 2020
(percentage points)



Differences vs. Sep. 2020
(percentage points)

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

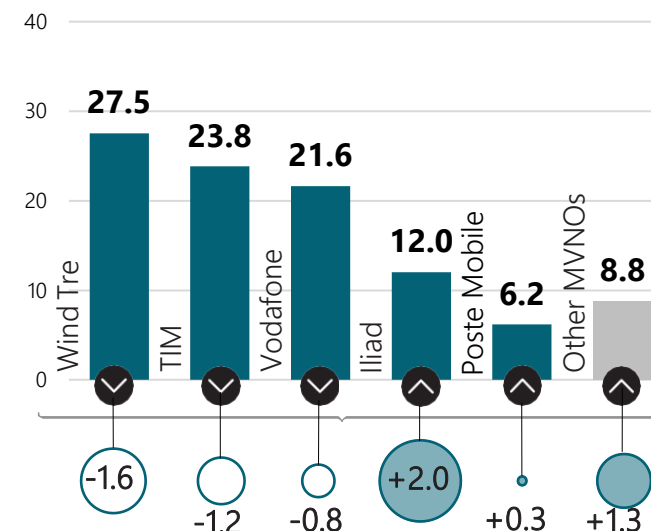
1.7 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



	Annual change (Sep. 2020 – Sep. 2021)			4-Year change (Sep. 2017 – Sep. 2021)		
	(no of sim in thousand)	(Δ %)		(no of sim in thousand)	(Δ %)	
Total human sim cards:	+147	↑	+0.2	-6,114	↓	-7.3
Residential sim card:	-221	↓	-0.3	-6,409	↓	-8.6
Business sim cards:	+368	↑	+3.8	+265	↑	+3.0

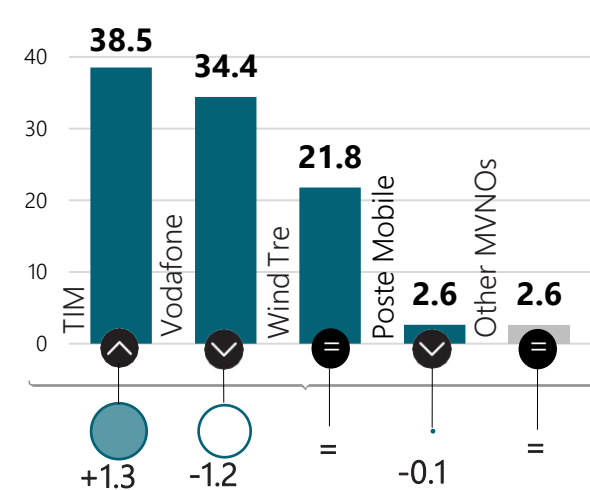
MARKET SHARES (%)

SEPTEMBER 2021



Residential

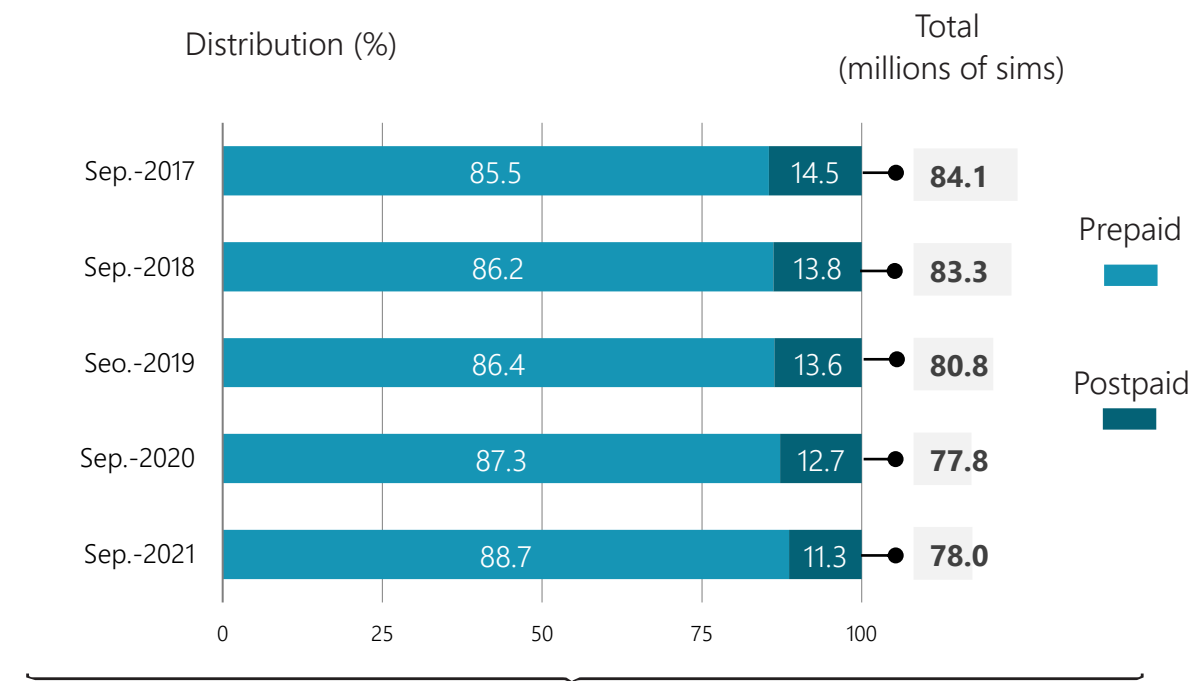
Differences vs. Sep. 2020
(percentage points)



Business

Differences vs. Sep. 2020
(percentage points)

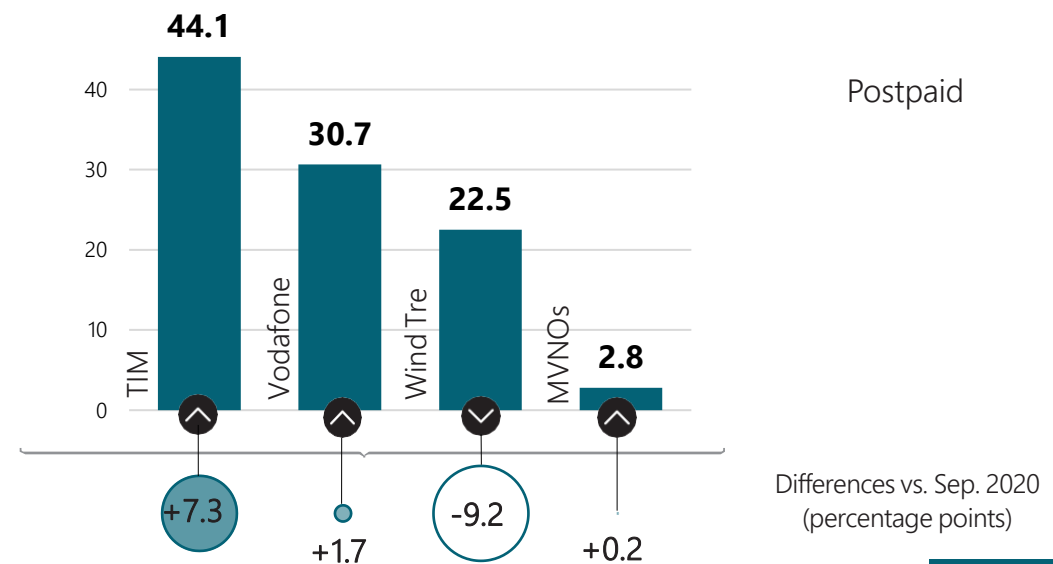
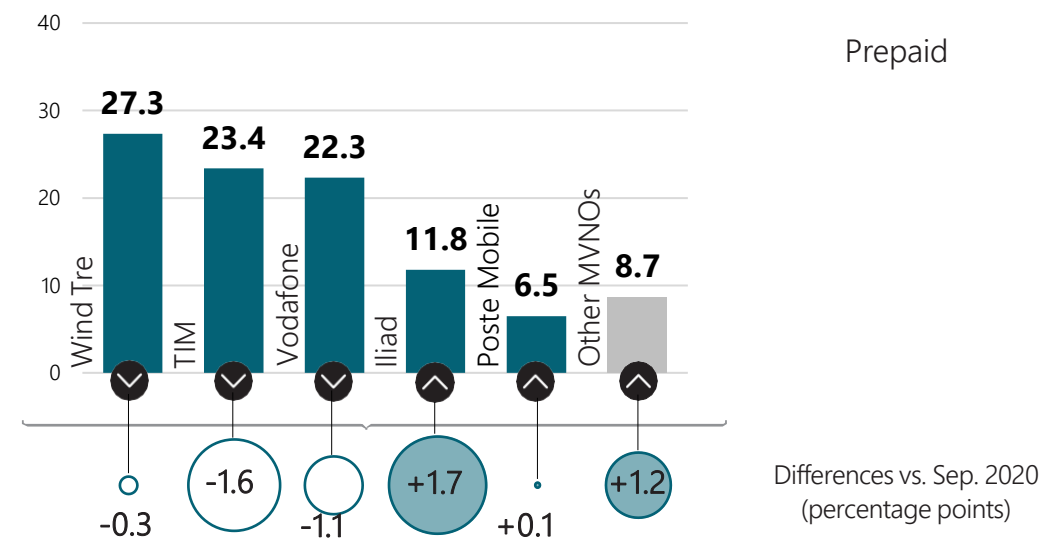
1.8 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT



	Annual change (Sep. 2020 – Sep. 2021)			4-Year change (Sep. 2017 – Sep. 2021)		
	(no of sim in thousand)	(Δ %)		(no of sim in thousand)	(Δ %)	
Total human sim cards:	+147	↑ +0.2		-6,114	↓ -7.3	
Prepaid sim cards:	+1,216	↑ +1.8		-2,767	↓ -3.8	
Postpaid sim cards:	-1,069	↓ -10.8		-3,347	↓ -27.5	

MARKET SHARES (%)

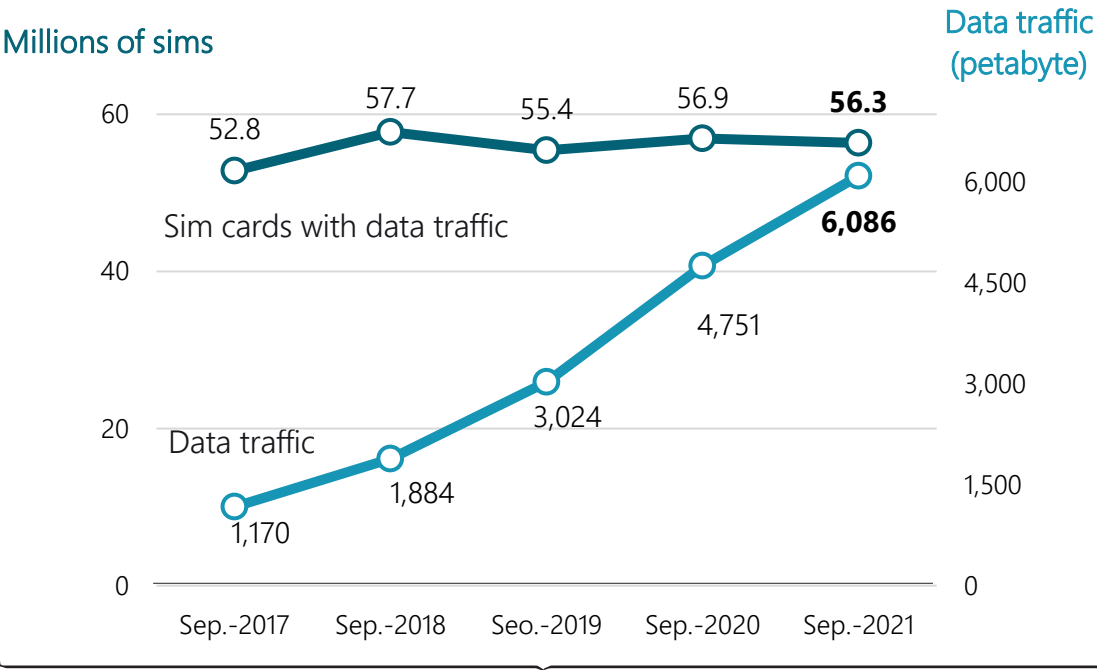
SEPTEMBER 2021



1.9 MOBILE NETWORK: DATA TRAFFIC HISTORICAL TRENDS (1/3)

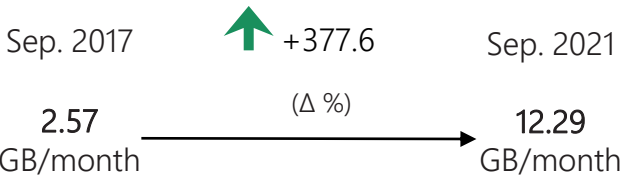
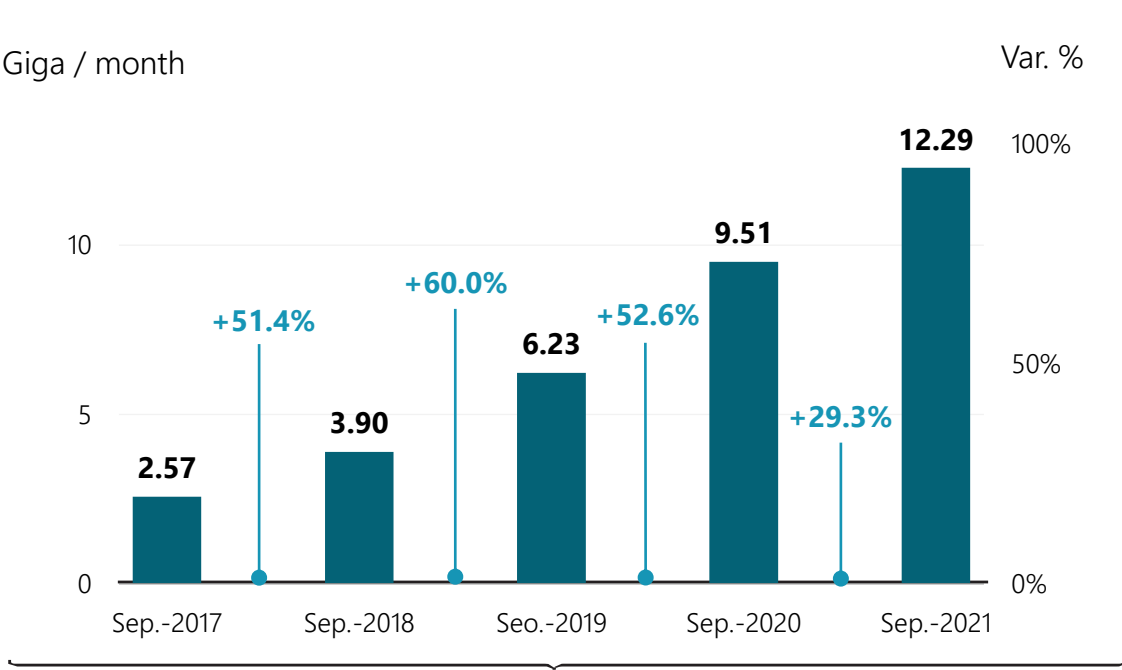


DATA TRAFFIC SINCE THE BEGINNING OF THE YEAR



	Annual change (Sep. 2020 – Sep. 2021)		4-Year change (Sep. 2017 – Sep. 2021)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
SIM cards with data traffic:	-581	↓ -1,0	+3,516	↑ +6.7
Data traffic:	(petabyte)	(Δ %)	(petabyte)	(Δ %)
	+1,335	↑ +28.1	+4,916	↑ +420.3

AVERAGE MONTHLY CONSUMPTION

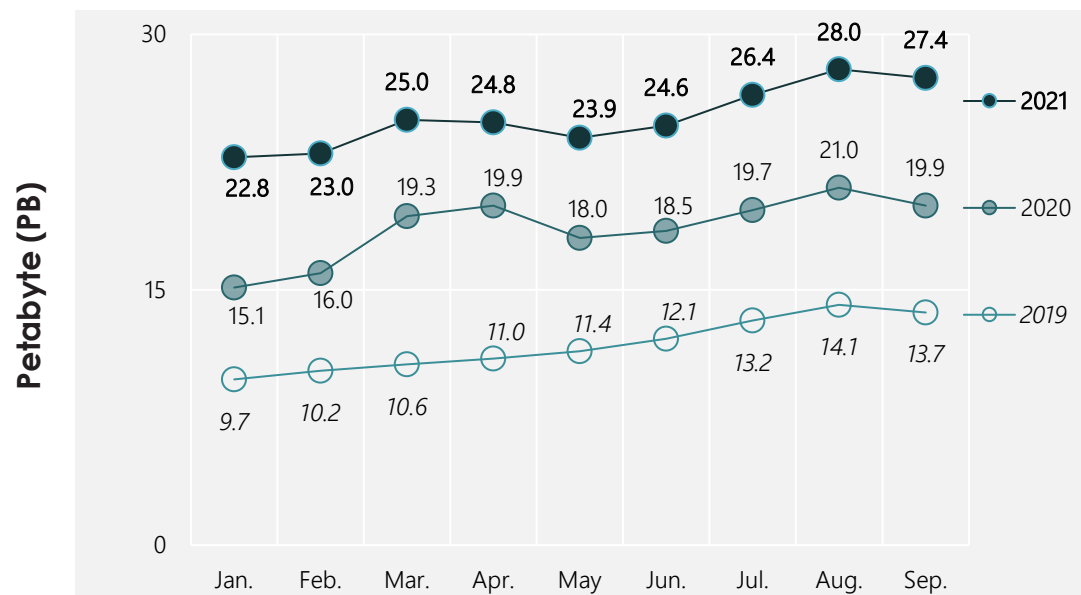


At the end of Sep. 2021, the number of sim cards with data traffic has reached **72.2%** of the total human sim cards

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

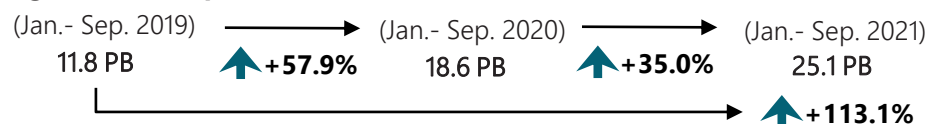
1.10 MOBILE NETWORK: DAILY DATA TRAFFIC (download + upload) (2/3)

DAILY TOTAL AVERAGE TRAFFIC



①

3Q average values comparison

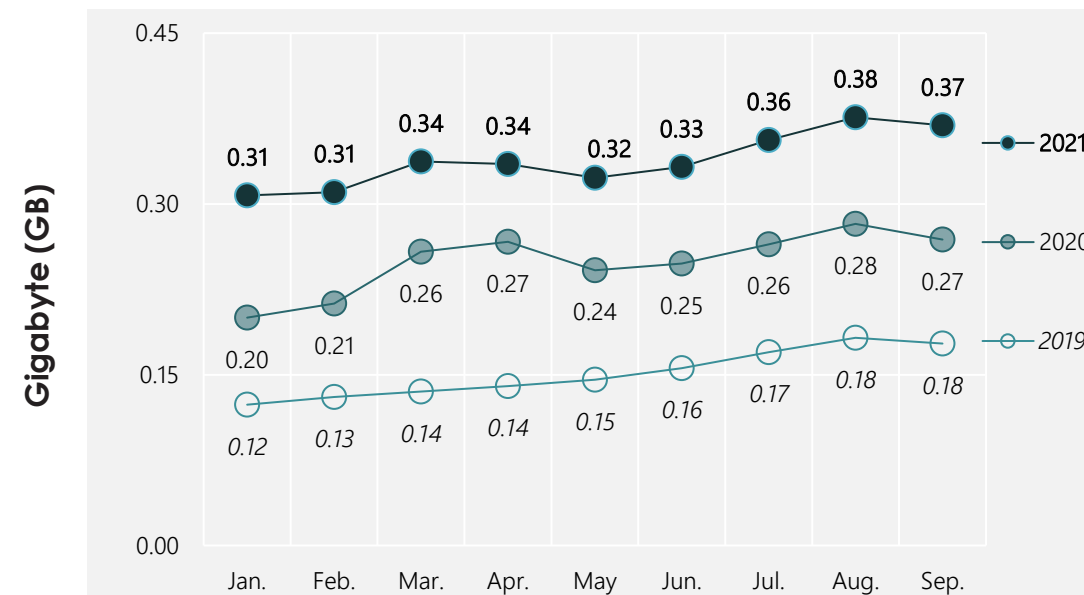


②

Monthly comparison (change in %)

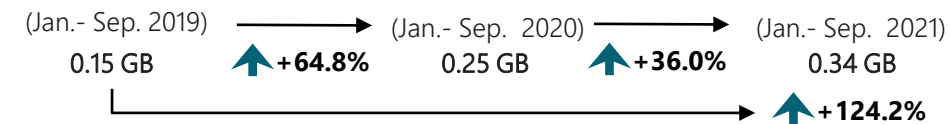
	2019/2020	2020/2021	2019/2021
January	+55.4	+50.7	+134.1
February	+55.9	+44.0	+124.5
March	+82.1	+29.3	+135.5
April	+81.9	+24.5	+126.5
May	+58.4	+32.7	+110.2
June	+52.1	+33.6	+103.2
July	+49.3	+34.4	+100.6
August	+48.8	+33.2	+98.1
September	+45.9	+37.6	+100.8

DAILY AVERAGE TRAFFIC PER SIM «HUMAN»



①

3Q average values comparison



②

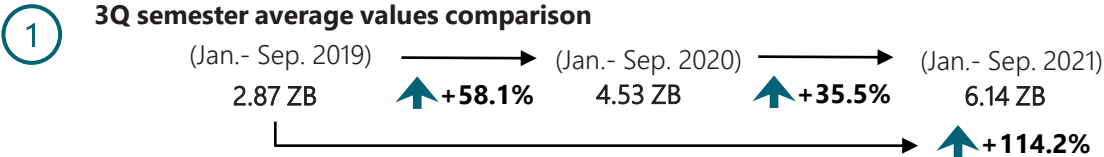
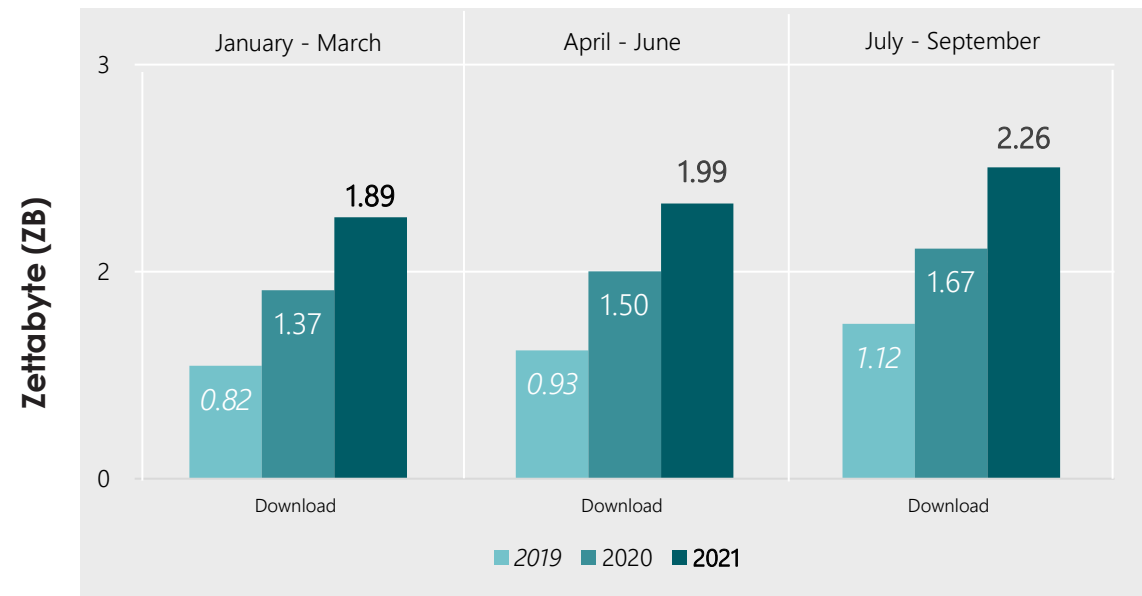
Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+61.8	+53.7	+148.6
February	+62.9	+46.2	+138.1
March	+90.9	+30.7	+149.4
April	+90.6	+25.5	+139.3
May	+65.9	+33.6	+121.6
June	+59.1	+34.2	+113.6
July	+55.8	+34.7	+109.8
August	+54.8	+33.2	+106.3
September	+51.5	+37.3	+108.0

1.11 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD (3/3)



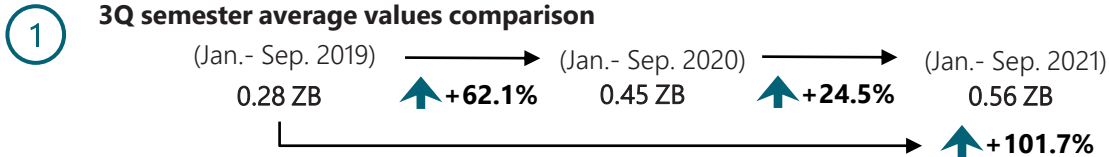
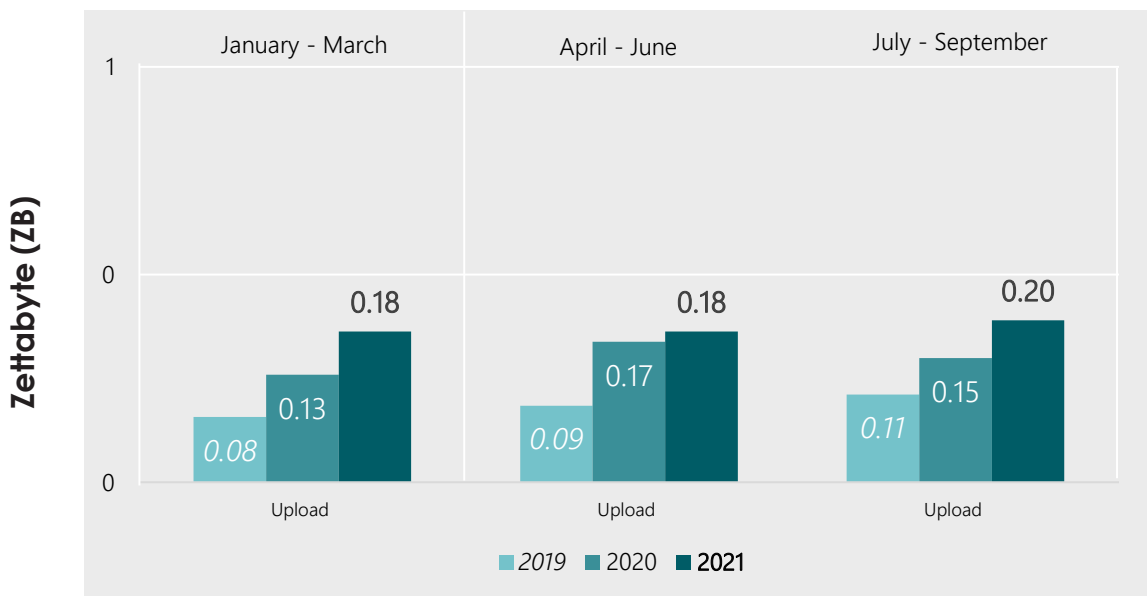
DOWNLOAD



2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+56.9	+49.8	+135.1
February	+62.4	+38.2	+124.5
March	+80.5	+30.2	+134.9
April	+77.7	+27.8	+127.2
May	+55.9	+35.7	+111.6
June	+52.7	+34.8	+105.5
July	+49.7	+35.0	+102.0
August	+49.7	+33.4	+99.7
September	+46.4	+37.9	+102.0

UPLOAD

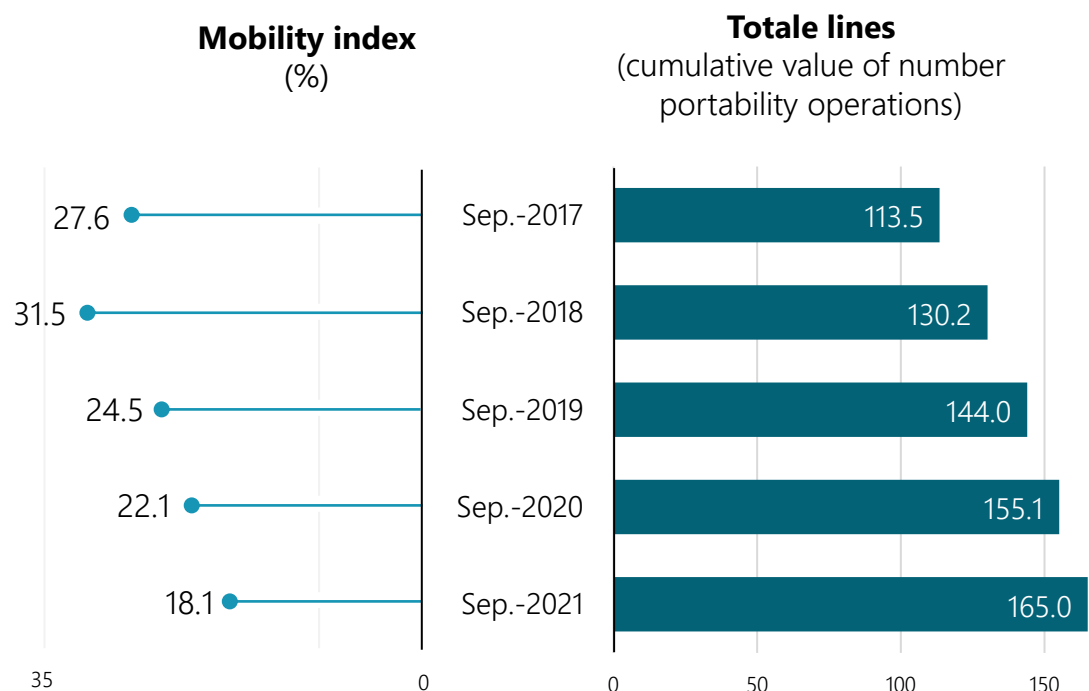


2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+39.8	+60.3	+124.2
February	+51.4	+48.8	+125.3
March	+98.8	+21.3	+141.2
April	+125.6	-2.9	+119.1
May	+84.1	+6.9	+96.7
June	+46.2	+21.2	+77.1
July	+45.3	+27.6	+85.4
August	+39.6	+30.0	+81.5
September	+40.4	+33.6	+101.7

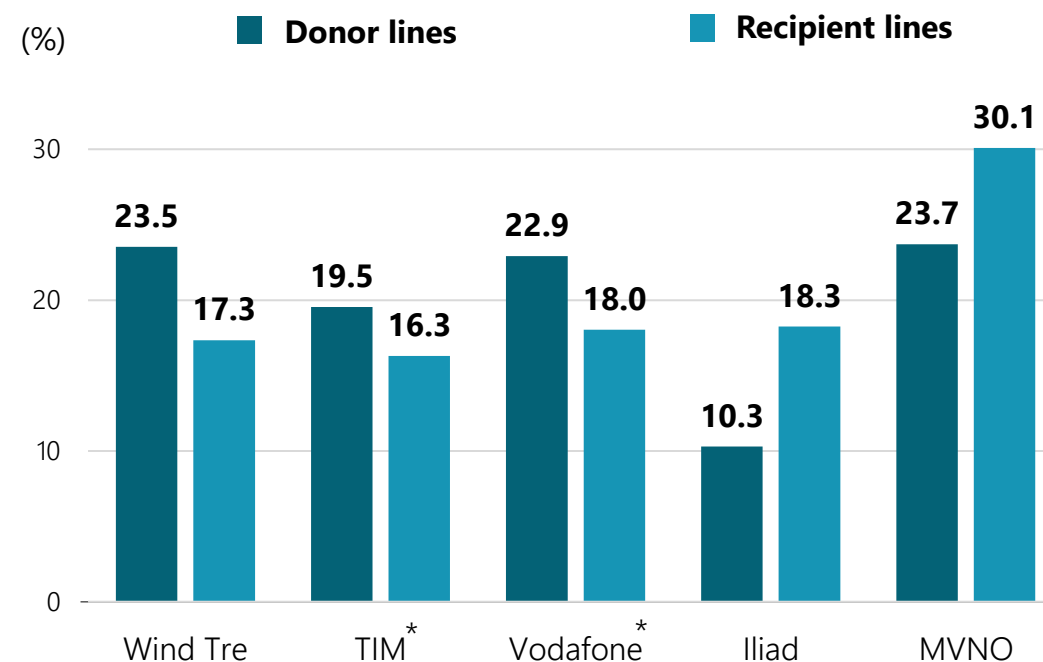
1.12 MOBILE NETWORK: NUMBER PORTABILITY

In one year (Sep. 2020 – Sep. 2021), there have been
9.9 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 customer base (net off M2M sims)

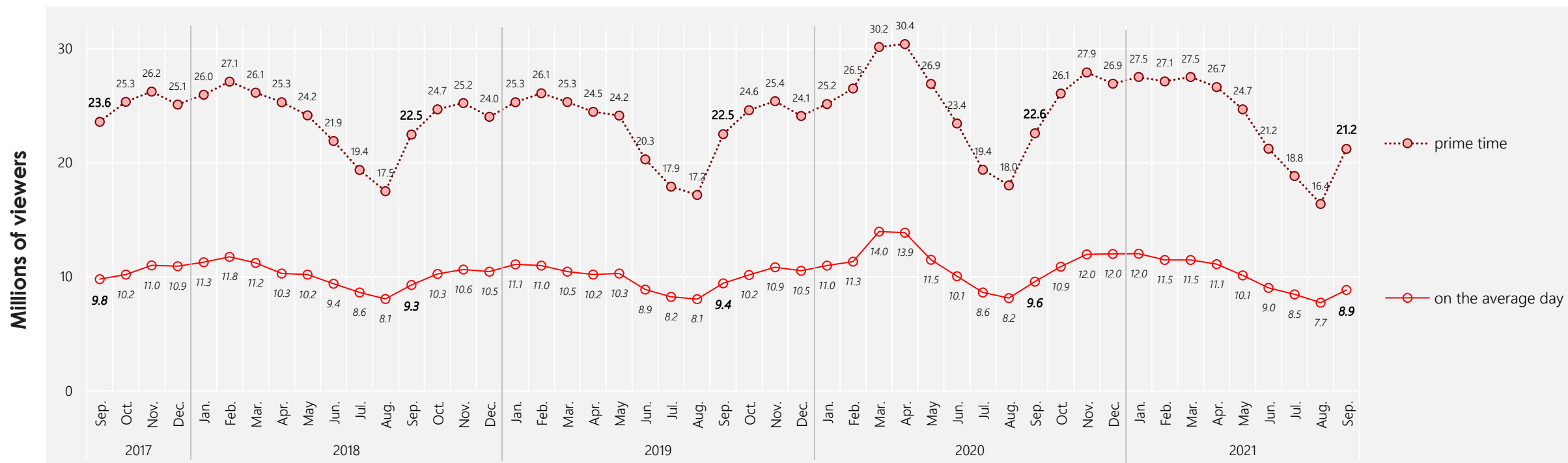
DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months) SEPTEMBER 2021



(*) **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

SEPTEMBER 2017 - 2021



Change in the number of viewers

Prime time audience
(Time slot: 20:30 – 22:30)

Average daily audience
(Time slot: whole day)

Annual change Sep. 2020 - Sep. 2021

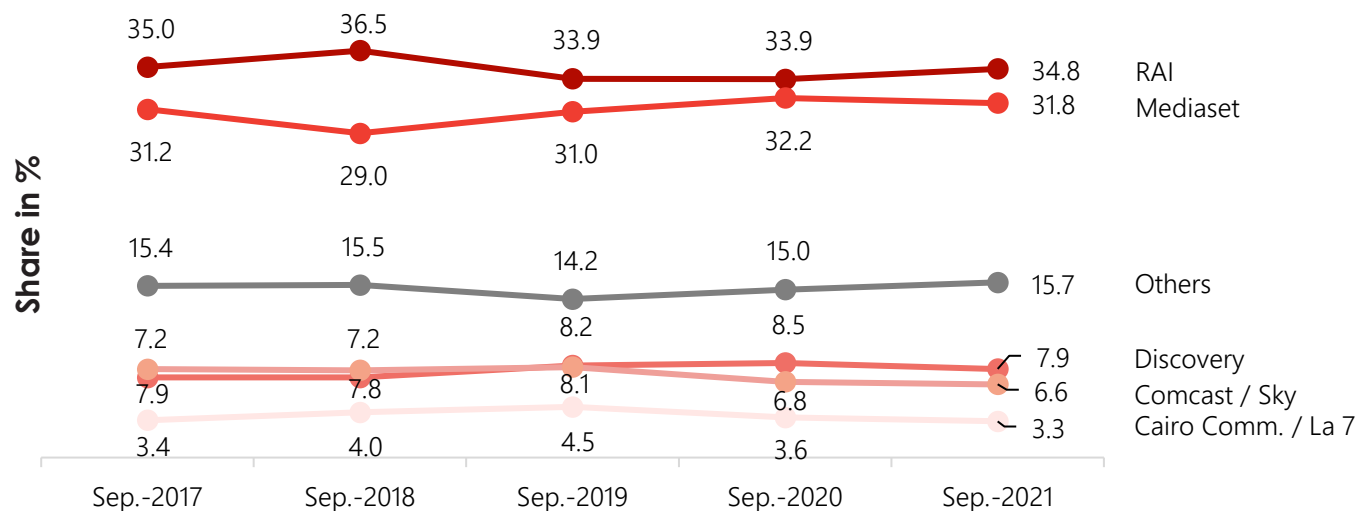
in %	in millions
-6.1	-1.37 mln
-7.6	-0.73 mln

Period change Sep. 2017 – Sep. 2021

in %	in millions
-10.0	-2.37 mln
-9.7	-0.95 mln

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

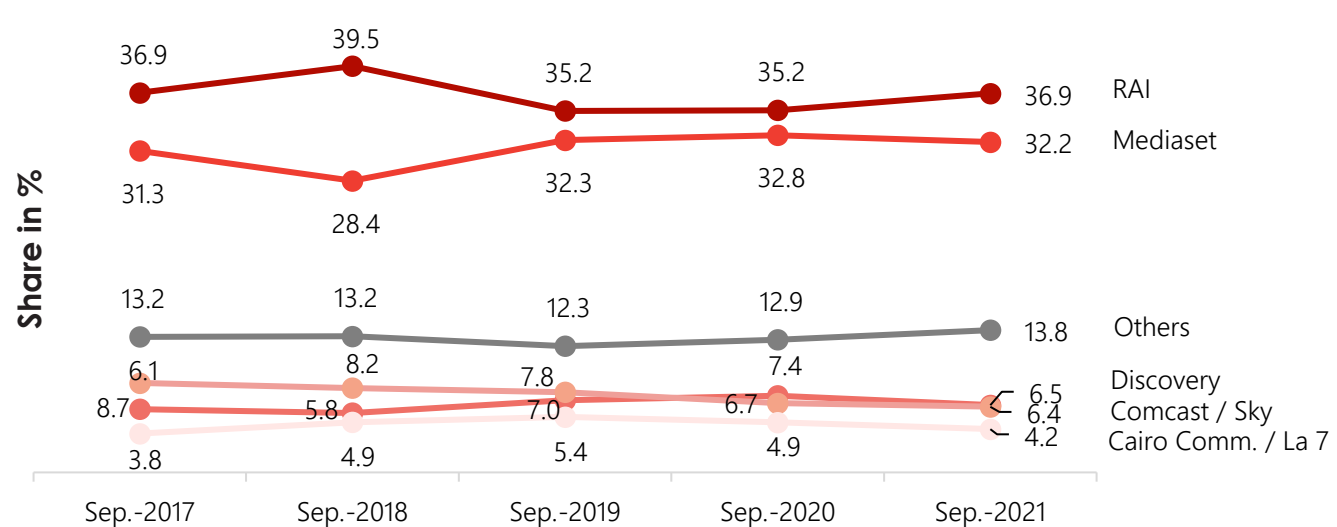
Average daily audience



Percentage point change

	Annual Sep. 2020 – Sep. 2021	Period Sep. 2017 – Sep. 2021
RAI	+0.9	-0.1
Mediaset	-0.5	+0.5
Discovery	-0.5	+0.8
Comcast / Sky	-0.2	-1.4
Cairo Comm. / La 7	-0.3	-0.1
Others	+0.6	+0.3

Prime time audience

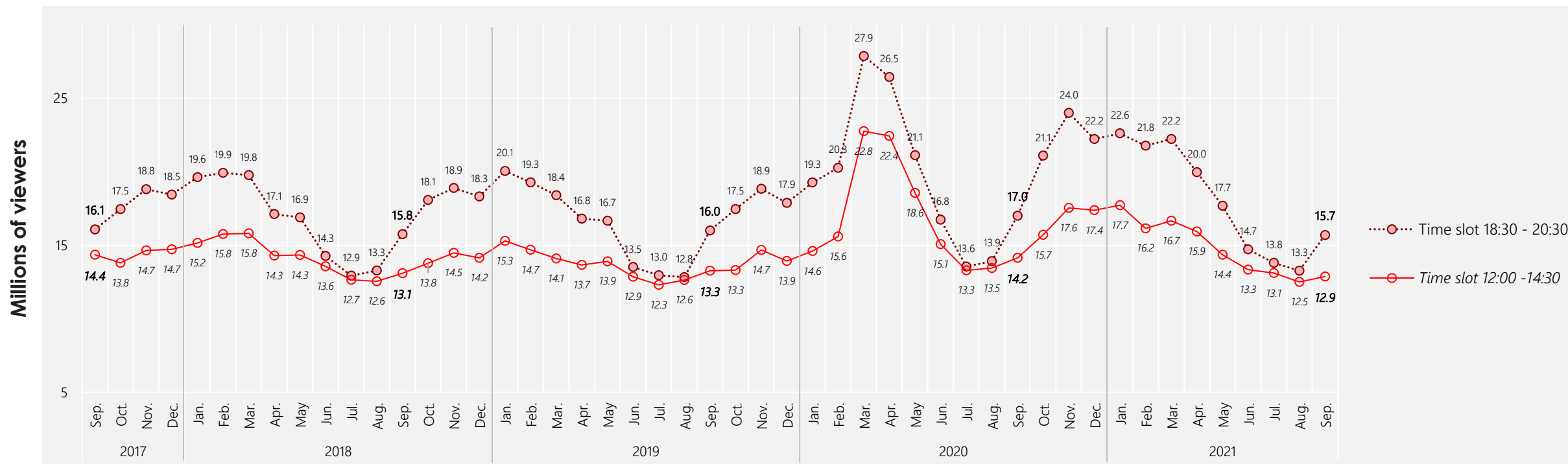


Percentage point change

	Annual Sep. 2020 – Sep. 2021	Period Sep. 2017 – Sep. 2021
RAI	+1.6	-0.1
Mediaset	-0.7	+0.9
Discovery	-0.9	+0.4
Comcast / Sky	-0.3	-2.3
Cairo Comm. / La7	-0.7	+0.4
Others	+0.9	+0.7

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

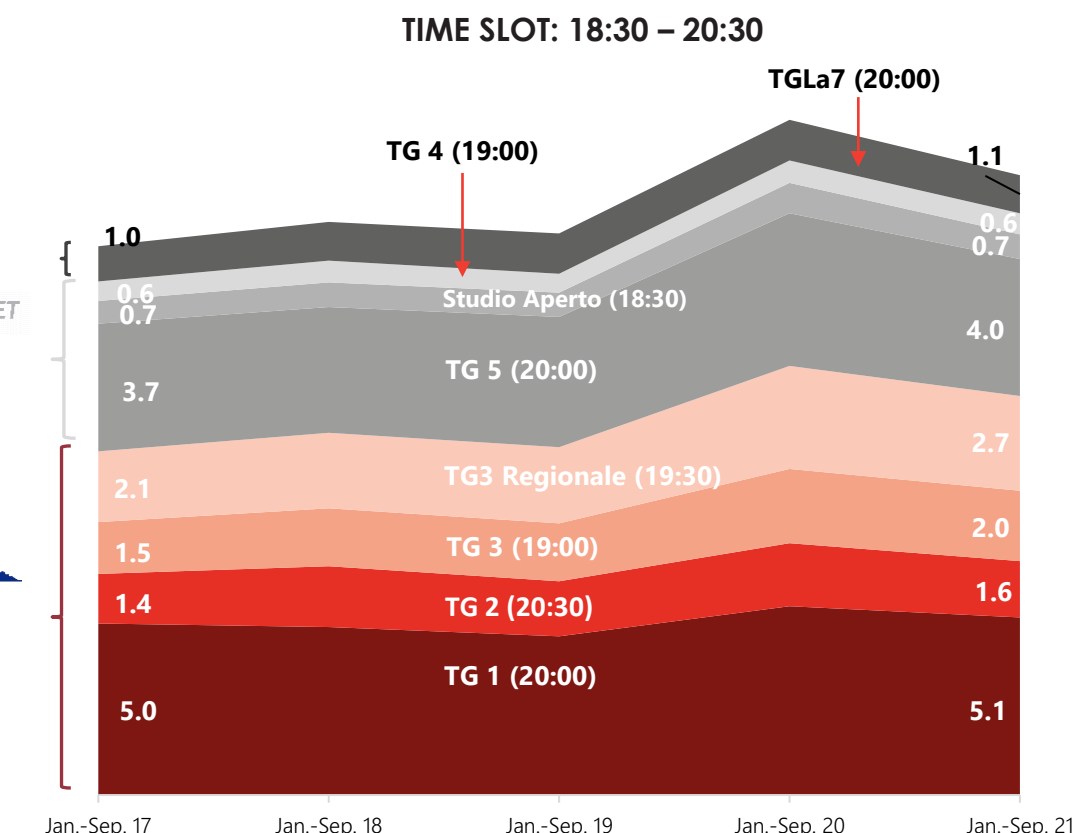
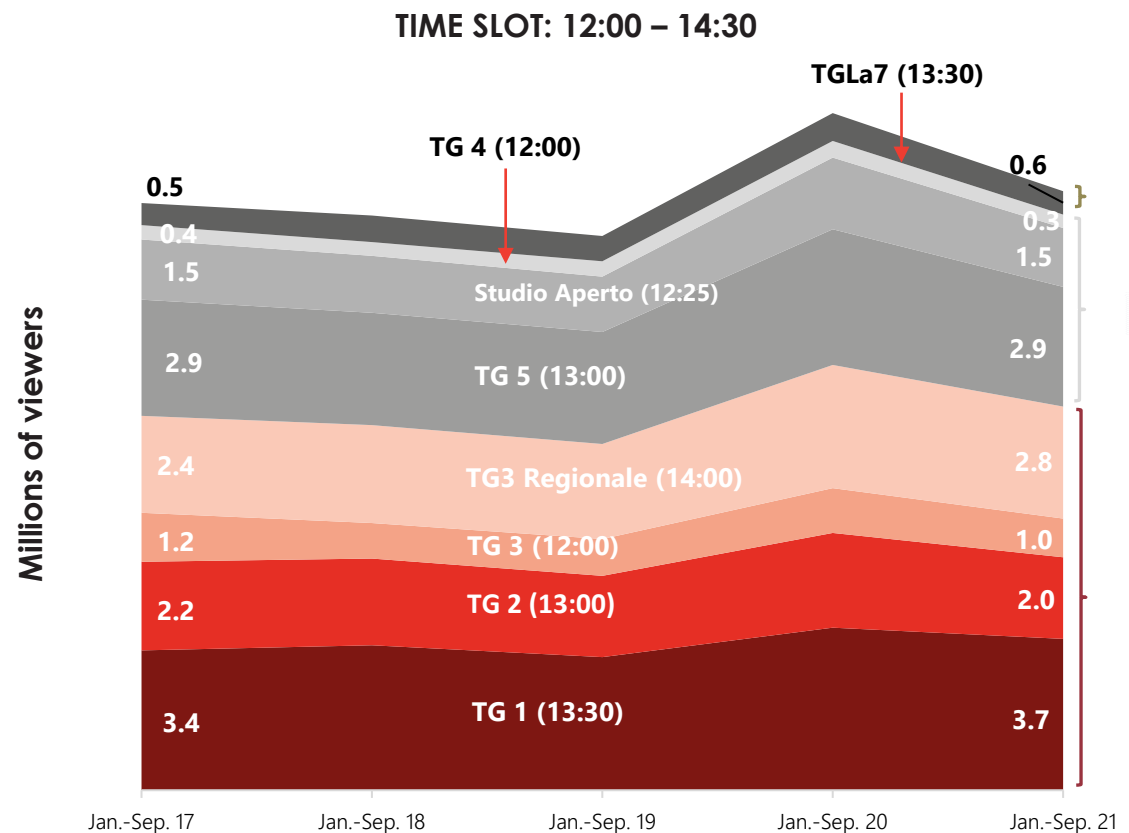
SEPTEMBER 2017 - 2021



Change in the number of viewers	Annual change Sep. 2020 - Sep. 2021		Period change Sep. 2017 – Sep. 2021	
	in %	in millions	in %	in millions
Time slot: 18:30 – 20:30	-7.7	-1.31 mln	-2.4	-0.38 mln
Time slot: 12:00 – 14:30	-9.0	-1.27 mln	-10.3	-1.48 mln

* **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.

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



Change in thousands (Jan. – Sep. 2020 vs. Jan. – Sep. 21)



Tg 1 (13:30 edition)	-279	▼	Tg 5 (13:00 edition)	-399	▼	Tg La 7 (13:30 edition)	-109	▼
Tg 2 (13:00 edition)	-318	▼	Tg 4 (12:00 edition)	-78	▼			
Tg 3 (12:00 edition)	-150	▼	Studio Aperto (12:25 edition)	-310	▼			
Tg 3 – Regionale (14:00 edition)	-275	▼						

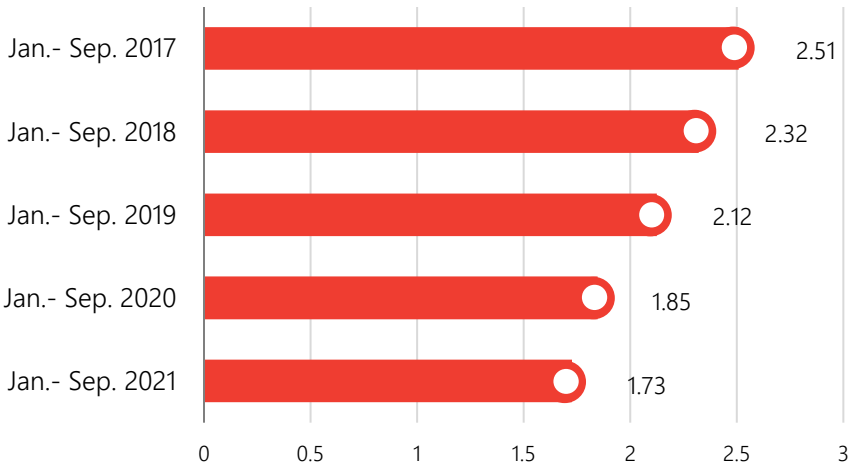
Change in thousands (Jan. – Sep. 2020 vs. Jan. – Sep. 21)



Tg 1 (20:00 edition)	-329	▼	Tg 5 (20:00 edition)	-450	▼	Tg La 7 (20:00 edition)	-72	▼
Tg 2 (20:30 edition)	-195	▼	Tg 4 (19:00 edition)	-41	▼			
Tg 3 (19:00 edition)	-110	▼	Studio Aperto (18:30 edition)	-170	▼			
Tg 3 – Regionale (19:30 edition)	-238	▼						

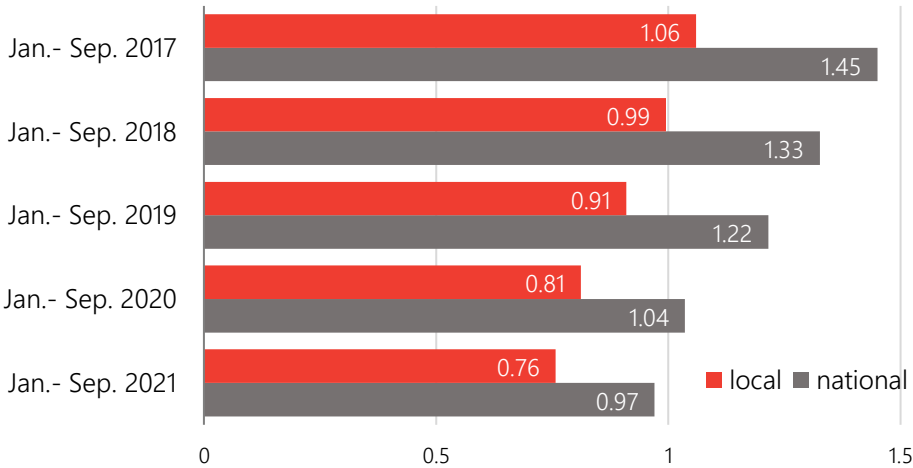
2.5 NEWSPAPERS: DAILY COPIES SOLD SINCE THE BEGINNING YEAR (1/2)

CUMULATIVE SALES
(copies sold in millions)



CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



Change in %

(Annual change)

(4-Year change)

Total copies:

-6.5 ↓

-31.2 ↓

Paper copies:

-8.4 ↓

-35.0 ↓

Digital copies:

+9.4 ↑

+13.7 ↑

National newspapers copies:

-6.3 ↓

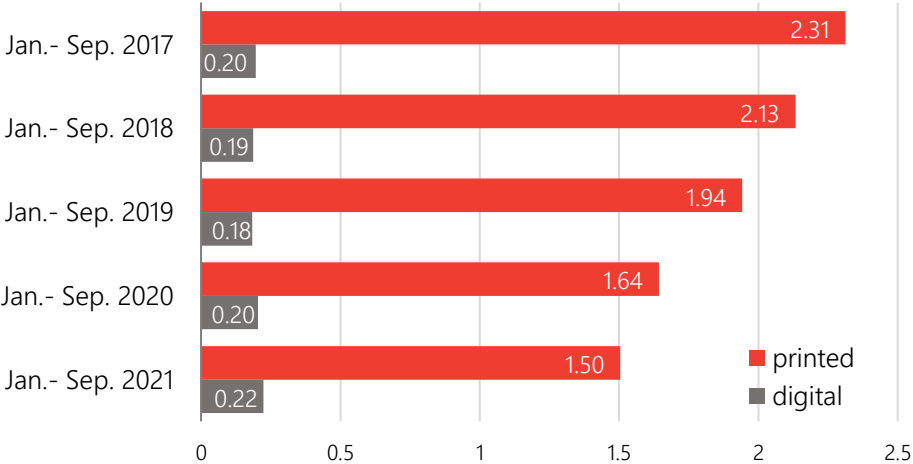
-33.1 ↓

Local newspapers copies:

-6.7 ↓

-28.5 ↓

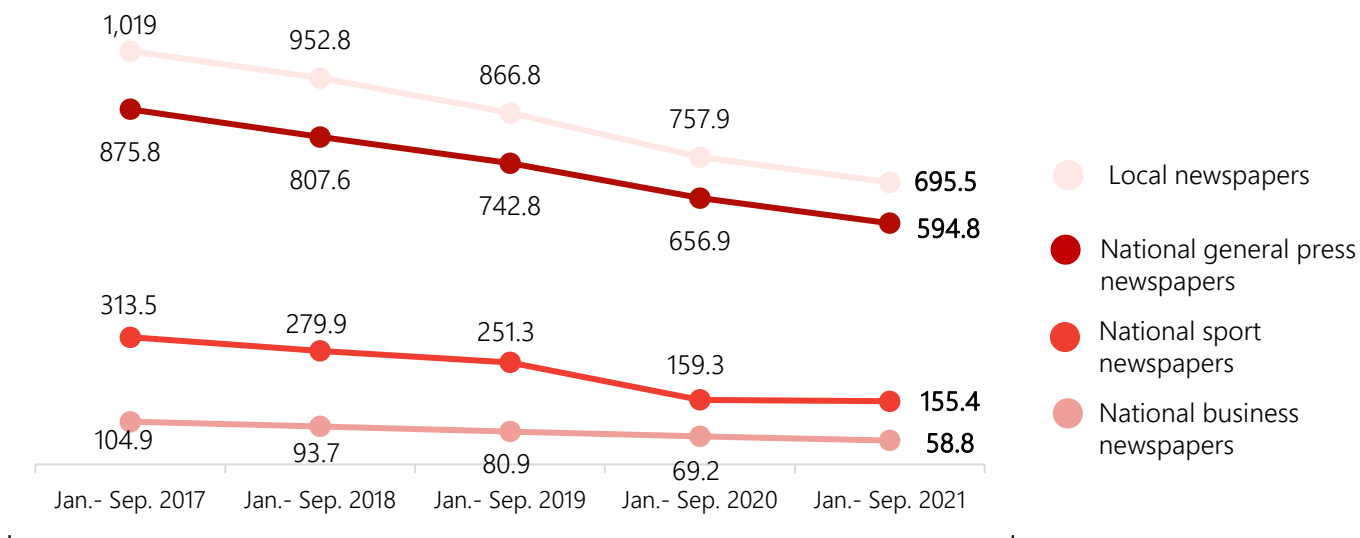
PAPER vs. DIGITAL COPIES



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

PAPER COPIES BY NEWSPAPER MACRO-CATEGORY

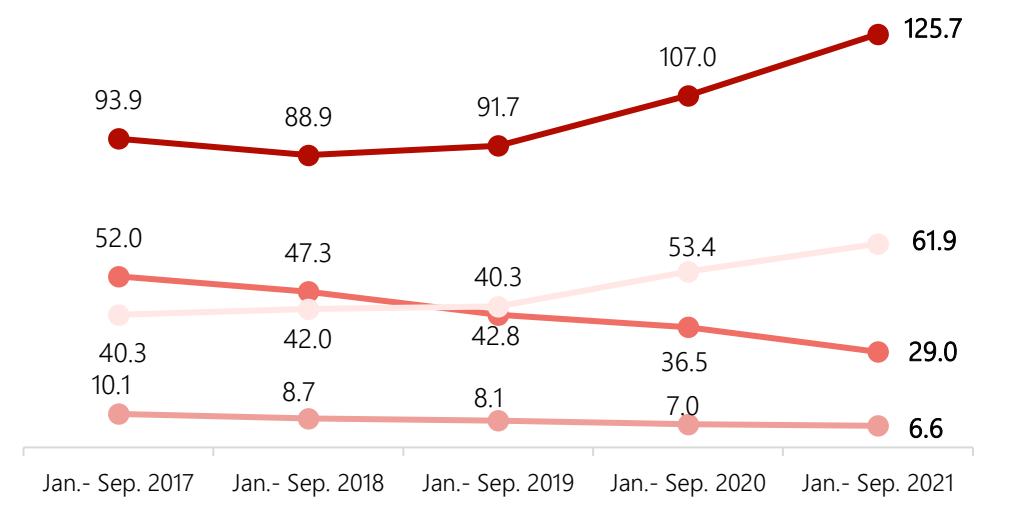
(copies sold in thousands)



Change in %	(Annual change)	(4-Year change)
National general press newspapers:	-9.4 ↓	-32.1 ↓
National sport newspapers:	-2.4 ↓	-50.4 ↓
National business newspapers:	-14.9 ↓	-43.9 ↓
Local newspapers:	-8.2 ↓	-31.8 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in thousands)



Change in %	(Annual change)	(4-Year change)
National general press newspapers:	+17.5 ↑	+33.8 ↑
National sport newspapers:	-6.3 ↓	-35.4 ↓
National business newspapers:	-20.5 ↓	-44.1 ↓
Local newspapers:	+15.8 ↑	+53.6 ↑

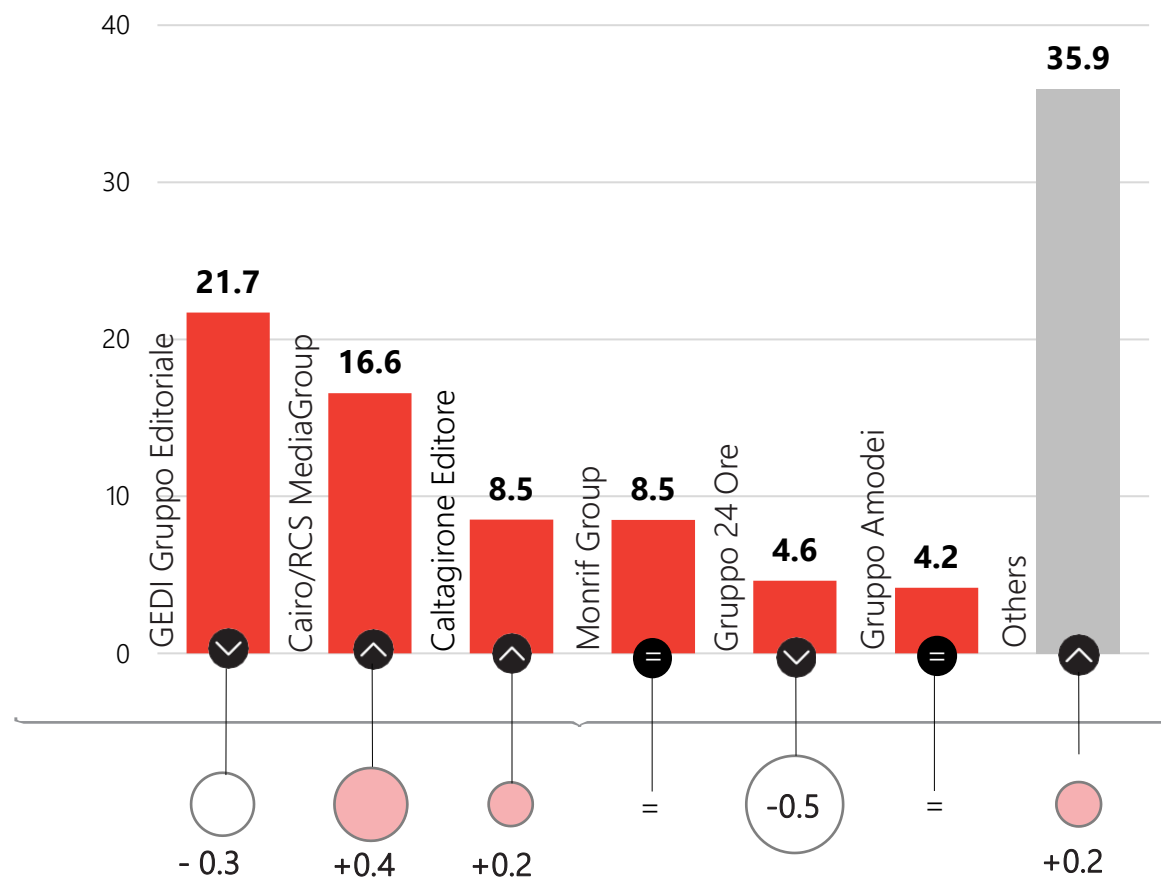
Ripartizione dei quotidiani per categoria

- **National general press newspapers:** Avvenire, Corriere della sera, Il Fatto Quotidiano, Il Giornale, Libero, Il Messaggero, La Repubblica, Stampa, Il tempo, La Verità
- **National sport newspapers:** Corriere dello Sport, Gazzetta dello sport, Tuttosport
- **National business newspapers:** Italia Oggi, Il Sole 24 Ore
- **Local newspapers:** regional and/or macro-regional newspapers

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 (%)

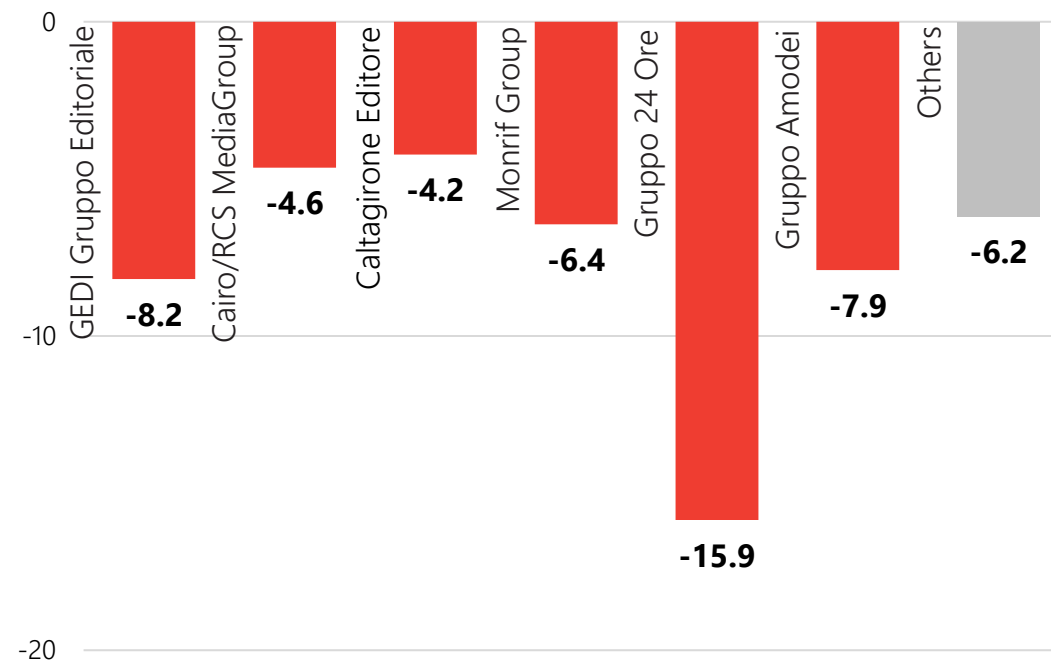
JANUARY - SEPTEMBER 2021



Difference vs. Jan. – Sep. 2020
(punti percentuali)

CHANGE IN TOTAL COPIES SOLD (%)

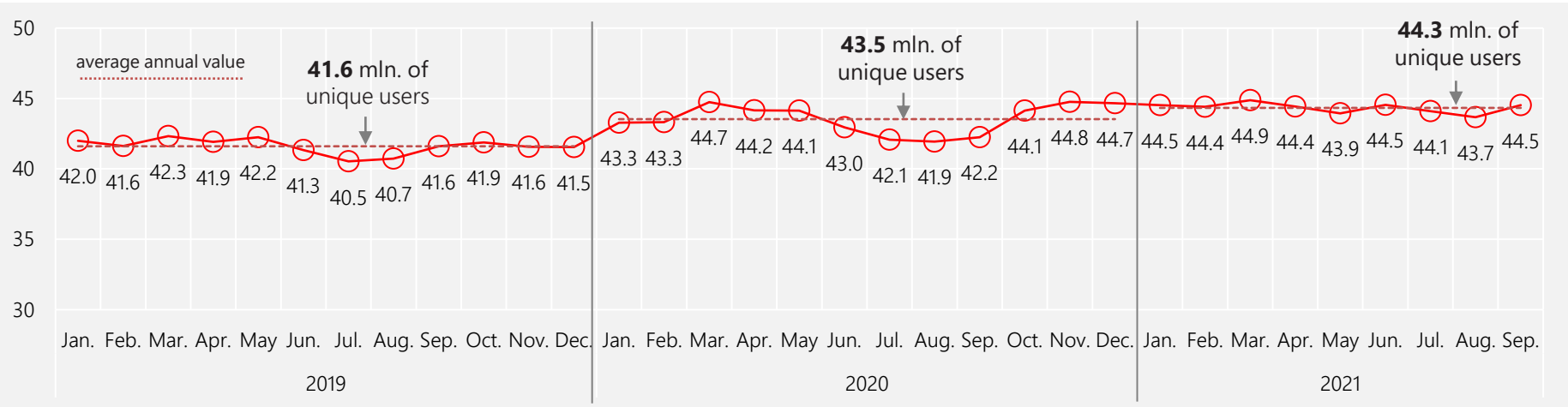
Difference vs. Jan. – Sep. 2020



2.8 PLATFORMS: WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

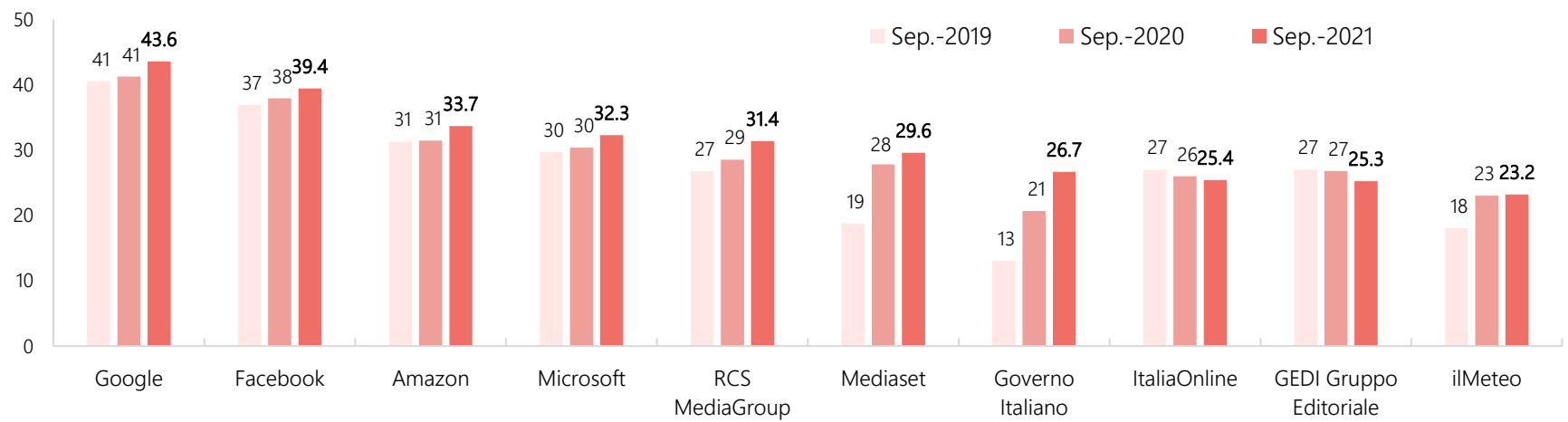
(January 2019 – September 2021)



44.5 million unique users logged on to the internet in September 2021 (+**2.3** million compared to September 2020)

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

UNIQUE USERS OF THE MAIN OPERATORS (Parent*)



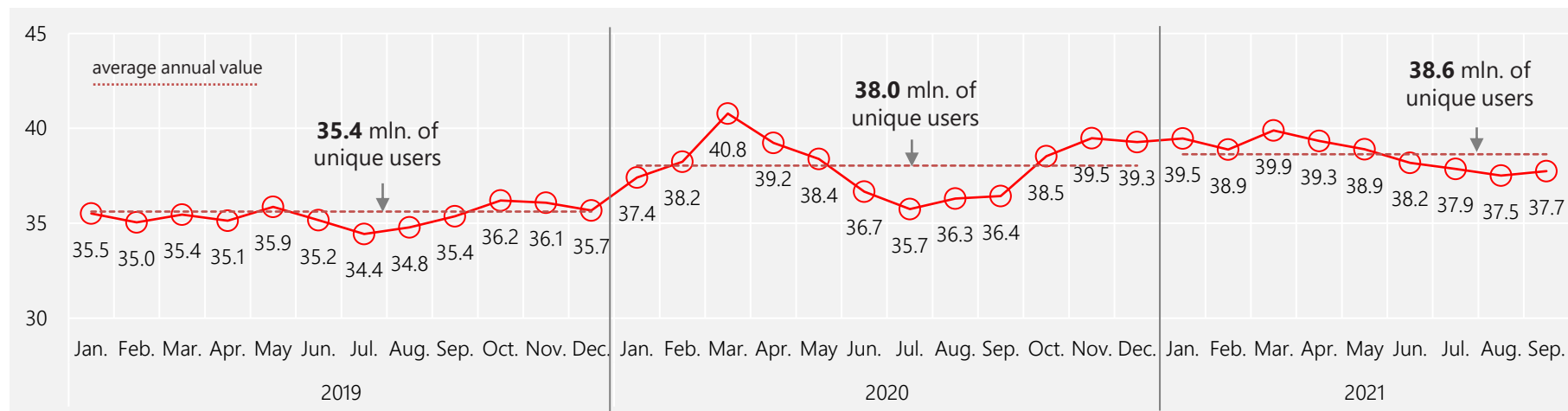
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

*** 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.

2.9 PLATFORMS: GENERAL PRESS WEBSITE/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

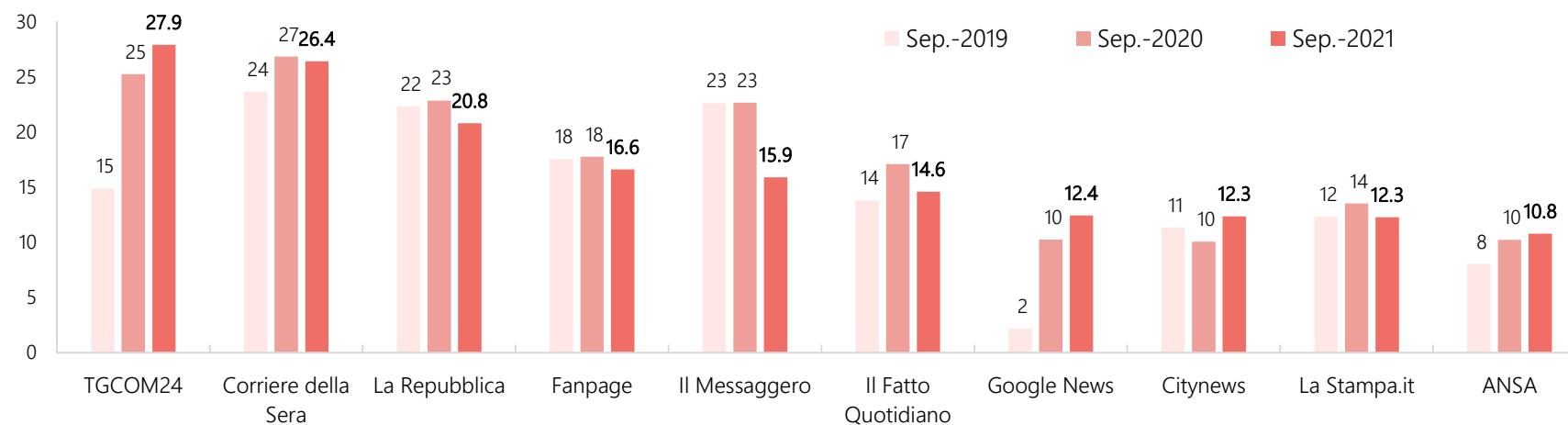
(January 2019 – September 2021)



37.7 million unique users logged on to the generalist news sites/APPs in September 2021 (+**1.3** million users compared to September 2020)

58 minutes and 22 seconds spent, on average, by each user browsing general news websites/APPs in September 2021

UNIQUE USERS OF THE MAIN WEBSITES



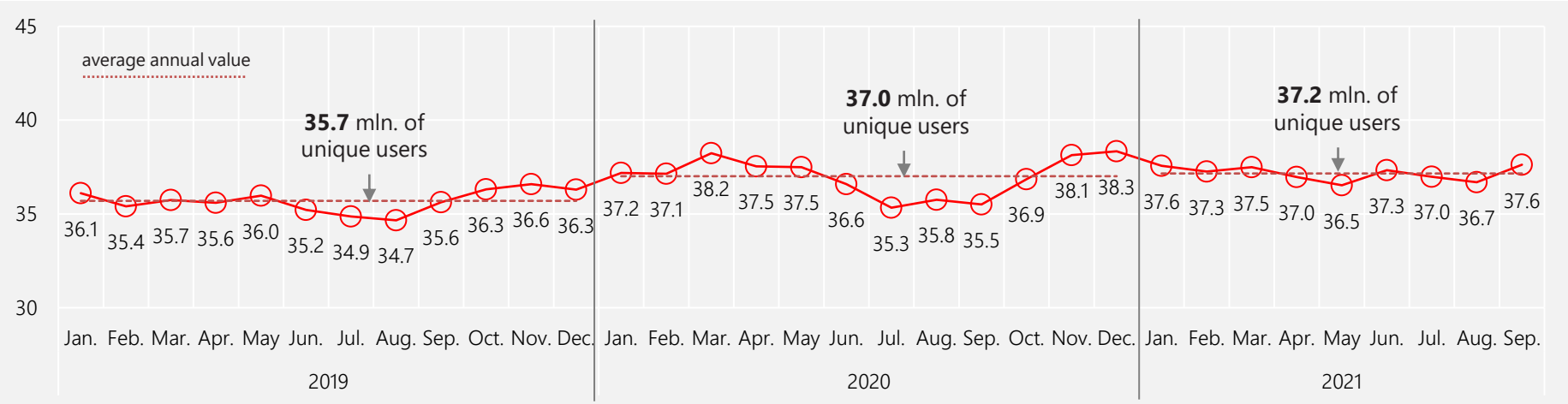
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

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



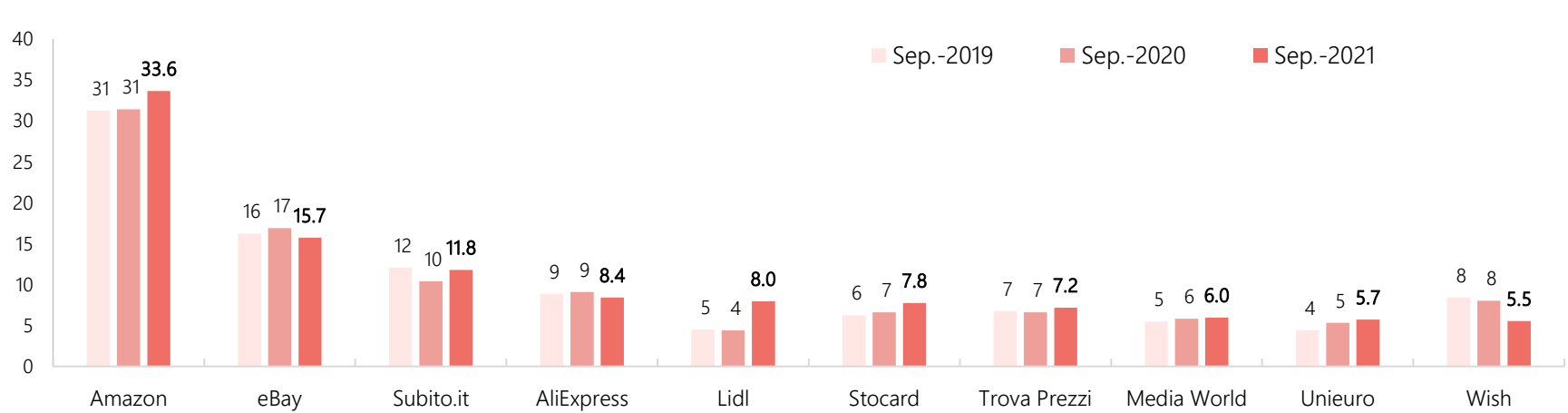
UNIQUE USERS IN MILLIONS (January 2019 – September 2021)



37.6 million unique users logged on to e-commerce sites/APPs in September 2021 (+2.1 million users compared to September 2020)

2 hours and 19 minutes spent, on average, by each user browsing e-commerce websites/APPs in September 2021

UNIQUE USERS OF THE MAIN WEBSITES



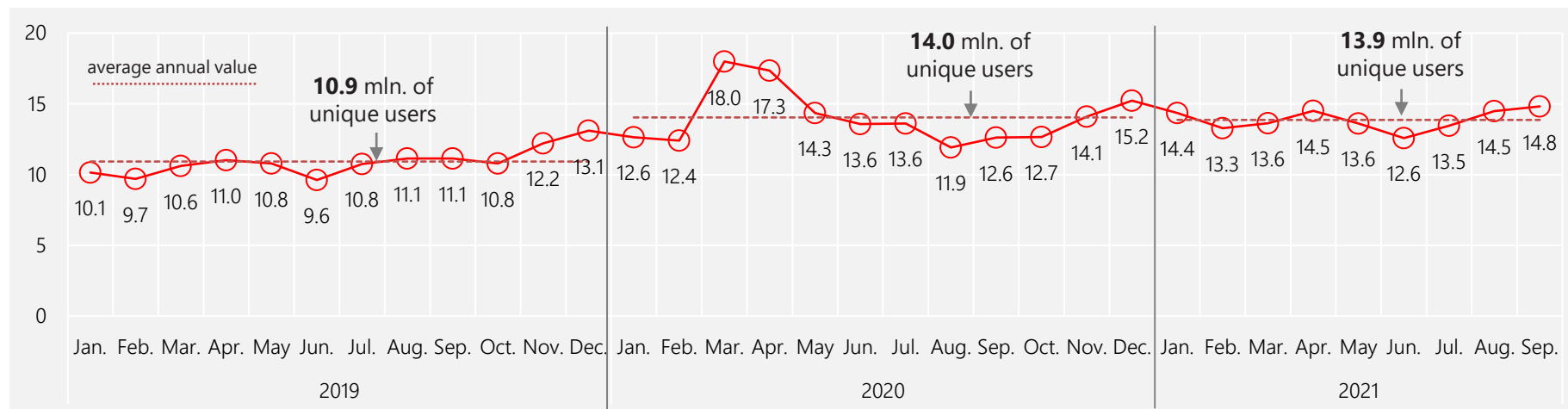
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

Source: Agcom elaboration on data from Audiweb (Averages values referring to the category: «Multi-category Commerce»)

2.11 PLATFORMS: VIDEO ON DEMAND WEBSITE/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

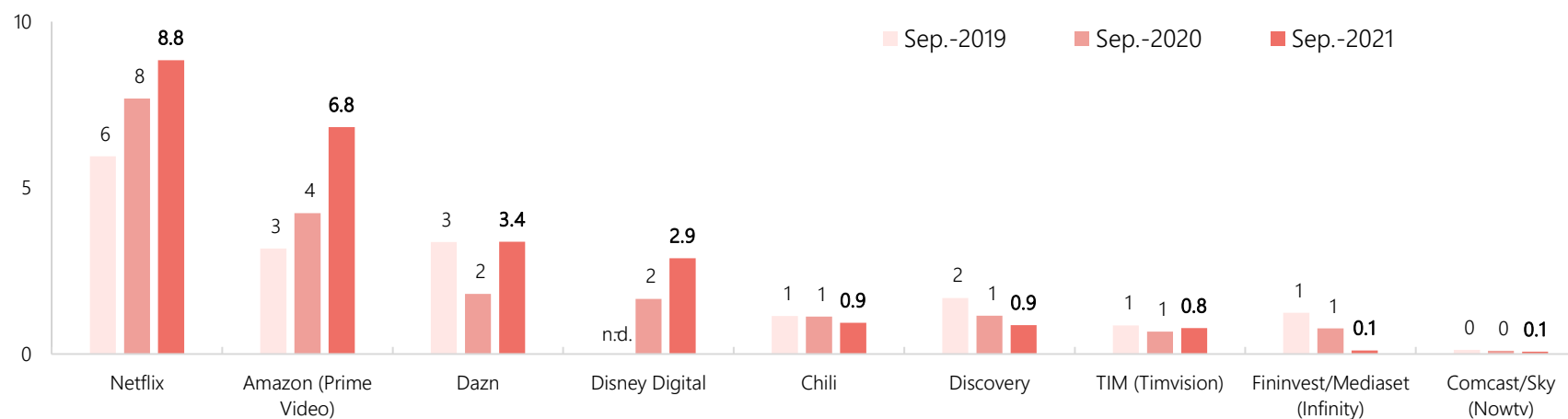
(January 2019 – September 2021)



14.8 million unique users logged on to video-on-demand sites/APPs in September 2021 (+2.2 million compared to 2020)

3 hours and 8 minutes spent, on average, by each user on video on demand websites/APPs in September 2021

UNIQUE USERS OF THE MAIN WEBSITES



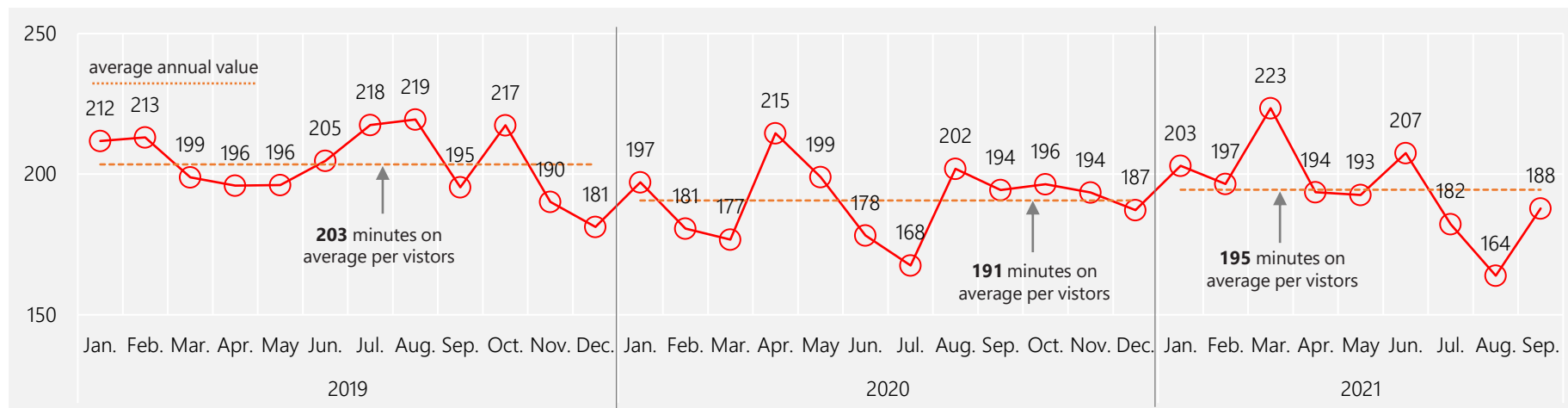
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

Source: Agcom elaboration on data from Comscore
(The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy)

2.12 PLATFORMS: TIME SPENT ON VIDEO ON DEMAND WEBSITE/APP

AVERAGE MINUTES SPENT PER VISITOR*

(January 2019 – September 2021)

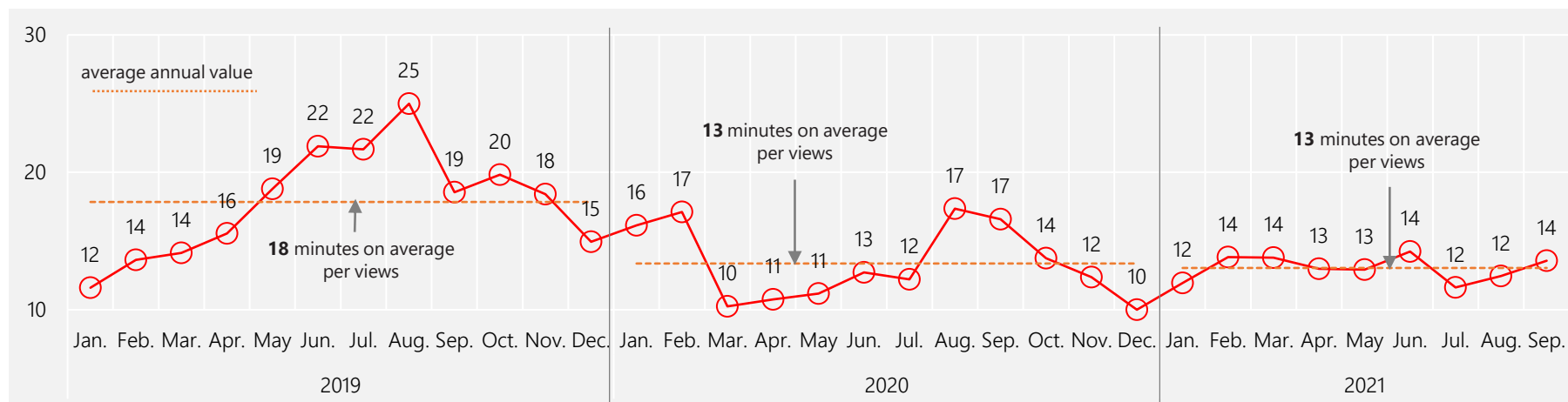


The average number of minutes spent per month by each visitor on pay-per-view video on demand websites/apps rose to **195** from January to September 2021.

* The average number of minutes spent on the website during the month, per visitor

MINUTES SPENT PER PAGE (OR CONTENT)*

(January 2019 – September 2021)



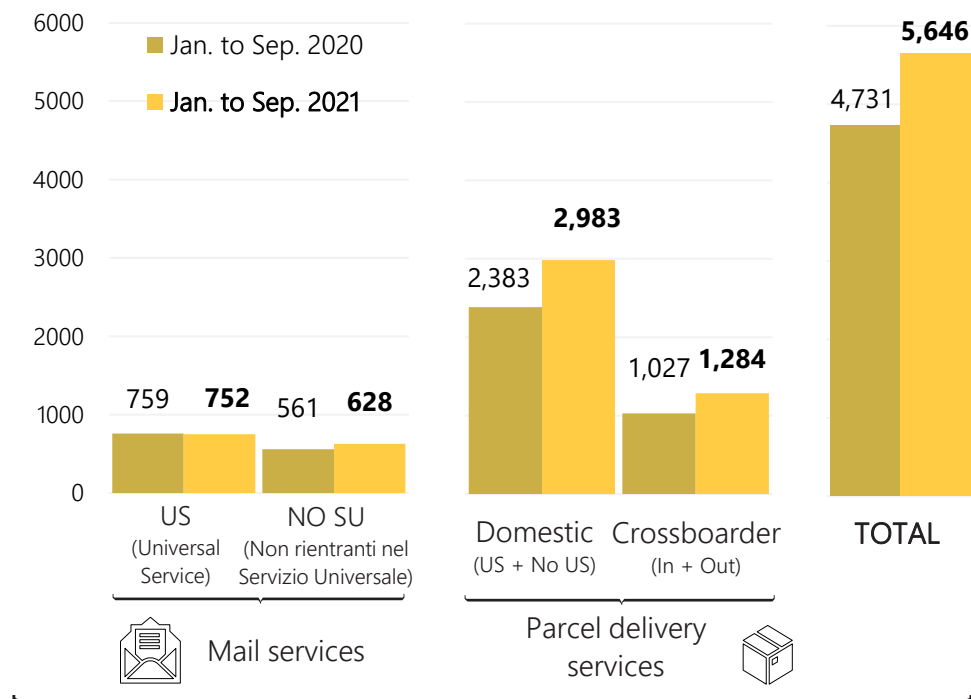
The time spent, on average per month, on each page (or content) visited (or viewed) referring to sites/apps of paid video on demand services remained stable at **13 minutes**, from January to September 2021.

* The average number of minutes spent on the website during the month, per views (page or video viewed)

3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



+4.5



+25.1



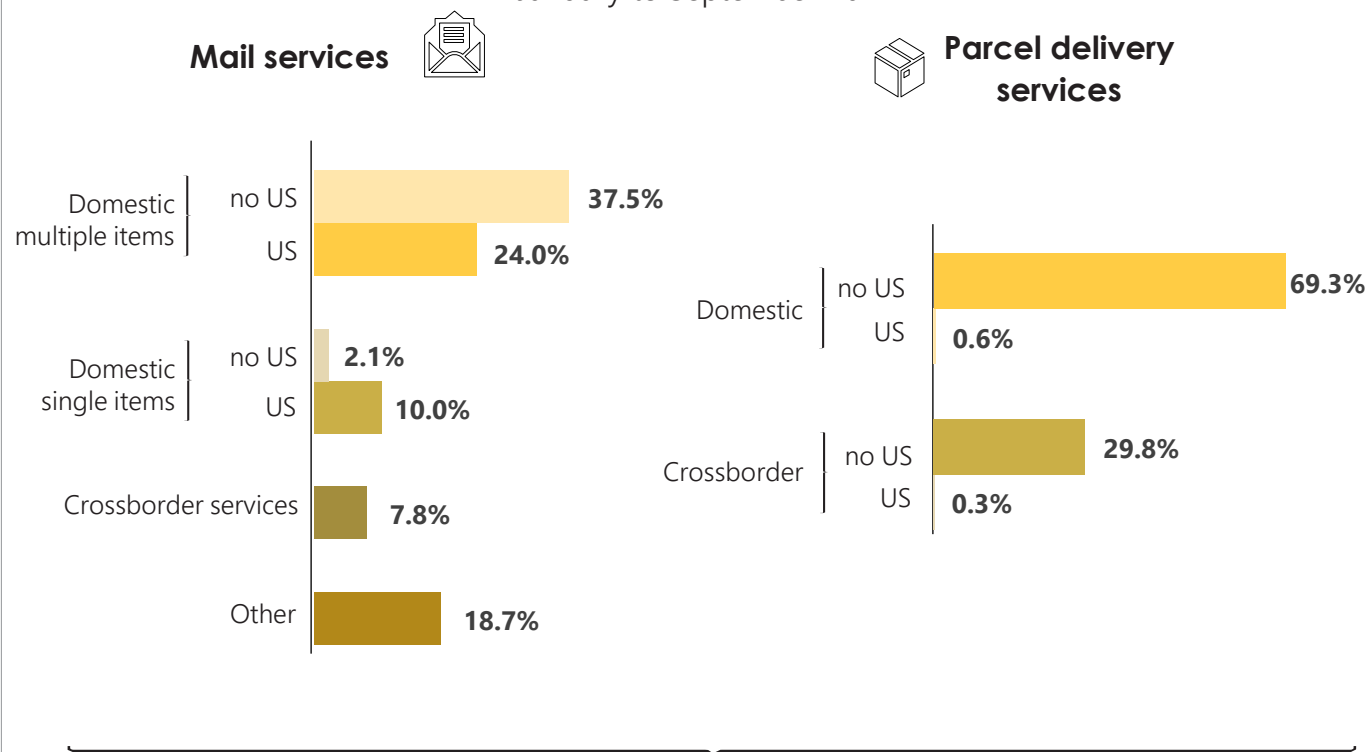
+19.3

Total

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

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

January to September 2021



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



+8.9

Domestic
multiple items



-5.2

Domestic single
items



-16.4

Crossborder
services



-8.4

Other



+25.2

Domestic

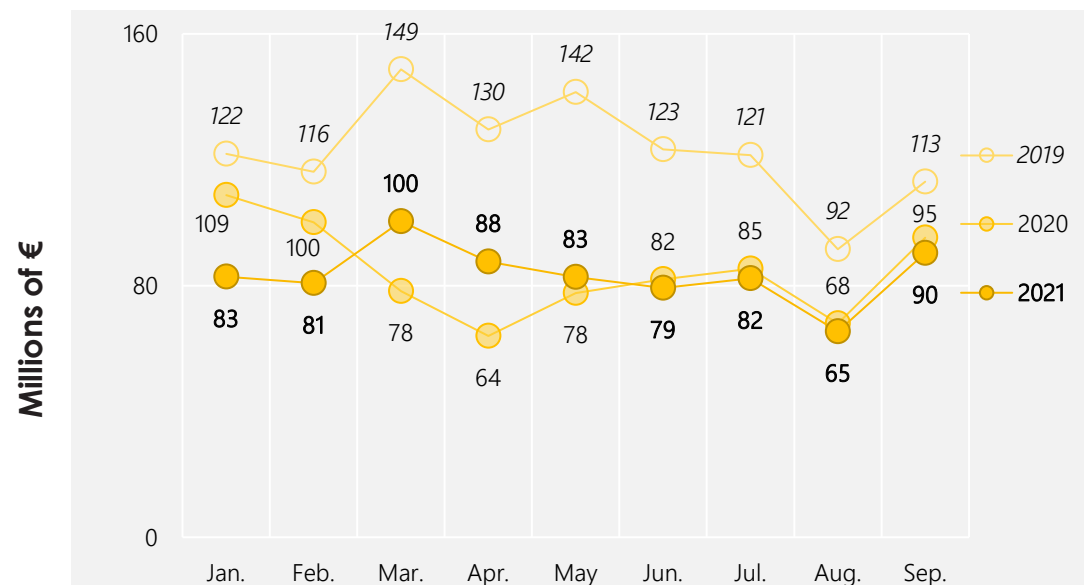


+24.9

Crossborder

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

UNIVERSAL SERVICE (US)



1

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

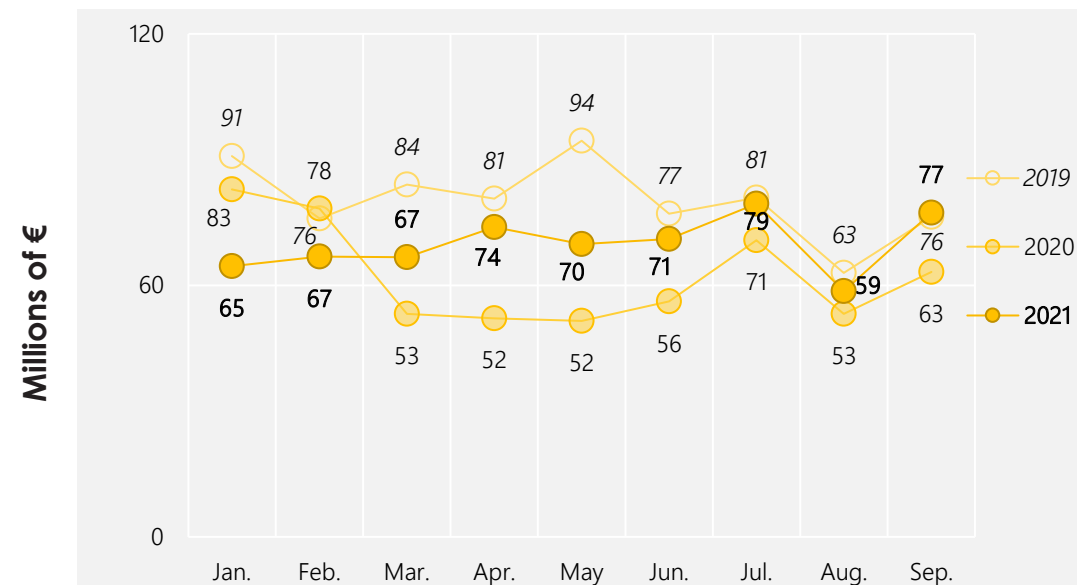


2

Monthly comparison (change in %)

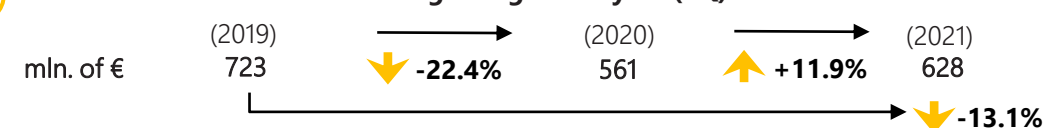
	2019/2020	2020/2021	2019/2021
January	-10.7	-23.9	-32.0
February	-13.8	-19.3	-30.5
March	-47.4	+28.3	-32.5
April	-50.6	+36.9	-32.4
May	-45.1	+6.5	-41.6
June	-33.5	-3.3	-35.7
July	-29.7	-3.6	-32.2
August	-25.7	-3.7	-28.5
September	-15.7	-5.1	-20.0

OTHER SERVICES (NO US)



1

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



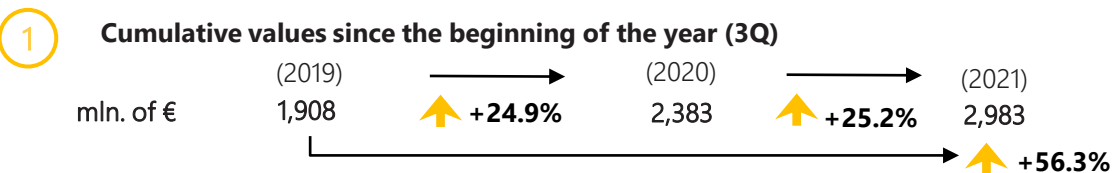
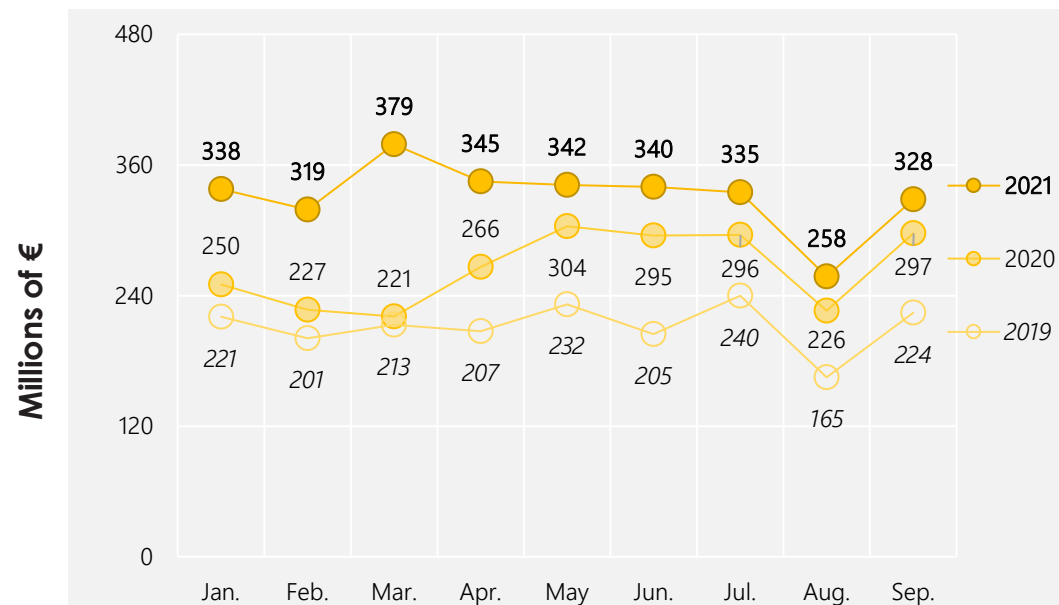
2

Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	-8.8	-22.1	-28.9
February	+3.1	-14.7	-12.1
March	-36.7	+25.3	-20.6
April	-35.3	+41.7	-8.4
May	-45.5	+35.5	-26.1
June	-27.1	+26.5	-7.8
July	-12.6	+12.3	-1.8
August	-15.5	+10.1	-7.0
September	-17.2	+22.3	+1.3

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

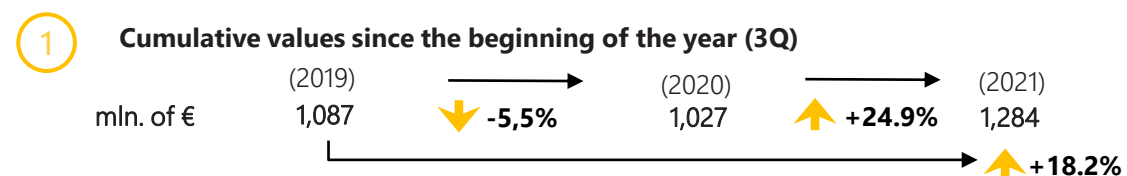
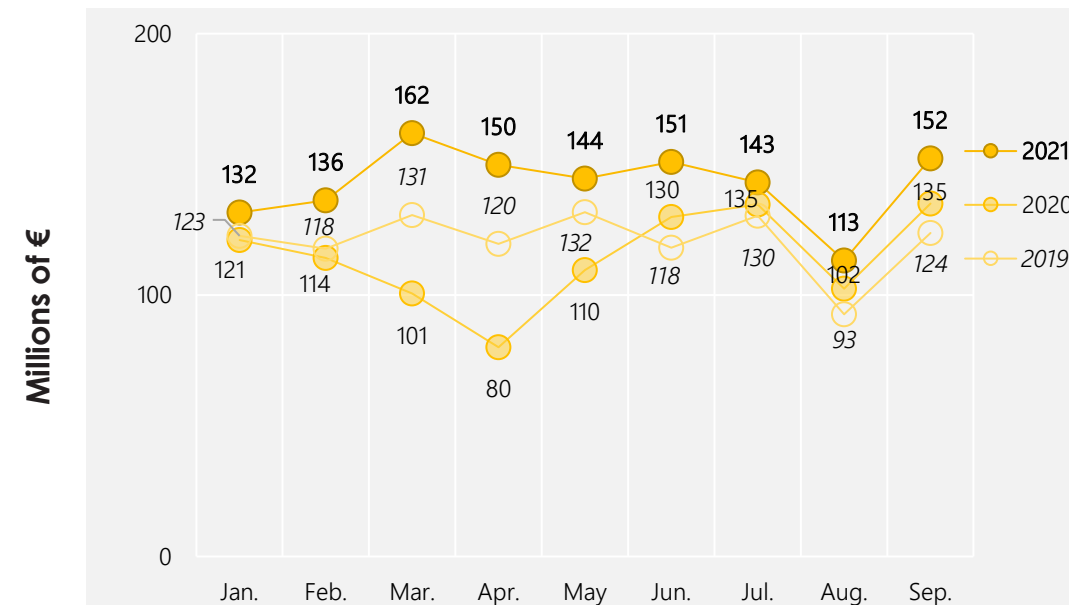
DOMESTIC



2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+13.4	+34.9	+53.1
February	+13.0	+40.5	+58.8
March	+3.6	+71.5	+77.7
April	+28.4	+29.5	+66.3
May	+30.8	+12.5	+47.2
June	+44.2	+15.0	+65.9
July	+23.3	+13.3	+39.7
August	+37.0	+13.9	+56.0
September	+32.5	+10.4	+46.4

CROSSBORDER



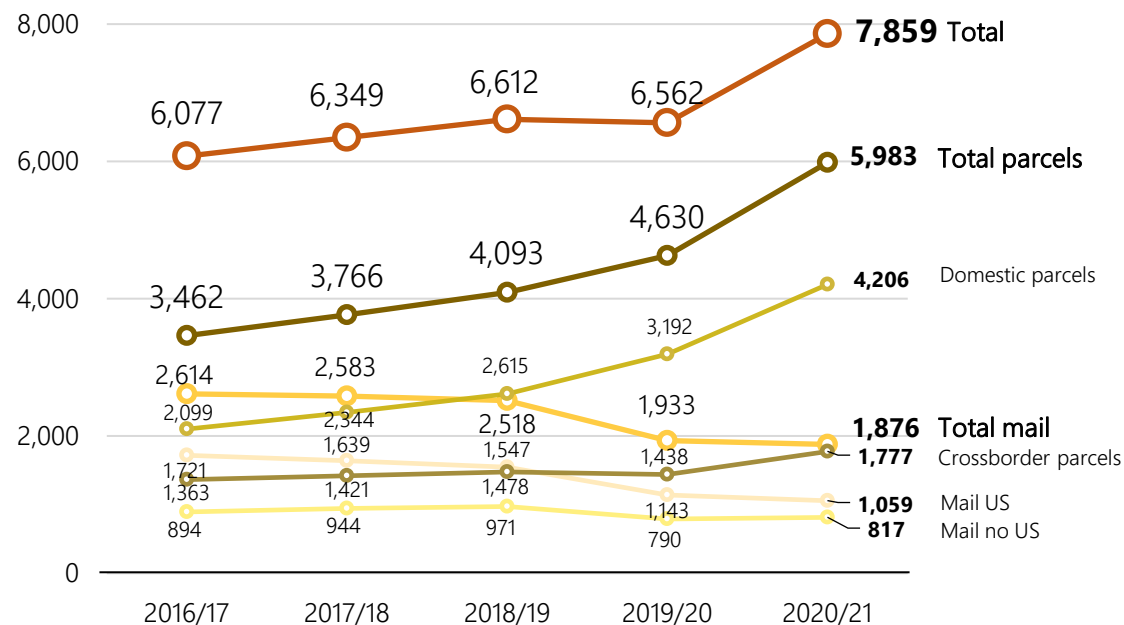
2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	-1.3	+8.7	+7.3
February	-3.0	+19.3	+15.8
March	-23.0	+61.0	+24.0
April	-33.0	+87.2	+25.4
May	-16.8	+31.9	+9.7
June	+9.9	+16.2	+27.8
July	+3.3	+6.3	+9.8
August	+10.6	+10.5	+22.2
September	+9.2	+12.8	+23.1

3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



Change in %

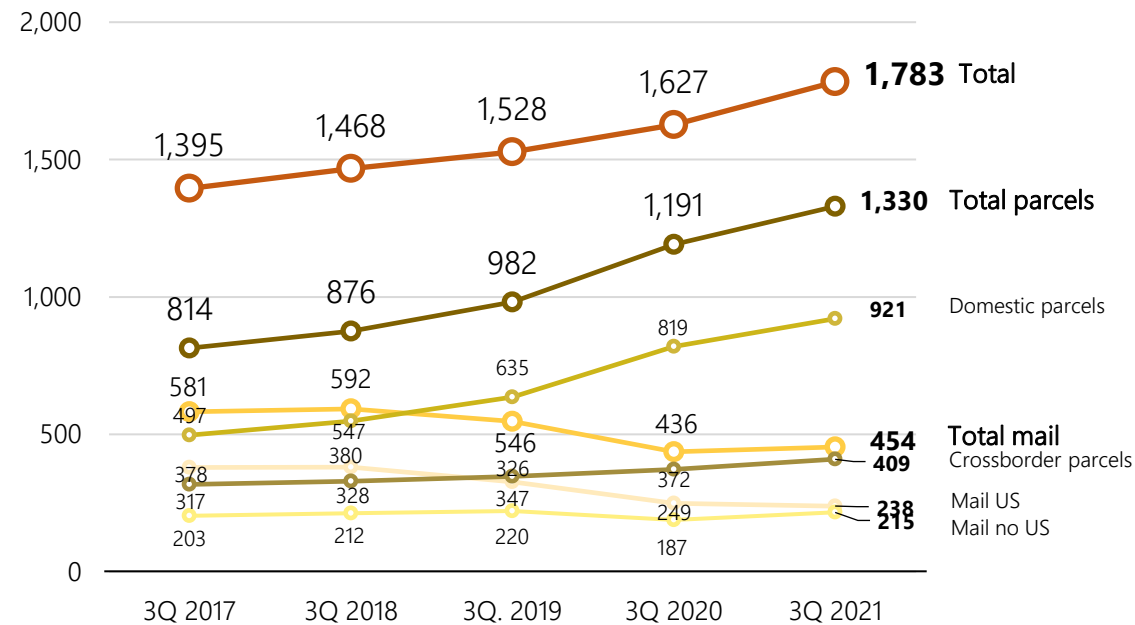
(2016/17 – 2020/21)

(2019/20 – 2020/21)

Total:	+29.3	↑	+19.8	↑
Mail services:	-28.3	↓	-3.0	↓
- Universal Service:	-38.5	↓	-7.3	↓
- No Universal Service:	-8.6	↓	-3.4	↓
Parcel delivery services:	+72.8	↑	+29.2	↑
- Domestic:	+100.4	↑	+31.8	↑
- Crossborder:	+30.4	↑	+23.6	↑

ON A QUARTERLY BASIS

MILLIONS OF €



Change in %

(3Q 2017 – 3Q 2021)

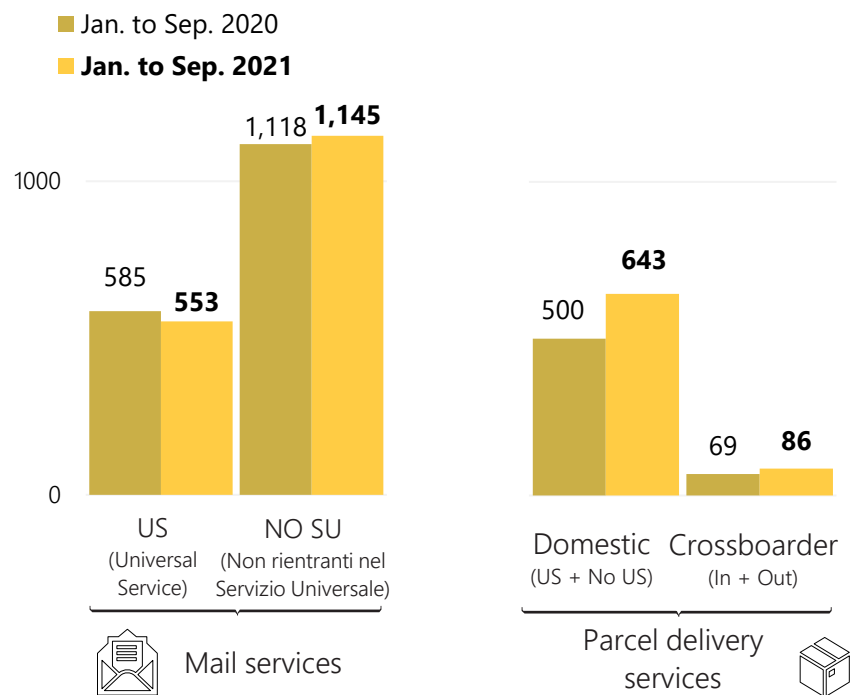
(3Q 2020 – 3Q 2021)

Total:	+27.8	↑	+9.6	↑
Mail services:	-22.0	↓	+4.1	↑
- Universal Service:	-37.1	↓	-4.2	↓
- No Universal Service:	+6.1	↑	+15.1	↑
Parcel delivery services:	+63.4	↑	+11.6	↑
- Domestic:	+85.3	↑	+12.4	↑
- Crossborder:	+29.0	↑	+9.8	↑

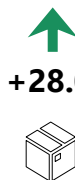
3.5: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS



-0.3

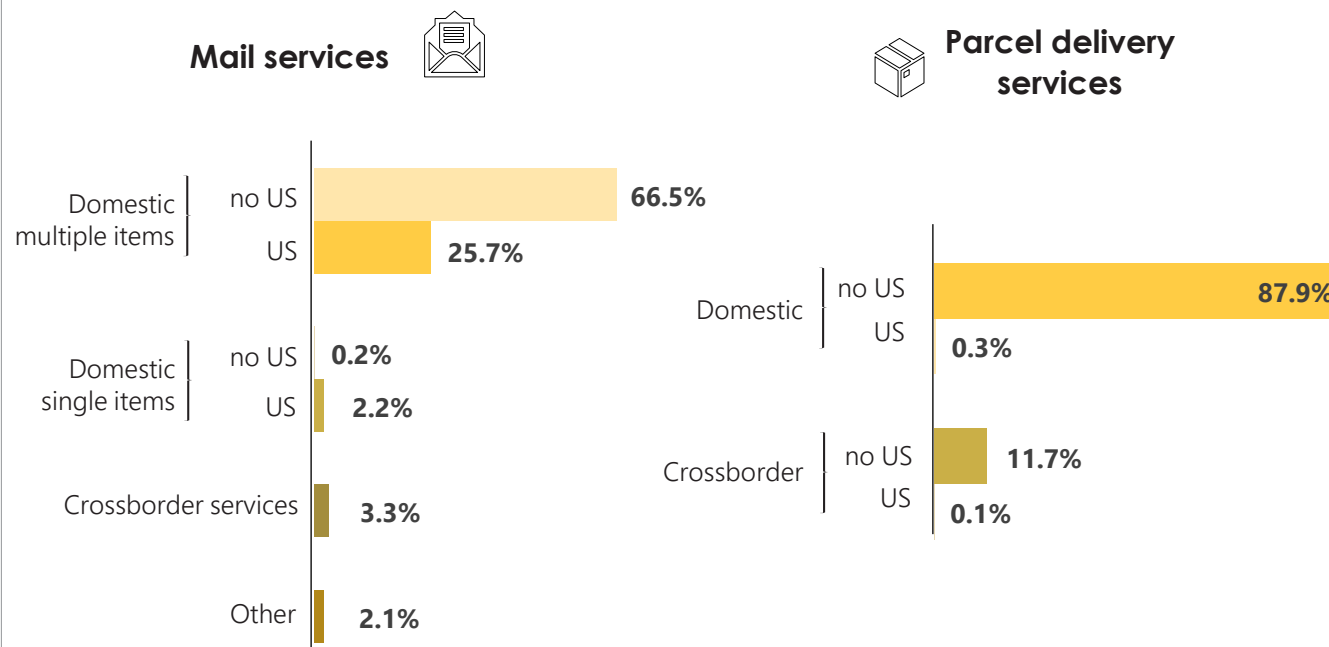


+28.0

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

VOLUMES BY SOURCE TYPE (%)

January to September 2021



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



+0.8

Domestic multiple items



-4.3

Domestic single items



-21.9

Crossborder services



-0.6

Other



+28.5

Domestic

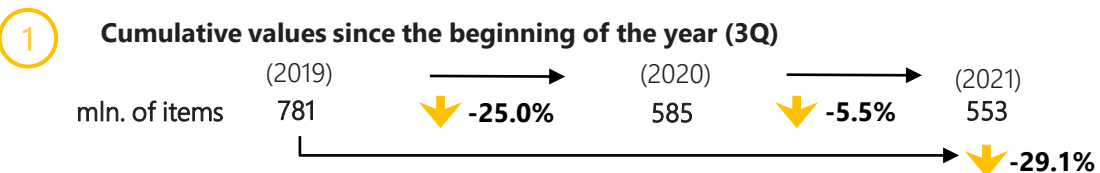
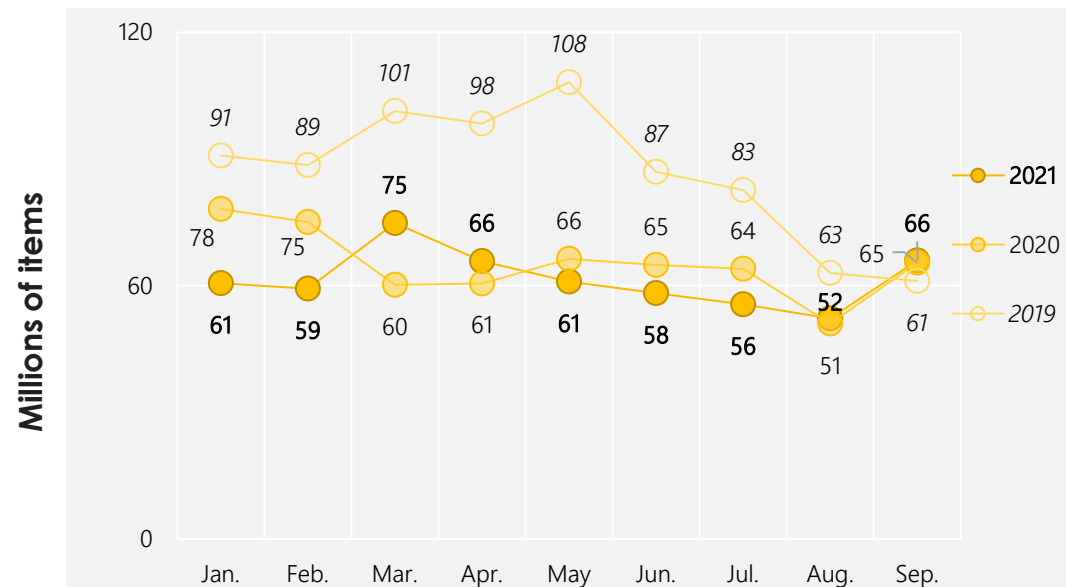


+24.9

Crossborder

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

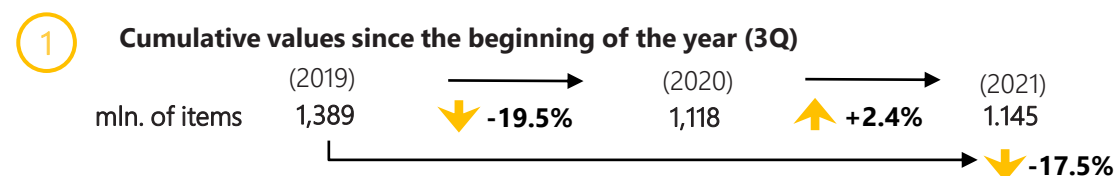
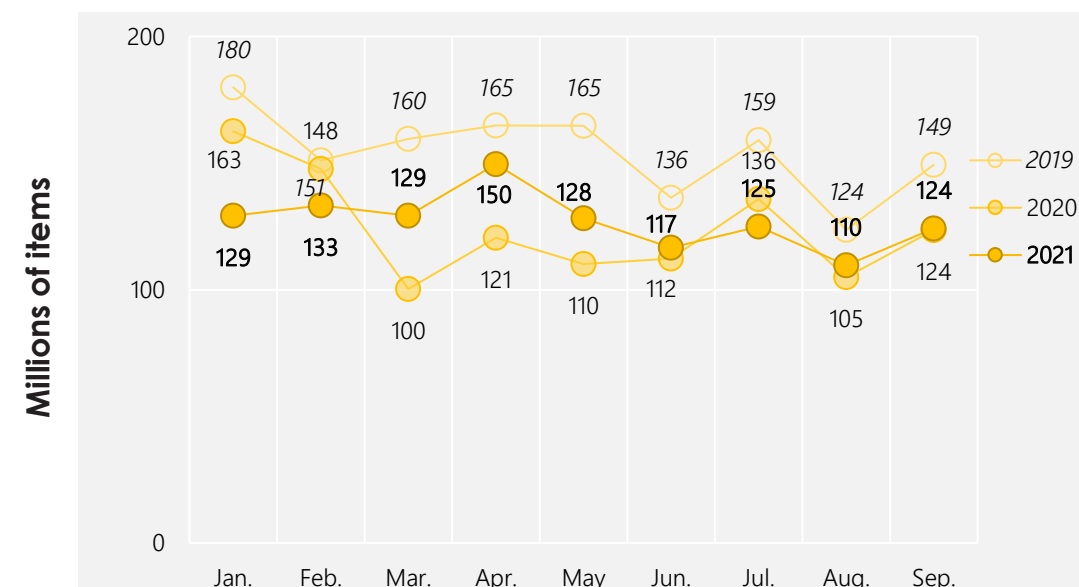
UNIVERSAL SERVICE



2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	-14.0	-22.5	-33.3
February	-15.2	-21.0	-33.0
March	-40.6	+24.4	-26.2
April	-38.5	+8.7	-33.2
May	-38.7	-8.2	-43.7
June	-25.4	-10.3	-33.0
July	-22.6	-13.1	-32.8
August	-19.1	+2.4	-17.1
September	+7.2	+0.8	+8.1

OTHER SERVICES (NO US)

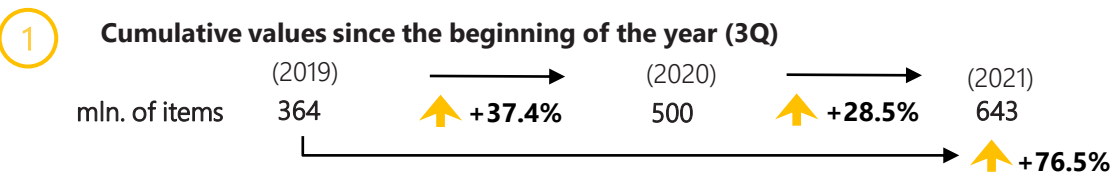
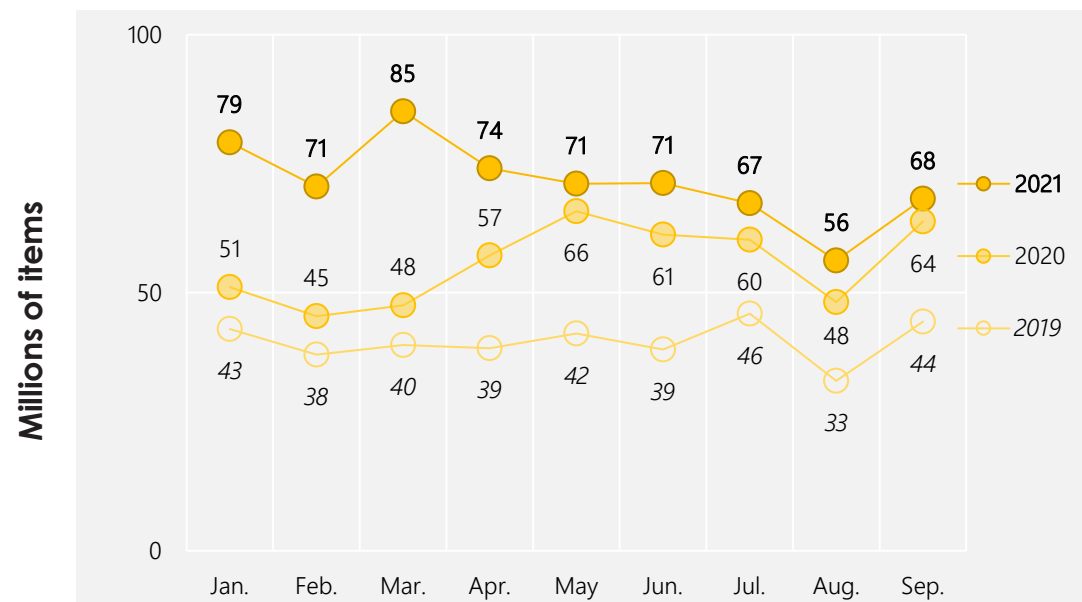


2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	-9.6	-20.5	-28.2
February	-2.2	-9.8	-11.8
March	-37.2	+28.8	-19.0
April	-26.9	+24.0	-9.3
May	-33.1	+16.4	-22.2
June	-17.6	+3.8	-14.4
July	-14.6	-8.0	-21.4
August	-15.1	+4.4	-11.3
September	-17.3	+0.5	-16.8

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

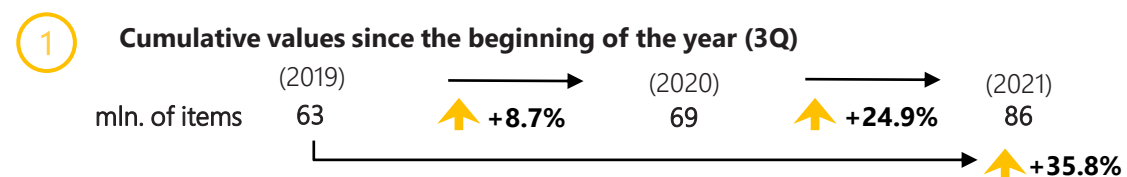
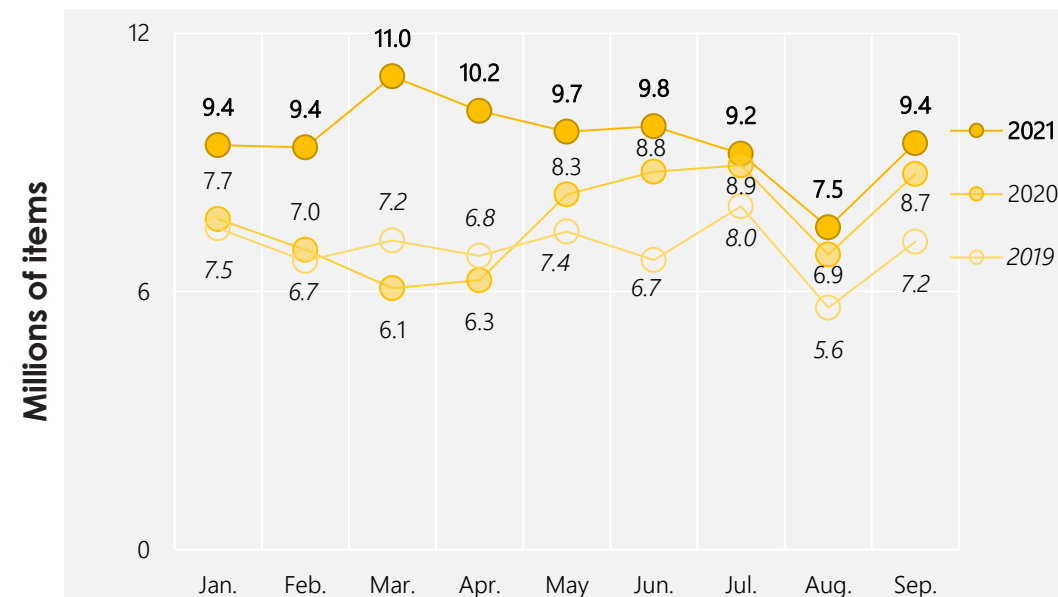
DOMESTIC



2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+19.0	+54.8	+84.2
February	+19.5	+55.4	+85.7
March	+19.4	+78.9	+113.6
April	+45.7	+29.5	+88.7
May	+56.2	+8.1	+68.9
June	+57.1	+16.3	+82.7
July	+31.2	+11.7	+46.5
August	+46.5	+16.7	+70.9
September	+43.8	+6.9	+53.7

CROSSBORDER



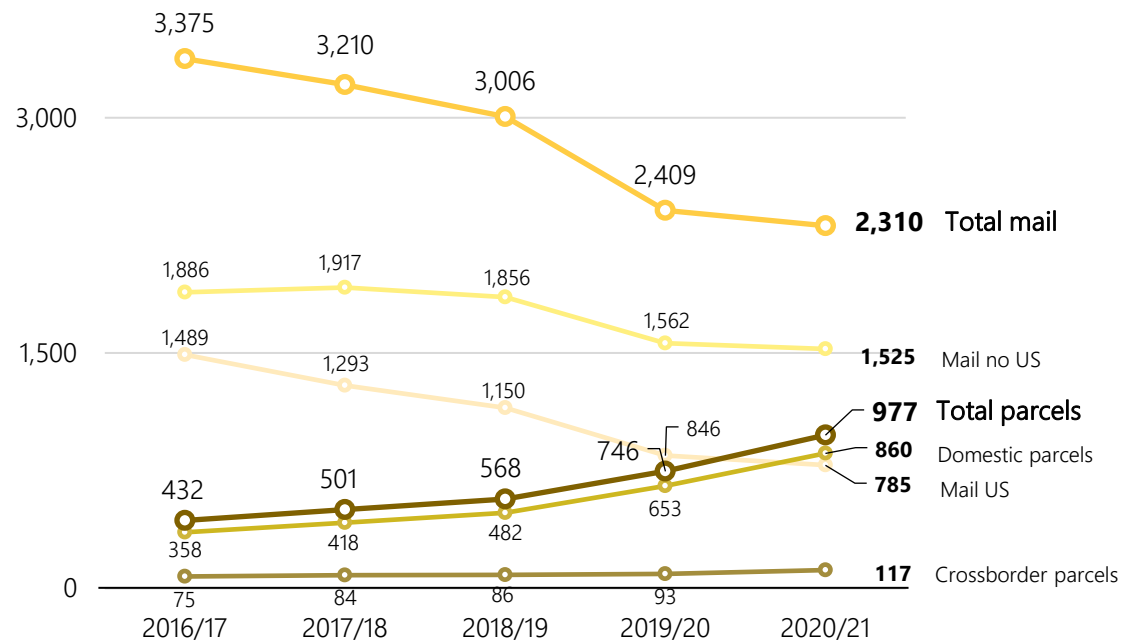
2 Monthly comparison (change in %)

	2019/2020	2020/2021	2019/2021
January	+2.9	+22.3	+25.9
February	+3.9	+34.2	+39.4
March	-15.5	+81.0	+53.0
April	-8.3	+62.9	+49.4
May	+11.7	+17.6	+31.4
June	+30.4	+12.1	+46.1
July	+11.9	+3.0	+15.3
August	+21.9	+9.3	+33.2
September	+22.0	+8.2	+32.0

3.8: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



Change in %

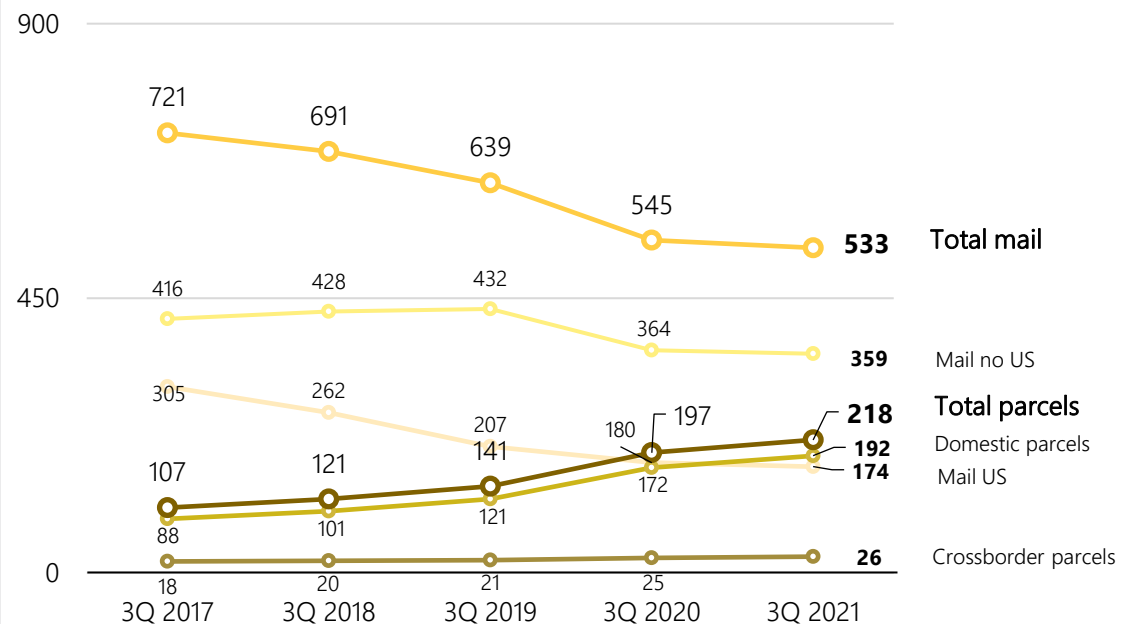
(2016/17 – 2020/21)

(2019/20 – 2020/21)

Mail services:	-31.5	↓	-4.1	↓
- Universal Service:	-47.3	↓	-7.2	↓
- No Universal Service:	-19.1	↓	-2.4	↓
Parcel delivery services:	+125.9	↑	+38.4	↑
- Domestic:	+140.3	↑	+31.6	↑
- Crossborder:	+56.9	↑	+26.3	↑

ON A QUARTERLY BASIS

MILLIONS OF UNITS



Change in %

(3Q 2017 – 3Q 2021)

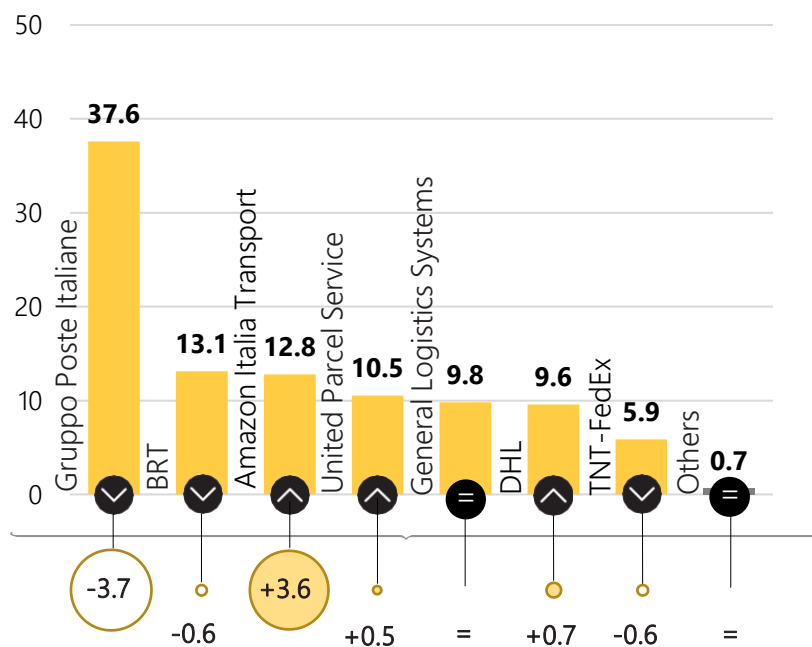
(3Q 2020 – 3Q 2021)

Mail services:	-26.1	↓	-2.2	↓
- Universal Service:	-43.0	↓	-3.7	↓
- No Universal Service:	-13.7	↓	-1.5	↓
Parcel delivery services:	+104.2	↑	+10.7	↑
- Domestic:	+117.0	↑	+11.3	↑
- Crossborder:	+42.6	↑	+6.6	↑

3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

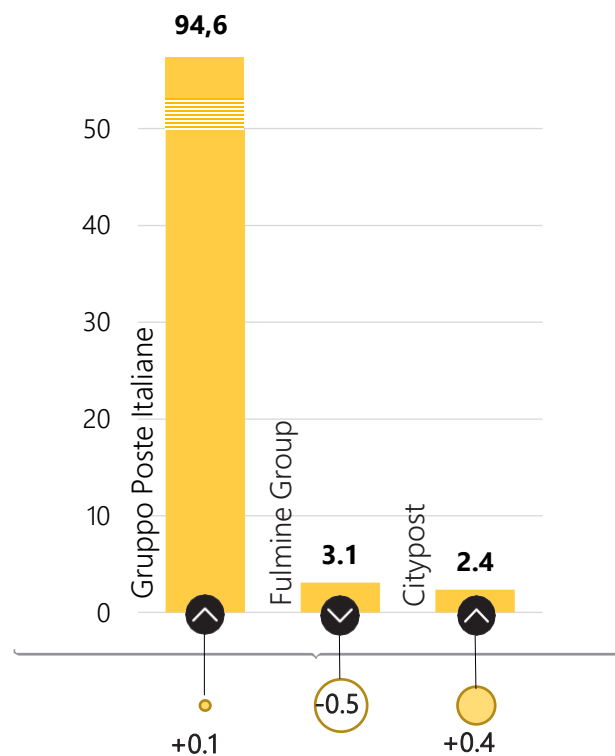
SEPTEMBER 2021

MAIL AND PARCEL DELIVERY SERVICES



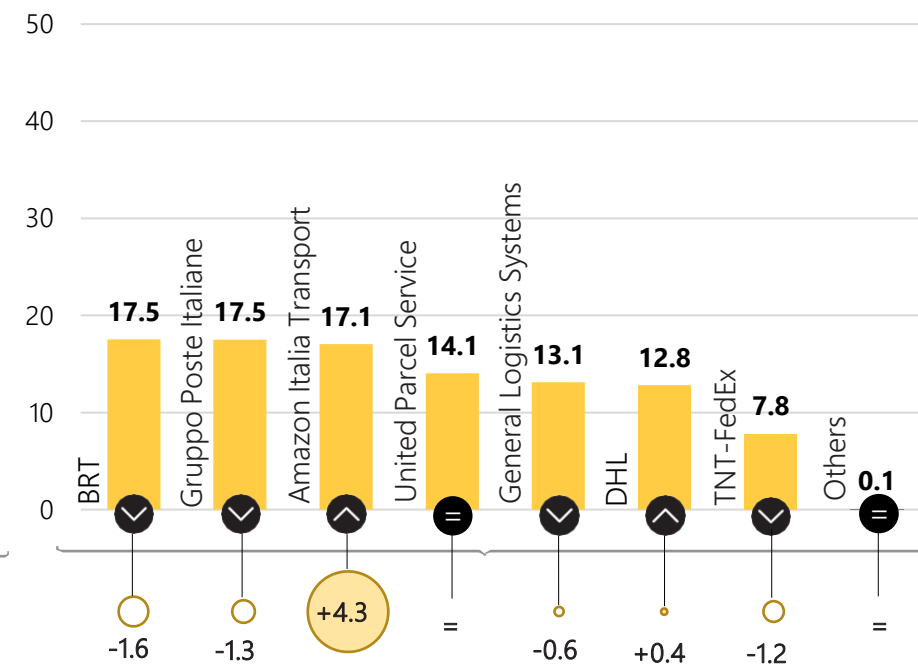
MAIL SERVICES

not included in Universal service



PARCEL DELIVERY SERVICES COURIERS

not included in Universal service

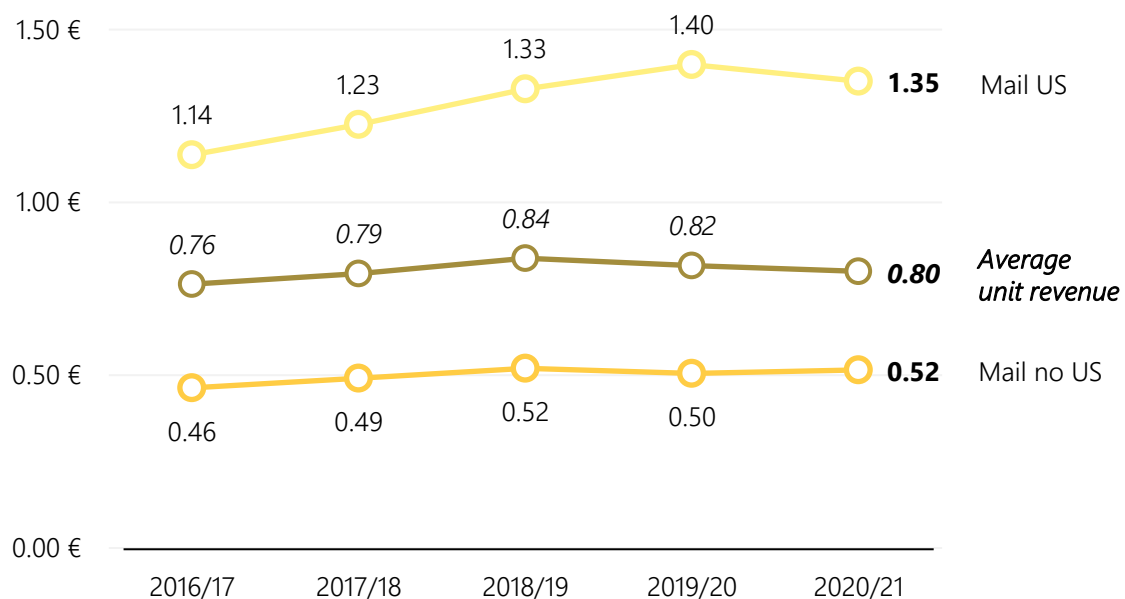


Differences vs. Sep. 2020
(percentage points)

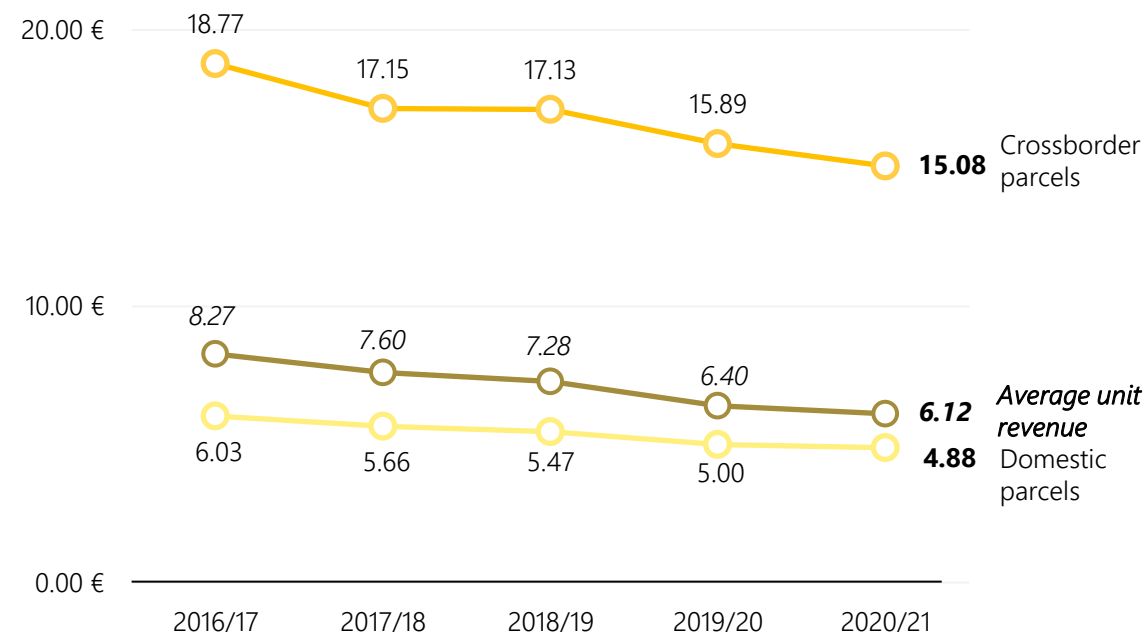
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group, Nexive Group S.r.l. and SDA Express Courier S.p.A.

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

MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

(2016/17 – 2020/21)

(2019/20 – 2020/21)

Average unit revenue:

+4.8



+1.2



- Mail US:

+16.7



-0.1



- Mail no US:

+13.0



+5.9



Change in %

(2016/17 – 2020/21)

(2019/20 – 2020/21)

Average unit revenue:

-23.5



-1.3



Crossborder parcels:

-16.9



-2.2



- US:

-17.3



-1.0



- No US:

-16.8



-2.2



Domestic parcels:

-16.6



+0.1



- US:

+1.8



+4.0



- No US:

-16.8

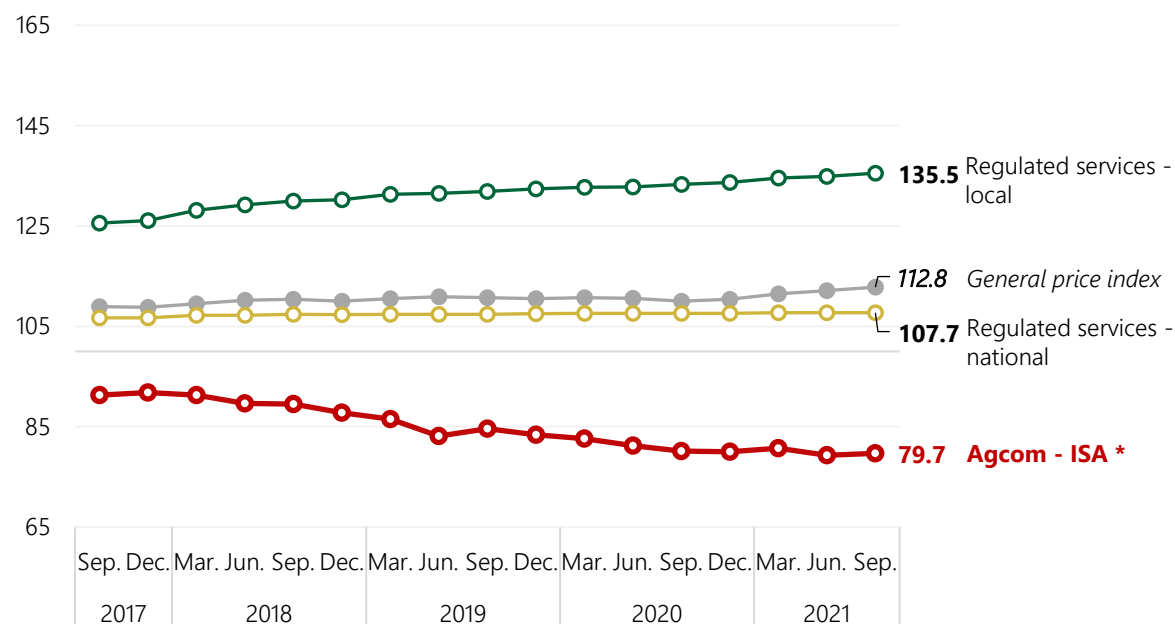


+0.1

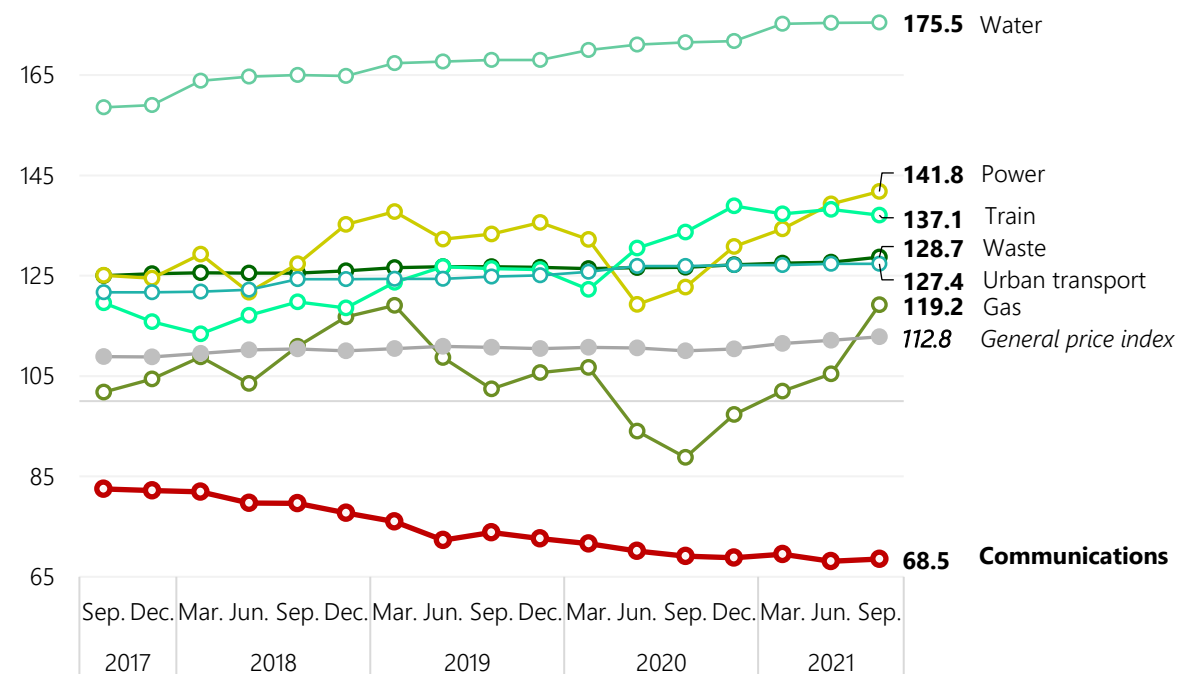


4.1 PRICE: HARMONISED CONSUMER PRICE INDEX AND OTHER UTILITIES PRICE INDICES (2010=100)

GENERAL PRICE INDEX



UTILITIES PRICE INDEX



Source: Agcom elaboration on data from Istat

ISA (Agcom summary price index):

Change in %			
4-Year	YoY		
-12.7	▼	-0.5	▼

General price index:

+3.6	▲	+2.5	▲
------	---	------	---

Regulated services - local:

+7.9	▲	+1.7	▲
------	---	------	---

Regulated services - national:

+0.9	▲	+0.1	▲
------	---	------	---

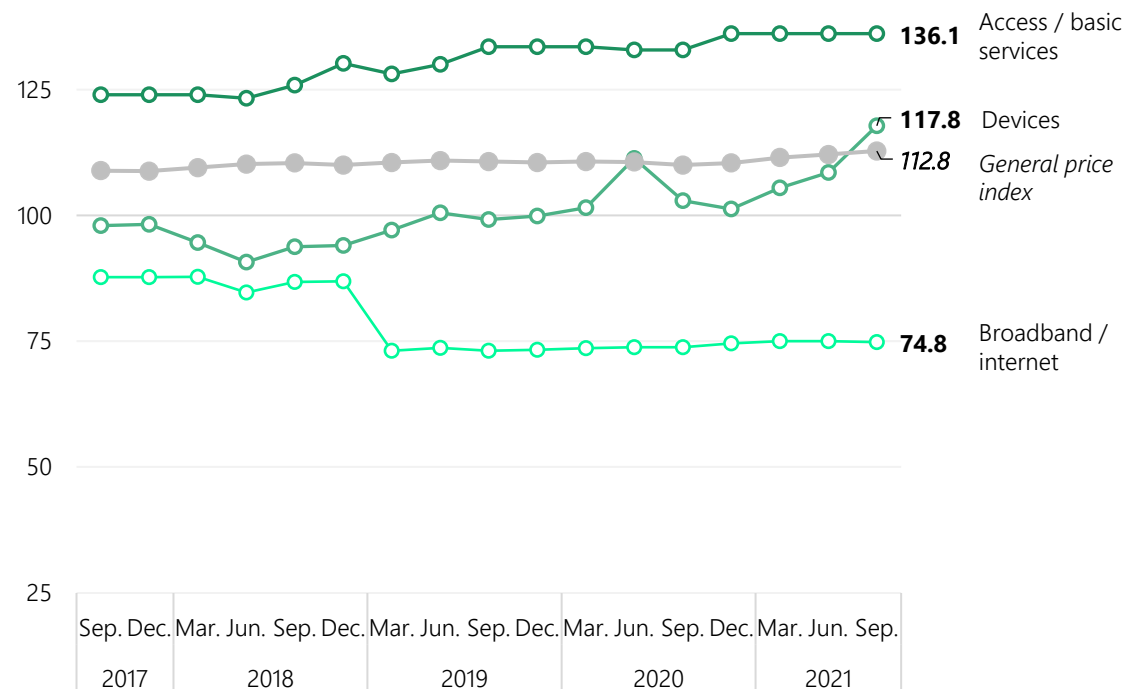
(*) **Note:** The ISA («Indice Sintetico Agcom») price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (for a total of 10 items).

Change in %				Change in %					
	4-Year		YoY			4-Year		YoY	
Water (04.4.1):	+10.7	▲	+2.3	▲	Train (07.3.1):	+14.6	▲	+2.5	▲
Waste (04.4.2):	+3.0	▲	+1.6	▲	Urban transport (07.3.2.1.1):	+5.3	▲	+0.4	▲
Power (04.5.1):	+13.3	▲	+15.6	▲	Communications (08):	-17.0	▼	-0.9	▼
Gas (04.5.2):	+17.1	▲	+34.2	▲					

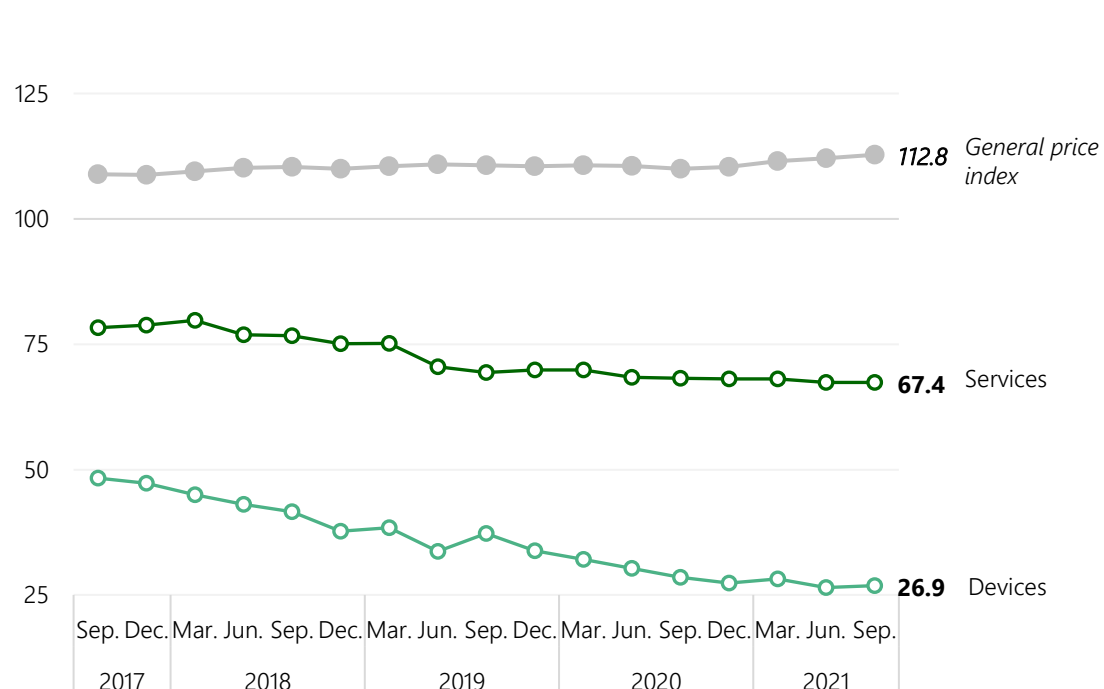
(COICOP - Classification of Individual Consumption by Purpose)

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

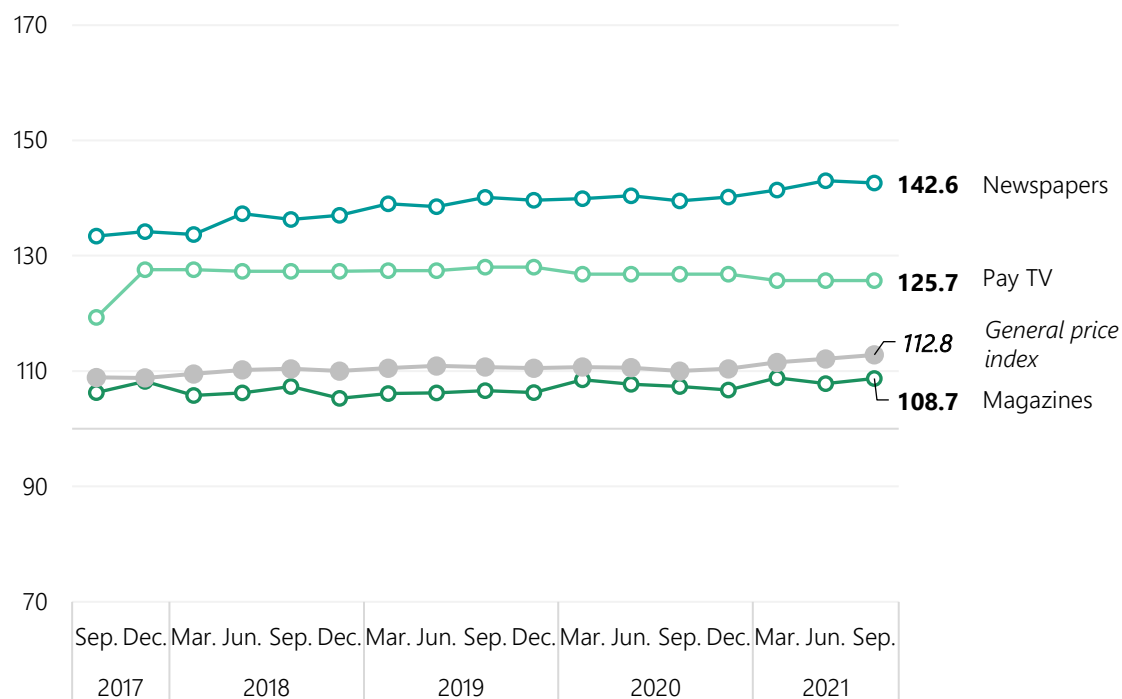
	Change in %	
	4-Year	YoY
Access / basic services (08.3.0.1):	+9.8 ▲	+2.4 ▲
Devices (08.2.0.1):	+20.2 ▲	+14.5 ▲
Broadband / internet (08.3.0.3.0.07):	-14.7 ▼	+1.4 ▲

	Change in %	
	4-Year	YoY
Services (08.3.0.2):	-13.9 ▼	-1.2 ▼
Devices (08.2.0.2):	-44.3 ▼	-5.6 ▼

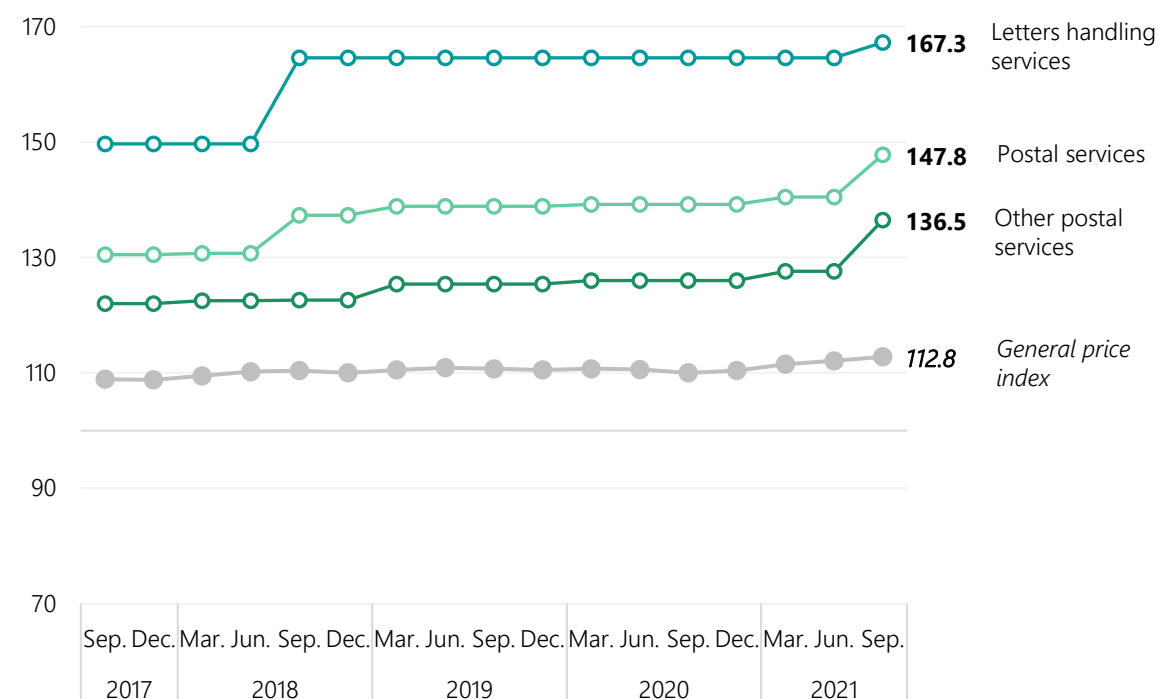
(COICOP - Classification of Individual Consumption by Purpose)

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

NEWSPAPERS, MAGAZINES, TV PRICE INDICES



POSTAL SERVICES PRICE INDEX



Source: Agcom elaboration on data from Istat

	Change in %	
	4-Year	YoY
Newspapers (09.5.2.1.0):	+6.9 ▲	+2.2 ▲
Pay TV (09.4.2.3.0.02):	+5.4 ▲	-0.9 ▼
Magazines (09.5.2.2.0):	+2.3 ▲	+1.3 ▲

	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):	+11.9 ▲	+8.3 ▲

(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

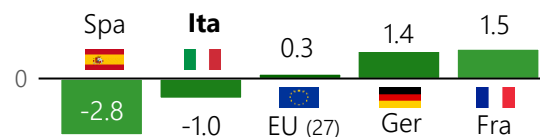
Source: Agcom elaboration on data from Eurostat



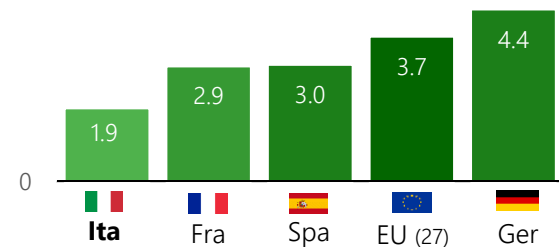
1-Year change %

Sep. 2020
-
Sep. 2021

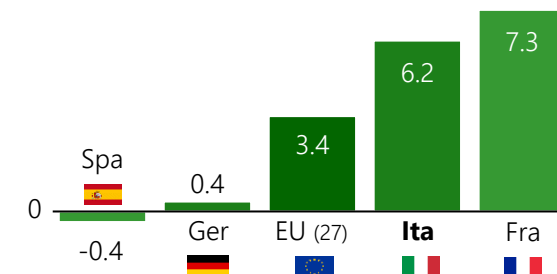
TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)



NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)

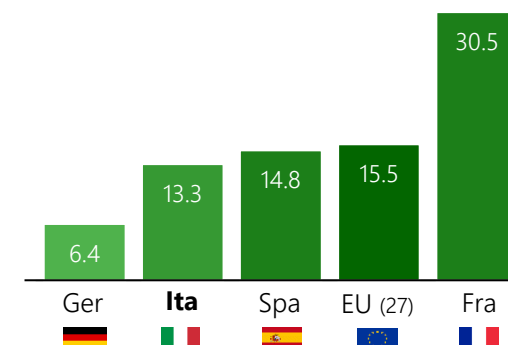
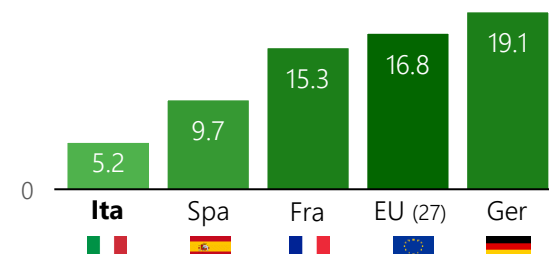
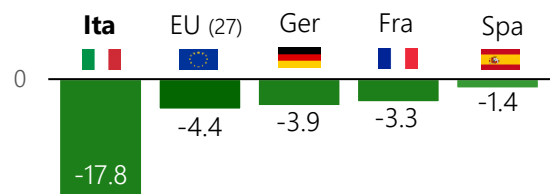


POSTAL SERVICES
(COICOP 08.1)



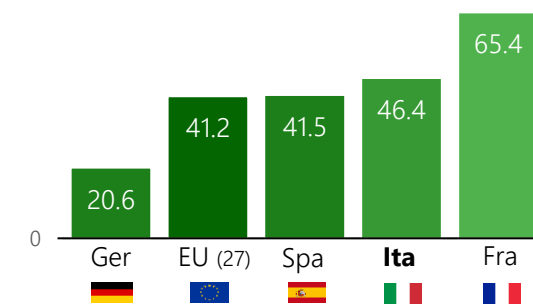
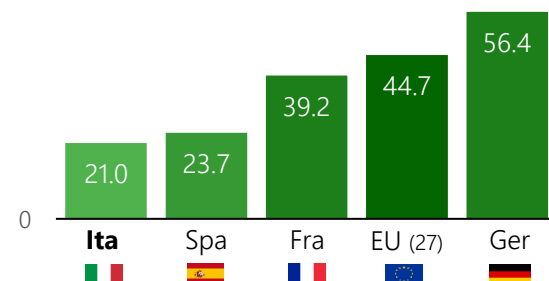
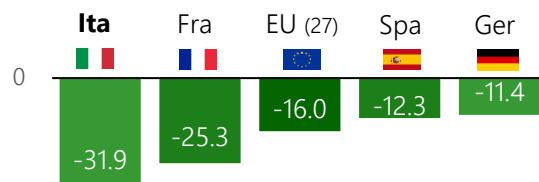
5-Year change %

Sep. 2016
-
Sep. 2021



10-Year change %

Sep. 2011
-
Sep. 2021





AUTORITÀ PER LE
GARANZIE NELLE
AGCOM COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2021

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