AGCOM AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 2/2024

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AR THE COMMUNICATIONS MARKET

(Annual Report 2024)

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

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

The data collected for this edition are updated to March 2024. 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.

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AGCOM

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AR-1: REVENUES IN AGCOM'S MARKETS BY SECTOR (2019 -2023)

Revenues in BILLIONS OF €	2019	2020	2021	2022	2023	CHANGE in bn. of € 2022/2023	CHANGE in bn. of € 2019/2023	CHANGE in % 2022/2023	CHANGE in % 2019/2023	DISTRIBUTION % 2022/2023	DISTRIBUTION % 2019/2023	DISTRIBUTION % Diff. p.p.
Electronic communications	30.07	28.65	27.85	26.94	27.14	+0.20	-2.93	+0.8	-9.7	57.6	50.4	-7.2
- Fixed Network	16.22	15.60	15.45	15.39	16.06	+0.68	-0.16	+4.4	-1.0	31.1	29.8	-1.2
- Mobile network	13.85	13.05	12.40	11.55	11.08	-0.47	-2.77	-4.1	-20.0	26.5	20.6	-5.9
Media	12.19	11.18	11.64	11.52	11.45	-0.07	-0.75	-0.6	-6.1	23.3	21.3	-2.1
- TV	8.03	7.64	8.02	8.13	8.24	+0.11	+0.20	+1.3	+2.5	15.4	15.3	-0.1
- Radio	0.69	0.54	0.58	0.61	0.63	+0.03	-0.06	4.9	-8.3	1.3	1.2	-0.1
- Publishing (newspapers and periodicals)	3.47	3.00	3.04	2.79	2.58	-0.21	-0.89	-7.5	-25.7	6.6	4.8	-1.9
Online advertising	3.36	4.07	5.54	6.17	6.84	+0.67	+3.48	+10.8	+103.6	6.4	12.7	+6.3
Postal services	6.60	6.90	7.89	8.14	8.42	+0.28	+1.82	+3.5	+27.6	12.6	15.6	3.0
- Mail services	2.23	1.67	1.75	1.73	1.72	-0.01	-0.51	-0.6	-22.7	4.3	3.2	-1.1
- Parcel delivery services	4.38	5.22	6.14	6.41	6.70	+0.29	+2.33	+4.6	+53.1	8.4	12.4	4.1
TOTAL	*52.23*	*50.80*	*52.92*	*52.77*	*53.85*	*+1.08*	*+1.63*	*+2.0*	*+3.1*	*100*	*100*	*100*

1. In 2023, the **total value** of AGCOM's markets is estimated at 53.85 bn. €. an increase of 2% (+1.08 bn. €) on an annual basis

2. The **Electronic communications** sector shows a slight recovery (+200 mln. €) as a result of two contrasting dynamics: the reduction in mobile network revenues (-470 mln. €) more than offset by the growth in fixed network revenues (+680 mln. €)

3. In the **Media** sector (-70 mln. €), the loss recorded in the publishing sector is significant (-210 mln. €), while television and radio revenues are slightly up (+110 and +30 mln. € respectively)

4. **Online advertising** resources continue their growth (+670 mln. €)

5. In the **postal sector** (+280 mln. €), revenue growth is attributable to the parcel delivery services segment (+290 mln. €), while the mail services segment shows a decline (-10 mln. €)

Source: Relazione Annuale 2024 sull'attività svolta e sui programmi di lavoro (AGCOM – Annual Report 2024)

RA-2: REVENUES IN AGCOM'S MARKETS BY TYPE (2019 -2023)

Revenues in BILLIONS OF €	2019	2020	2021	2022	2023	CHANGE in bn. of € 2022/2023	CHANGE in bn. of € 2019/2023	CHANGE in % 2022/2023	CHANGE in % 2019/2023	DISTRIBUTION % 2022/2023	DISTRIBUTION % 2019/2023	DISTRIBUTION % Diff. p.p.
Electronic communications	**30.07**	**28.65**	**27.85**	**26.94**	**27.14**	**+0,20**	**-2,93**	**+0.8**	**-9.7**	**57.6**	**50.4**	**-7.2**
- Retail	24.62	22.97	22.19	22.05	22.23	+0,18	-2.39	+0.8	-9.7	47.1	41.3	-5.9
- Wholesale	5.45	5.68	5.66	4.89	4.91	+0.02	-0.54	+0.5	-9.9	10.4	9.1	-1.3
Media	**12.19**	**11.18**	**11.64**	**11.52**	**11.45**	**-0.07**	**-0.75**	**-0.6**	**-6.1**	**23.3**	**21.3**	**-2.1**
- Advertisement	4.85	4.04	4.46	4.29	4.34	+0.05	-0.52	+1.2	-10.6	9.3	8.1	-1.2
- User spending	7.07	6.85	6.89	6.92	6.80	-0.12	-0.27	-1.8	-3.8	13.5	12.6	-0.9
- Subsidies	0.28	0.29	0.29	0.31	0.31	=	+0.04	+1.4	+13.8	0.5	0.6	+0.1
Online advertising	**3.36**	**4.07**	**5.54**	**6.17**	**6.84**	**+0.67**	**+3.48**	**+10.8**	**+103.6**	**6.4**	**12.7**	**+6.3**
- Online platforms	2.61	3.32	4.50	5.19	5.83	+0.64	+3.21	+12.4	+122.9	5.0	10.8	+5.8
- Publisher and others	0.74	0.75	1.04	0.98	1.01	+0.03	+0.26	+2.4	+35.6	1.4	1.9	+0.4
Postal services	**6.60**	**6.90**	**7.89**	**8.14**	**8.42**	**+0.28**	**+1.82**	**+3.5**	**+27.6**	**12.6**	**15.6**	**+3.0**
- Domestic	4.76	5.11	5.80	5.96	6.16	+0.20	+1.40	+3.3	+29.3	9.1	11.4	+2.3
- Cross-border	1.84	1.79	2.10	2.18	2.26	+0.08	+0.42	+4.0	+23.1	3.5	4.2	+0.7
TOTAL	*52.23*	*50.80*	*52.92*	*52.77*	*53.85*	*+1.08*	*+1.63*	*+2.0*	*+3.1*	*100*	*100*	*100*

1. In the **Electronic communications** sector, both retail and, much more marginally, wholesale revenues have grown over the past year. The former will amount to 22.23 bn. € in 2023, the wholesale just under 5 bn. €.

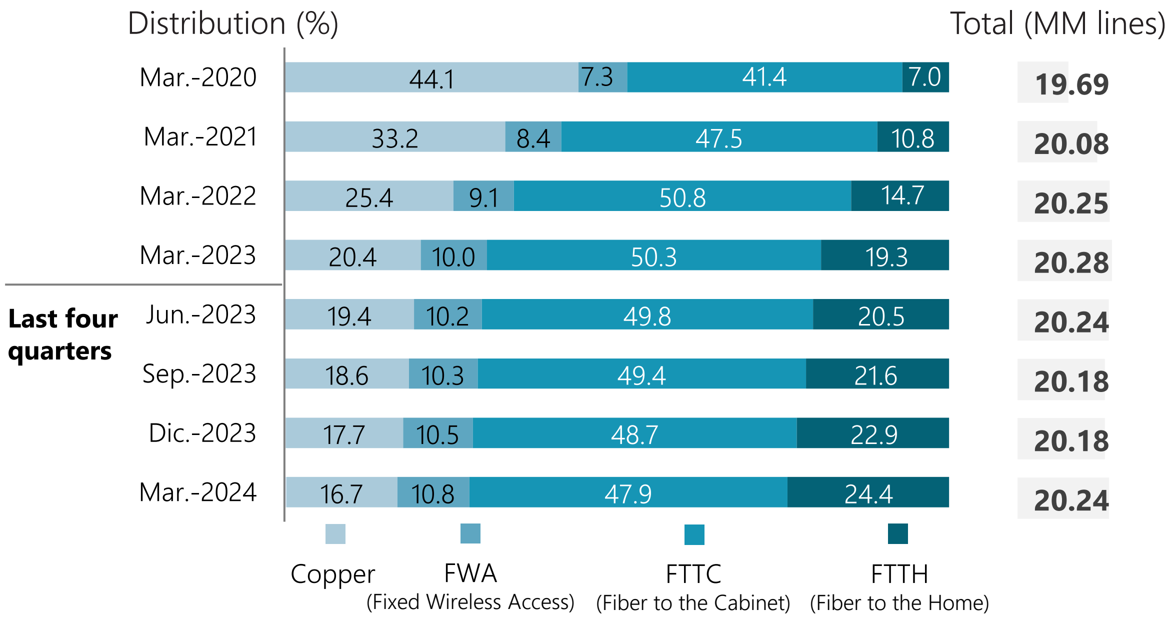
2. In the **media** sector, advertising revenues grew in the last year, while user spending and revenues from subsidies decreased.

3. Among **online advertising**, resources attributable to platforms grew by 12.4 per cent, the type of revenue, among all communications sectors, that grows the most.

4. In the **postal sector**, revenue growth attributable to domestic services was above 6 bn. €, cross-border services slightly 2 bn. €. Both types are growing year-on-year and in relation to the entire period under review.

Source: Relazione Annuale 2023 sull'attività svolta e sui programmi di lavoro (AGCOM – Annual Report 2023)

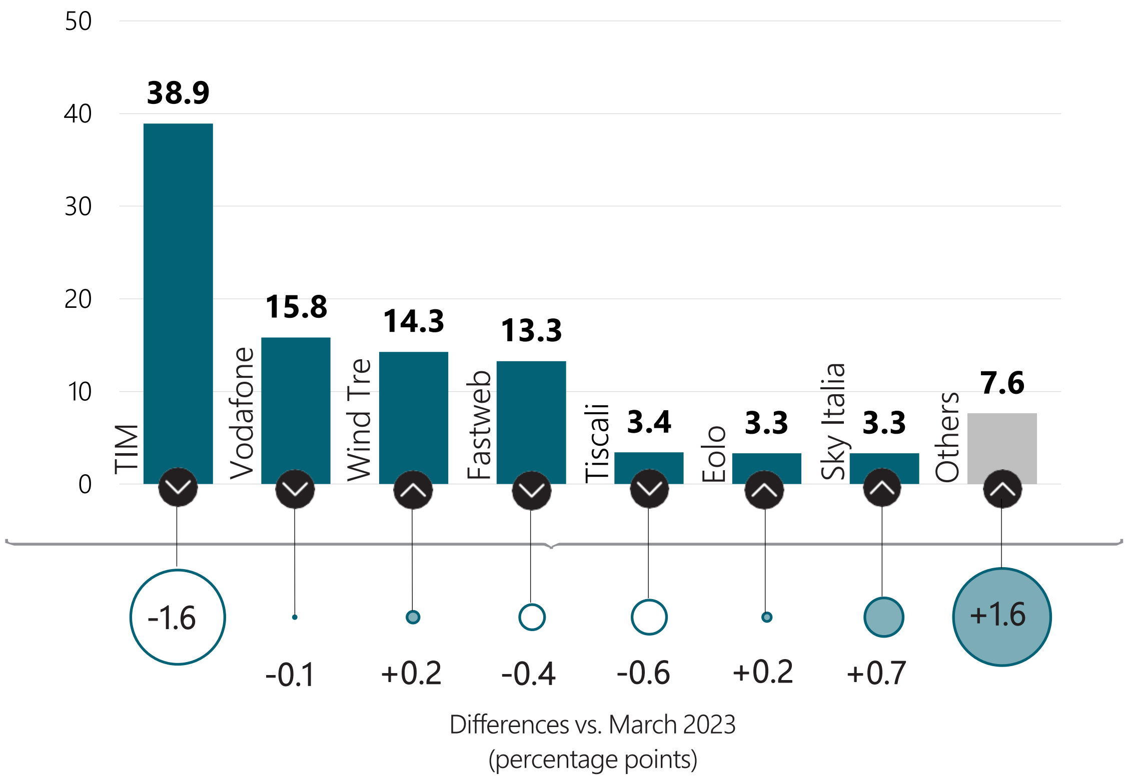
1.1 FIXED NETWORK: TOTAL LINES



*Total lines, coherently with European reporting, also includes lines indicated in the "other NGA," "other not NGA," and "Satellite" categories. Overall, as of March 2024, these lines are estimated to be about 0.3 percent of the total lines (about 50,000 line), mostly satellite.

MARKET SHARES (%)

MARCH 2024



Total lines	(no. of lines)	(Δ %)	
Quarterly change (Dec. 2023 – Mar. 20243)	**+58 k** accesses	+0.3	↑
Annual change (Mar. 2023 – Mar. 2024)	**-36 k** accesses	-0.2	↓
4-Year change (Mar. 2020 – Mar. 2024)	**+555 k** accesses	+2.8	↑

Distribution

(Δ 2023-2024) percentage points

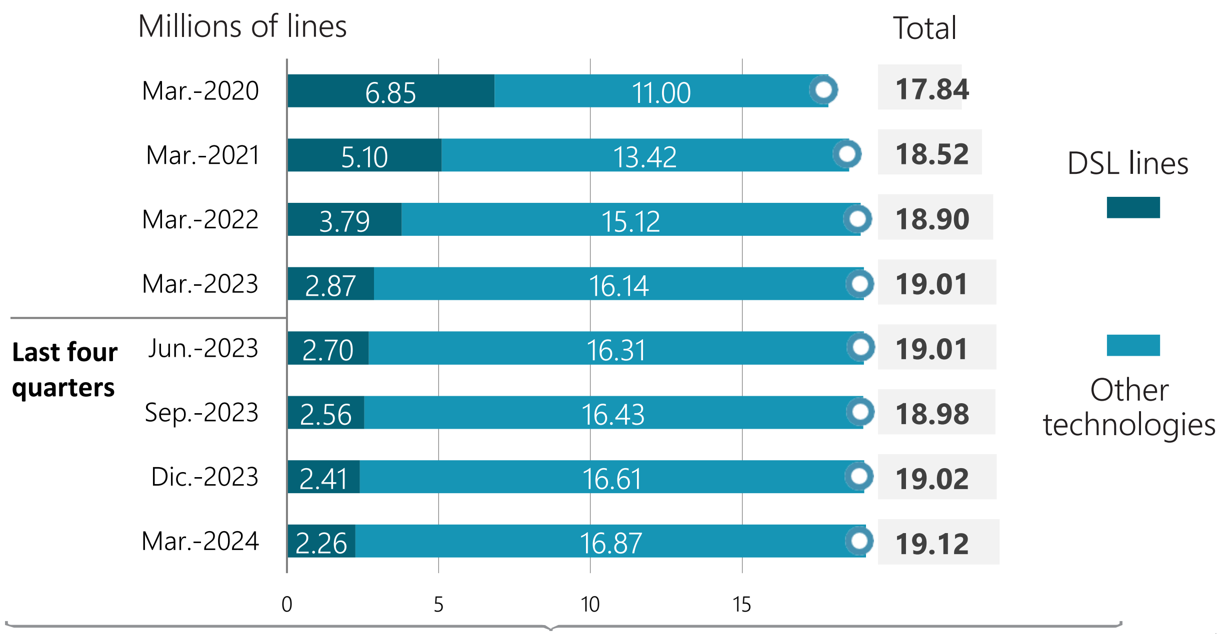
Copper:	-3.7	↓
FWA:	+0.9	↑
FTTC:	-2.4	↓
FTTH:	+5.1	↑

Data provided by: Aruba, BBBell, Brennercomm, BT Italia, Colt Technology Services, Compagnia Italia Mobile, Coop Italia (CoopVoce), Convergenze, Daily Telecom Mobile, DIGI Italy, Enel Energia (Enel Fibra), Eolo, FastAlp, Fastweb, Fidoka, Go Internet, Green TLC, Hal Services, Iccom, Iliad, Infranet, Intred, Irideos, Lycamobile, Mavianmax, Megaweb, Micso, Mordacchini S.r.l., Open Fiber, Planetel, PostePay, PSA, Retelit, Sky Italia, Stadtwerke ASM, Stel, Tecno Adsl, Tesselis (Tiscali), TIM, Unidata, Vianova, Virgin Fibra, Vodafone Italia, Wind Tre.

The data presented in the Electronic communications section also include an estimate of 'other companies' in the market

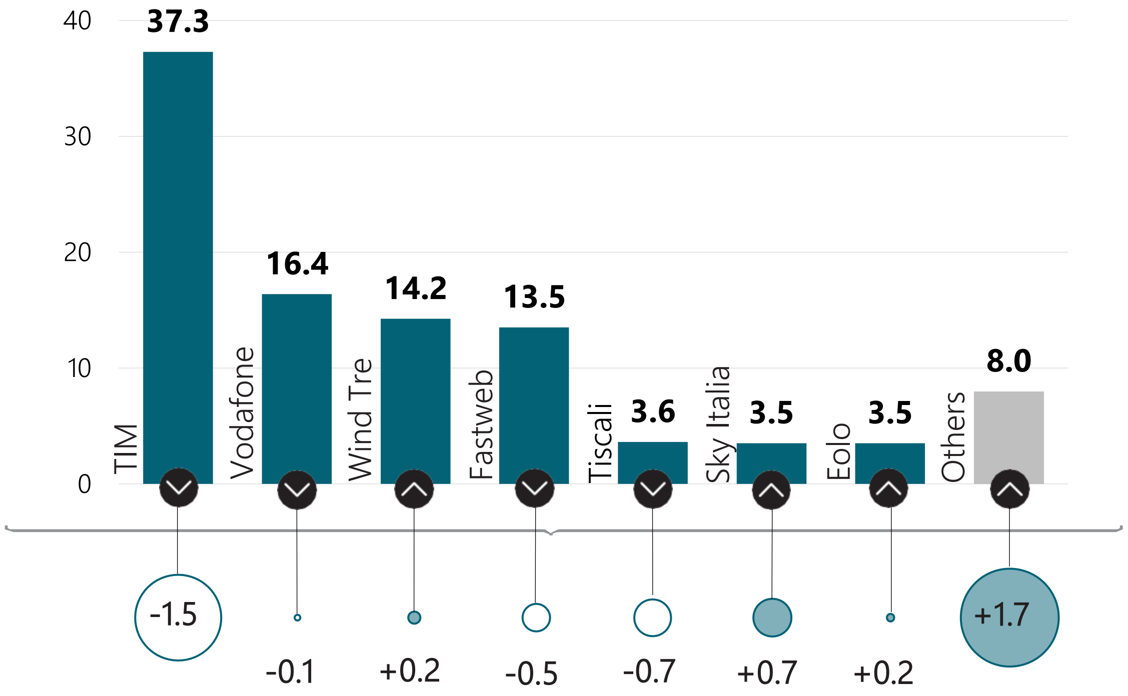
k = thousand

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



MARKET SHARES (%)

MARCH 2024



Differences vs. March 2023
(percentage points)

Quarterly change
(Dec. 2023 – Mar. 2024)

Total lines

+101 k
lines
(+0.5%)

Annual change
(Mar. 2023 – Mar. 2024)

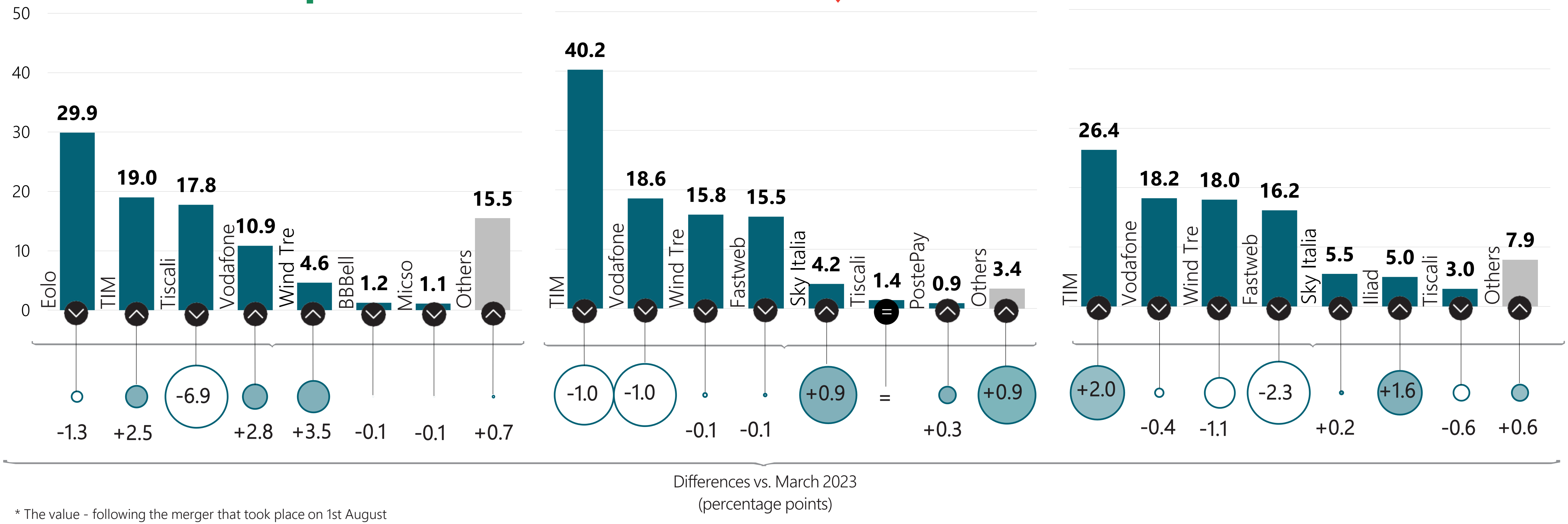
Total lines	DSL lines	Other technologies
+112 k lines (+0.6 %)	**-615 k** lines (-21.4%)	**+727 k** lines (+4.5%)

k = thousand

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

MARCH 2024

FWA	FTTC	FTTH
Total lines: **2.20** million access	Total lines: **9.69** million access	Total lines: **4.93** million access
Annual change (Mar. 2023 – Mar. 2024)	Annual change (Mar. 2023 – Mar. 2024)	Annual change (Mar. 2023 – Mar. 2024)
+8.3%	**-4.9**	**+26.1%**



* The value - following the merger that took place on 1st August 2022- include the share previously attributed to Linkem

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: DATA TRAFFIC IN DOWNLOAD AND UPLOAD

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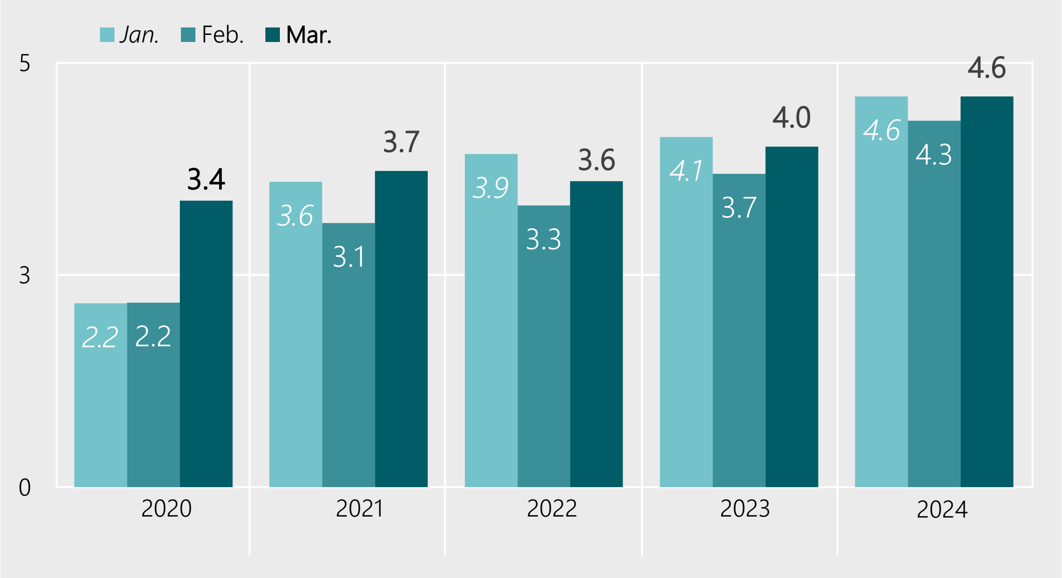
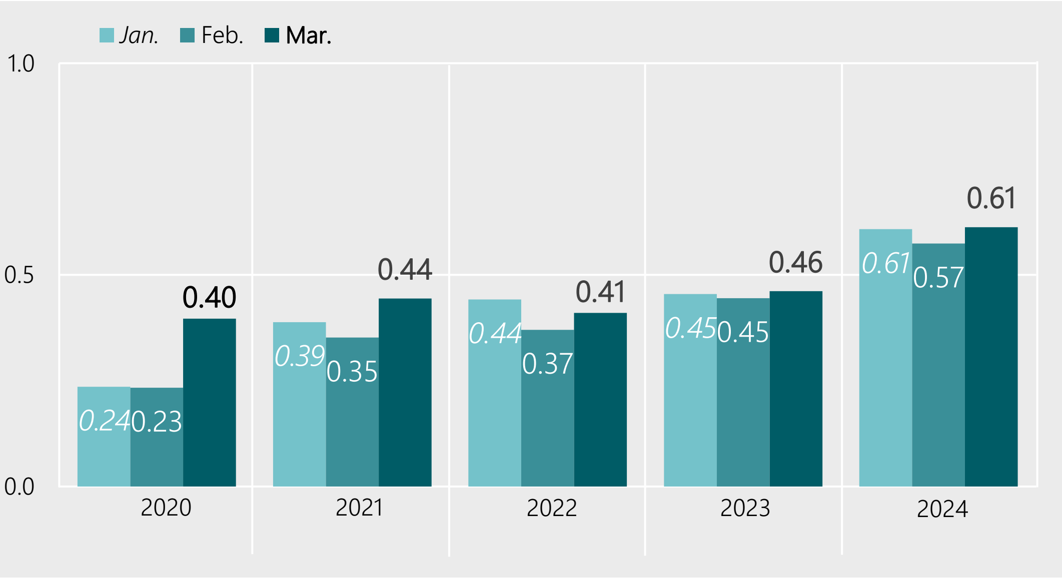
DOWNLOAD (cumulative monthly data)



UPLOAD (cumulative monthly data)



Download

1 **Cumulative data since the beginning of the year** (Jan. – Mar.)

(2020) → (2021) → (2022) → (2023) → (2024)

Exabyte 7.72 **+35.2%** 10.44 **+4.0%** 10.85 **+9.1%** 11.83 **+14.3%** 13.52

2020 → 2024: **+75.2%**

2 **Monthly comparision (change %)**

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+66.2	+9.1	+5.1	+11.6	+112.7
February	+43.1	+6.6	+11.3	+16.9	+98.4
March	+10.3	-3.2	+11.3	+14.6	+36.3

Upload

1 **Cumulative data since the beginning of the year** (Jan. – Mar.)

(2020) → (2021) → (2022) → (2023) → (2024)

Exabyte 0.87 **+36.8%** 1.18 **+3.2%** 1.22 **+11.3%** 1.36 **+31.8%** 1.79

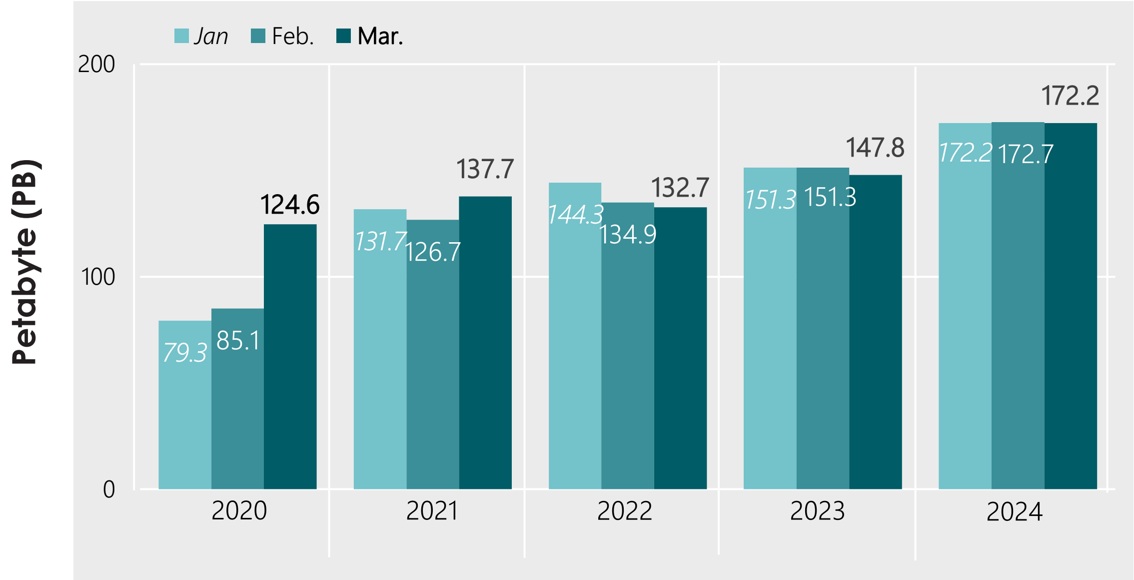
2020 → 2024: **+107.2%**

2 **Monthly comparision (change %)**

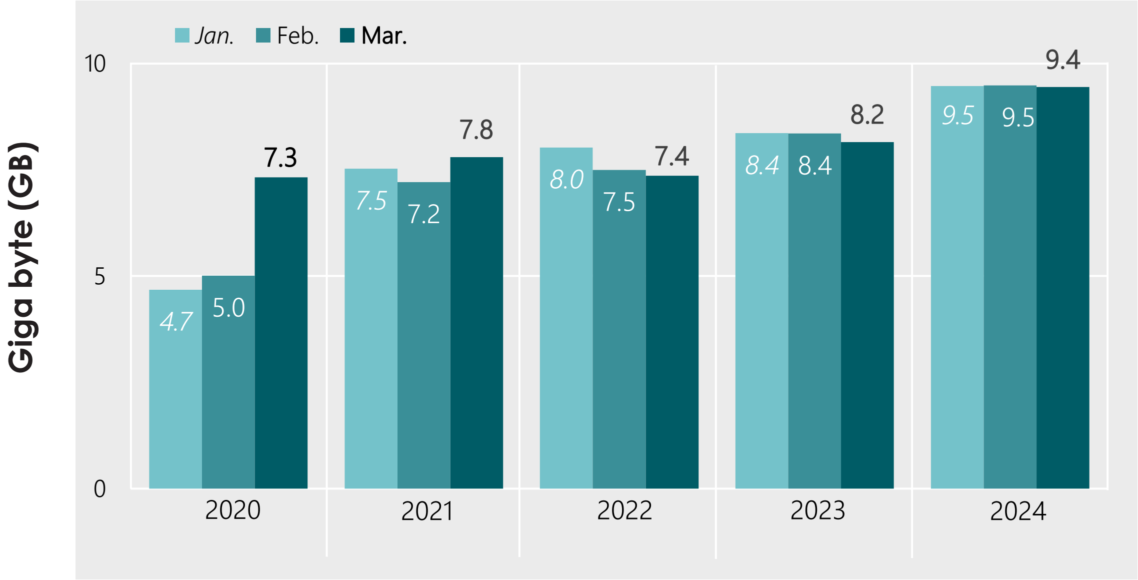
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+64.6	+13.8	+2.9	+33.6	+157.5
February	+50.7	+5.3	+20.2	+29.0	+145.8
March	+12.0	-7.7	+12.5	+32.9	+54.5

1.5 FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

TOTAL TRAFFIC



PER BROADBAND LINE



① **Average daily comparison since the beginning of the year** (Jan. – Mar.)

	(2020)		(2021)		(2022)		(2023)		(2024)
Petabyte	96.6	**+36.9%**	132.2	**+3.9%**	137.4	**+9.1%**	150.1	**+14.8%**	172.4

2020 → 2024: **+78.4%**

① **Average daily comparison since the beginning of the year** (Jan. – Mar.)

	(2020)		(2021)		(2022)		(2023)		(2024)
Gigabyte	5.69	**+32.2%**	7.52	**+1.5%**	7.63	**+8.6%**	8.29	**+14.3%**	9.47

2020 → 2024: **+66.4%**

② **Monthly daily average comparision (change %)**

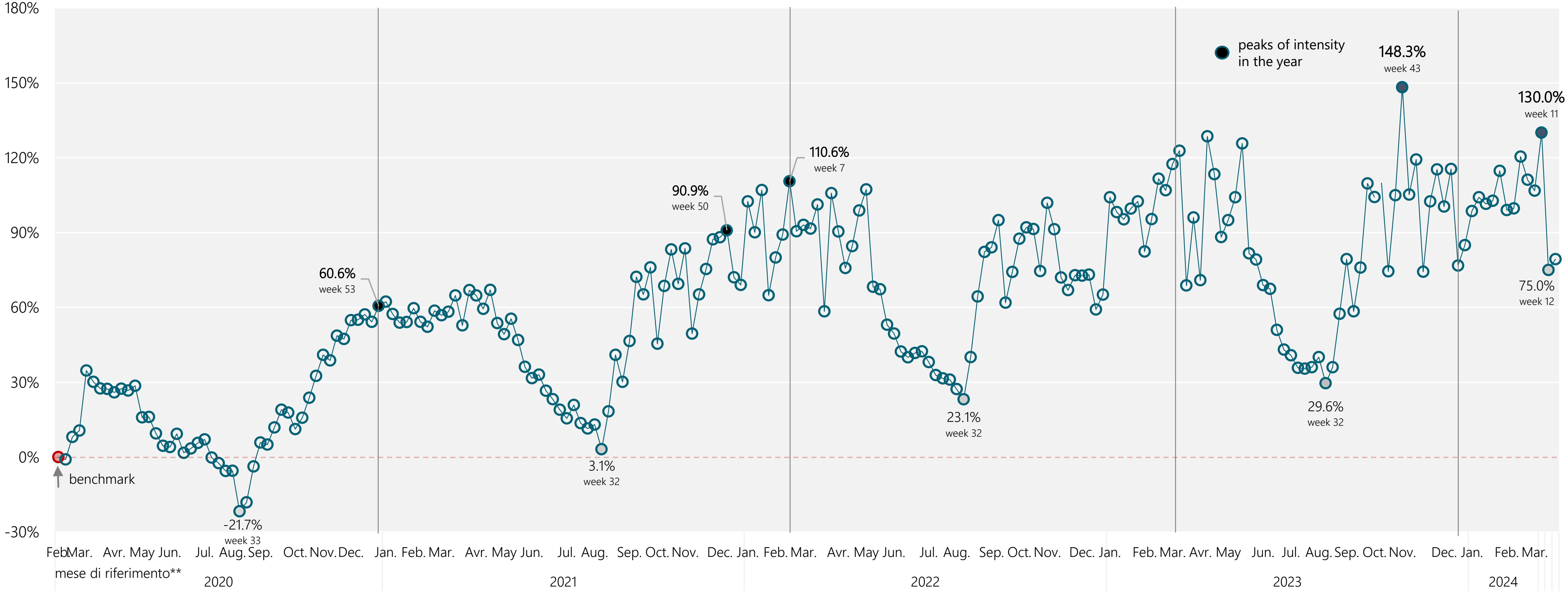
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+66.1	+9.5	+4.9	+13.8	+117.1
February	+49.0	+6.5	+12.1	+14.1	+103.0
March	+10.5	-3.7	+11.4	+16.5	+38.2

② **Monthly daily average comparision (change %)**

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+60.8	+6.6	+4.2	+13.3	+102.3
February	+43.8	+4.0	+11.4	+13.6	+89.3
March	+6.4	-5.6	+10.8	+15.8	+28.9

1.6 FIXED NETWORK: WEEKLY DATA TRAFFIC INTENSITY

Data traffic intensity variation (*)



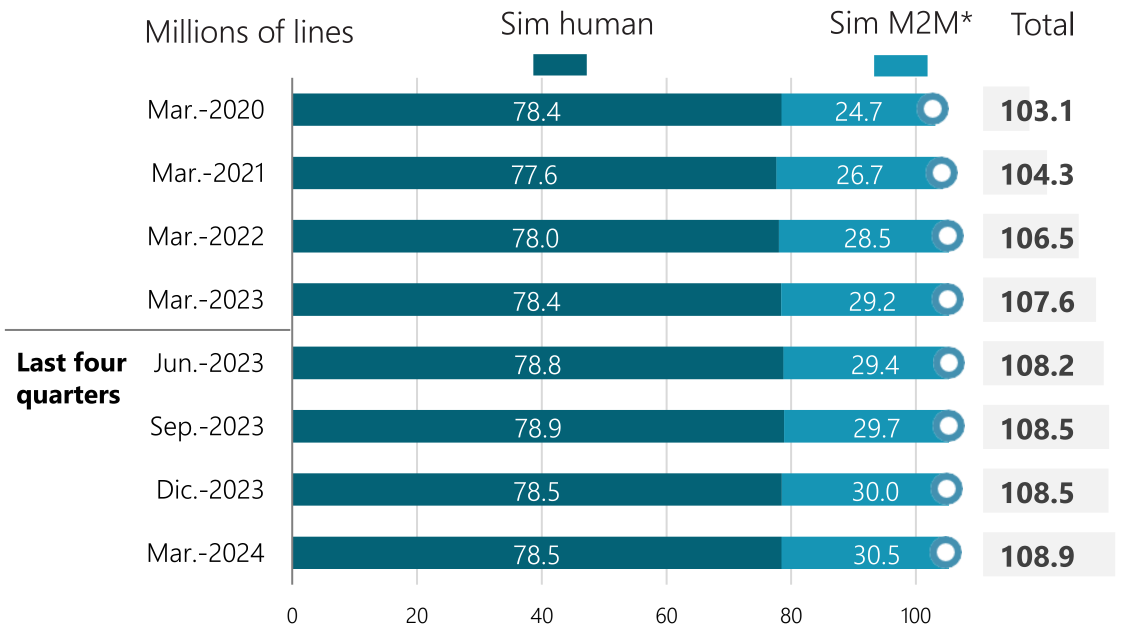
Definition: data traffic intensity (Gbps) represents the peak inbound traffic volume registered in a timespan of 5 to 60 minutes.

*For each week. the intensity indicator is represented by the percentage change. compared to the 7th week of 2020 (10 to 16 February - red dot in the graph). of the weighted average of the traffic data calculated on the operators' data using. as weighting coefficient. the percentual broadband market share of each operator at the end of the previous year.

For example. the figure for week 53 of the year 2020 shows a 60.6 per cent increase in traffic intensity compared to benchmark week. week 7 of 2020.

** In some cases. a week straddles two months.

1.7 MOBILE NETWORK: TOTAL SUBSCRIBERS



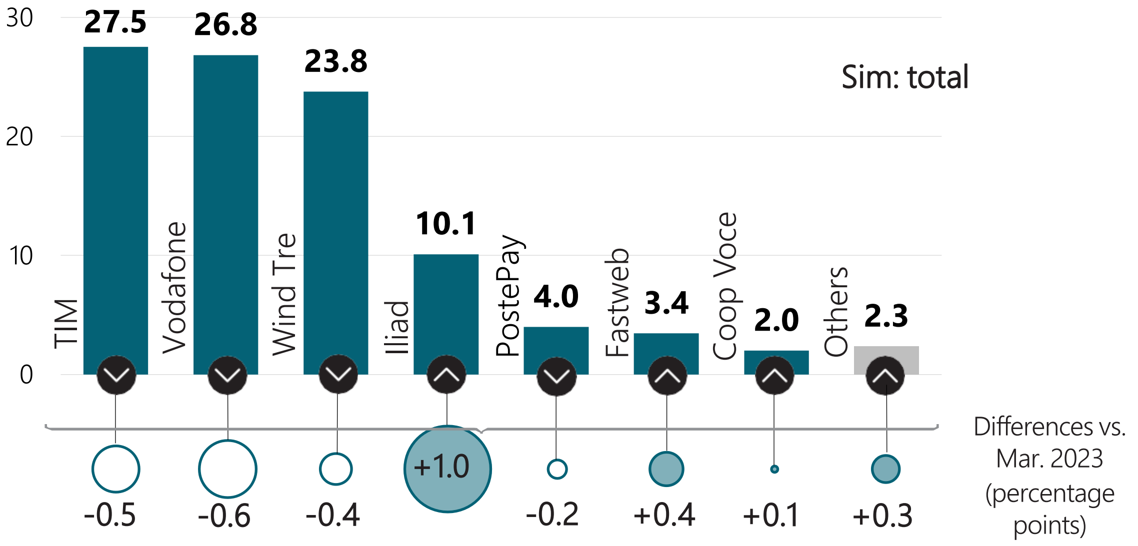
(*) **Note**: Machine-to-Machine sims are based on the technologies that enable devices and sensors or "things" (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

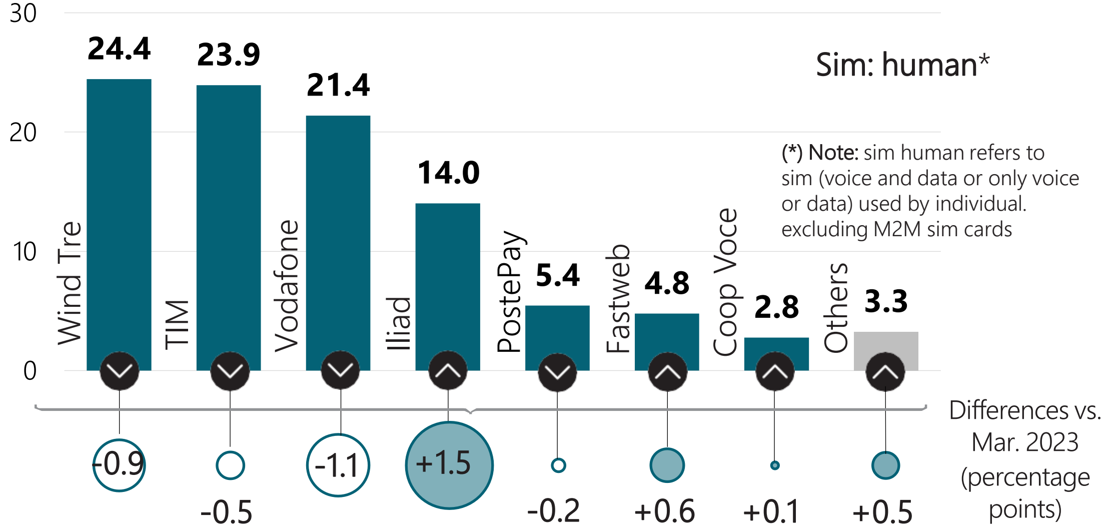
	Quarterly change (Dec. 2023 – Mar. 2024) (no of sim in thousand)		Quarterly change (Δ %)	Annual change (Mar. 2023 – Mar. 2024) (no of sim in thousand)		Annual change (Δ %)
Total sim cards:	+449	↑	+0.4	+1,298	↑	+1.2
Sim human:	-9	↓	-0.01	+58	↑	+0.1
Sim M2M:	+458	↑	+1.5	+1,240	↑	+4.2

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 (%)

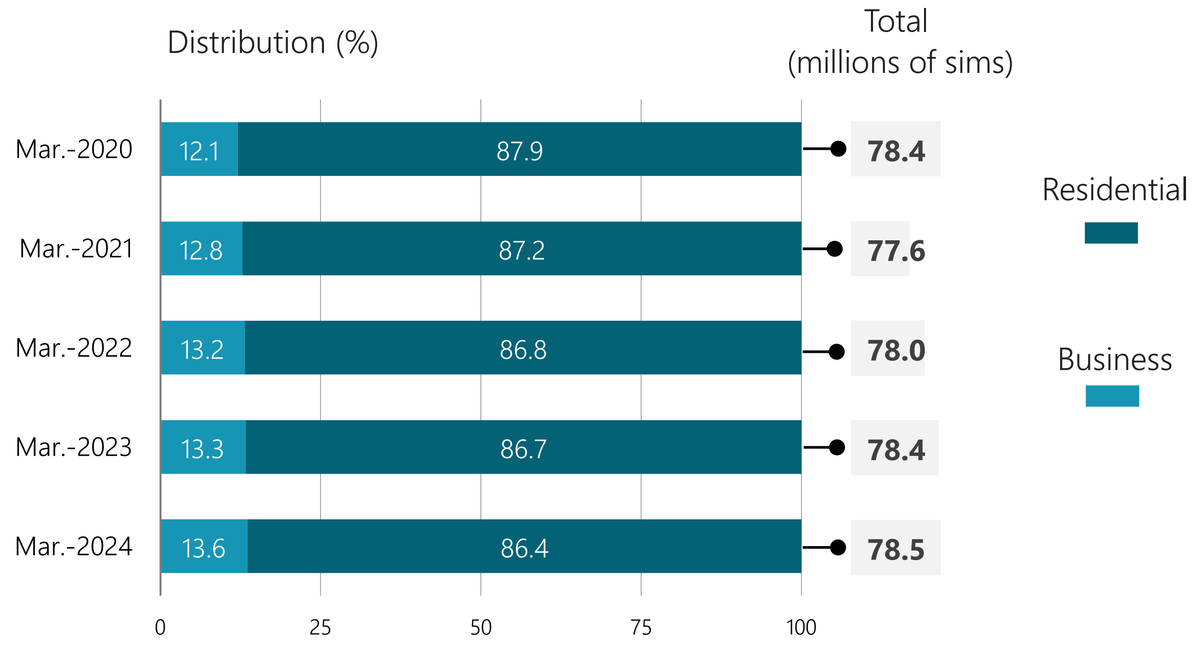
MARCH 2024





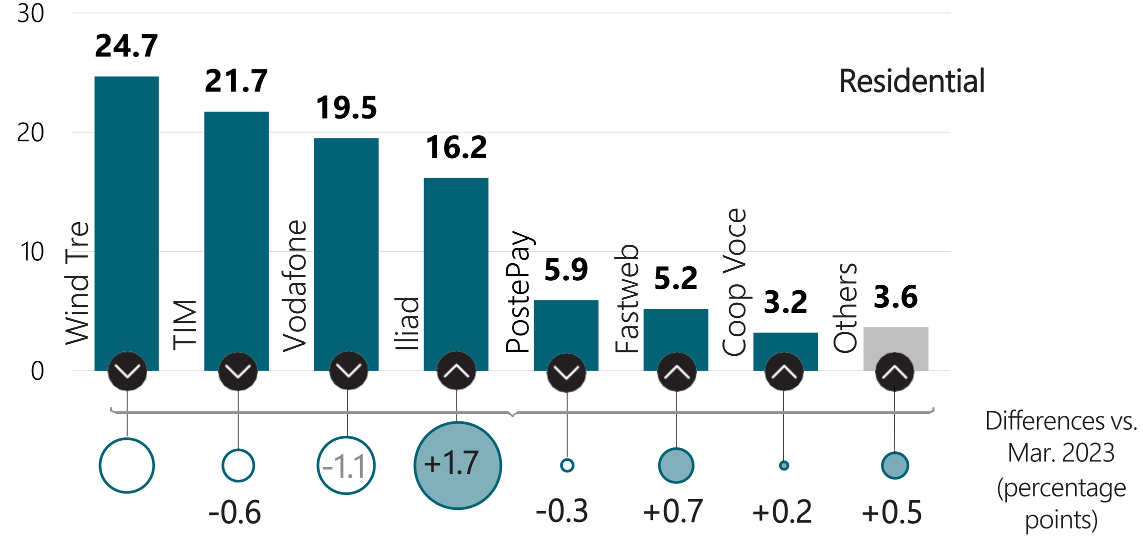
(*) **Note:** sim human refers to sim (voice and data or only voice or data) used by individual. excluding M2M sim cards

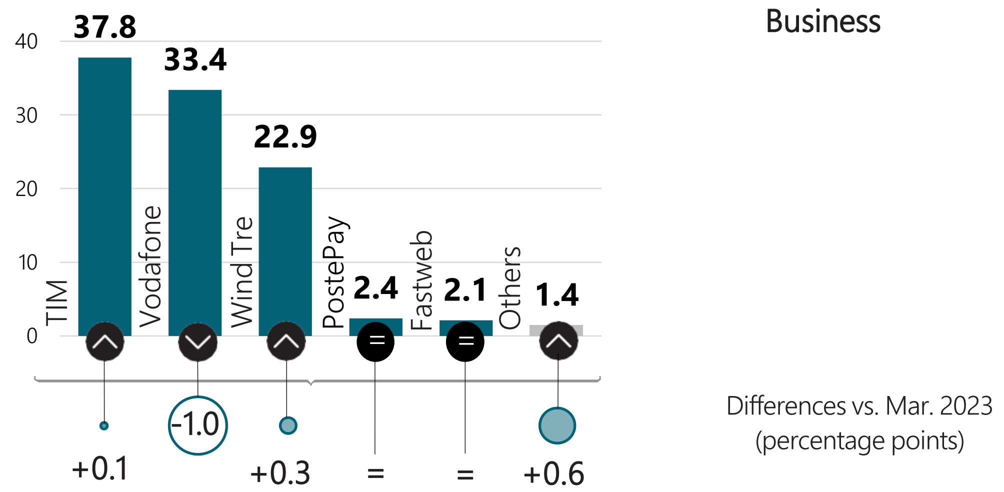
1.8 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



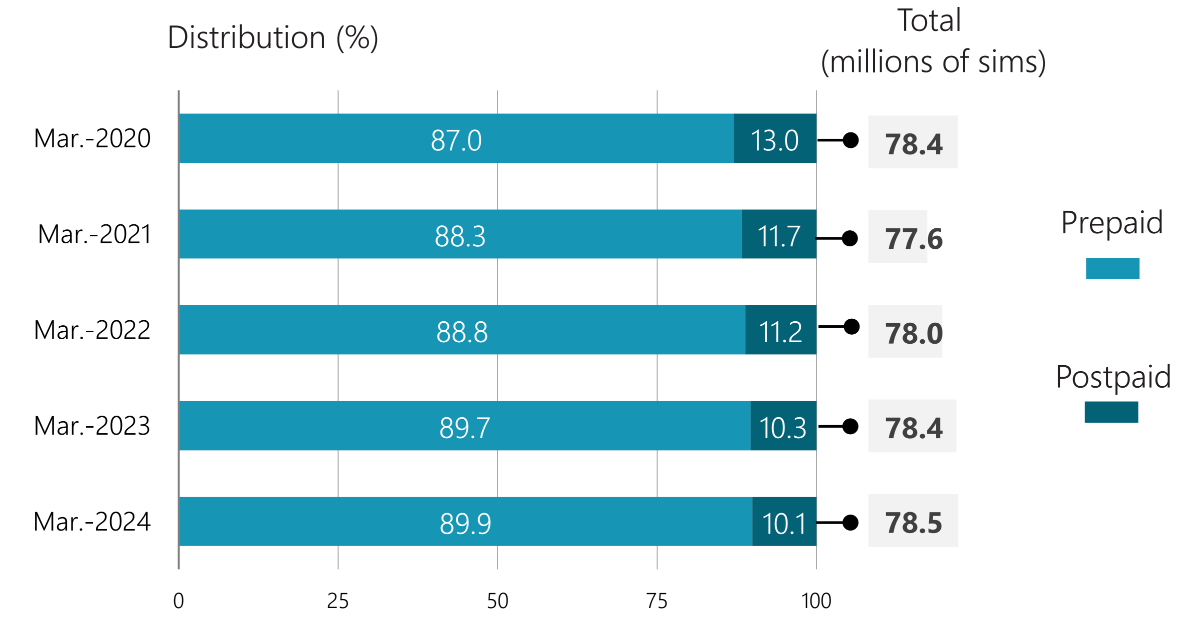
	Annual change (Mar. 2023 – Mar. 2024) (no of sim in thousand)		Annual change (Δ %)	4-Year change (Mar. 2020 – Mar. 2024) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	+58	↑	+0.1	+9	↑	-0,01
Residential sim card:	-190	↓	-0.3	-1,180	↓	-1.7
Business sim cards:	+247	↑	+2.4	+1,189	↑	+12.5

MARKET SHARES (%)
MARCH 2024





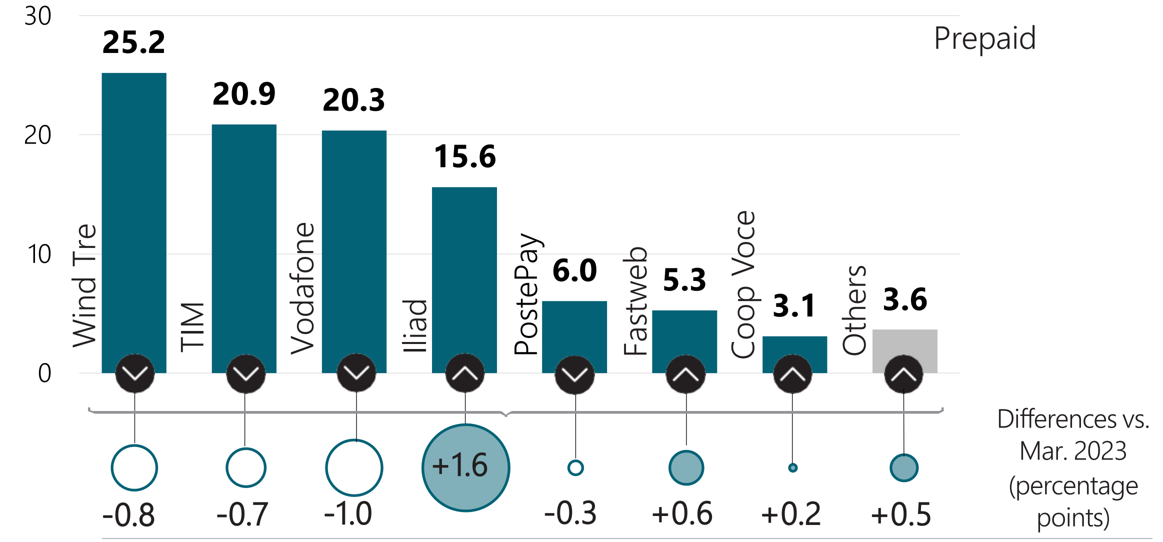
1.9 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT

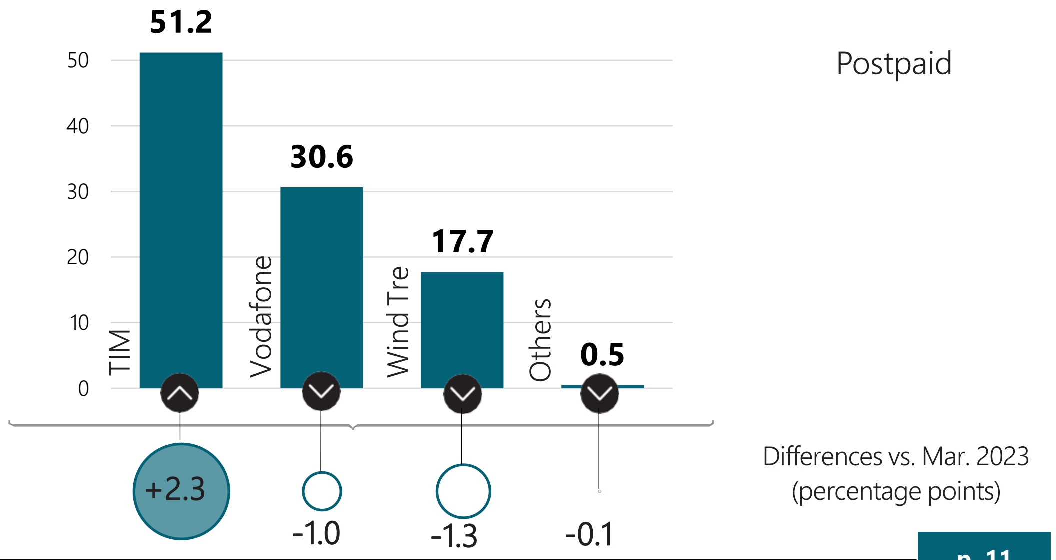


	Annual change (Mar. 2023 – Mar. 2024) (no of sim in thousand)		Annual change (Δ %)	4-Year change (Mar. 2020 – Mar. 2024) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	+58	↑	+0.1	+9	↑	+0.01
Prepaid sim cards:	+224	↑	+0.3	+2,270	↓	+3.3
Postpaid sim cards:	-166	↓	-2.1	-2,261	↓	-22.2

MARKET SHARES (%)

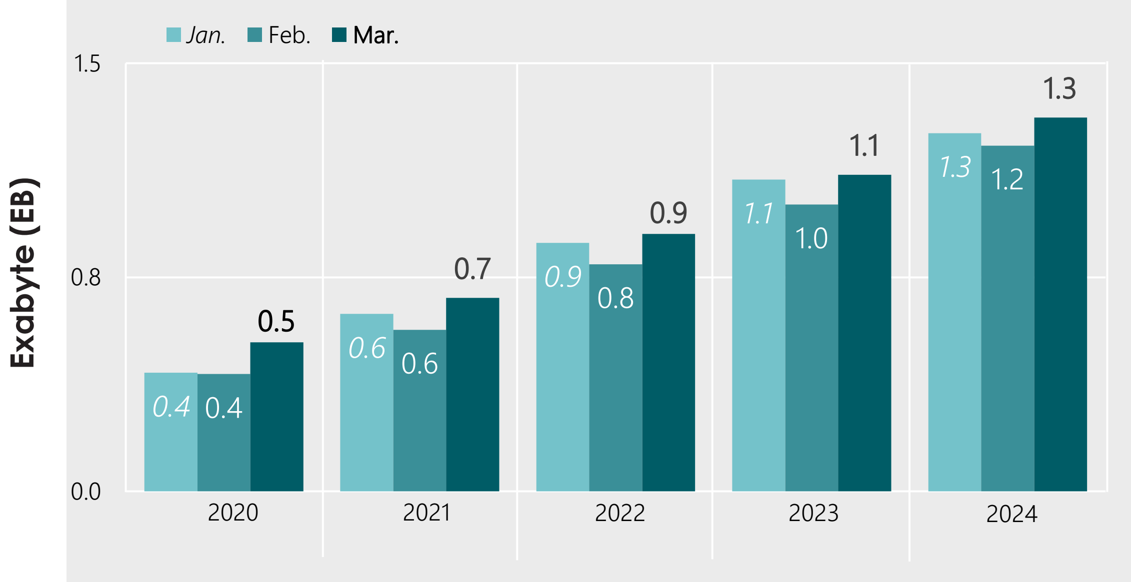
MARCH 2024



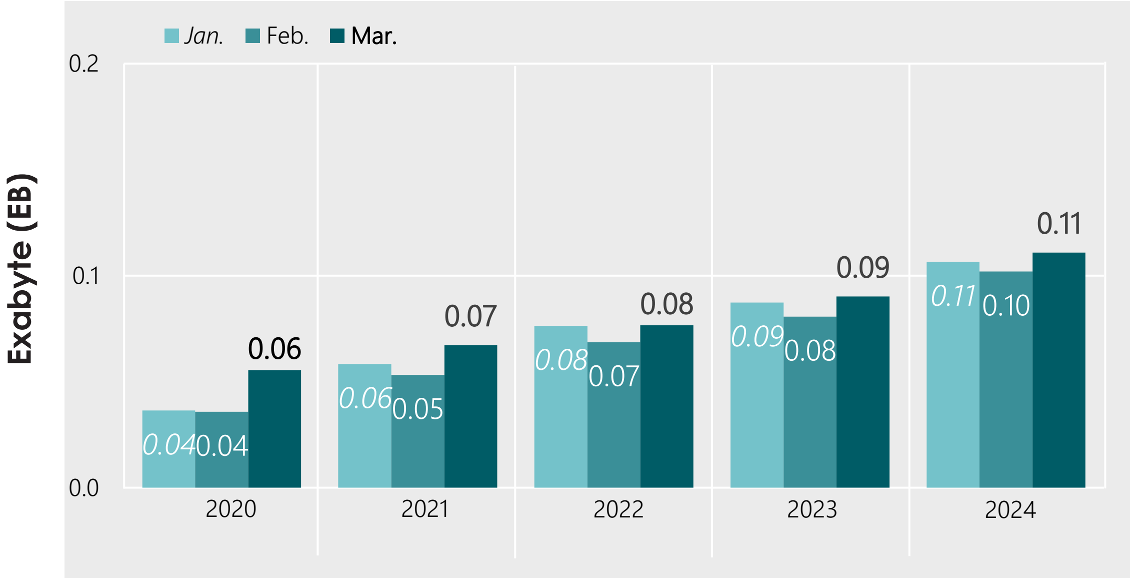


1.10 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD

DOWNLOAD (cumulative monthly data)



UPLOAD (cumulative monthly data)



Download

1 **Cumulative data since the beginning of the year** (Jan. – Mar.)

	(2020)		(2021)		(2022)		(2023)		(2024)
Exabyte	1.35	**+38.4%**	1.87	**+37.6%**	2.57	**+24.9%**	3.21	**+17.7%**	3.78

2020 → 2024: **+180.1%**

2 **Monthly daily average comparision (change %)**

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+49.5	+40.1	+25.5	+14.9	+202.1
February	+37.9	+40.5	+26.3	+20.5	+194.9
March	+29.9	+33.0	+23.1	+18.0	+151.0

Upload

1 **Cumulative data since the beginning of the year** (Jan. – Mar.)

	(2020)		(2021)		(2022)		(2023)		(2024)
Exabyte	0.13	**+39.9%**	0.18	**+24.0%**	0.22	**+16.5%**	0.26	**+23.7%**	0.32

2020 → 2024: **+149.9%**

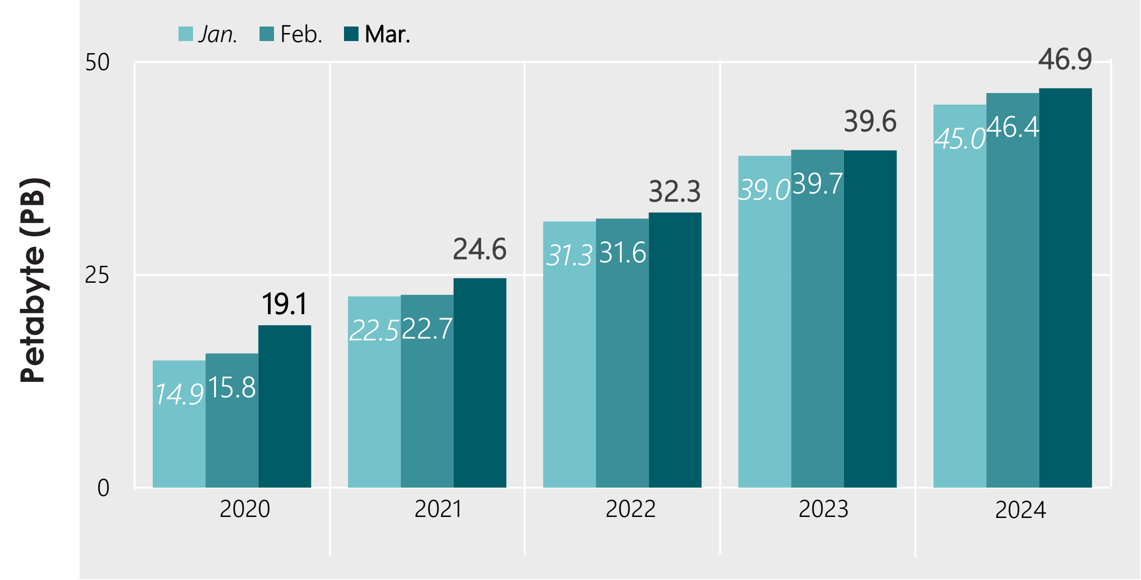
2 **Monthly daily average comparision (change %)**

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+60.0	+31.0	+14.4	+21.9	+192.4
February	+48.5	+29.0	+17.5	+26.3	+184.5
March	+21.1	+14.0	+17.6	+23.1	+99.7

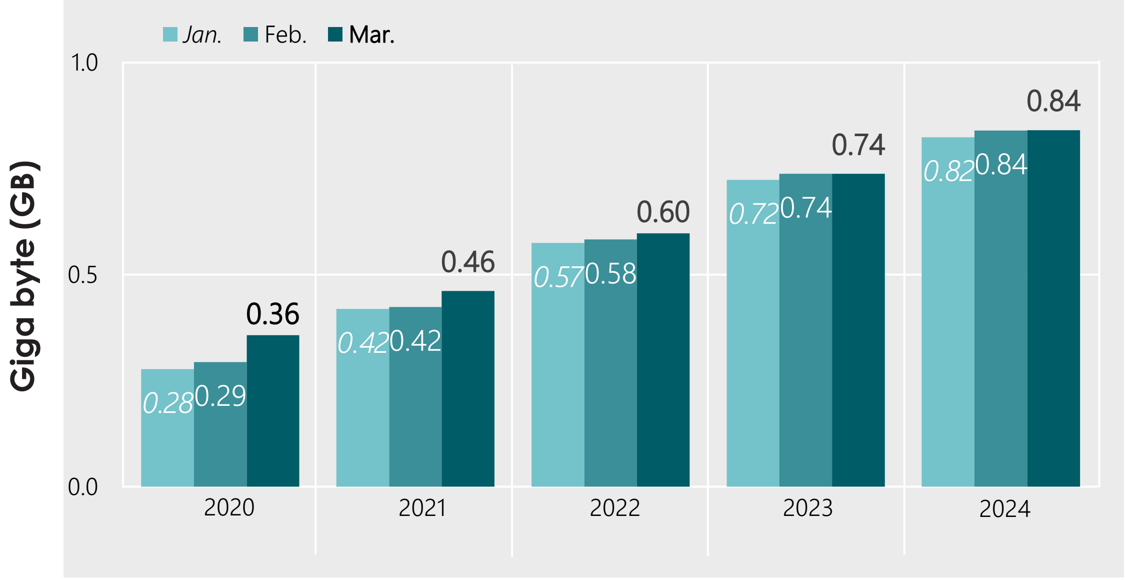
1.11 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)

AGCOM

TOTAL TRAFFIC



PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



1 Average daily comparison since the beginning of the year (Jan. – Mar.)

Total traffic

	(2020)		(2021)		(2022)		(2023)		(2024)
Petabyte	16.6	**+40.0%**	23.3	**+36.4%**	31.7	**+24.2%**	39.4	**+16.9%**	46.1

2020 → 2024: **+177.5%**

Per SIM

	(2020)		(2021)		(2022)		(2023)		(2024)
Giga byte	0.31	**+40.5%**	0.43	**+34.4%**	0.58	**+25.3%**	0.73	**+14.0%**	0.83

2020 → 2024: **+169.7%**

2 Monthly daily average comparision (change %)

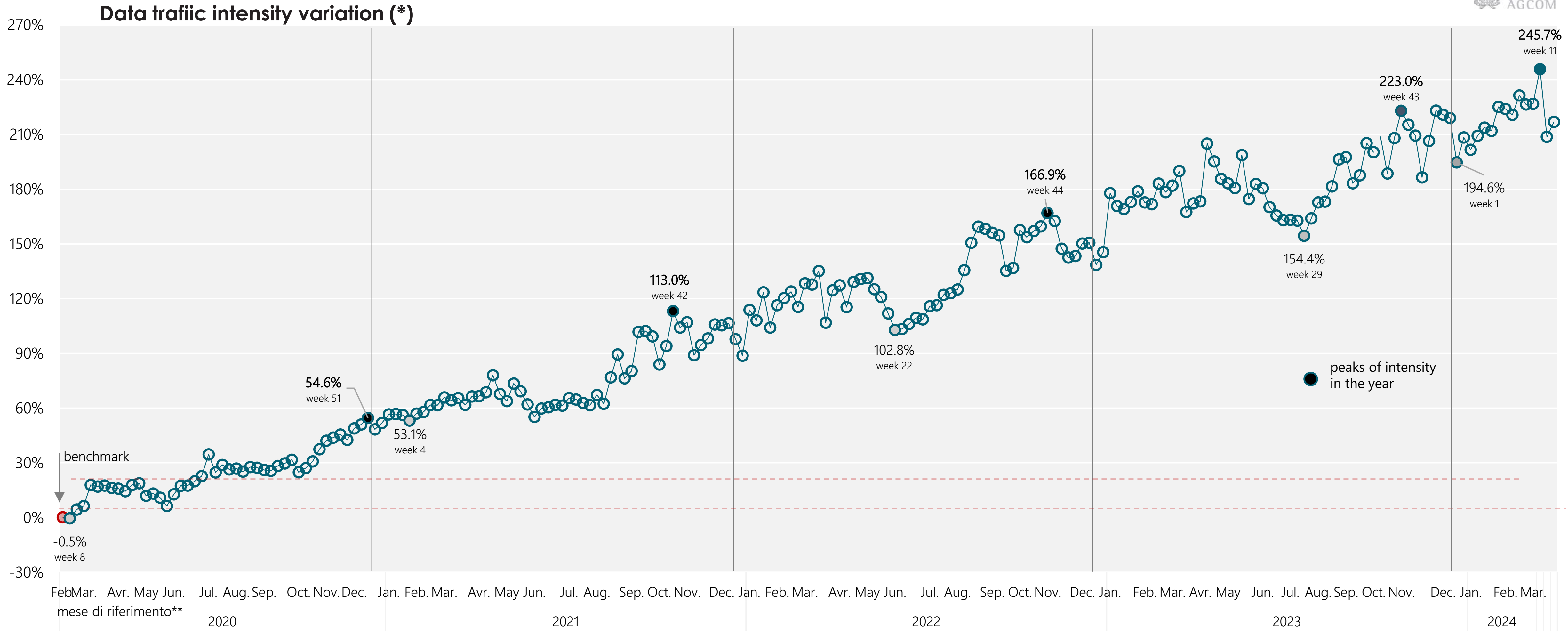
Total traffic

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+50.4	+39.3	+24.6	+15.4	+201.3
February	+43.7	+39.5	+25.6	+16.8	+194.1
March	+29.0	+31.3	+22.7	+18.4	+146.1

Per SIM

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+51.2	+37.1	+25.9	+14.0	+197.4
February	+44.2	+37.5	+26.6	+13.9	+185.9
March	+29.2	+29.5	+23.4	+14.0	+135.6

1.12 MOBILE NETWORK: WEEKLY DATA TRAFFIC INTENSITY



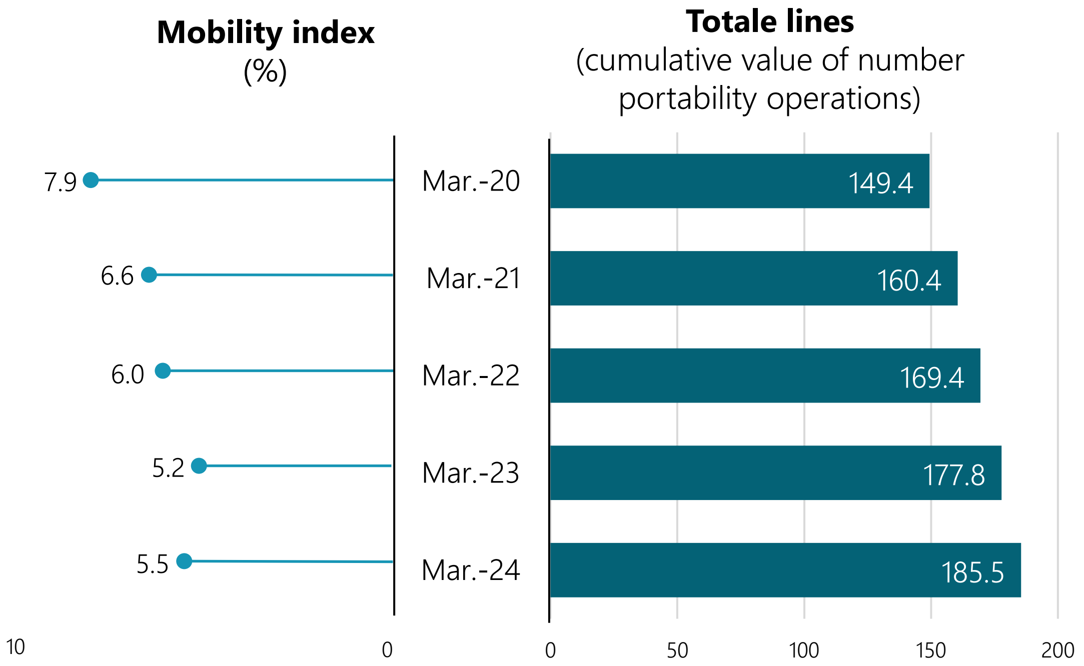
Definition: data traffic intensity (Gbps) represents the peak inbound traffic volume registered in a timespan of 5 to 60 minutes.

*For each week. the intensity indicator is represented by the percentage change. compared to the 7th week of 2020 (10 to 16 February - red dot in the graph). of the weighted average of the traffic data calculated on the operators' data using. as weighting coefficient. the percentual market share of each operator at the end of the previous year.

For example. the figure for week 51 of the year 2020 shows a 54.6 per cent increase in traffic intensity compared to benchmark week. week 7 of 2020.

** In some cases. a week straddles two months.

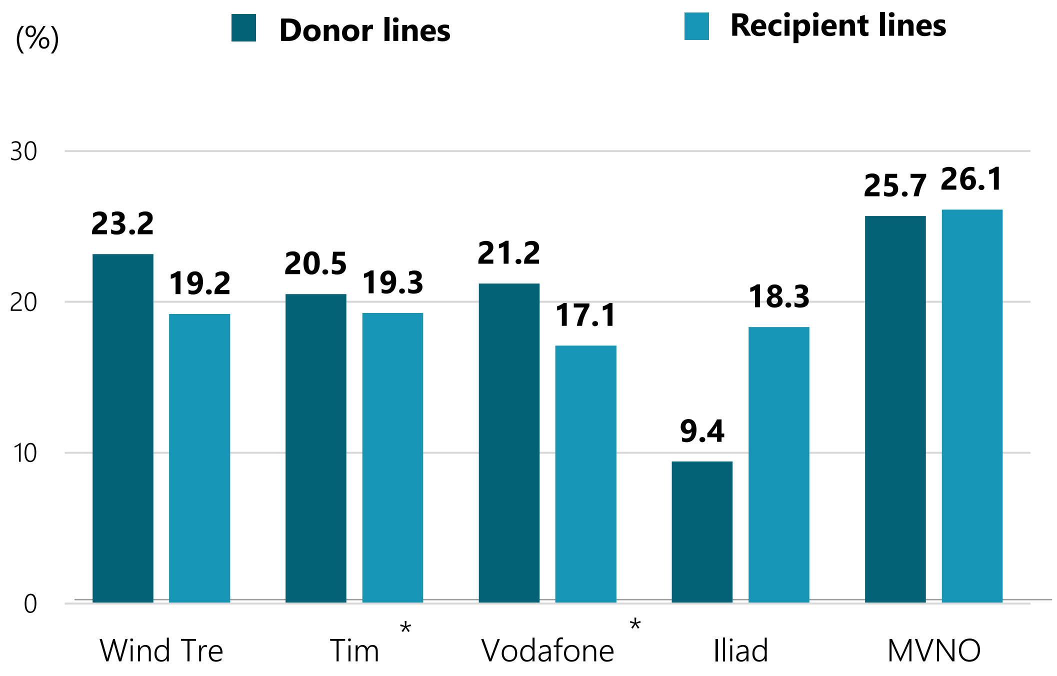
In one year (Mar. 2023 – Mar. 2024). there have been
7.8 million of Mobile Number Portability (MNP) operations



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)

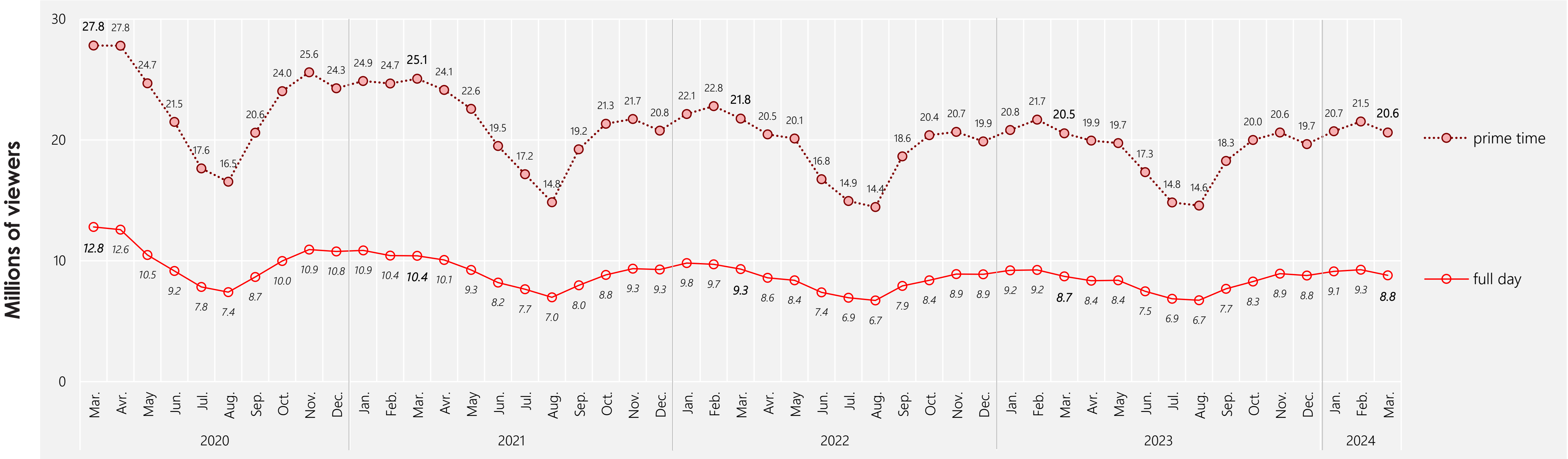
DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months)

MARCH 2024



(*) **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)

MARCH 2020 – MARCH 2024 (average daily audince)



Change in the number of viewers (average daily value Jan. – Mar. in millions)	(2020)		(2021)		(2022)		(2023)		(2024)
Prime time audience (Time slot: 20:30 – 22.30)	25.29	-1.7%	24.87	-10.6%	22.23	-5.5%	21.02	-0.3%	20.96
2020 → 2024									-17.1%
Full day audience (Time slot: 02:00 – 25:59)	11.17	-5.5%	10.56	-9.0%	9.61	-5.8%	9.06	=	9.06
2020 → 2024									-18.9%

Source: Agcom elaboration on data from Auditel

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

PRIME TIME AUDIENCE

Average daily audience since the beginning of the year
(Jan. – Mar.) in million

Broadcasters	2020	2021	2022	2023	2024	Change in % '20-'24	Change in % '23-'24
RAI	10.45	10.27	9.23	8.56	8.28	-20.8	-3.3
Mediaset	8.99	8.82	8.40	7.83	7.46	-17.0	-4.8
Warner Bros. Discovery	1.55	1.55	1.39	1.39	1.81	+17.2	+30.3
Comcast / Sky	1.87	1.81	1.41	1.47	1.48	-20.9	+1.1
Cairo Comm. / La 7	1.38	1.47	1.23	1.02	1.19	-14.1	+17.0
Others	1.05	0.94	0.58	0.75	0.74	-29.8	-1.9

Average share Jan. – Mar. (in %)

Broadcasters	2020	2021	2022	2023	2024	Change in p.p. '20-'24	Change in p.p. '23-'24
RAI	41.3	41.3	41.5	40.7	39.5	-1.8	-1.2
Mediaset	35.5	35.5	37.8	37.3	35.6	=	-1.7
Warner Bros. Discovery	6.1	6.2	6.3	6.6	8.7	+2.5	+2.0
Comcast / Sky	7.4	7.3	6.3	7.0	7.1	-0.3	+0.1
Cairo Comm. / La 7	5.5	5.9	5.5	4.8	5.7	+0.2	+0.8
Others	4.1	3.8	2.6	3.6	3.5	-0.6	-0.1

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year
(Jan. – Mar.) in million

Broadcasters	2020	2021	2022	2023	2024	Change in % '20-'24	Change in % '23-'24
RAI	4.49	4.24	3.83	3.55	3.46	-23.1	-2.7
Mediaset	3.87	3.76	3.60	3.40	3.35	-13.6	-1.6
Warner Bros. Discovery	0.87	0.82	0.73	0.69	0.80	-8.7	+15.3
Comcast / Sky	0.80	0.70	0.63	0.63	0.64	-19.7	+1.1
Cairo Comm. / La 7	0.49	0.49	0.42	0.34	0.36	-25.1	+8.6
Others	0.65	0.56	0.38	0.45	0.46	-29.8	+2.5

Average share Jan. – Mar. (in %)

Broadcasters	2020	2021	2022	2023	2024	Change in p.p. '20-'24	Change in p.p. '23-'24
RAI	40.2	40.1	39.9	39.2	38.1	-2.1	-1.1
Mediaset	34.7	35.6	37.5	37.5	36.9	+2.3	-0.6
Warner Bros. Discovery	7.8	7.8	7.6	7.6	8.8	+1.0	+1.2
Comcast / Sky	7.1	6.6	6.6	7.0	7.1	-0.1	+0.1
Cairo Comm. / La 7	4.3	4.6	4.4	3.7	4.0	-0.3	+0.3
Others	5.8	5.3	4.0	4.9	5.1	-0.8	+0.1

Source: Agcom elaboration on data from Auditel

2.3 TELEVISION (DVB-T E SAT): AVERAGE MONTHLY AUDIENCE OF THE MAIN NATIONAL TV CHANNELS

PRIME TIME AUDIENCE

Average daily audience since the beginning of the year
(Jan. – Mar) in million

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in % '20-'24	Change in % '23-'24
RAI	Rai 1	5.81	5.49	5.29	5.00	5.22	-10.3	+4.4
	Rai 2	1.65	1.44	1.16	0.99	0.81	-50.8	-18.4
	Rai 3	1.37	1.74	1.58	1.44	1.14	-16.7	-20.8
Mediaset	Canale 5	4.19	3.97	3.84	3.51	3.30	-21.2	-6.0
	Italia 1	1.48	1.39	1.26	1.21	1.25	-15.3	+3.3
	Rete 4	1.25	1.23	1.05	0.84	0.81	-34.8	-3.9
Cairo Comm.	La7	1.30	1.40	1.14	0.93	1.09	-16.1	+17.3
Warner Bros. Discovery	Nove	0.38	0.47	0.39	0.42	0.72	+88.3	+70.7
Comcast / Sky	TV8	0.61	0.56	0.43	0.49	0.50	-17.5	+2.8

Average share Jan. – Mar. (in %)

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in p.p. '20-'24	Change in p.p. '23-'24
RAI	Rai 1	23.0	22.1	23.8	23.8	24.9	+1.9	+1.1
	Rai 2	6.5	5.8	5.2	4.7	3.9	-2.7	-0.9
	Rai 3	5.4	7.0	7.1	6.9	5.5	=	-1.4
Mediaset	Canale 5	16.6	16.0	17.3	16.7	15.7	-0.8	-1.0
	Italia 1	5.8	5.6	5.7	5.8	6.0	+0.1	+0.2
	Rete 4	4.9	5.0	4.7	4.0	3.9	-1.0	-0.1
Cairo Comm.	La7	5.1	5.6	5.1	4.4	5.2	+0.1	+0.8
Warner Bros. Discovery	Nove	1.5	1.9	1.7	2.0	3.5	+1.9	+1.4
Comcast / Sky	TV8	2.4	2.3	1.9	2.3	2.4	=	+0.1

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year
(Jan. – Mar.) in million

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in % '20-'24	Change in % '23-'24
RAI	Rai 1	2,19	2,02	1,99	1,86	1,85	-15.8	-0.9
	Rai 2	0,62	0,55	0,47	0,46	0,45	-28.6	-3.0
	Rai 3	0,84	0,88	0,76	0,66	0,60	-29.5	-9.5
Mediaset	Canale 5	1,88	1,85	1,78	1,64	1,61	-14.5	-2.0
	Italia 1	0,58	0,52	0,44	0,42	0,42	-27.1	+0.5
	Rete 4	0,46	0,43	0,40	0,34	0,34	-26.9	-0.7
Cairo Comm.	La7	0,43	0,44	0,38	0,29	0,32	-25.1	+10.0
Warner Bros. Discovery	Nove	0,18	0,20	0,17	0,16	0,21	+15.8	+32.5
Comcast / Sky	TV8	0,25	0,20	0,18	0,20	0,20	-18.4	+0.1

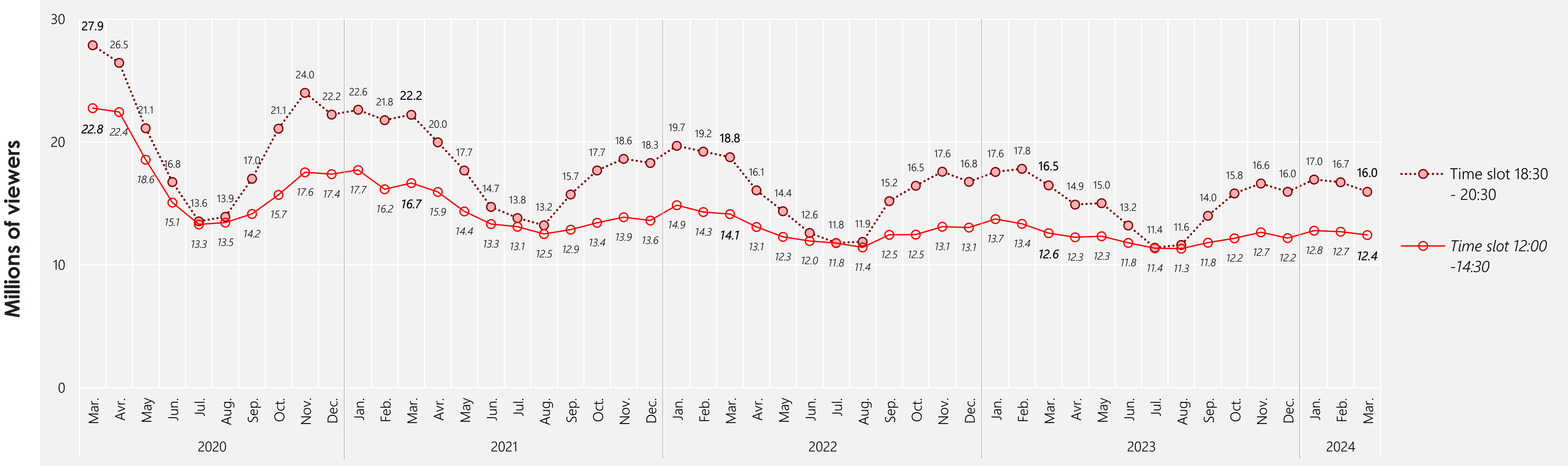
Average share Jan. – Mar. (in %)

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in p.p. '20-'24	Change in p.p. '23-'24
RAI	Rai 1	19.6	19.2	20.7	20.6	20.4	+0.8	-0.2
	Rai 2	5.6	5.2	4.9	5.1	4.9	-0.7	-0.2
	Rai 3	7.6	8.3	7.9	7.3	6.6	-1.0	-0.7
Mediaset	Canale 5	16.9	17.5	18.5	18.1	17.8	+0.9	-0.4
	Italia 1	5.2	4.9	4.6	4.6	4.6	-0.5	=
	Rete 4	4.1	4.1	4.2	3.7	3.7	-0.4	=
Cairo Comm.	La7	3.9	4.2	4.0	3.3	3.6	-0.3	+0.3
Warner Bros. Discovery	Nove	1.6	1.9	1.7	1.7	2.3	+0.7	+0.6
Comcast / Sky	TV8	2.2	1.9	1.9	2.2	2.2	=	=

Source: Agcom elaboration on data from Auditel

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

MARCH 2020 – MARCH 2024 (average daily audince)



Change in the number of viewers
(average daily value Jan. – Mar. in millions)

	(2020)	→	(2021)	→	(2022)	→	(2023)	→	(2024)	2020 → 2024
Time slot: 18:30 – 20.30	22.49	-1.2%	22.22	-13.4%	19.24	-10.1%	17.30	-4.3%	16.55	-26.4%
Time slot: 12:00 – 14:30	17.66	-4.6%	16.86	-14.3%	14.44	-8.5%	13.22	-4.3%	12.65	-28.4%

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

Source: Agcom elaboration on data from Auditel

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

TIME SLOT: 12:00 – 14:30

	National news programs	2020	2021	2022	2023	2024	Change (in thousand) '20-'24	Change (in thousand) '23-'24	Change (in %) '20-'24	Change (in %) '23-'24
	Average audience since the beginning of the year (Jan. – Mar.) in millions									
RAI	Tg 1 (13:30 edition)	4.27	4.31	3.89	3.59	3.33	-938	-251	-21.9	-7.0
RAI	Tg 2 (13:00 edition)	2.53	2.23	1.93	1.75	1.59	-940	-163	-37.2	-9.3
RAI	Tg 3 (12:00 edition)	1.24	1.14	0.91	0.79	0.76	-481	-36	-38.8	-4.5
RAI	Tg 3 Regionale (14:00 edition)	3.08	3.17	2.50	2.19	2.17	-908	-24	-29.5	-1.1
Mediaset	Tg 4 (12:00 edition)	0.44	0.35	0.31	0.29	0.29	-153	+2	-34.3	+0.9
Mediaset	Tg 5 (13:00 edition)	3.52	3.33	3.05	2.97	2.84	-684	-134	-19.4	-4.5
Mediaset	Studio Aperto (12:25 edition)	1.81	1.62	1.24	1.13	1.07	-742	-61	-40.9	-5.4
La 7	Tg La 7 (13:30 edition)	0.77	0.72	0.61	0.50	0.60	-168	+102	-21.8	+20.5

TIME SLOT: 18:30 – 20:30

	National news programs	2020	2021	2022	2023	2024	Change (in thousand) '20-'24	Change (in thousand) '23-'24	Change (in %) '20-'24	Change (in %) '23-'24
	Average audience since the beginning of the year (Jan. – Mar.) in millions									
RAI	Tg 1 (20:00 edition)	6.34	6.23	5.65	5.03	4.81	-1,529	-220	-24.1	-4.4
RAI	Tg 2 (20:30 edition)	1.94	1.79	1.41	1.12	0.95	-992	-171	-51.0	-15.2
RAI	Tg 3 (19:00 edition)	2.54	2.66	2.23	2.04	1.96	-583	-78	-22.9	-3.8
RAI	Tg 3 Regionale (19:30 edition)	3.29	3.44	2.78	2.55	2.46	-825	-86	-25.1	-3.4
Mediaset	Tg 4 (12:00 edition)	0.81	0.74	0.75	0.66	0.54	-270	-121	-33.4	-18.4
Mediaset	Tg 5 (13:00 edition)	5.13	4.97	4.51	4.24	4.02	-1,110	-220	-21.6	-5.2
Mediaset	Studio Aperto (18:30 edition)	1.05	0.95	0.69	0.60	0.54	-512	-62	-48.5	-10.2
La 7	Tg La 7 (20:00 edition)	1.38	1.44	1.22	1.06	1.27	-112	+211	-8.1	+20.0

Source: Agcom elaboration on data from Auditel

2.6 TELEVISION (DVB-T E SAT): AVERAGE MONTHLY AUDIENCE OF MAIN NATIONAL «ALL NEWS PROGRAMS»

The "all news" channels considered in the analysis are:
Rai News 24 – Sky Tg 24 - TgCom 24

Average audience since the beginning of the year Jan. – Mar. (in thousand)

	Year	Full day	07:00 09:00	12:00 15:00	18:00 20:30
Totale «all news» channels	2024	114	230	168	146
	2023	118	226	169	172
	2022	173	277	251	261
	2021	190	313	264	305
	2020	221	303	319	354
Change %	2024/2023	-3.6	1.8	-0.5	-15.3
	2024/2020	-48.7	-24.0	-47.3	-58.8

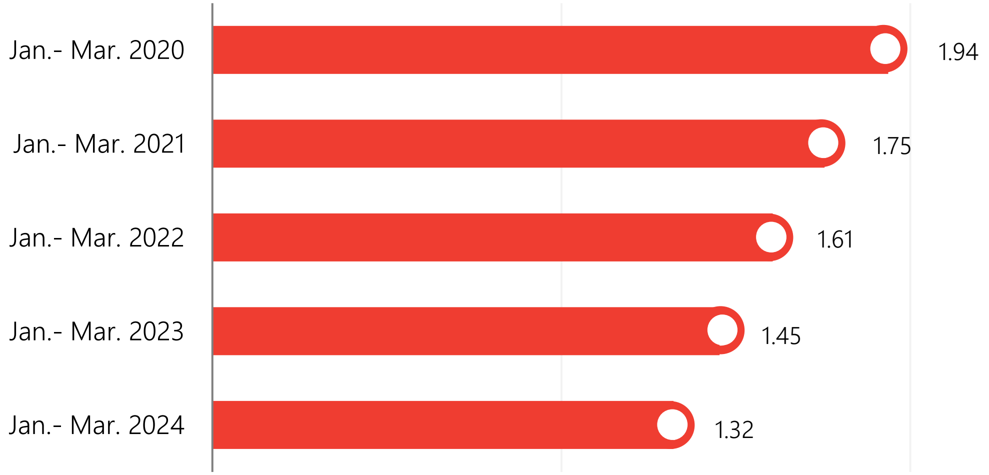
Average audience since the beginning of the year Jan. – Mar. (in thousand)

	Year	Full day	07:00 09:00	12:00 15:00	18:00 20:30
Rai News 24	2024	45	96	51	39
	2023	48	98	56	51
	2022	78	143	97	98
	2021	89	164	109	111
	2020	101	158	121	141
Change %	2024/2023	-7.5	-1.2	-8.4	-23.8
	2024/2020	-55.7	-39.0	-57.8	-72.5
TgCom 24	2024	40	77	69	67
	2023	40	75	68	71
	2022	51	74	81	90
	2021	53	92	78	94
	2020	58	79	94	87
Change %	2024/2023	+0.1	+2.6	+0.9	-5.5
	2024/2020	-30.9	-2.5	-26.6	-23.5
Sky Tg24	2024	29	57	48	40
	2023	30	53	45	50
	2022	43	61	73	73
	2021	48	57	77	100
	2020	63	66	104	126
Change %	2024/2023	-2.2	6.3	7.2	-20.4
	2024/2020	-53.9	-13.9	-53.8	-68.0

Source: Agcom elaboration on data from Auditel

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

CUMULATIVE SALES
(copies sold in millions)

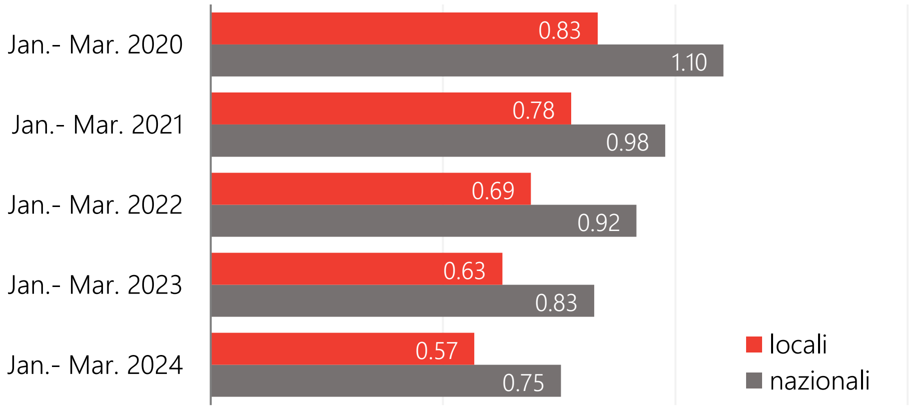


Change in %
Period Jan. – Mar.

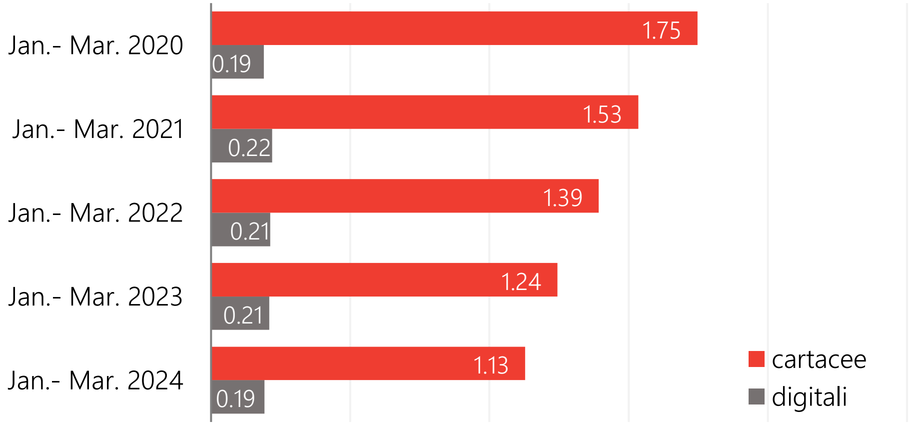
	(2023 – 2024)	(2020 – 2024)
Total copies:	**-9.1** ↓	**-31.8** ↓
Paper copies:	**-9.3** ↓	**-35.4** ↓
Digital copies:	**-8.1** ↓	**+1.7** ↑
National newspapers copies:	**-8.6** ↓	**-31.7** ↓
Local newspapers copies:	**-9.7** ↓	**-31.9** ↓

CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



PAPER vs. DIGITAL COPIES



Source: Agcom elaboration on data from ADS

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

PAPER COPIES BY NEWSPAPER MACRO-CATEGORY
(copies sold in thousands)

	Jan. – Mar.	2020	2021	2022	2023	2024
National newspapers	General press - Top 5	568	493	448	386	354
	Other general press	127	129	113	103	93
	Business	78	63	56	51	40
	Sport	189	136	145	133	128
Local newspapers	Top 10	366	341	307	278	256
	Others	420	373	323	293	258

Change in %	Jan. – Mar.	('20 – '24)	('23 – '24)
National newspapers	General press Top 5	-37.6 ↓	-8.3 ↓
	Other general press	-26.7 ↓	-9.5 ↓
	Business	-49.2 ↓	-22.5 ↓
	Sports	-32.4 ↓	-3.9 ↓
Local newspapers	Top 10	-30.0 ↓	-7.8 ↓
	Others	-38.5 ↓	-12.0 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY
(copies sold in thousands)

	Jan. – Mar.	2020	2021	2022	2023	2024
National newspapers	General press - Top 5	78	89	89	91	93
	Other general press	21	32	31	27	15
	Business	36	30	28	28	27
	Sport	7	7	6	5	4
Local newspapers	Top 10	20	27	26	24	23
	Others	27	35	33	33	30

Change in %	Jan. – Mar.	('20 – '24)	('23 – '24)
National newspapers	General press Top 5	+18.3 ↑	+1.3 ↑
	Other general press	-26.1 ↓	-44.4 ↓
	Business	-23.9 ↓	-3.3 ↓
	Sports	-42.6 ↓	-21.8 ↓
Local newspapers	Top 10	+14.5 ↑	-2.7 ↓
	Others	+11.1 ↑	-10.1 ↓

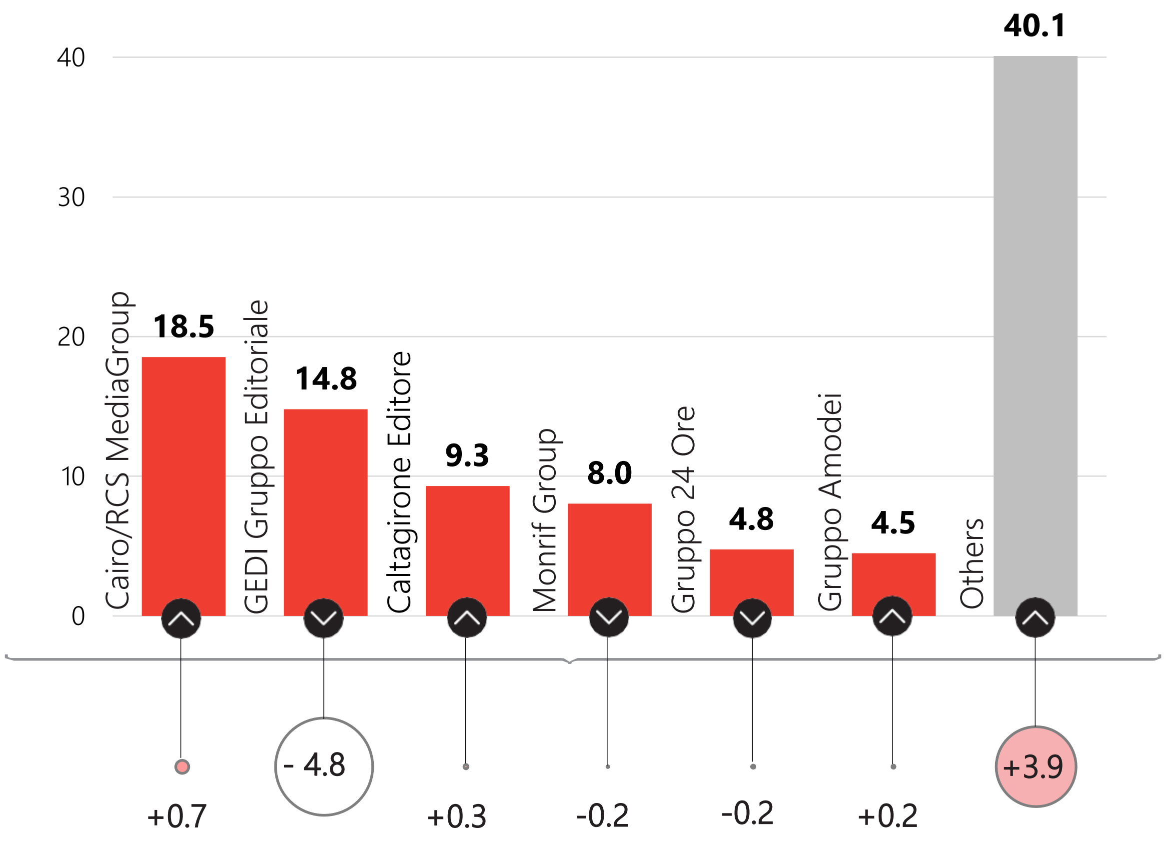
Newspapers categories

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

Source: Agcom elaboration on data from ADS

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

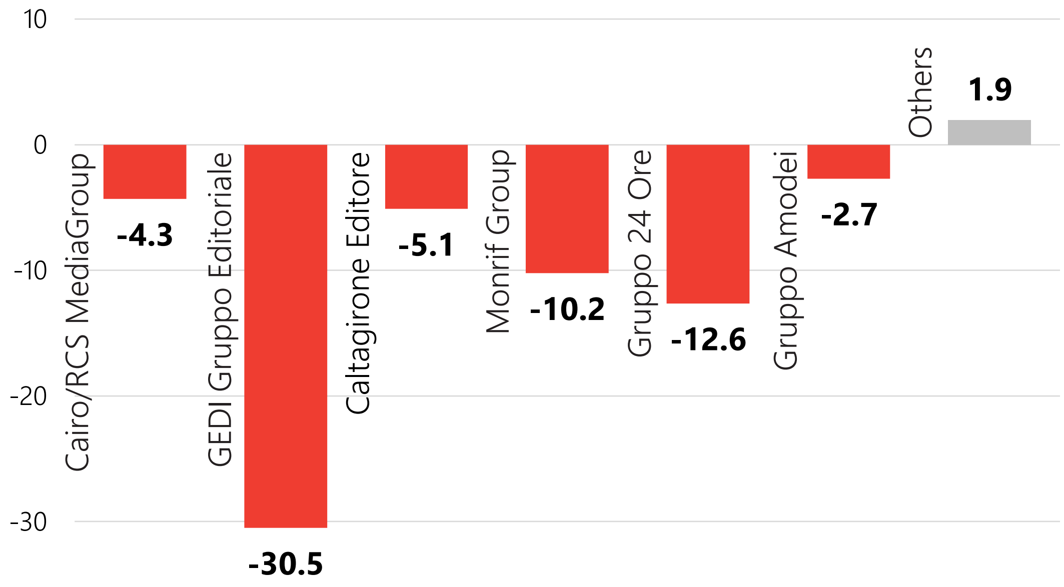
JANUARY – MARCH 2024



Difference vs. Jan. – Mar. 2023
(percentage points)

CHANGE IN TOTAL COPIES SOLD (%)

Difference vs. Jan. – Mar. 2023



Source: Agcom elaboration on data from ADS

2.10 NEWSPAPERS: DISTRIBUTION OF COPIES SOLD BY MAJOR NEWSPAPERS

Distribution of copies sold in the last 12 month (%)

(Descending rank >2% based on the period April 2023 – March 2024)

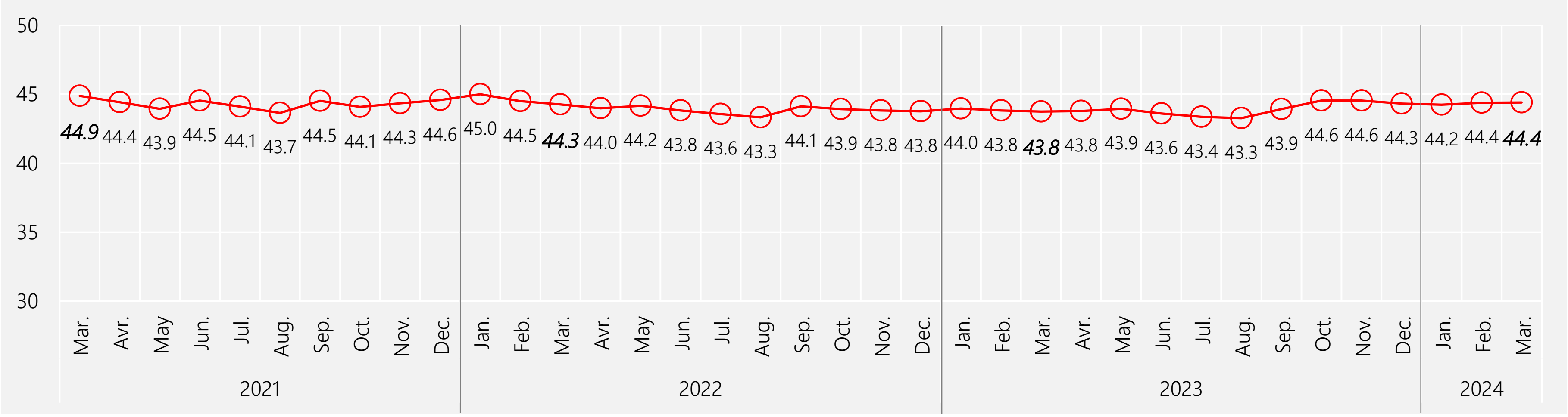
	TOTAL COPIES (paper + digital)							PAPER COPIES			DIGITAL COPIES		
Major Newspapers	19/20	20/21	21/22	22/23	23/24	Change pp. 22/23 vs 23/24	Change pp. 19/20 vs 23/24	23/24	Change pp. 22/23 vs 23/24	Change pp. 19/20 vs 23/24	23/24	Change pp. 22/23 vs 23/24	Change pp. 19/20 vs 23/24
Corriere della sera	10.94	11.35	11.63	12.29	12.73	+0.44	+1.80	10.97	-0.20	+0.68	22.90	+3.65	5.48
Repubblica (La)	8.47	8.86	8.43	7.39	7.18	-0.21	-1.29	6.19	-0.16	-1.47	12.92	-0.96	-3.75
Gazzetta dello sport (La) (*)	6.63	4.36	5.52	5.80	5.81	+0.02	-0.82	6.59	+0.12	-0.39	1.35	-0.26	-1.82
Stampa (La)	5.52	5.46	5.42	5.26	5.08	-0.18	-0.44	5.15	-0.17	-0.50	4.64	-0.22	+0.47
Sole 24 Ore (Il)	4.95	4.94	4.67	4.76	4.68	-0.08	-0.27	3.25	-0.18	-0.15	12.95	-0.12	-7.61
Avvenire	4.02	4.14	4.12	3.98	4.35	+0.38	+0.33	4.86	+0.45	+0.48	1.43	+0.20	+1.01
QN - Il Resto del Carlino	4.04	4.22	4.19	4.16	4.02	-0.14	-0.02	4.63	-0.05	+0.30	0.49	-0.37	-0.59
Messaggero (Il)	3.88	3.46	3.77	3.82	3.88	+0.06	=	3.99	+0.05	-0.05	3.26	+0.20	+0.88
Corriere dello sport (*)	3.08	2.27	2.65	2.74	2.90	0.16	-0.18	3.32	+0.23	-0.02	0.50	-0.06	-0.03
QN - La Nazione	2.90	2.90	2.83	2.72	2.64	-0.08	-0.26	3.04	-0.03	-0.08	0.32	-0.21	-0.38
Gazzettino (Il)	2.27	2.43	2.48	2.54	2.62	+0.08	+0.36	2.54	+0.08	+0.30	3.11	+0.06	+0.57
Fatto quotidiano (Il)	1.65	2.53	2.54	2.53	2.35	-0.18	+0.70	1.58	+0.03	+0.35	6.83	-1.82	+0.91
Giornale (Il)	2.13	2.54	2.12	2.00	2.02	+0.03	-0.11	2.26	+0.04	-0.01	0.67	+0.04	-0.03

(*) – includes the Monday edition

Source: Agcom elaboration on data from ADS

2.11 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS (March 2021 – March 2024)

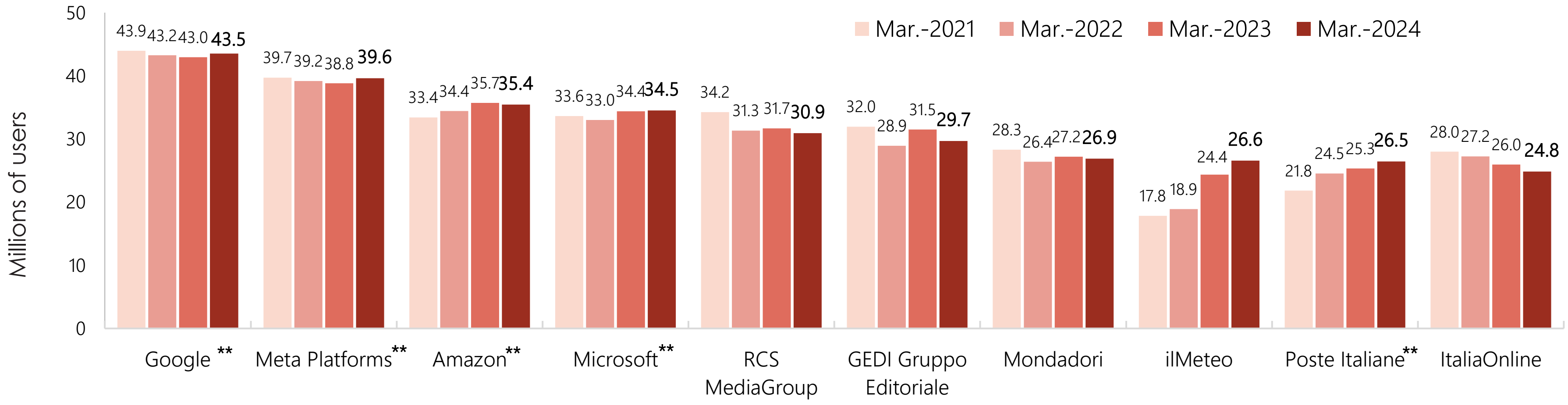


44 million and **418** thousand unique users logged on to the internet in March 2023 (**+660** thousand compared to March 2022)

Approximately **73 hours and 35 minute** spent. on average. by each user surfing the Internet in March 2024

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

UNIQUE USERS OF THE MAIN OPERATORS (Parent*)



* **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.

Google. Facebook. Amazon and Microsoft are detected only through the Audiweb Panel.

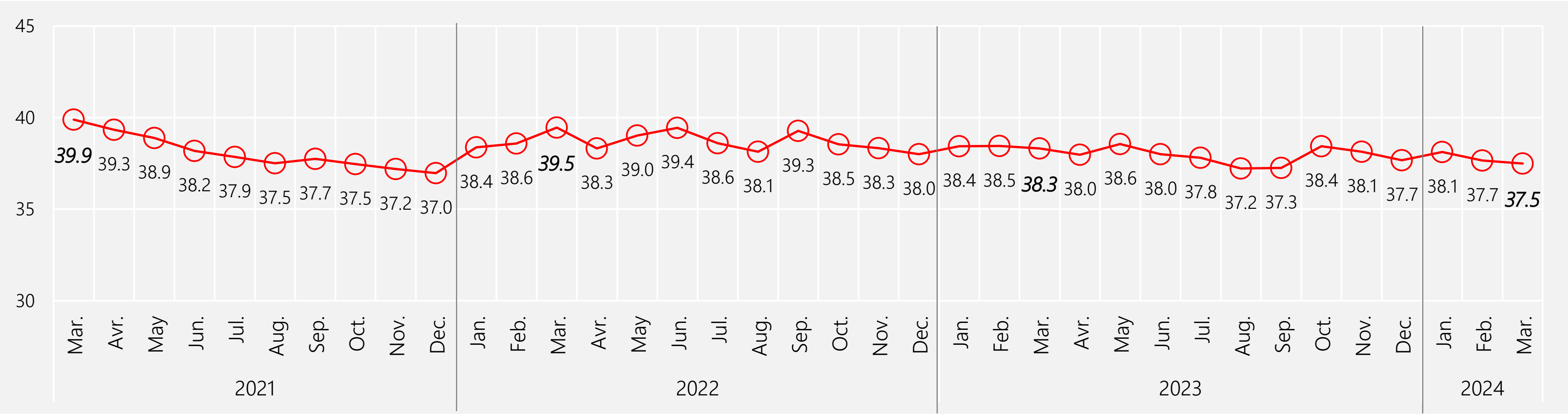
Source: Agcom elaboration on data from Audicom – sistema Audiweb

Note**: Google. Meta Platforms. Amazon. Microsoft and Poste Italiane are tracked only through Audiweb Panel.

2.12 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

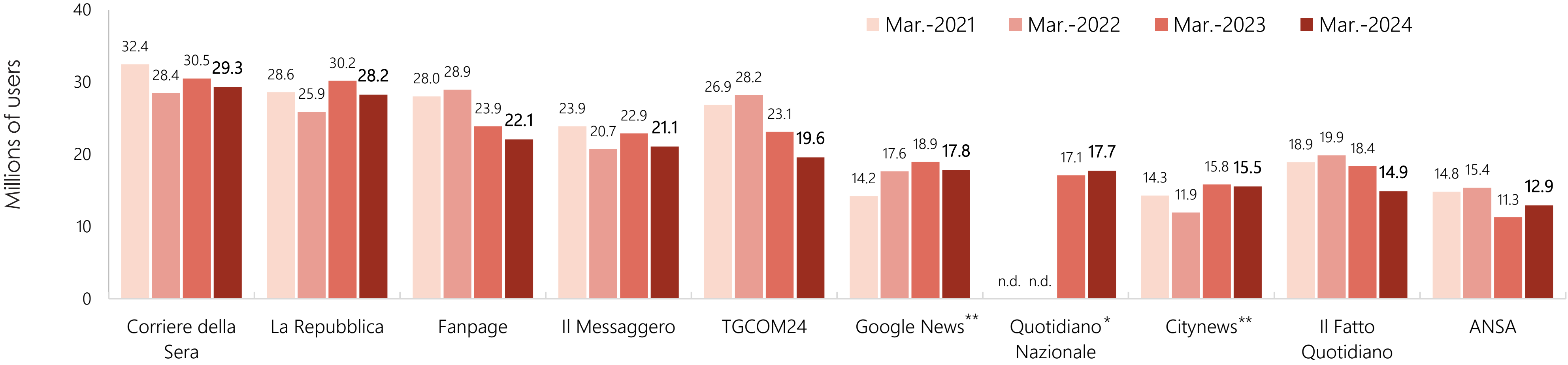
(March 2021 – March 2024)



37 million and **487** thousand unique users logged on to the generalist news sites/APPs in March 2023 (over **830** thousand users compared to March 2023)

About **1 hour and 3 minute** spent. on average. by each user browsing general news websites/APPs in March 2024

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.

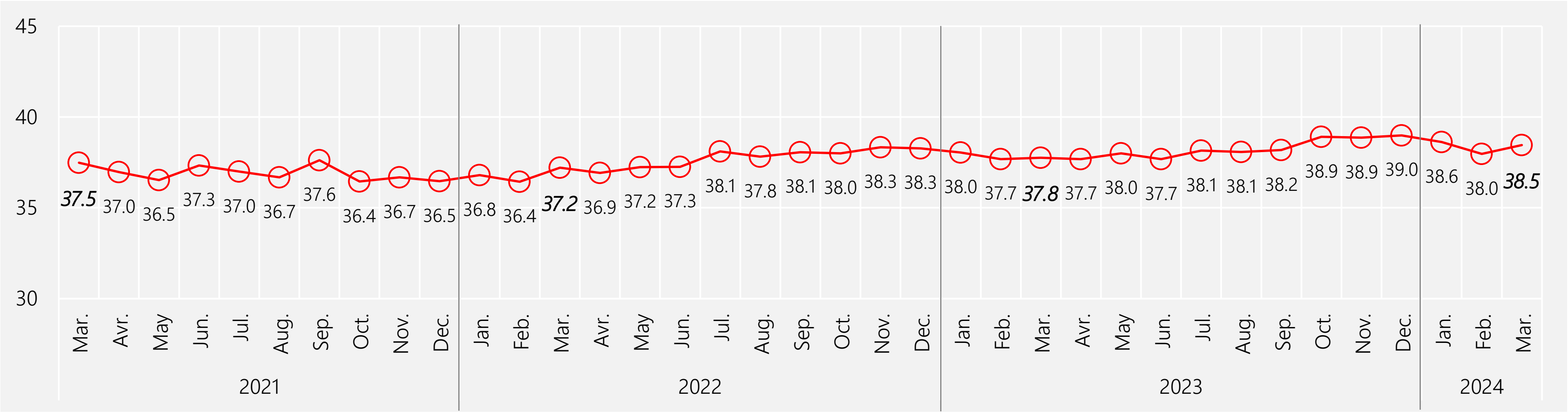
* *n.c.*: not comparable. Starting from April 2022. the Monrif group entered in the Audiweb survey system. This has led to a change in the classification perimeter and the detection method which - in addition to the *Audiweb Panel* - now also uses the census component *Audiweb Census*. For this reason. the values relating to the month of March 2022 and March 2023 are not directly comparable with those of previous years.

** Google News and Citynews are detected only through the Audiweb Panel.

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

2.13 PLATFORMS: E-COMMERCE WEBSITES/APP UNIQUE USERS

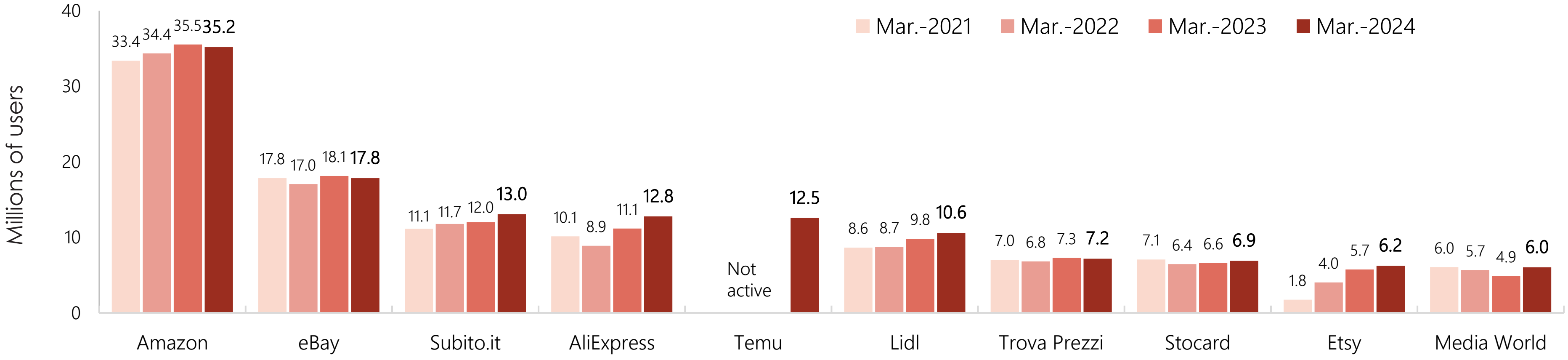
UNIQUE USERS IN MILLIONS (March 2021 – March 2024)



38 million and **454** thousand unique users logged on to e-commerce sites/APPs in March 2023 (**+693** thousand users compared to March 2022)

2 hour and 52 minute spent. on average. by each user browsing e-commerce websites/APPs in March 2024

UNIQUE USERS OF THE MAIN WEBSITES*



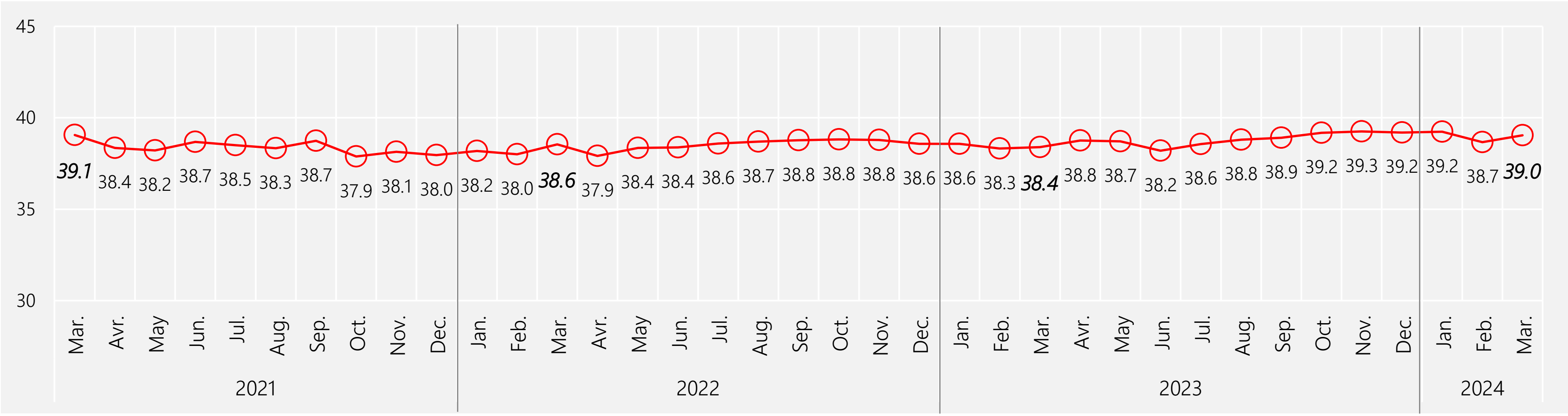
Unique users: number of different users/people who visited any content of a website. category. channel or application during the reporting period.

Source: Agcom elaboration on data from Audicom – sistema Audiweb *(Values referring to the category: «Multi-category Commerce»)*

* The brand represented are dectected only through the Audiweb Panel.

2.14 PLATFORMS: SOCIAL NETWORK WEBSITES/APP UNIQUE USERS

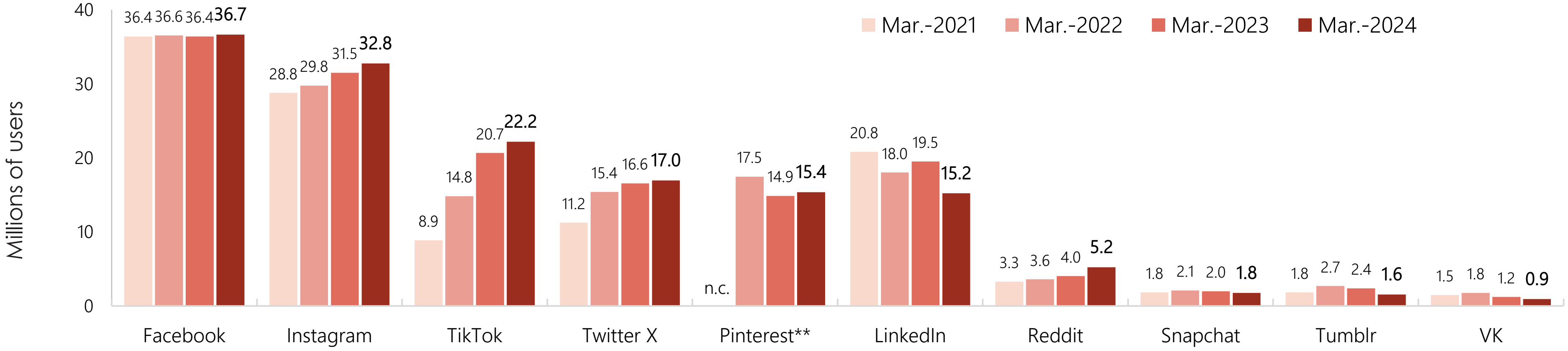
UNIQUE USERS IN MILLIONS (March 2021 – March 2024)



39 million and **37** thousand unique users logged on to social networking sites/APPs in March 2024 (**+644** thousand users compared to March 2023)

24 hour and 21 minute spent, on average, by each user browsing social networking websites/APPs in March 2024

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.

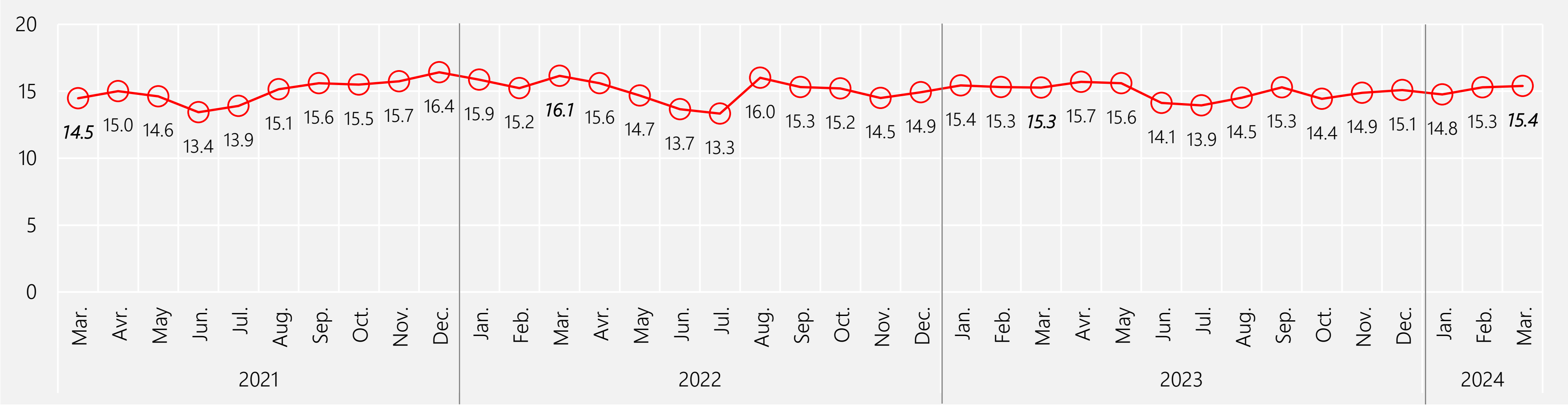
Source: Agcom elaboration on data from Audicom – sistema Audiweb *(Values referring to the category: «Member Communities»)*

* The chart shows the unique users of the top 10 Brands that belong to the sub-category "Member Communities" and offer Social Networking services in Italy.

** Note: as a result of activities to improve the accuracy of the survey, data from January 2022 onward are not comparable (n.c.) with those of previous years; the outcomes of this activity cannot be isolated from any seasonal effects.

2.15 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

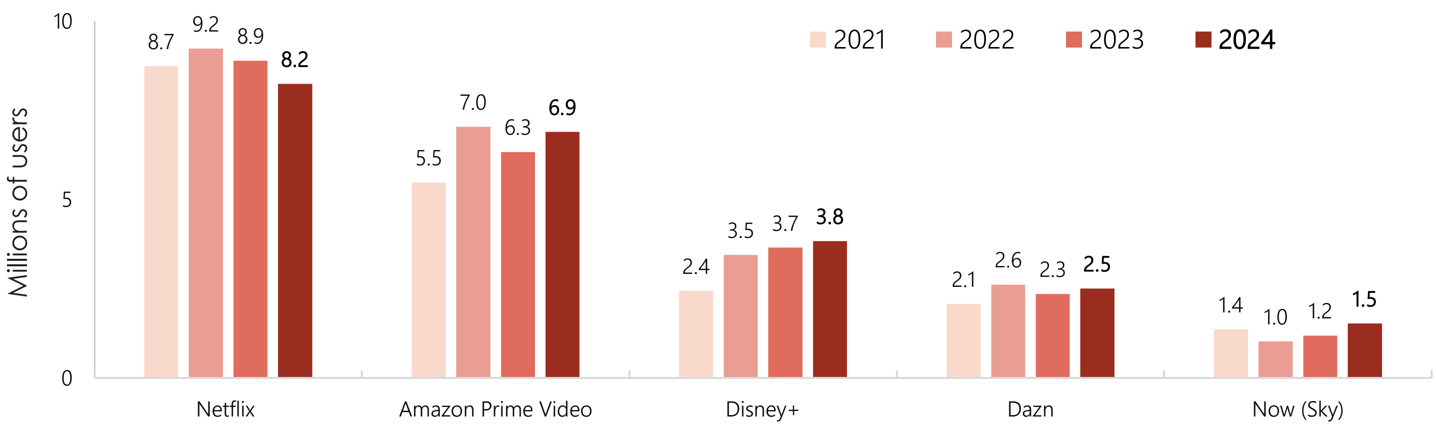
UNIQUE USERS IN MILLIONS (March 2021 – March 2024)



15 million and **388** thousand unique users logged on to video-on-demand sites/APPs in March 2024 (**113** thousand compared to March 2023)

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

UNIQUE USERS OF THE MAIN PLATFORMS* (average since the beginning of the year)



* Note: the main operators by average unique users are represented

Source: Agcom elaboration on data from ComScore

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

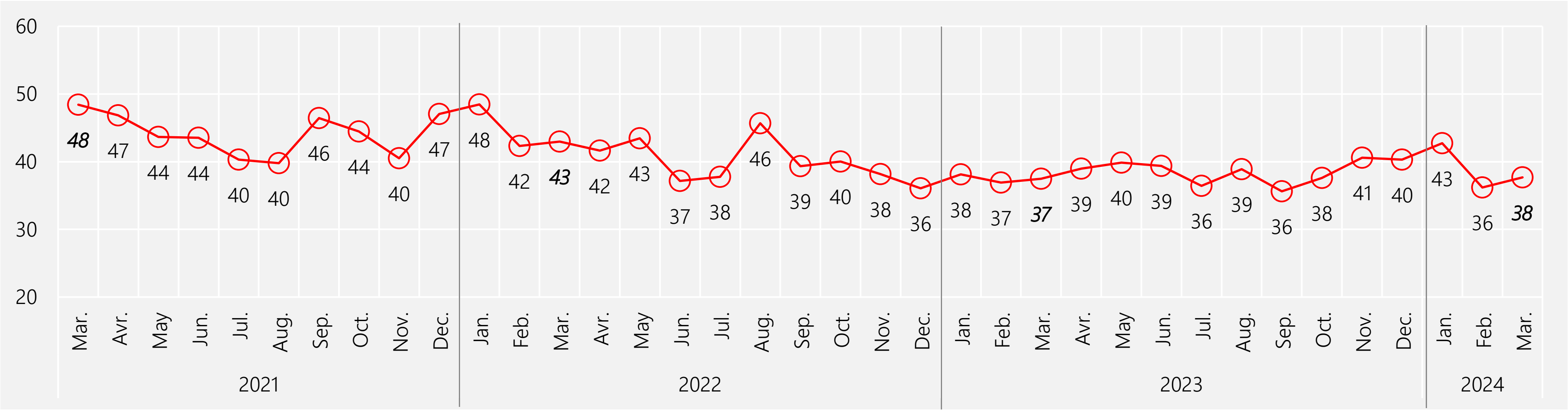
Mediaset Infinity data are not considered due to an editorial choice which does not allow to separate the part of the paid services from the free one.

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

Dazn data will be collected by Auditel starting from August 2022. according to AGCOM resolution no. 18/22/CONS

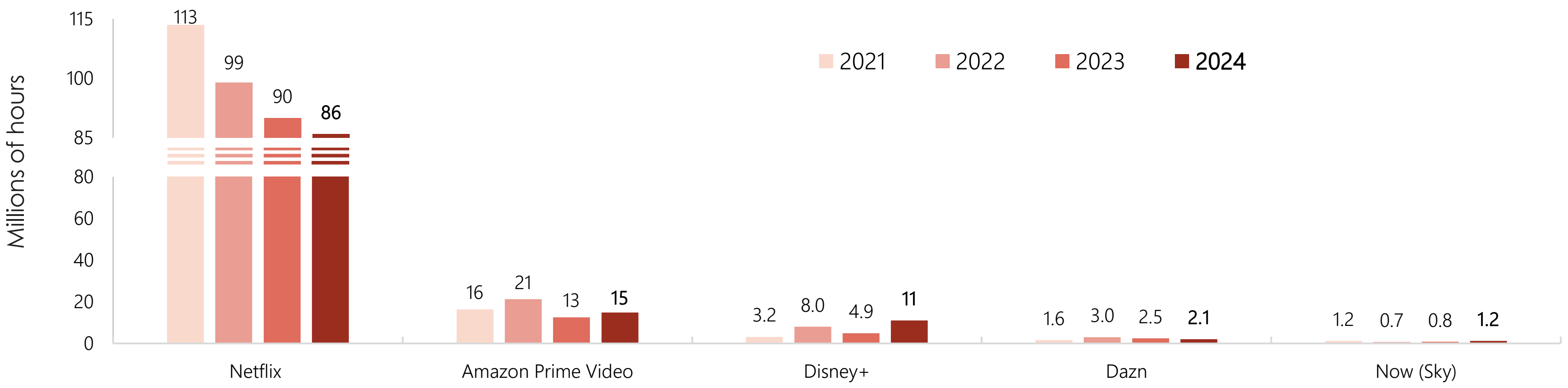
2.16 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT (in millions of hours) (March 2021 – March 2024)



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 26 minute** in March 2024

MAIN PLATFORMS – TOTAL HOURS SPENT SINCE THE BEGINNING OF THE YEAR*



* Note: the total hours of the first 5 operators for unique users (slide 2.15) are represented

Source: Agcom elaboration on data from ComScore

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

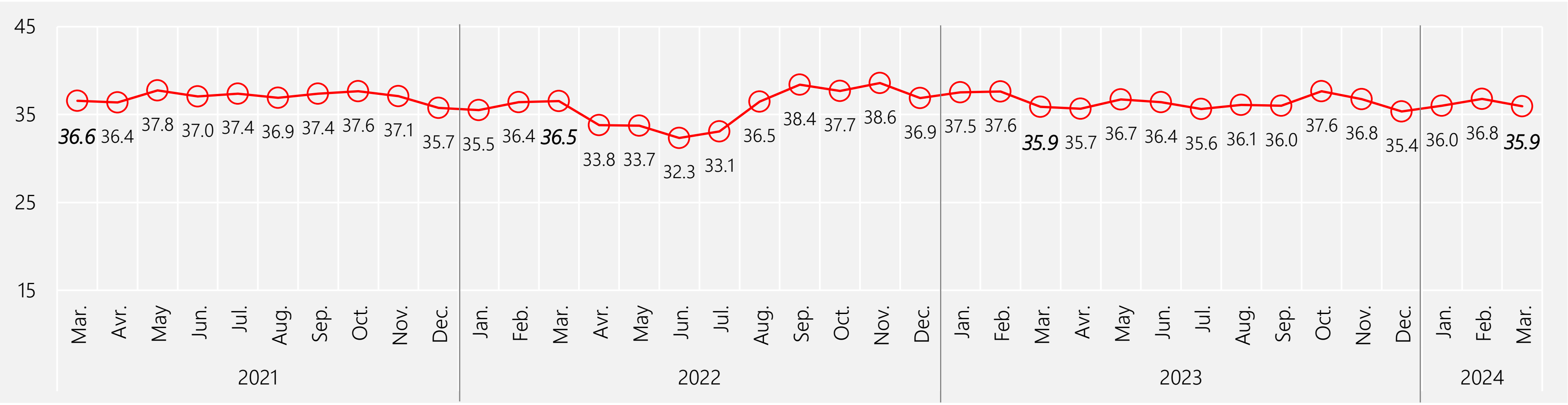
Mediaset Infinity data are not considered due to an editorial choice which does not allow to separate the part of the paid services from the free one.

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

Source: Agcom elaboration on data from Comscore

2.17 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS

UNIQUE USERS IN MILLIONS (March 2021 – March 2024)



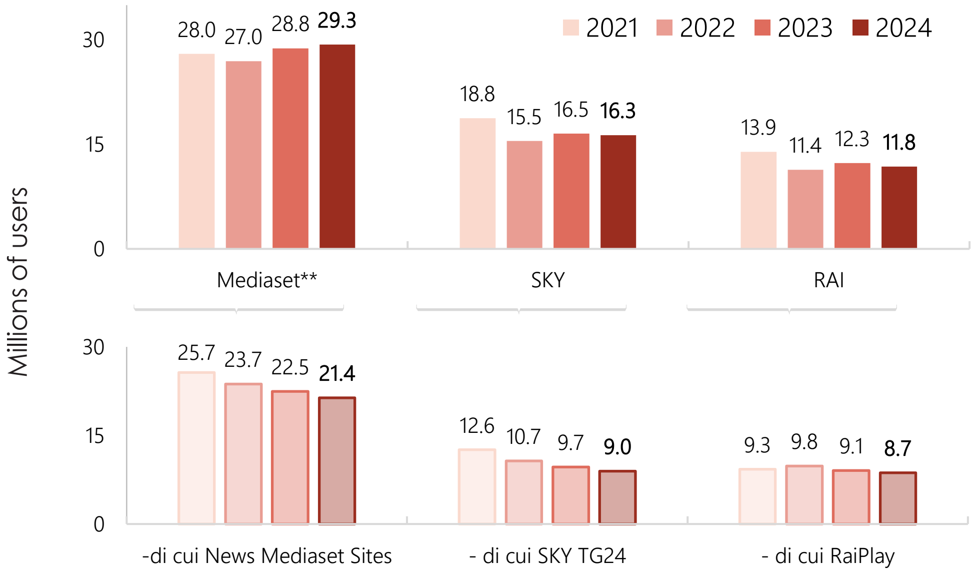
Almost **36** million unique users logged on to free video-on-demand sites/APPs in March 2024 (slightly higher than in March 2023)

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

The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: Mediaset (Mediaset Infinity Sites and TGCOM 24 Sites Jan.19 - Spr.22; Mediaset.it Sites since May 22). Rai (RaiPlay; Rai News. Rai Sport). Discovery (Discovery Inc). Sky (Cielotv.it. TV8 Sites. Sky.it Sprt HD. Sky.it TG24 HD. Sky.it Uno HD gen.19-apr.19; Sky Free ToAir; Sky sport; Sky TG24. Sky Entertainment mag.19 - giu.22). Cairo/La 7 (La7). Paramount/Viacom (Nickelodeon Kids and Family; MTV Italy). Rakuten (VIKI.COM). Warner (TBS Entertainment Digital). De Agostini (DEABYDAY.TV; DEAKIDS.IT). VVVVID.IT; A+E Networks Digital; SPORTITALIA.COM; TV2000.IT; POPCORNTV.IT; WITTYTV.IT.

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

UNIQUE USERS OF THE MAIN PLATFORMS* (average since the beginning of the year)



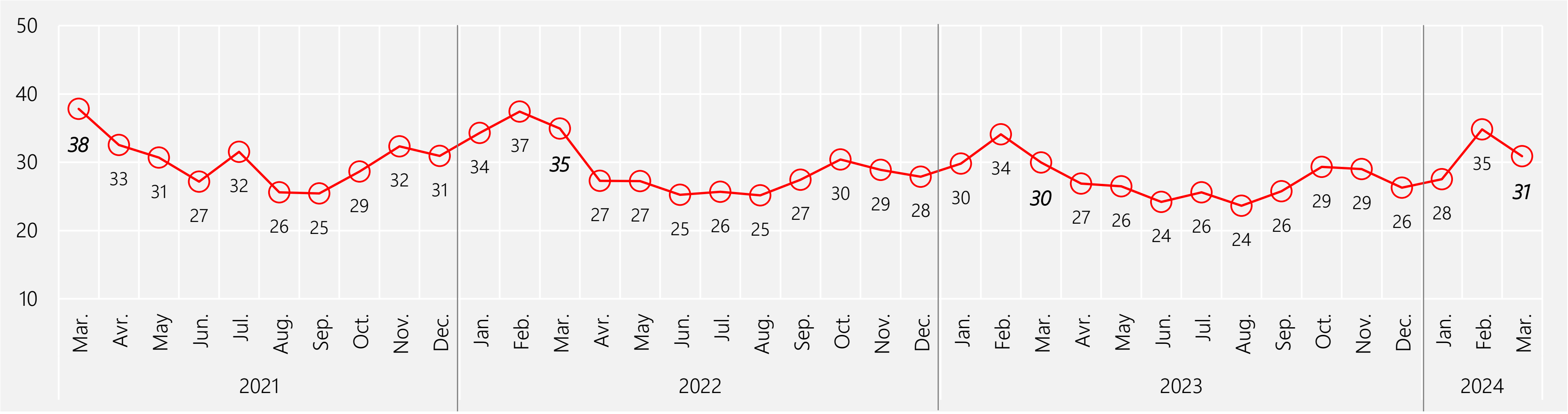
* For each publishers it is displayed separately the component. of those considered (News. Sport and Entertainment). that is most relevant in terms of unique audience.

** MFE/Mediaset unique users are those relating to the Mediaset.it Sites/App component due to editorial choices by the operator that do not allow the traffic of paid VOD services included in Mediaset Infinity Sites to be unbundled. Since the beginning of the year, this component has amounted to an average of approximately 16 million 438 thousand unique users.

Source: Agcom elaboration on data from ComScore

2.18 PLATFORMS: TIME SPENT ON FREE VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT (in millions of hours) (March 2021 – March 2024)

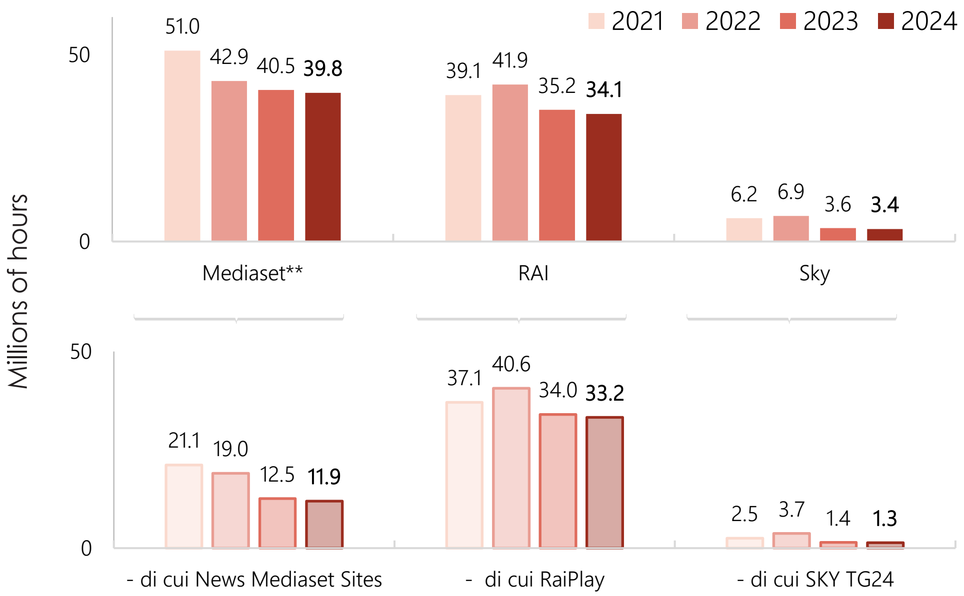


The average time spent per month by each visitor on free video on demand platforms is **51 minute** in March 2023

The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: Mediaset (Mediaset Infinity Sites and TGCOM 24 Sites Jan.19 - Spr.22; Mediaset.it Sites since May 22). Rai (RaiPlay; Rai News. Rai Sport). Discovery (Discovery Inc). Sky (Cielotv.it. TV8 Sites. Sky.it Sprt HD. Sky.it TG24 HD. Sky.it Uno HD gen.19-apr.19; Sky Free ToAir; Sky sport; Sky TG24. Sky Entertainment mag.19 - giu.22). Cairo/La 7 (La7). Paramount/Viacom (Nickelodeon Kids and Family; MTV Italy). Rakuten (VIKI.COM). Warner (TBS Entertainment Digital). De Agostini (DEABYDAY.TV; DEAKIDS.IT). VVVVID.IT; A+E Networks Digital; SPORTITALIA.COM; TV2000.IT; POPCORNTV.IT; WITTYTV.IT.

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

MAIN PLATFORMS – TOTAL HOURS SPENT SINCE THE BEGINNING OF THE YEAR*



* For each publishers it is displayed separately the component. of those considered (News. Sport and Entertainment). that is most relevant in terms of unique audience.

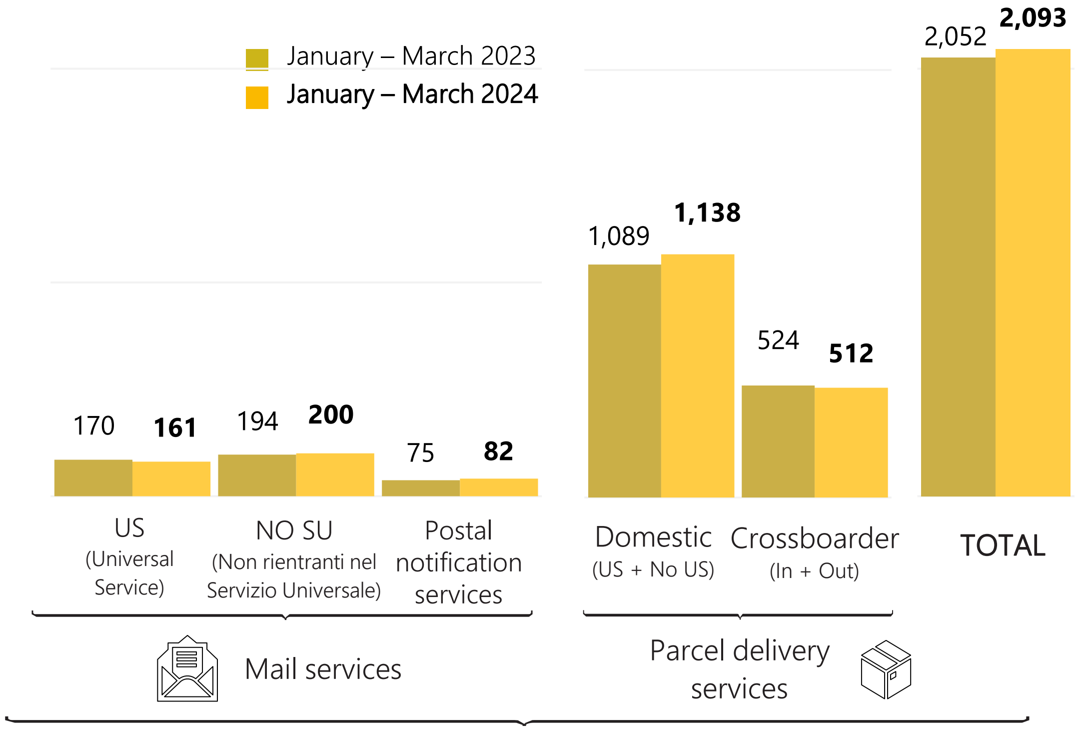
** MFE/Mediaset total hours are those relating to the Mediaset.it Sites/App component due to editorial choices made by the operator that do not allow the traffic of paid VOD services included in Mediaset Infinity Sites to be unbundled. This component has averaged just under 23 million hours since the beginning of the year.

Source: Agcom elaboration on data from ComScore

Source: Agcom elaboration on data from Comscore

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



+1.0

+2.3

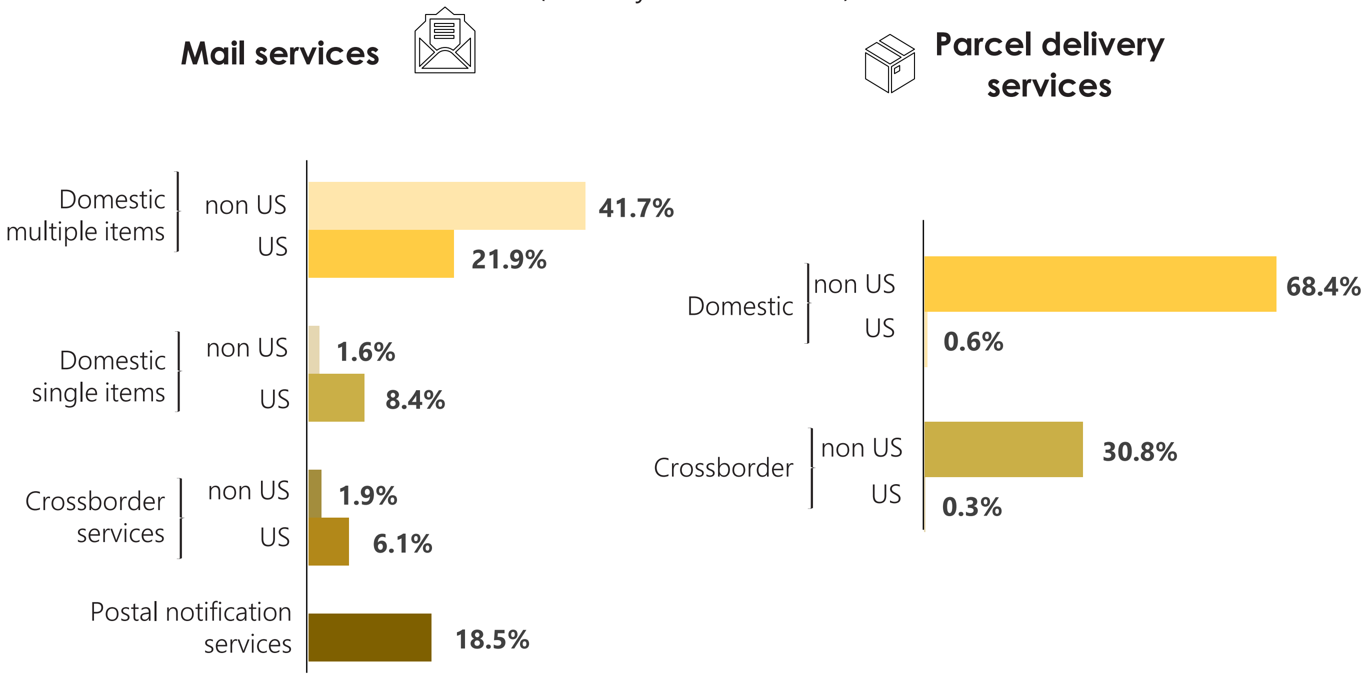
+2.0

Total

Annual change in %
(Jan. - Mar. 2023) – (Jan. – Mar. 2024)

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

(January - March 2024)



Annual change in %
(Jan. - Mar. 2023 – Jan. - Mar. 2024)

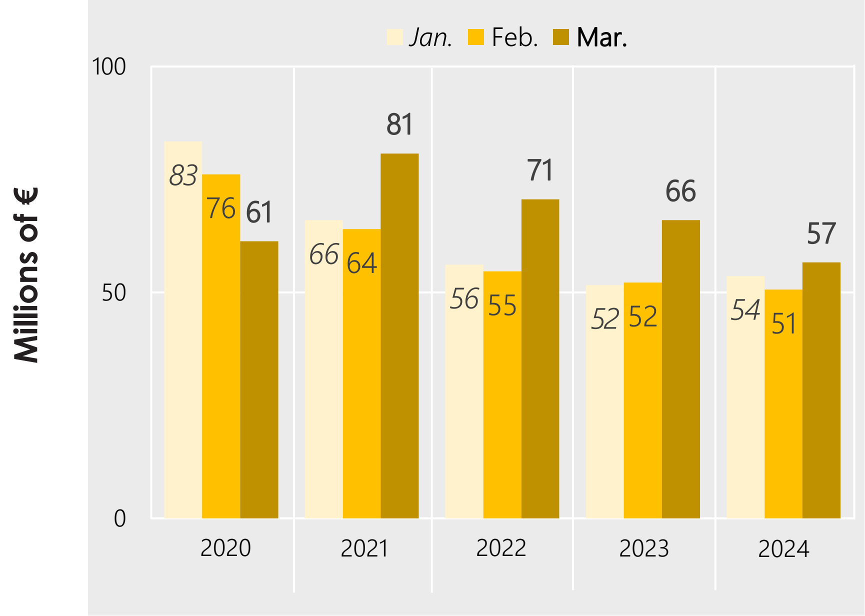
+1.7	-9..2	-7.2	+9.4	+4.5	-2.3
Domestic multiple items	Domestic single items	Crossborder services	Postal notification services	Domestic	Crossborder

Note: Due to changes in firms' accounting data are not directly comparable with previous versions

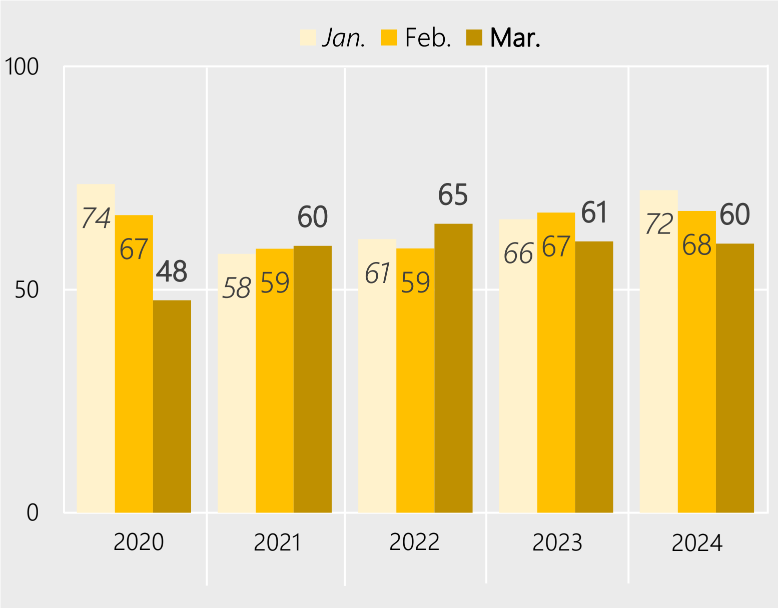
Data refers to the following postal operators: Amazon Italia Transport S.r.l., BRT S.p.A., DHL Express Italy S.r.l., FedEx Express Italy S.r.l., Fulmine Group S.r.l., GLS Italy S.p.A., Locker Inpost Italia S.r.l., Nexive Group S.r.l., Poste Italiane S.p.A., Sailpost S.p.A., SDA Express Courier S.p.A., TNT Global Express S.r.l. e UPS Italia S.r.l.

3.2 POSTAL SERVICES: MONTHLY MAIL SERVICES REVENUES

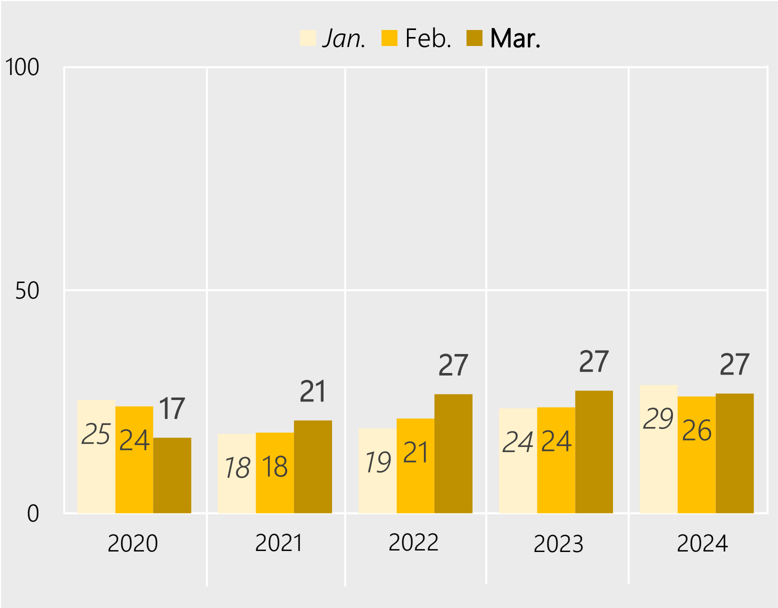
UNIVERSAL SERVICE (US)



OTHER SERVICES (NON US)



POSTAL NOTIFICATION SERVICES



1 **Cumulative values since the beginning of the year** (Jan. – Mar.)

Universal Service (mln. €): (2020) 221 → -4.6% → (2021) 211 → -13.9% → (2022) 181 → -6.4% → (2023) 170 → -5.3% → (2024) 161; 2020→2024: -27.2%

Other Services: (2020) 188 → -5.8% → (2021) 177 → +4.7% → (2022) 185 → +4.6% → (2023) 194 → +3.3% → (2024) 200; 2020→2024: +6.6%

Postal Notification Services: (2020) 66 → -14.6% → (2021) 57 → +18.2% → (2022) 67 → +11.7% → (2023) 75 → +9.4% → (2024) 82; 2020→2024: +23.4%

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

Universal Service (US)

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	-20.9	-14.9	-8.0	+3.8	-35.7
February	-16.0	-14.6	-4.5	-3.0	-33.5
March	+31.7	-12.6	-6.5	-14.2	-7.7

Other Services (Non US)

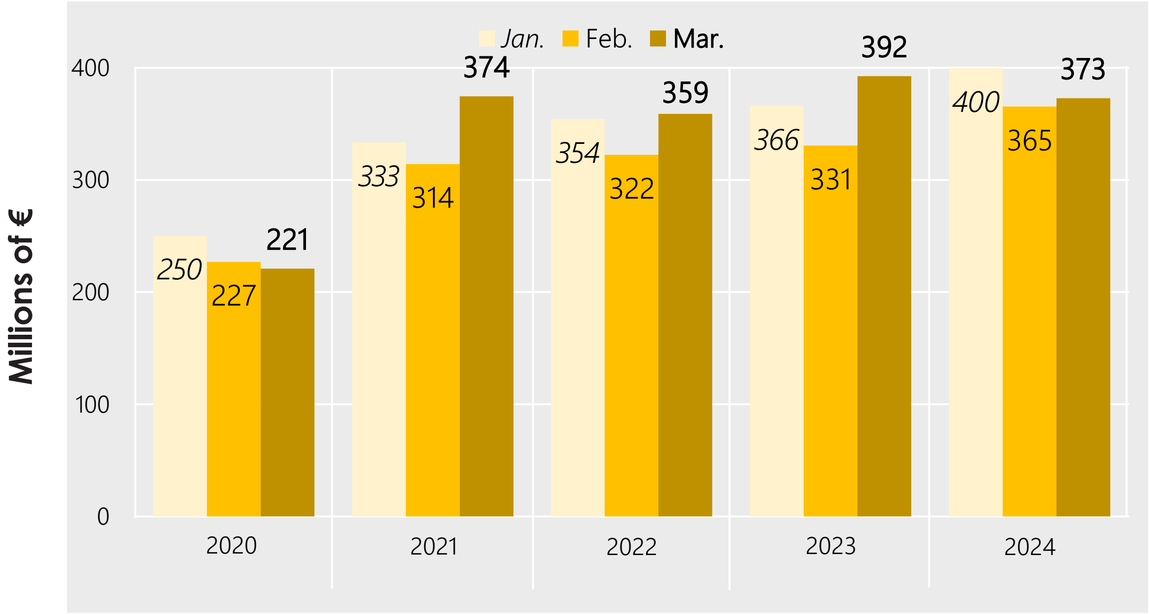
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	-21.2	+5.7	+7.3	+10.0	-1.8
February	-11.2	=	+13.7	+0.5	+1.5
March	+25.7	+8.4	-6.1	-0.8	+26.8

Postal Notification Services

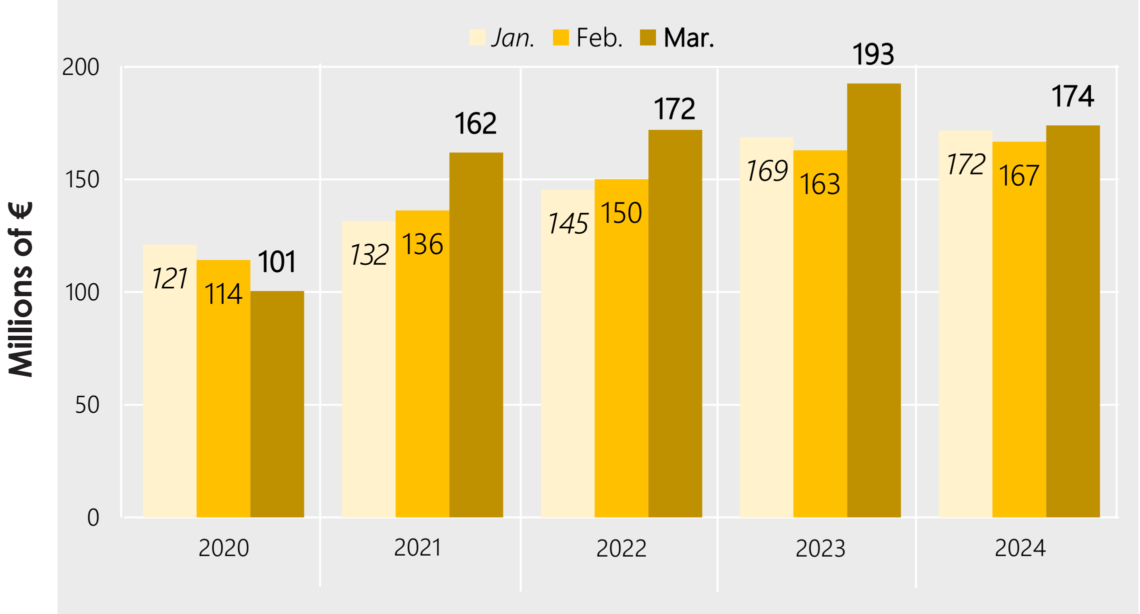
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	-29.9	+6.9	+23.9	+22.3	+13.4
February	-24.7	+17.7	+11.7	+10.3	+9.2
March	+22.8	+28.2	+3.1	-2.4	+58.4

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

DOMESTIC



CROSSBORDER



1 **Cumulative values since the beginning of the year** (Jan. – Mar.)

	(2020)		(2021)		(2022)		(2023)		(2024)
mln. €	698	+46,4%	1,022	+1,3%	1,036	+5.2%	1,089	+4.5%	1,138

2020 → 2024: **+62.9%**

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+33.2	+6.2	+3.3	+9.2	+59.6
February	+38.4	+2.6	+2.6	+10.5	+60.9
March	+69.6	-4.1	+9.3	-5.0	+68.8

1 **Cumulative values since the beginning of the year** (Jan. – Mar.)

	(2020)		(2021)		(2022)		(2023)		(2024)
mln. €	336	+28,0%	430	+8.8%	468	+12.2%	524	-2.3%	512

2020 → 2024: **+52.6%**

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

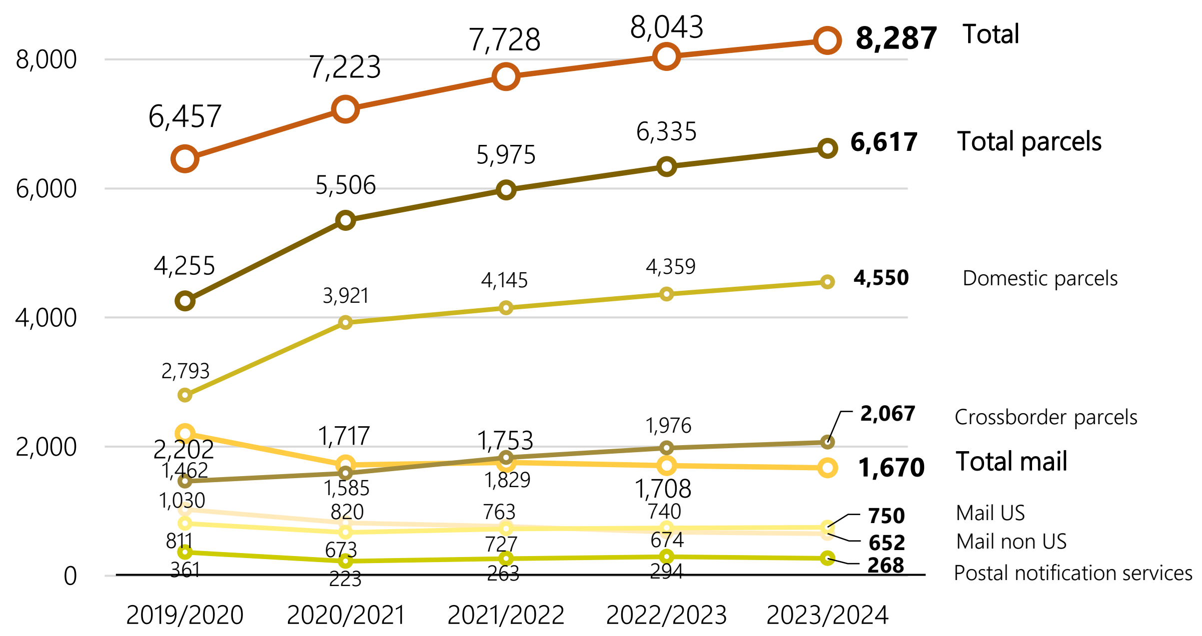
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+8.7	+10.5	+16.1	+1.7	+41.8
February	+19.4	+10.2	+8.5	+2.3	+46.0
March	+61.1	+6.2	+12.0	-9.7	+73.1

3.4 POSTAL SERVICES: REVENUES HISTORICAL TRENDS

AGCOM

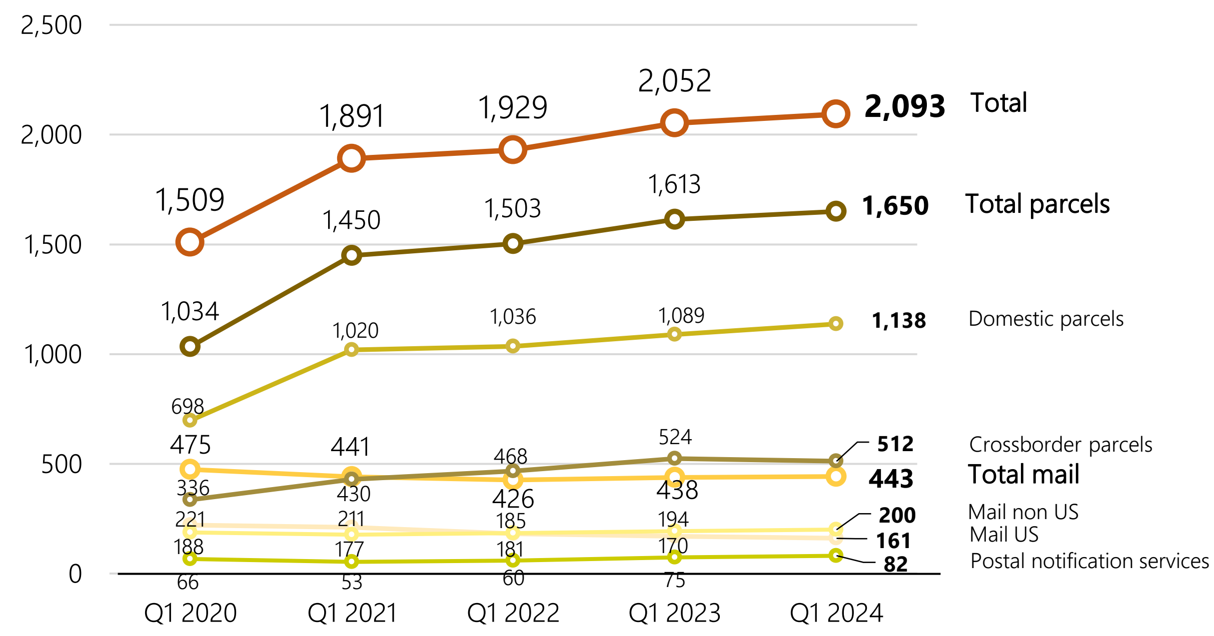
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €

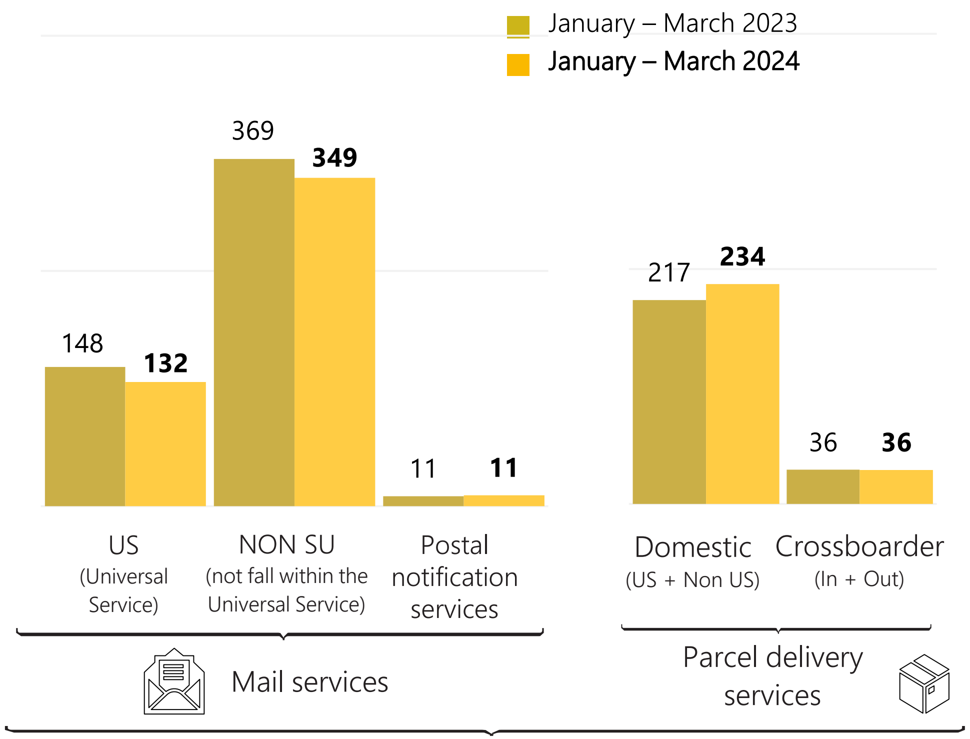


	Change in % (2019/20 – 2023/24)		Change in % (2022/23 – 2023/24)	
Total:	**+28.3**	↑	**+3.0**	↑
Mail services:	**-24.1**	↓	**-2.2**	↓
- Universal Service:	-36.7	↓	-3.3	↓
- No Universal Service:	-7.5	↓	+1.4	↑
- Postal notification services:	-25.7	↓	-8.7	↓
Parcel delivery services:	**+55.5**	↑	**+4.4.7**	↑
- Domestic:	+62.9	↑	+4.4	↑
- Crossborder:	+41.4	↑	+4.6	↑

	Change in % Q1 2020 – Q1 2024		Change in % (Q1 2023 – Q1 2024)	
Total:	**+38.7**	↑	**+2.0**	↑
Mail services:	**-6.8**	↓	**+1.0**	↑
- Universal Service:	-27.2	↓	-5.3	↓
- No Universal Service:	+6.5	↑	+3.3	↑
- Postal notification services:	+23.4	↑	+9.4	↑
Parcel delivery services:	**+59.6**	↑	**+2.3**	↑
- Domestic:	+62.9	↑	+4.5	↑
- Crossborder:	+52.6	↑	-2.3	↓

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS

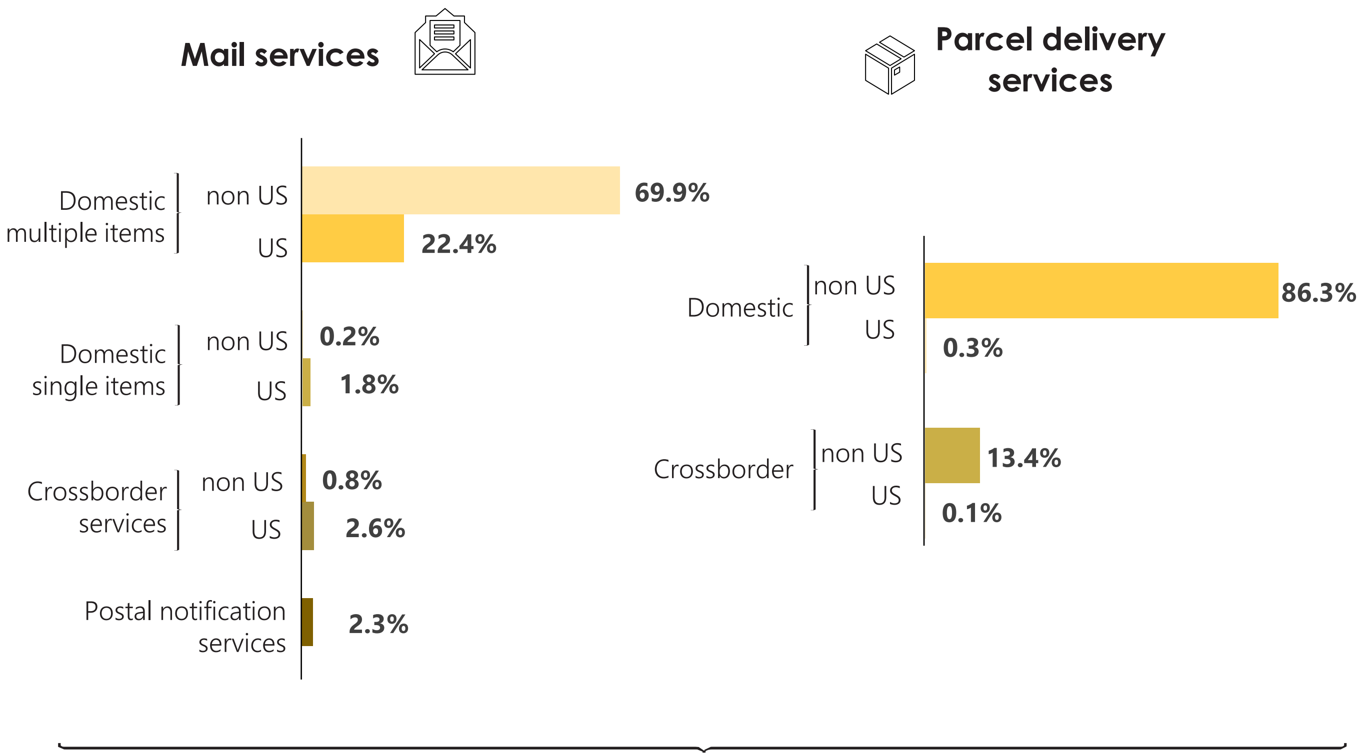


Mail services	Parcel delivery services
-6.7	+6.6

Annual change in %
(Jan. - Mar. 2023) – (Jan. – Mar. 2024)

VOLUMES BY SOURCE TYPE (%)

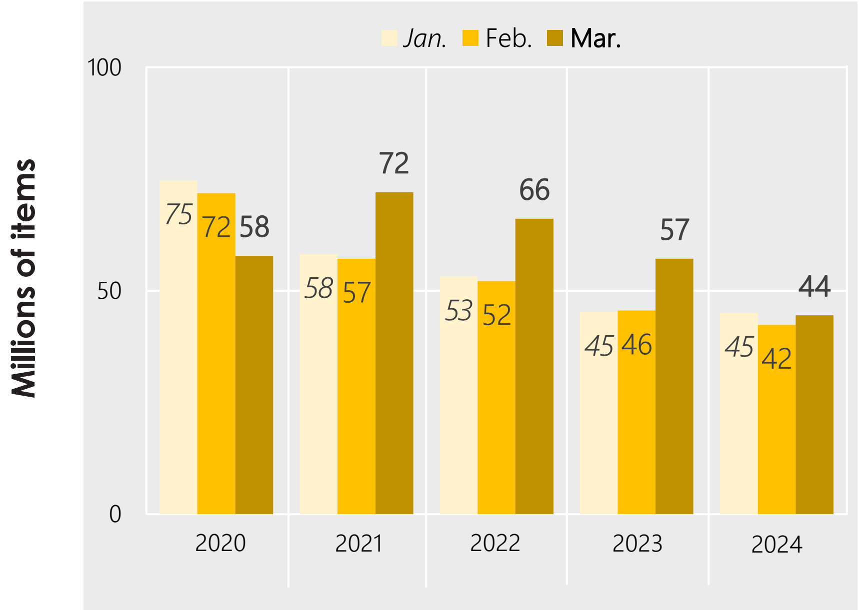
(January – March 2024)



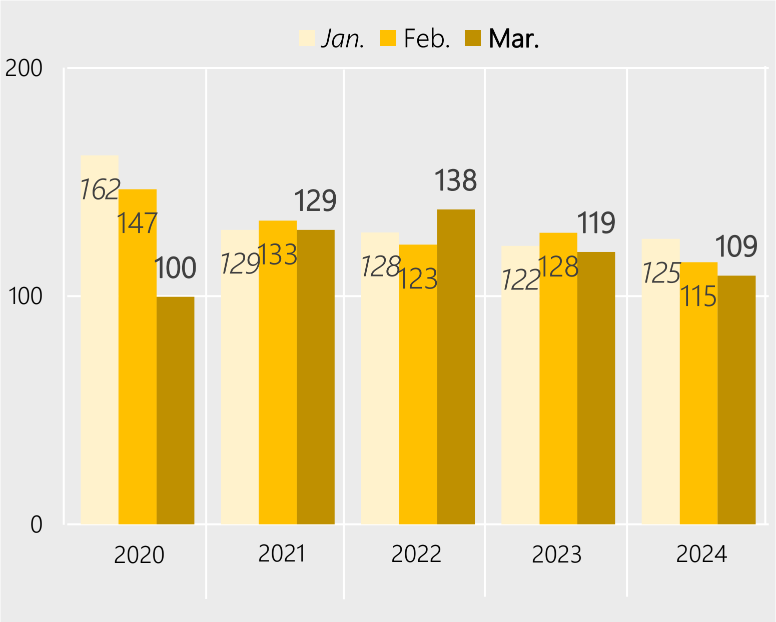
Annual change in %
(Jan. - Mar. 2023 – Jan. - Mar. 2024)

Domestic multiple items	Domestic single items	Crossborder services	Postal notification services	Domestic	Crossborder
-6.8	-11.7	-10.7	+8.0	+7.8	-0.3

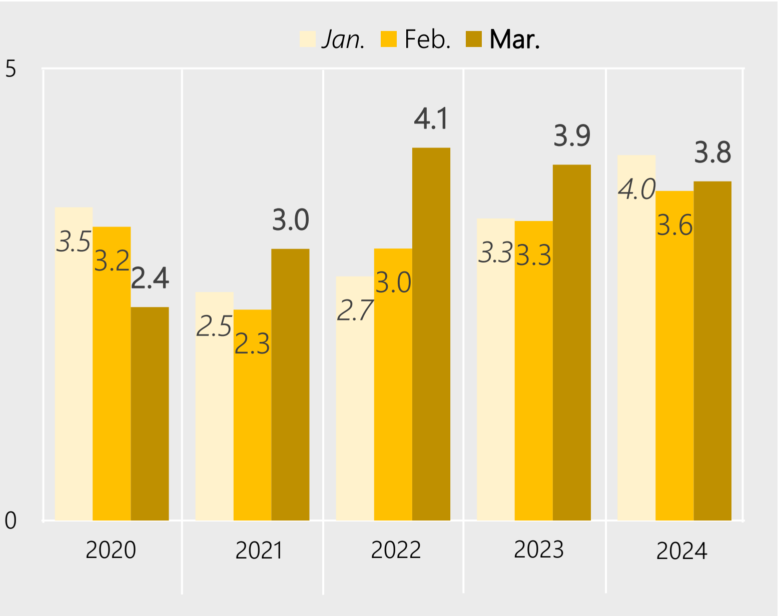
UNIVERSAL SERVICE (US)



OTHER SERVICES (NON US)



POSTAL NOTIFICATION SERVICES



1 **Cumulative values since the beginning of the year** (Jan. – Mar.)

mln. of items

Universal service (US): (2020) 204 → -8.3% → (2021) 187 → -8.5% → (2022) 171 → -13.7% → (2023) 148 → -10.9% → (2024) 132; 2020→2024: -35.5%

Other services (non US): (2020) 408 → -4.1% → (2021) 391 → -0.7% → (2022) 388 → -5.0% → (2023) 369 → -5.5% → (2024) 349; 2020→2024: -14.5%

Postal notification services: (2020) 9.1 → -13.3% → (2021) 7.9 → +25.0% → (2022) 9.8 → +7.7% → (2023) 10.6 → +8.0% → (2024) 11.4; 2020→2024: +26.1%

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

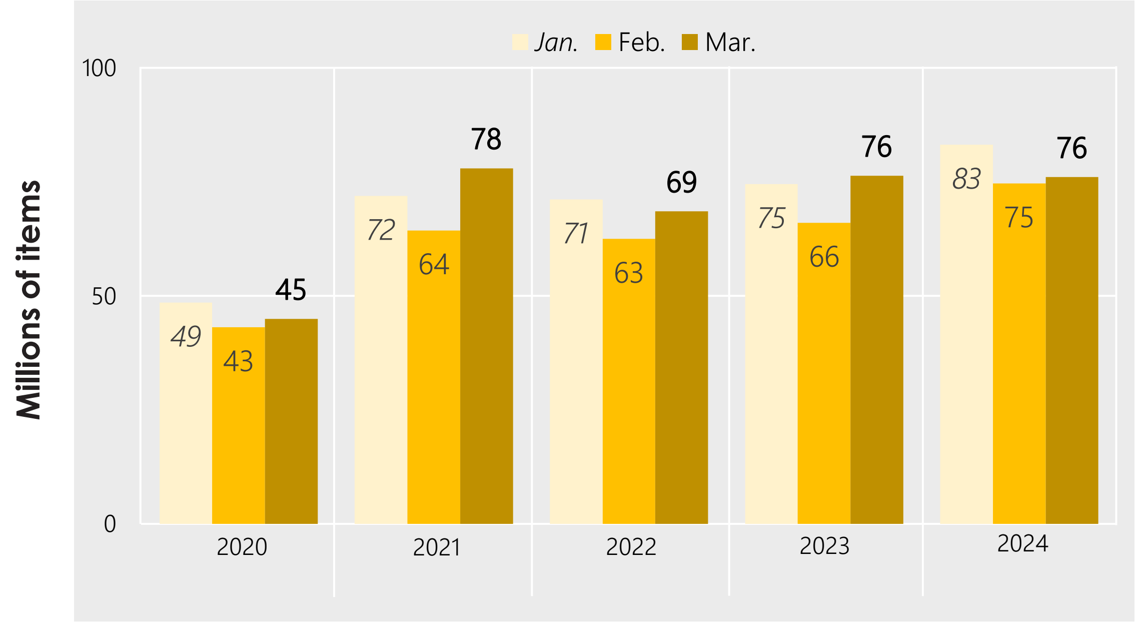
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	-22.1	-8.6	-14.9	-0.5	-39.7
February	-20.4	-8.8	-12.7	-7.0	-41.0
March	+24.5	-8.2	-13.5	-22.2	-23.1

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	-20.2	-0.9	-4.6	+2.5	-22.6
February	-9.3	-8.0	+4.3	-10.1	-21.8
March	+29.5	+6.9	-13.5	-8.6	+9.4

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	-27.0	+6.9	+23.7	+20.9	+16.7
February	-28.2	+29.0	+10.0	+10.1	+12.1
March	+27.3	+37.2	-4.6	-4.7	+58.9

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

DOMESTIC



① **Cumulative values since the beginning of the year** (Jan. – Mar.)

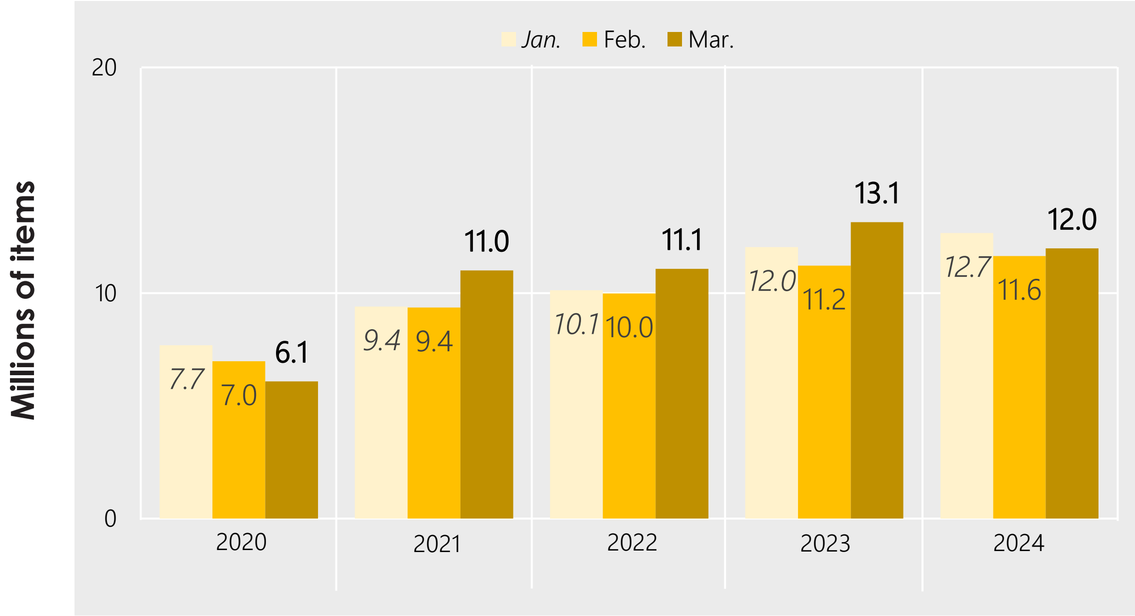
mln. of items: (2020) 137 → +56.8% → (2021) 214 → -5.6% → (2022) 202 → +7.3% → (2023) 217 → +7.8% → (2024) 234

2020 → 2024: +71.1%

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

	YoY 2020/2021	YoY 2021/2022	YoY 2022/2023	YoY 2023/2024	Whole period 2020/2024
January	+48.1	-1.0	+4.8	+11.5	+71.3
February	+49.3	-2.9	+5.7	+13.1	+73.2
March	+73.4	-12.1	+11.4	-0.4	+69.1

CROSSBORDER



① **Cumulative values since the beginning of the year** (Jan. – Mar.)

mln. of items: (2020) 20.7 → +43.6% → (2021) 29.8 → +4.7% → (2022) 31.2 → +16.7% → (2023) 36.4 → -0.3% → (2024) 36.3

2020 → 2024: +75.0%

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

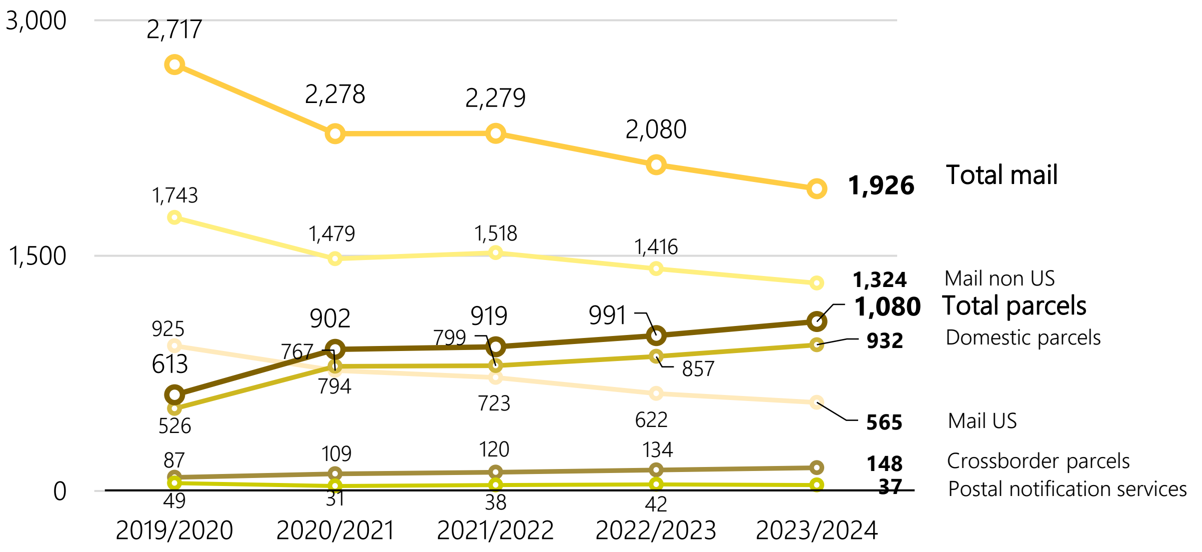
	YoY 2020/2021	YoY 2021/2022	YoY 2022/2023	YoY 2023/2024	Whole period 2020/2024
January	+22.4	+7.6	+18.9	+5.2	+64.7
February	+34.2	+6.7	+12.3	+3.8	+67.0
March	+81.1	+0.6	+18.7	-8.9	+97.1

3.8 POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

AGCOM

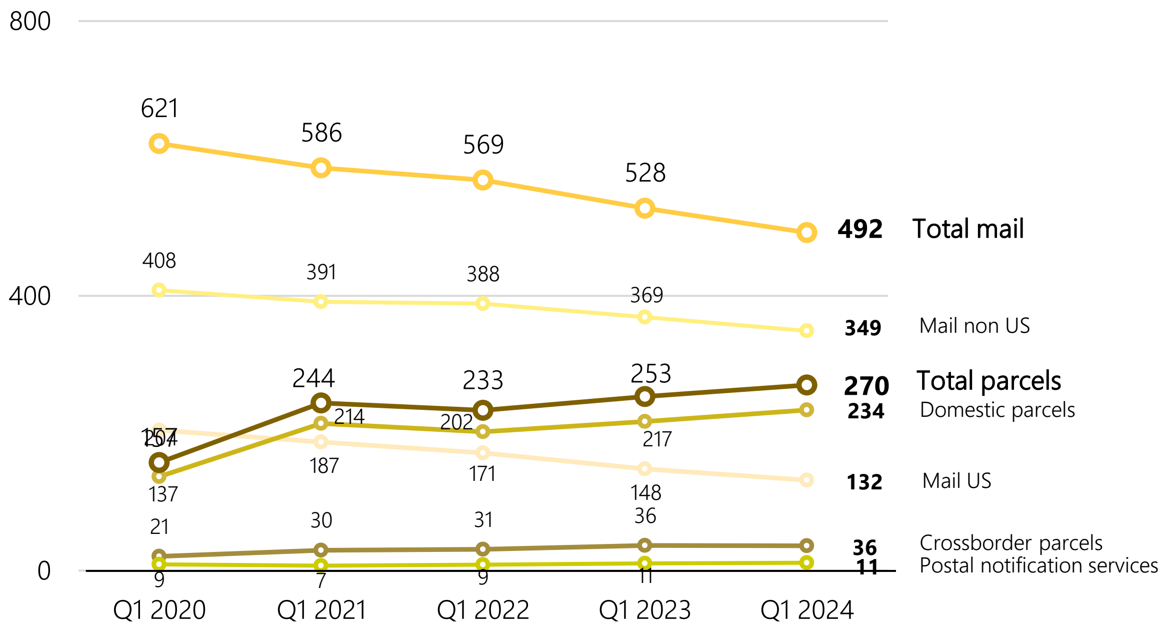
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS

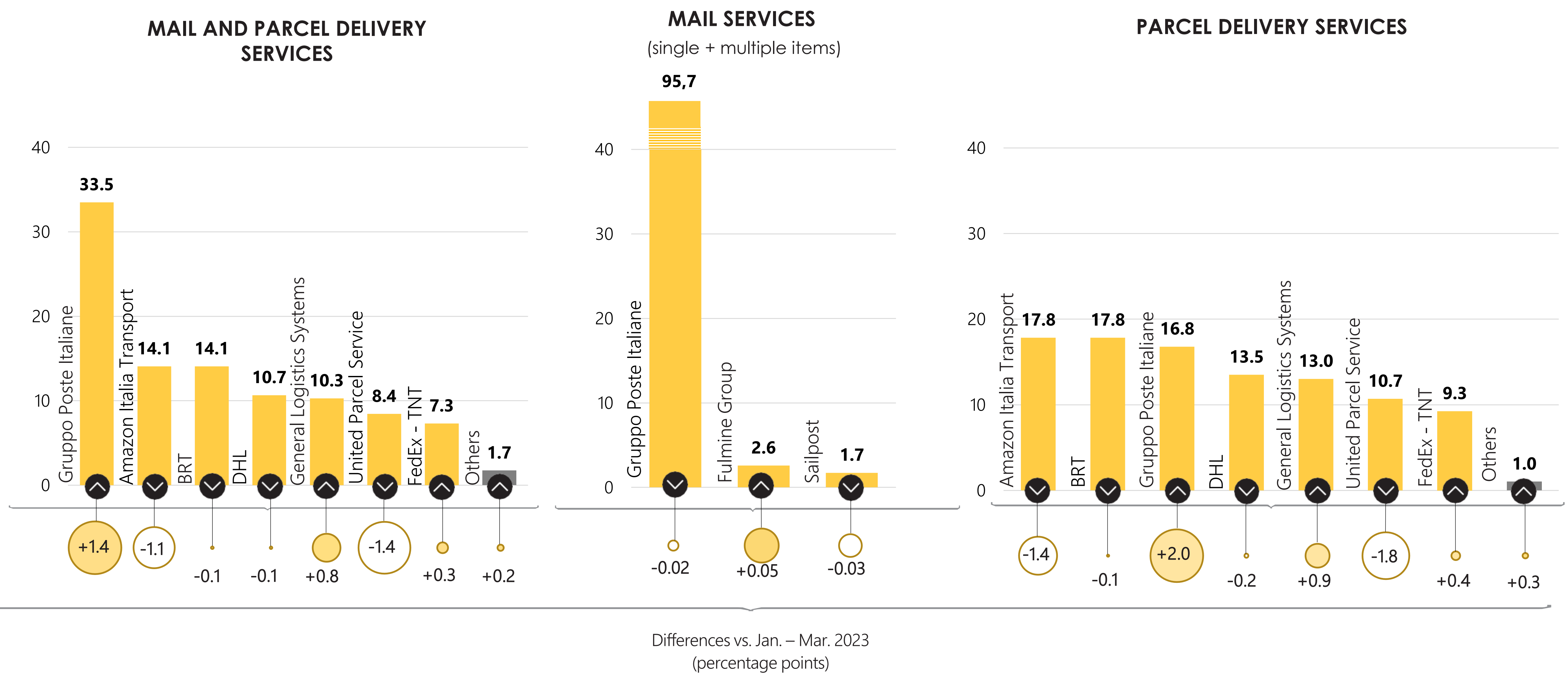


	Change in % (2019/20 – 2023/24)	Change in % (2022/23 – 2023/24)
Mail services:	**-29.1** ↓	**-7.4** ↓
- Universal Service:	-39.0 ↓	-9.2 ↓
- Non Universal Service:	-24.0 ↓	-6.5 ↓
- Postal notification services:	-24.4 ↓	-11.4 ↓
Parcel delivery services:	**+76.2** ↑	**+9.0** ↑
- Domestic:	+77.2 ↑	+8.8 ↑
- Crossborder:	+70.6 ↑	+10.2 ↑

	Change in % (1Q 2020 – 1Q 2024)	Change in % (1Q 2023 – 1Q 2024)
Mail services:	**-20.8** ↓	**-6.7** ↓
- Universal Service:	-35.5 ↓	-10.9 ↓
- Non Universal Service:	-14.5 ↓	-5.5 ↓
- Postal notification services:	+26.1 ↑	+8.0 ↑
Parcel delivery services:	**+71.6** ↑	**+6.6** ↑
- Domestic:	+71.1 ↑	+7.8 ↑
- Crossborder:	+75.0 ↑	-0.3 ↓

3.9 POSTAL SERVICES: COMPETITIVE LANDSCAPE

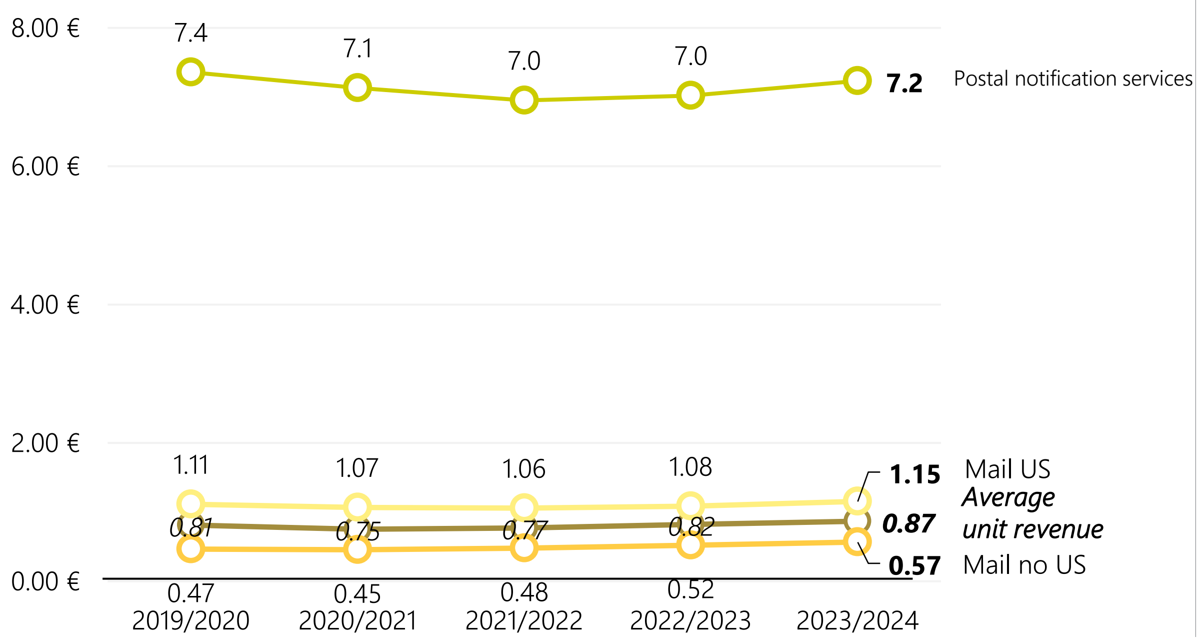
JANUARY - MARCH 2024 – IN % OF TOTALE REVENUES (Universal service + Non Universal service)



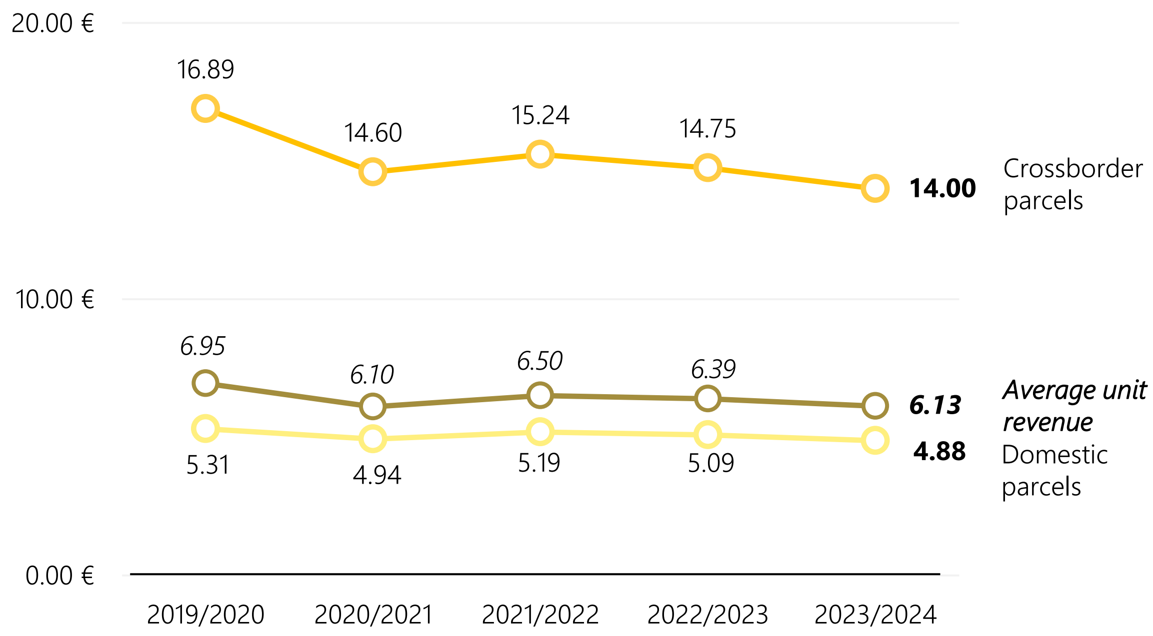
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group, Nexive Group S.r.l. and SDA Express Courier S.p.A.

3.10 POSTAL SERVICES: PER-UNIT REVENUES HISTORICAL TRENDS IN € (average last 12 month)

MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

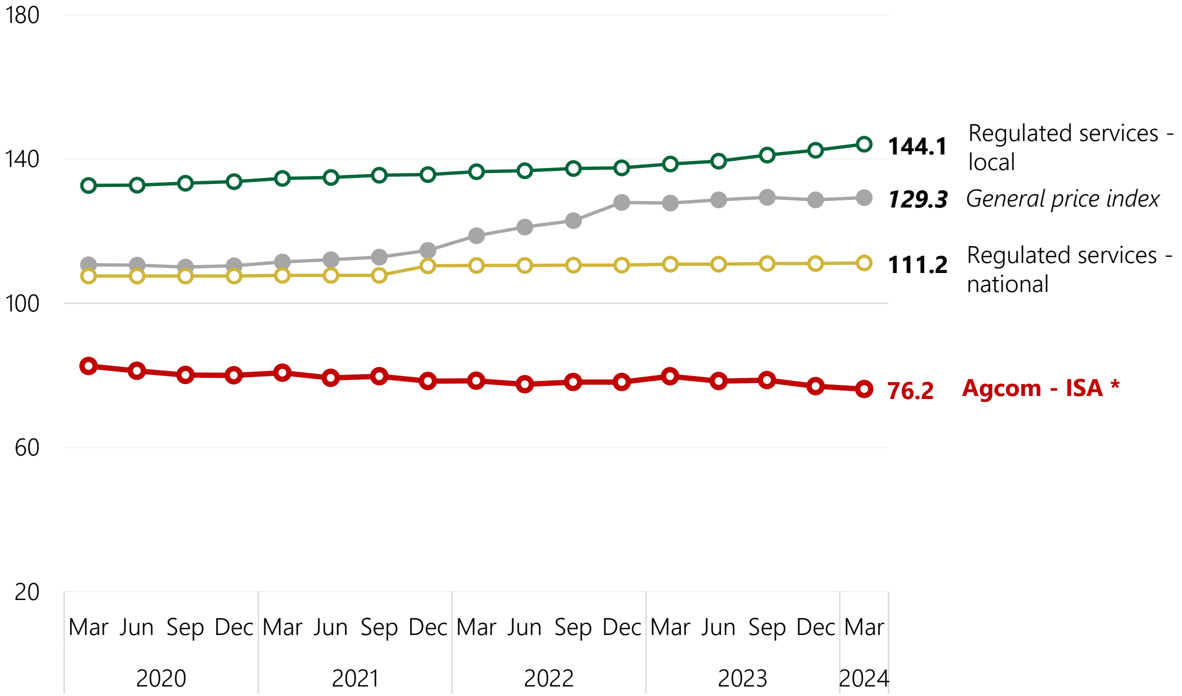
	(2019/20 – 2023/24)		(2022/23 – 2023/24)	
Average unit revenue:	**+7.0**	↑	**+5.6**	↑
- Mail US:	+3.7	↑	+6.5	↑
- Mail non US:	+21.7	↑	+8.5	↑
- Postal notification services:	-1.7	↓	+3.0	↑

Change in %

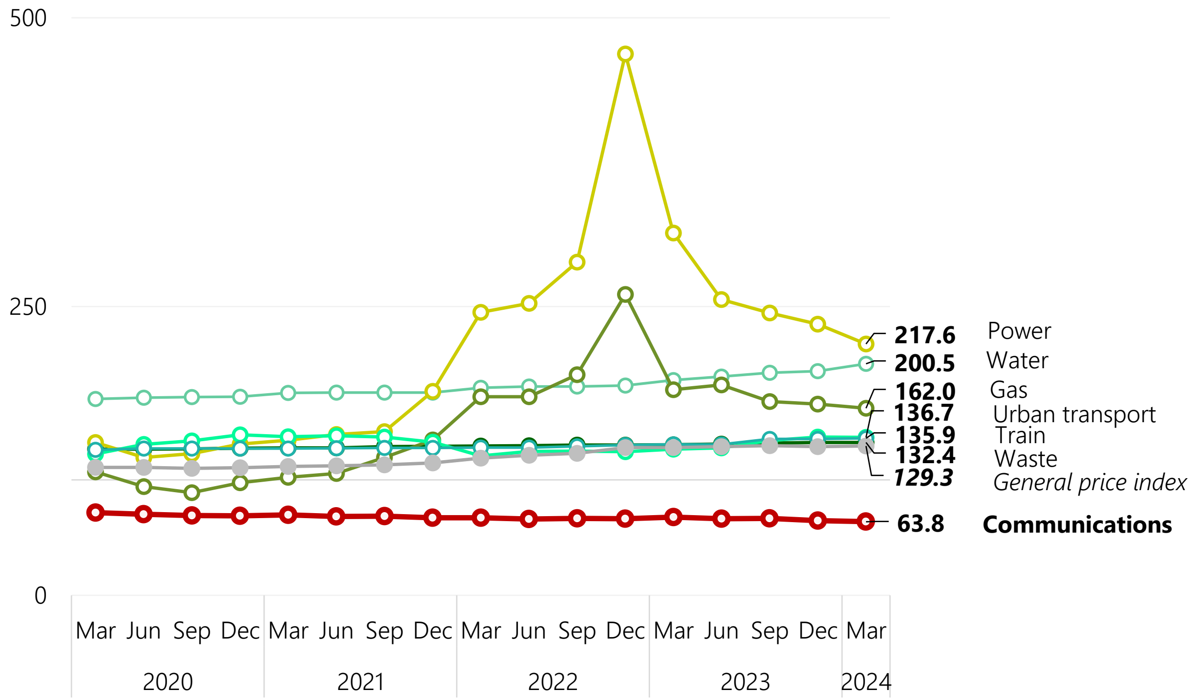
	(2019/20 – 2023/24)		(2022/23 – 2023/24)	
Average unit revenue:	**-11.8**	↓	**-4.1**	↓
Crossborder parcels:	-17.1	↓	-5.1	↓
- US:	*+4.7*	↑	*+1.3*	↑
- Non US:	*-17.1*	↓	*-5.1*	↓
Domestic parcels:	-8.1	↓	-4.0	↓
- US:	*+9.6*	↑	*+6.5*	↑
- Non US:	*-8.0*	↓	*-4.1*	↓

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

	Change in % 4-Year	Change in % YoY
ISA (Agcom summary price index):	-7.7 ↓	-4.4 ↓
General price index:	+16.8 ↑	+1.2 ↑
Regulated services - local:	+8.6 ↑	+4.0 ↑
Regulated services - national:	+3.3 ↑	+0.4 ↑

	Change in % 4-Year	Change in % YoY
Water *(04.4.1)*:	+17.9 ↑	+7.6 ↑
Waste *(04.4.2)*:	+4.7 ↑	+1.5 ↑
Power *(04.5.1)*:	+64.6 ↑	-30.6 ↓
Gas *(04.5.2)*:	+51.8 ↑	-9.0 ↓

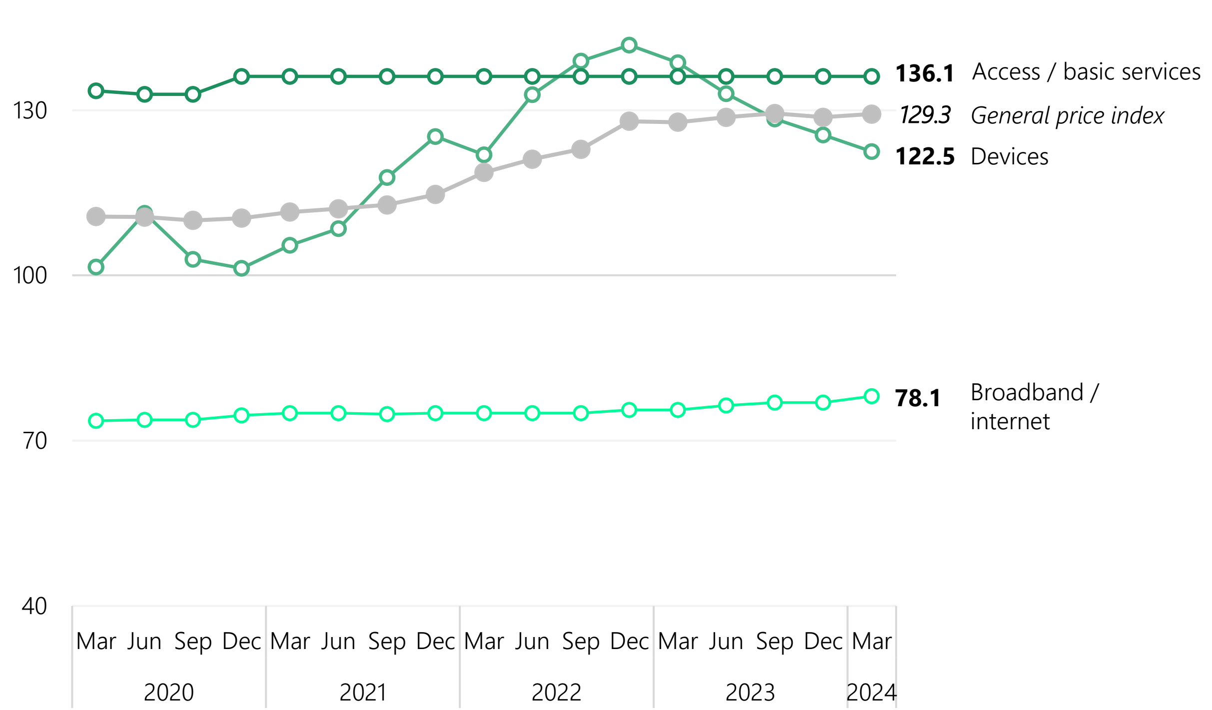
	Change in % 4-Year	Change in % YoY
Train *(07.3.1)*:	+11.8 ↑	+8.1 ↑
Urban transport *(07.3.2.1.1)*:	+8.0 ↑	+4.1 ↑
Communications *(08)*:	-10.9 ↓	-5.6 ↓

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

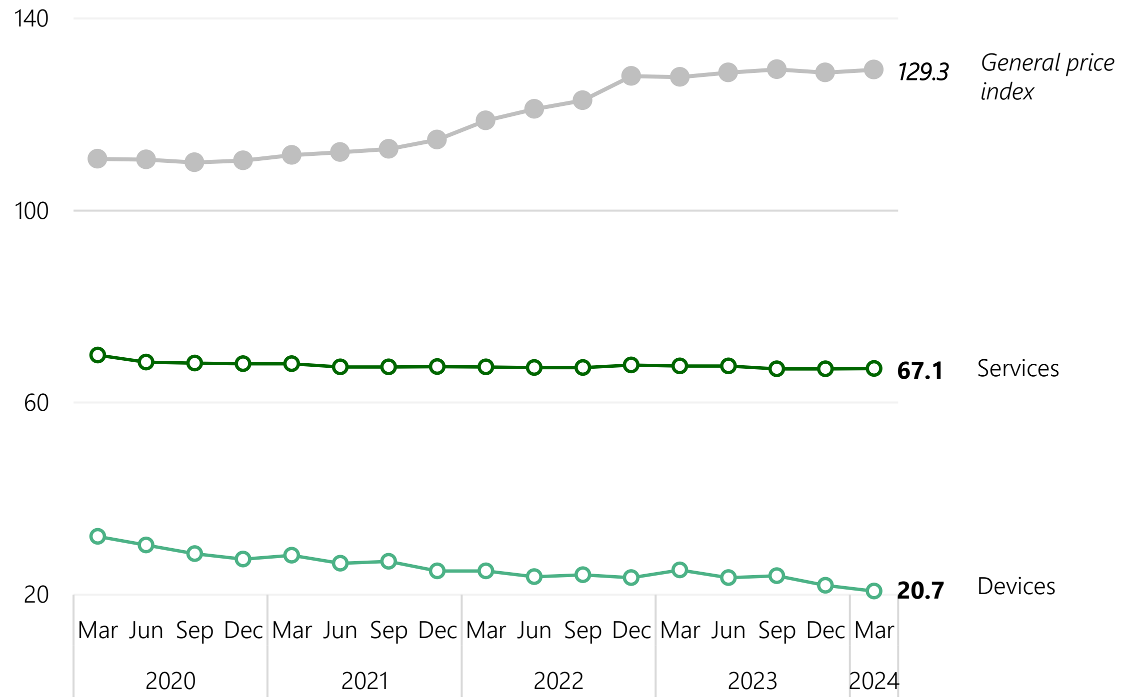
(COICOP - Classification of Individual Consumption by Purpose)

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

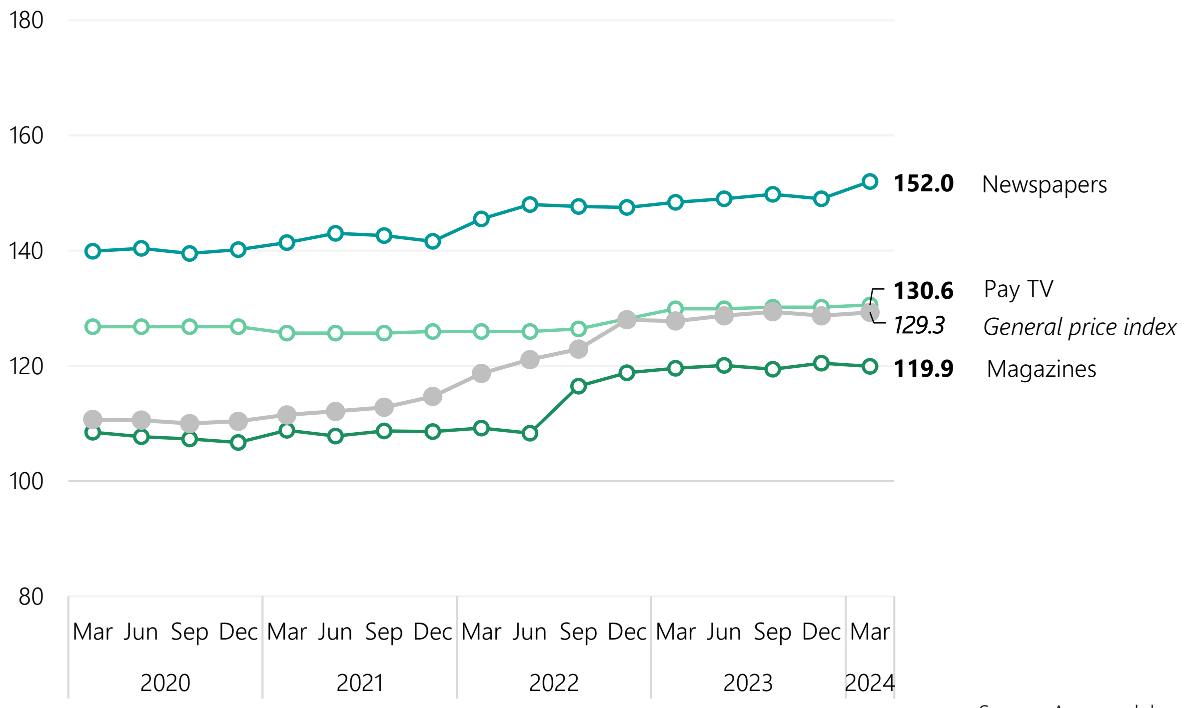
	Change in % 4-Year		Change in % YoY	
Access / basic services *(08.3.0.1)*:	**+1.9**	↑	=	
Devices *(08.2.0.1)*:	**+20.7**	↑	**-11.6**	↓
Broadband / internet *(08.3.0.3.0.01)*:	**+6.1**	↑	**+3.3**	↑

	Change in % 4-Year		Change in % YoY	
Servces *(08.3.0.2)*:	**-4.0**	↓	**-0.7**	↓
Devices *(08.2.0.2)*:	**-35.5**	↓	**-17.5**	↓

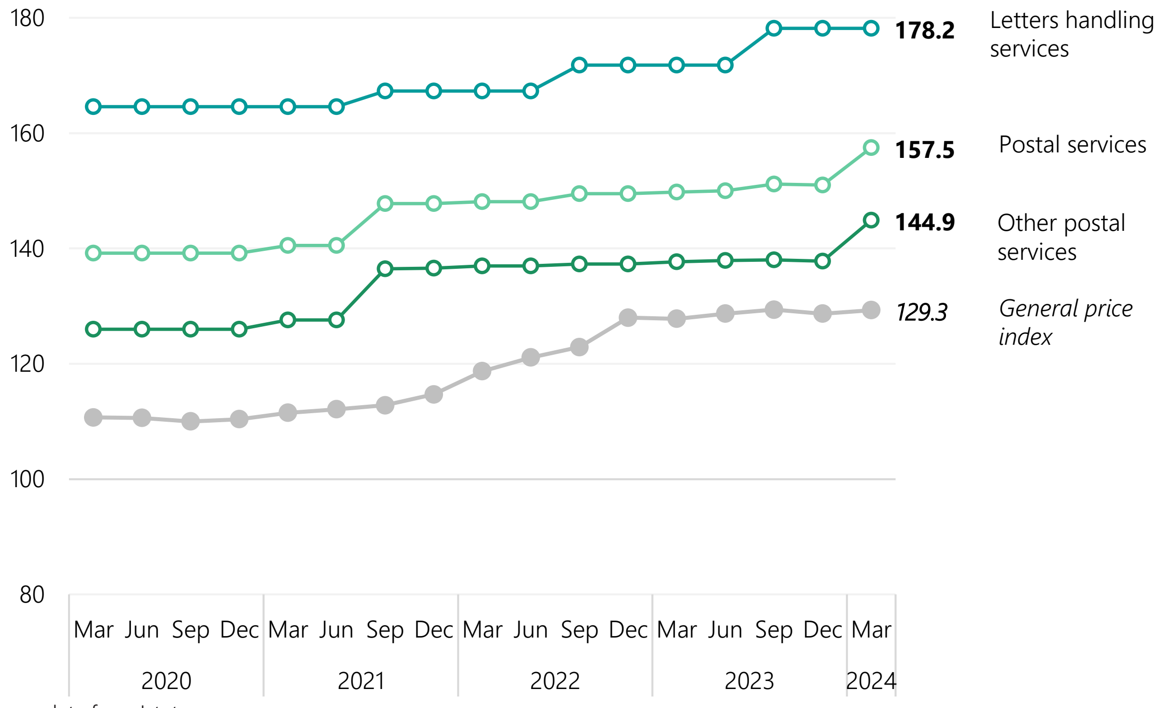
(COICOP - Classification of Individual Consumption by Purpose)

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	Change in % YoY
Newspapers *(09.5.2.1.0)*:	+8.6 ↑	+2.4 ↑
Pay TV *(09.4.2.3.0.02)*:	+3.0 ↑	+0.5 ↑
Magazines *(09.5.2.2.0)*:	+ 10.5 ↑	+0.3 ↑

	Change in % 4-Year	Change in % YoY
Postal services *(08.1)*:	+13.1 ↑	+5.1 ↑
Letters handling services *(08.1.0.1.0.00)*:	+8.3 ↑	+3.7 ↑
Other postal services *(08.1.0.9.0.00)*:	+15.0 ↑	+5.2 ↑

(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

Source: Agcom elaboration on data from Eurostat

1-Year change %

Mar. 2023 - Mar. 2024

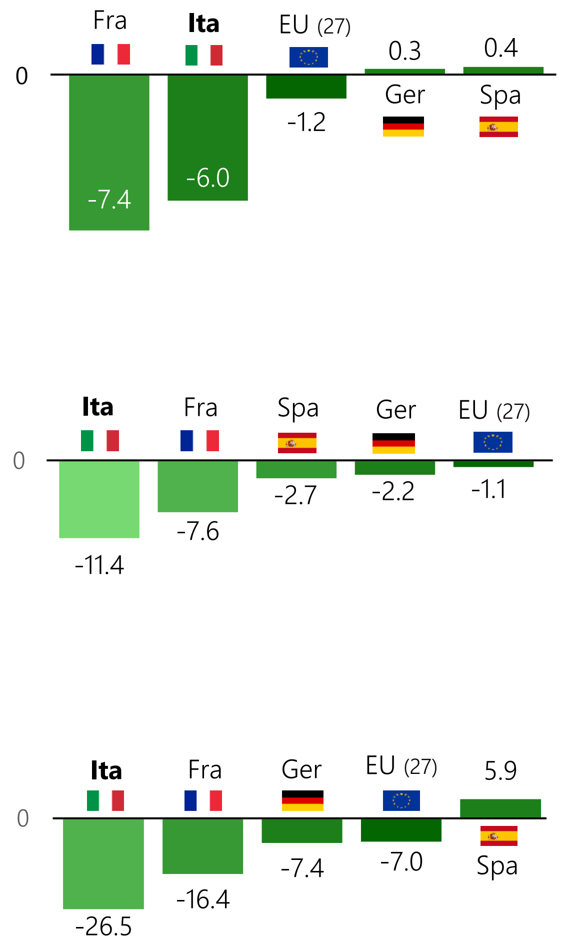
5-Year change %

Mar. 2020 - Mar. 2024

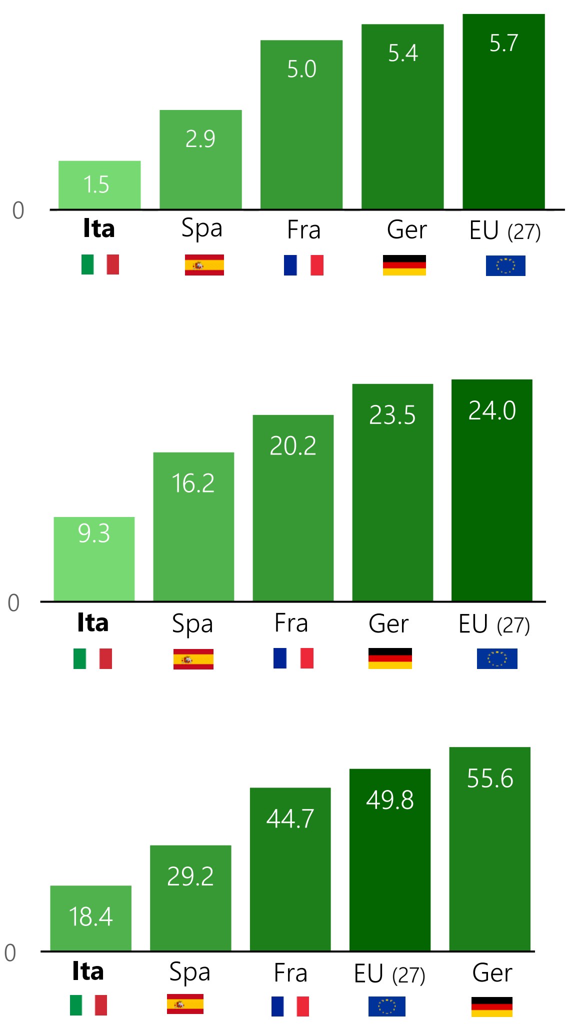
10-Year change %

Mar. 2015 - Mar. 2024

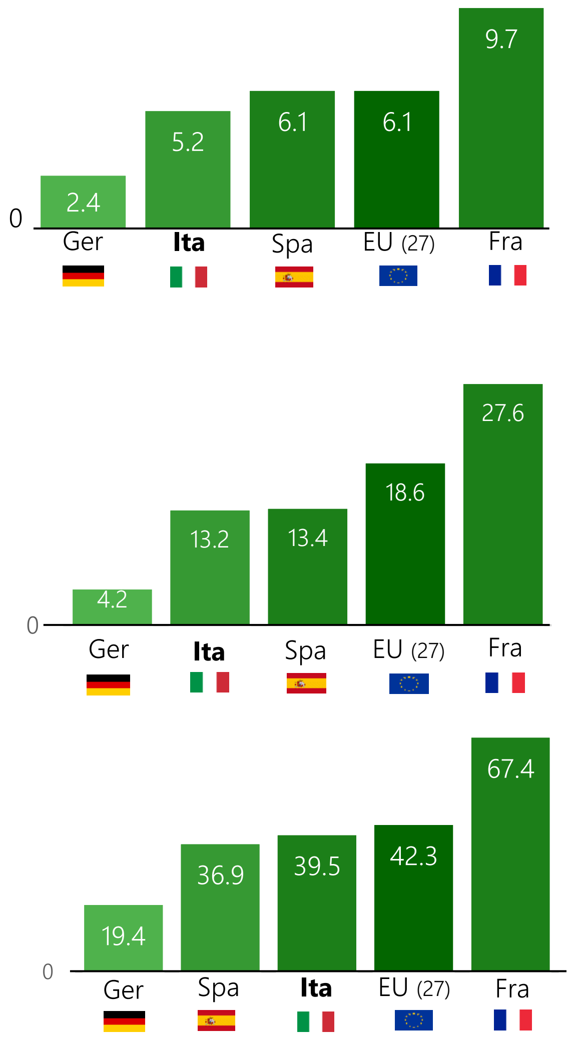
TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)



NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)



POSTAL SERVICES
(COICOP 08.1)



AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 2/2024

For information: Direzione studi, ricerche e statistiche - segreteria.dsr@agcom.it

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