AGCOM AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 2/2022

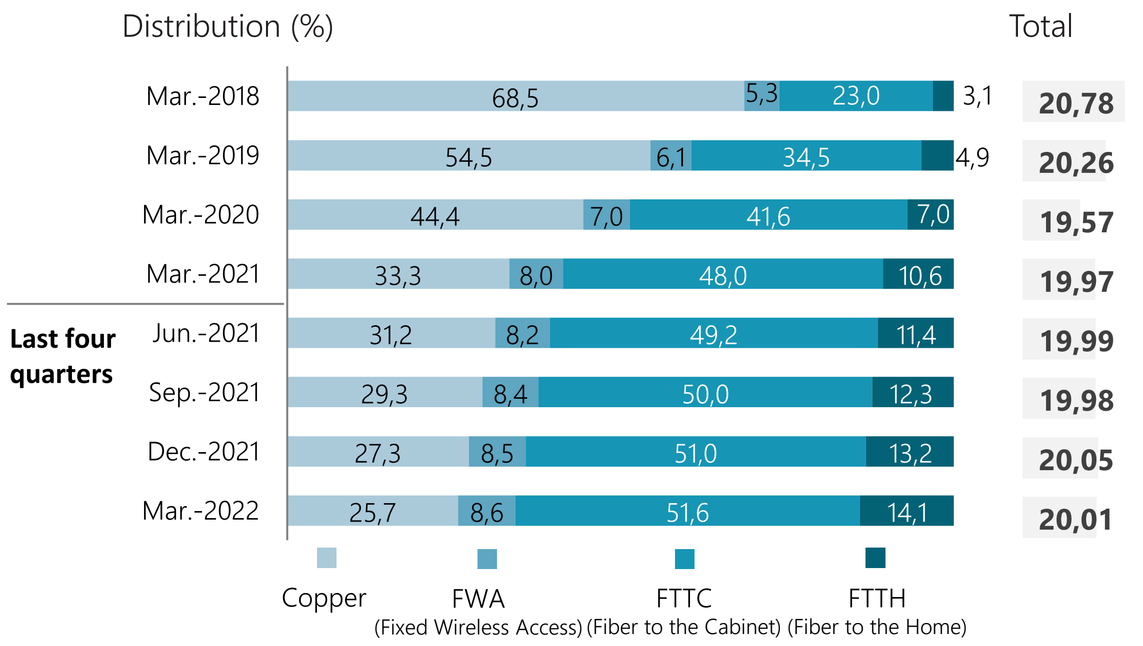
INDEX

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

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

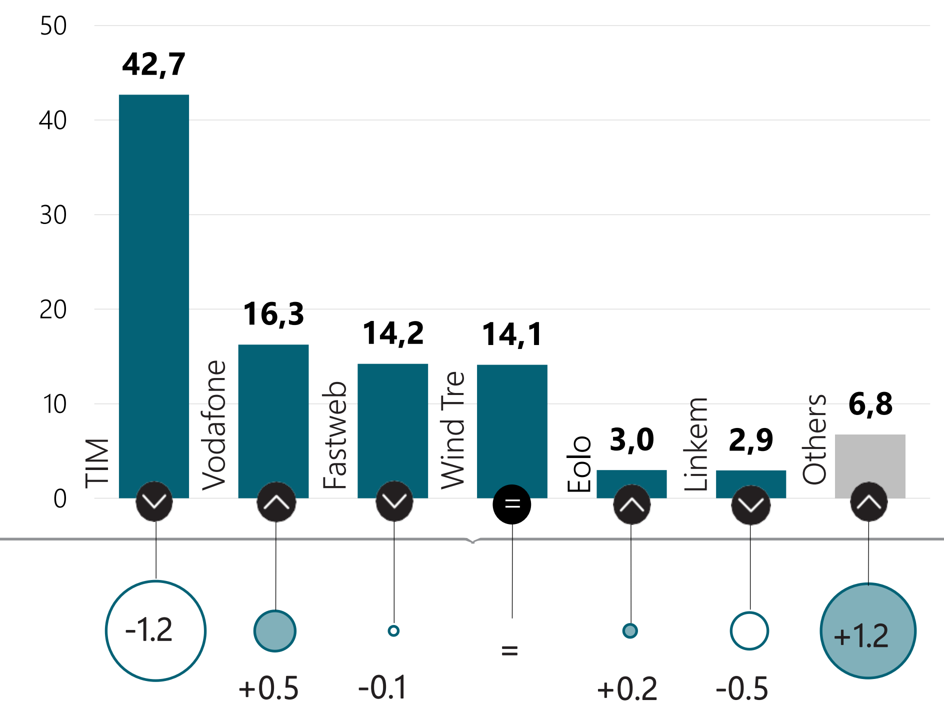
The data collected for this edition are updated to March 2022. The percentage compositions are automatically rounded to the first decimal place. Due to changes in firms' accounting methods, some figures cannot be compared directly with those reported in previous issues.

1.1 FIXED NETWORK: TOTAL LINES



MARKET SHARES (%)

MARCH 2022



Differences vs. Mar. 2021 (percentage points)

Total lines	(no. of lines)	(Δ %)
Quarterly change (Dec. 2021 – Mar. 2022)	**-42 K** accesses	-0.2
Annual change (Mar. 2021 – Mar. 2022)	**+34 K** accesses	+0.2
4-Year change (Mar. 2018 – Mar. 2022)	**-758 K** accesses	-3.7

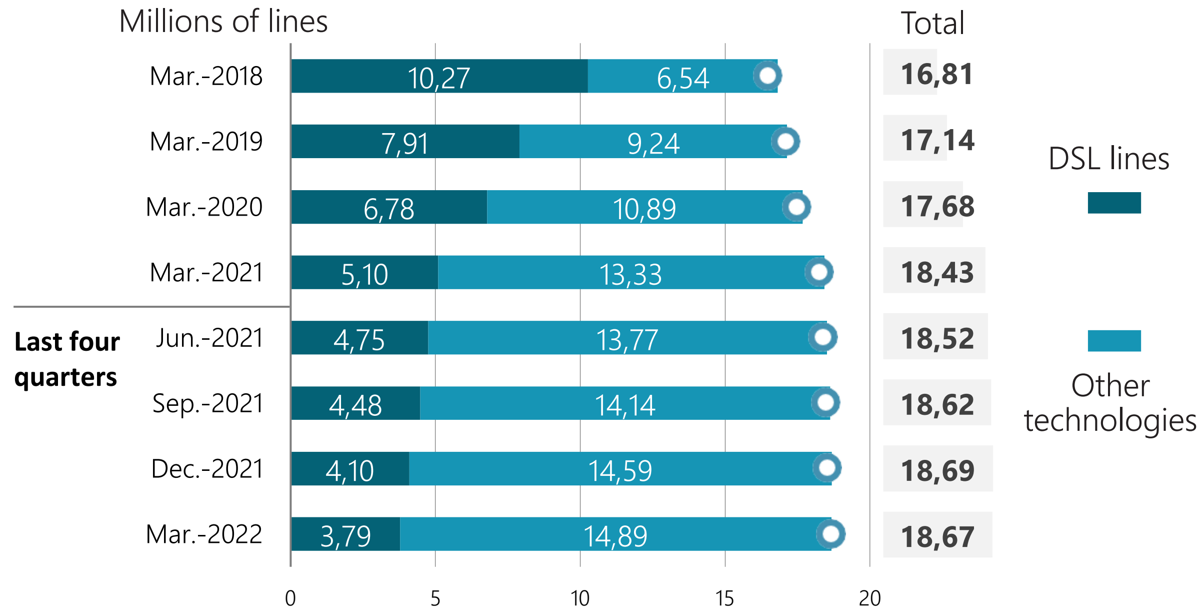
Distribution
(Δ 2021-2022) percentage points

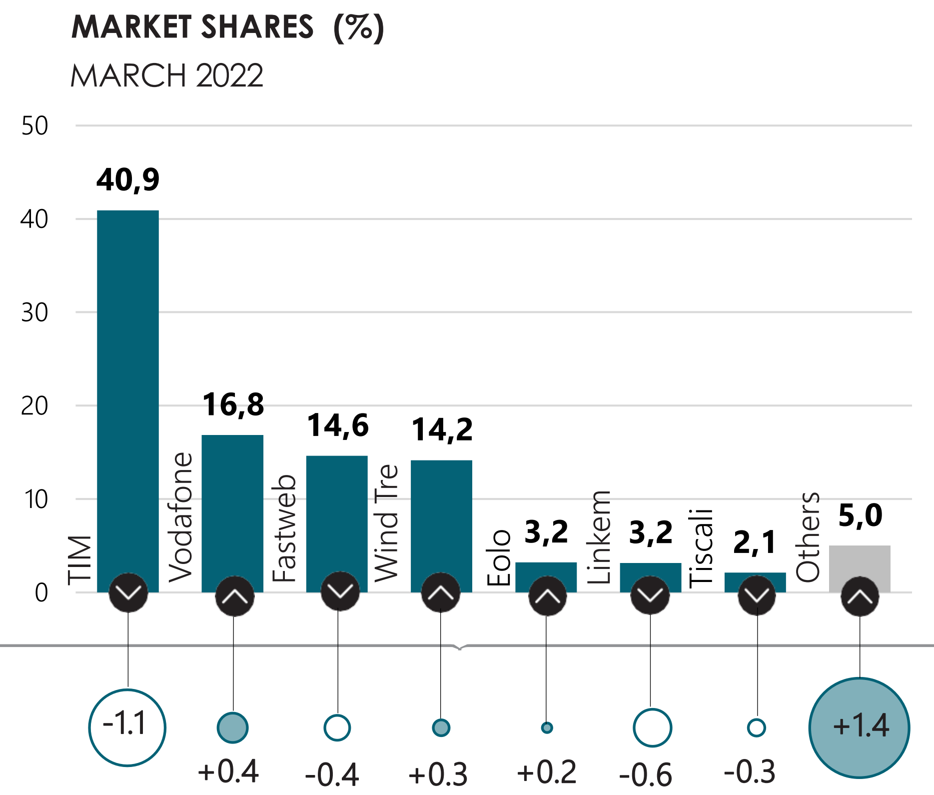
Copper:	-7.7
FWA:	+3.6
FTTC:	+3.5
FTTH:	+0.5

K = thousand

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

1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES





Quarterly change
(Dec. 2021 – Mar. 2022)

Total lines

-14 K
lines
(-0,1%)

Annual change
(Mar. 2021 – Mar. 2022)

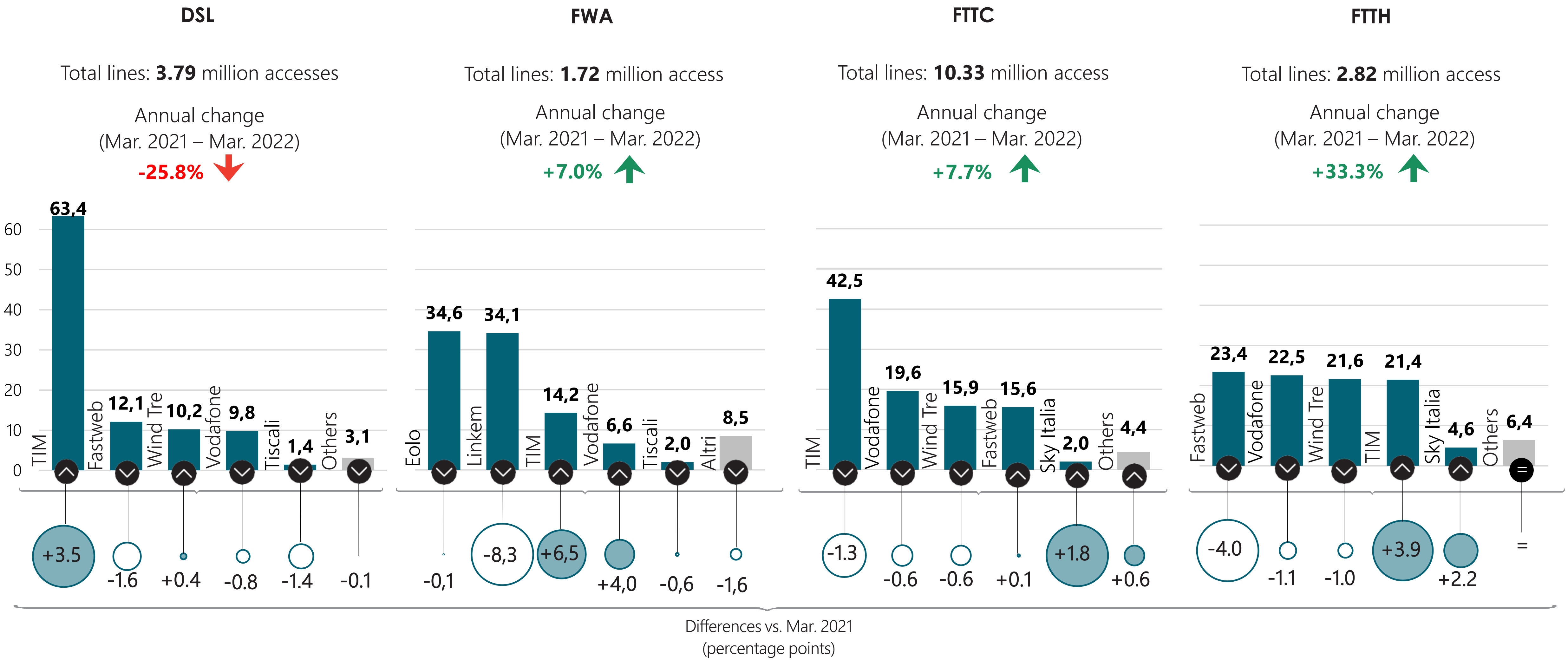
Total lines	DSL lines	Other technologies
+244 K lines (+1.3 %)	**-1.315 M** lines (-25.8%)	**+1.558 M** lines (+11,7%)

Differences vs. Mar. 2021
(percentage points)

K = thousand
M = million

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

MARCH 2022

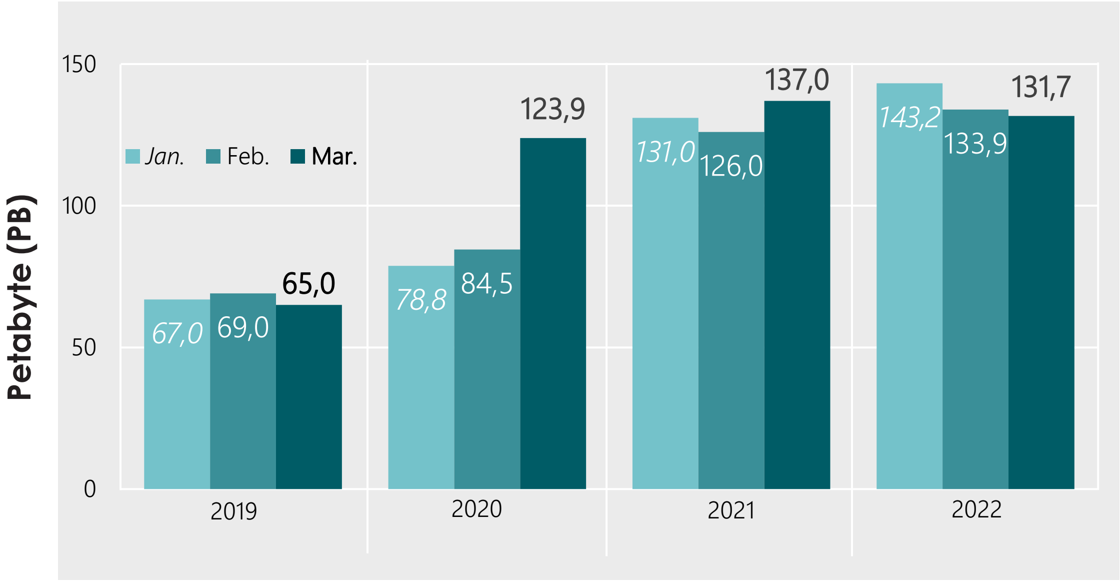


Note: elaborations based on data provided by companies in the context of the preparation of European reporting A few thousand lines allocated by the companies in the categories "Other non-NGA" and "Other NGA" are excluded from the analysis..

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

AGCOM

TOTAL TRAFFIC



1 Average monthly comparison from the beginning of the year

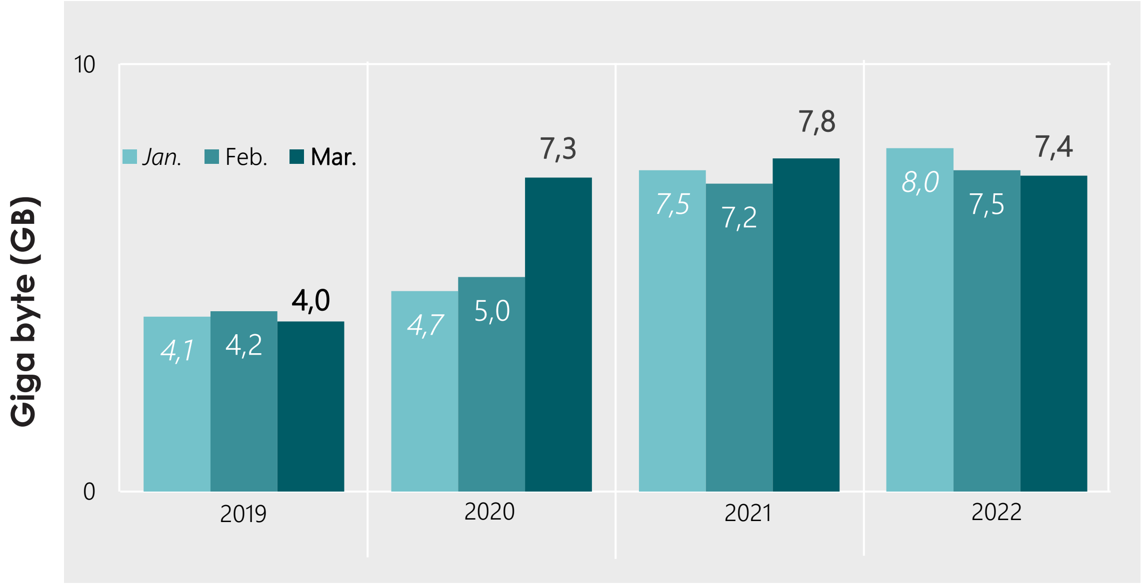
Petabyte (2019) 66.9 → (+43.4%) (2020) 96.0 → (+37.0%) (2021) 131.5 → (+3.7%) (2022) 136.3

+103.7%

2 Monthly comparison (change in %)

	YoY 2019/2020	YoY 2020/2021	YoY 2021/2022	Whole period 2019/2022
January	+17.7	+66.2	+9.3	+113.8
February	+22.4	+49.1	+6.2	+94.0
March	+90.5	+10.6	-3.9	+102.5

PER BROADBAND LINE



1 Average monthly comparison from the beginning of the year

Giga byte (2019) 4.1 → (+39.3%) (2020) 5.7 → (+31.8%) (2021) 7.5 → (+1.8%) (2022) 7.7

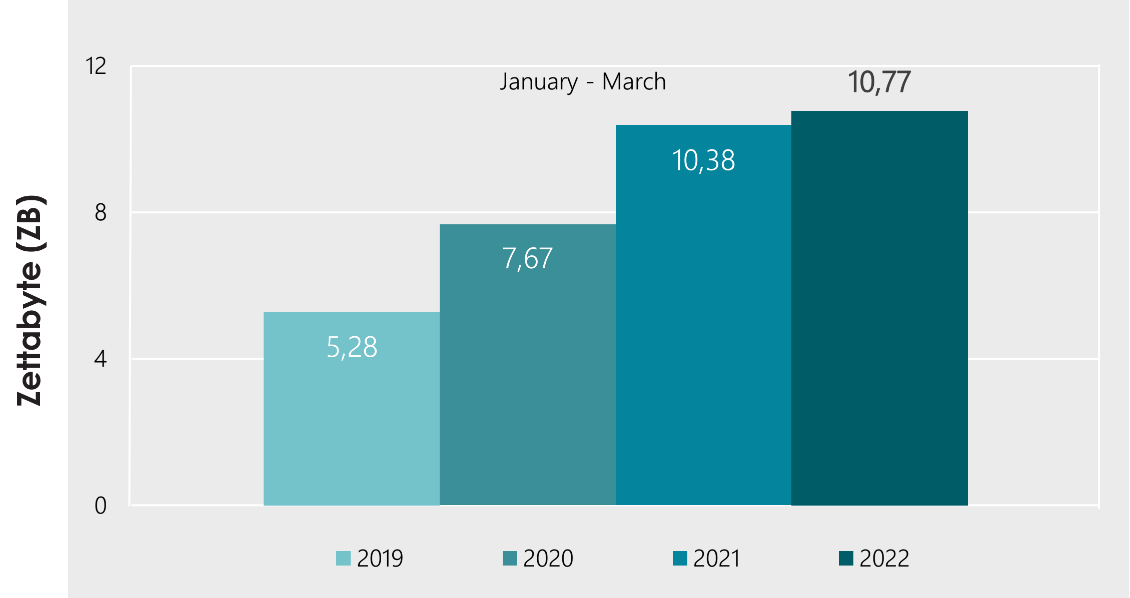
+87.0%

2 Monthly comparison (change in %)

	YoY 2019/2020	YoY 2020/2021	YoY 2021/2022	Whole period 2019/2022
January	+14.5	+60.4	+6.8	+96.3
February	+18.9	+43.5	+4.4	+78.1
March	+84.7	+6.1	-5.1	+85.9

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

DOWNLOAD

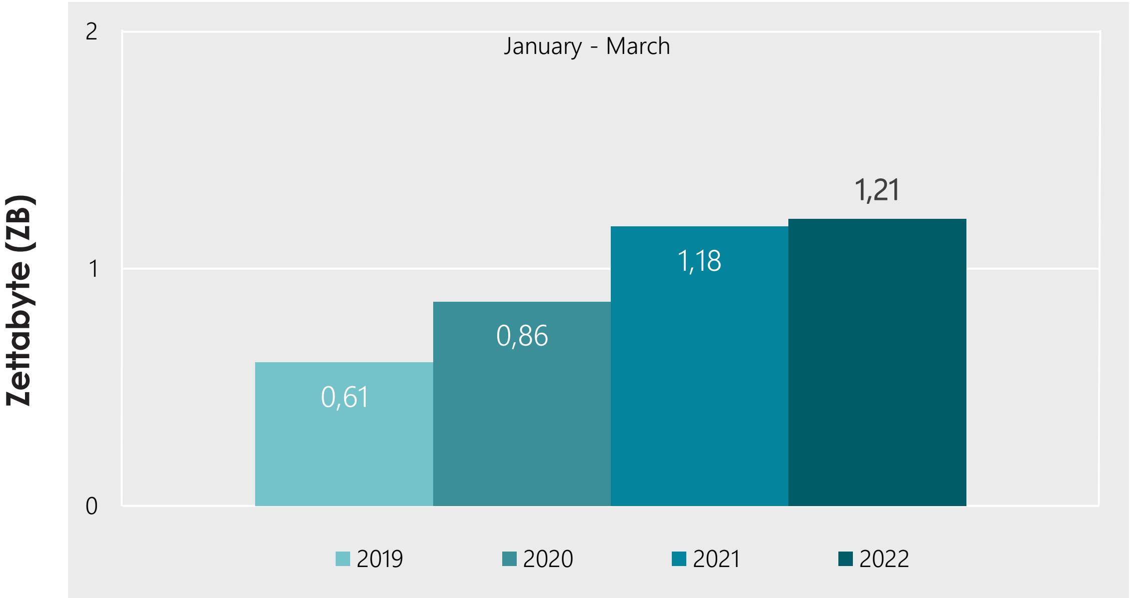


① **Average monthly comparison from the beginning of the year**

	(2019)		(2020)		(2021)		(2022)
Zettabyte	5.28	**(+45.3%)**	7.67	**(+35.4%)**	10.38	**(+3.7%)**	10.77

2019 → 2022: **+104.0%**

UPLOAD

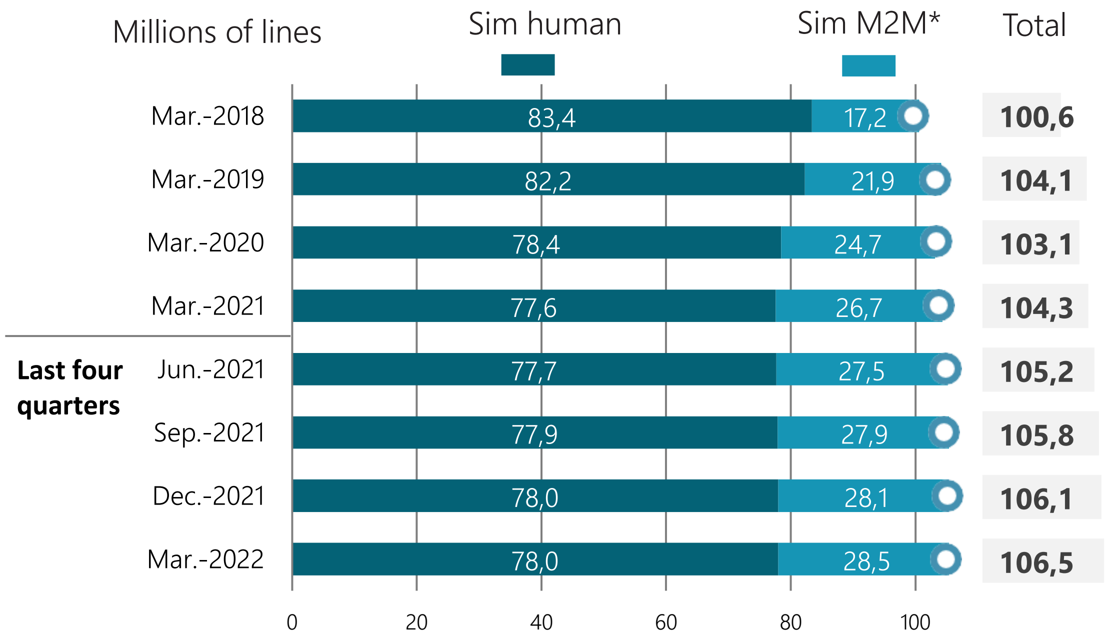


① **Average monthly comparison from the beginning of the year**

	(2019)		(2020)		(2021)		(2022)
Zettabyte	0.61	**(+42.1%)**	0.86	**(+36.9%)**	1.18	**(+3.0%)**	1.21

2019 → 2022: **+100.4%**

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

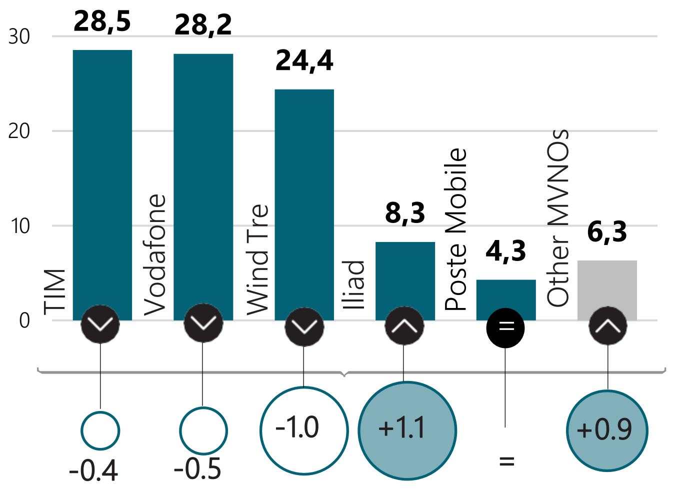
	Quarterly change (Dec. 2021 – Mar. 2022) (no of sim in thousand)	Quarterly change (Δ %)	Annual change (Mar. 2021 – Mar. 2022) (no of sim in thousand)	Annual change (Δ %)
Total sim cards:	+374	+0.4	+2,138	+2.0
Sim human:	-3	-0.01	+409	+0.5
Sim M2M:	+377	+1.3	+1,729	+6.5

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 2022

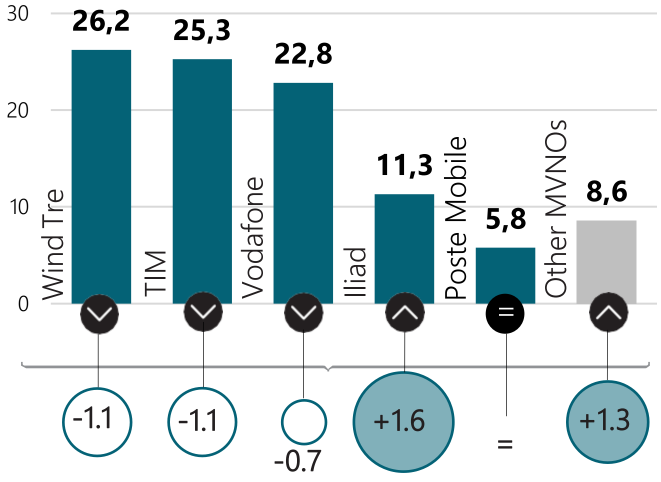
Sim: total



Differences vs. Mar. 2021 (percentage points)

Sim: human*

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



Differences vs. Mar. 2021 (percentage points)

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

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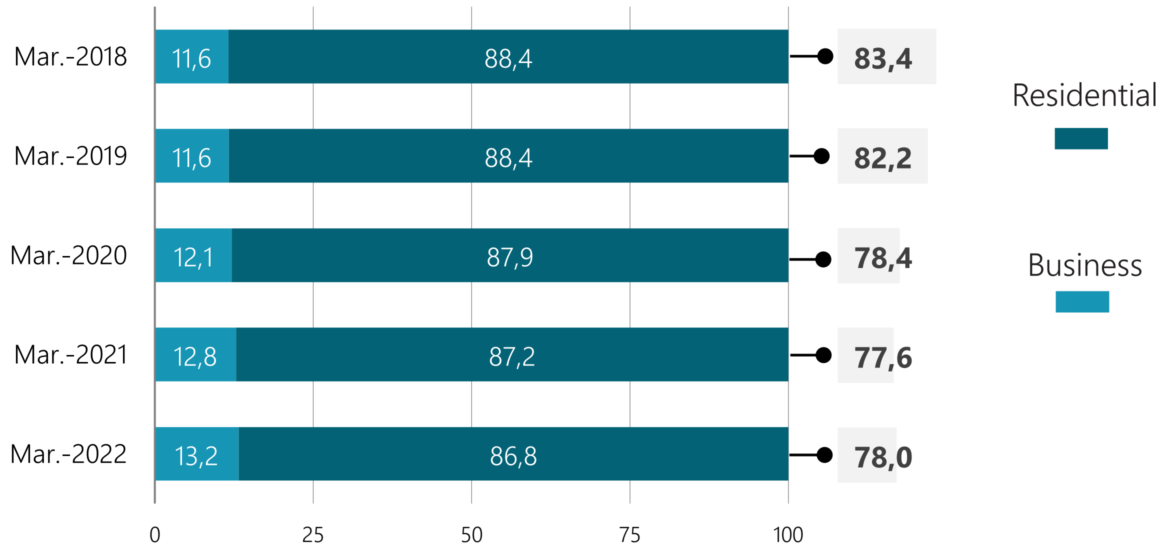
Distribution (%)

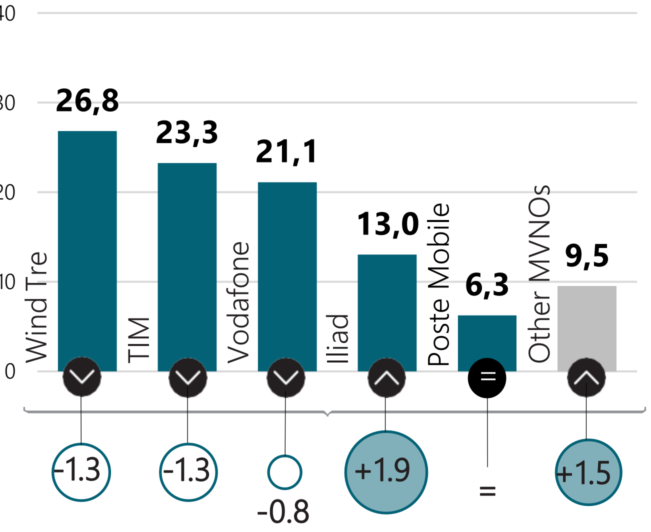
Total (millions of sims)



	Annual change (Mar. 2021 – Mar. 2022) (no of sim in thousand)		Annual change (Δ %)	4-Year change (Mar. 2018 – Mar. 2022) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	+409	↑	+0.5	-5,379	↓	-6.5
Residential sim card:	+30	↑	+0.04	-6,023	↓	-8.2
Business sim cards:	+379	↑	+3.8	+644	↑	+6.7

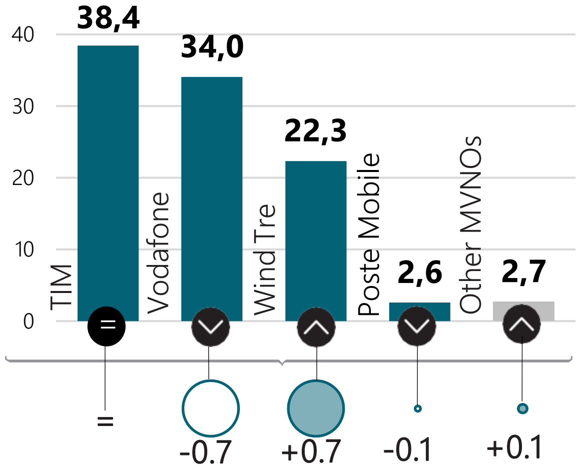
MARKET SHARES (%)

MARCH 2022



Residential

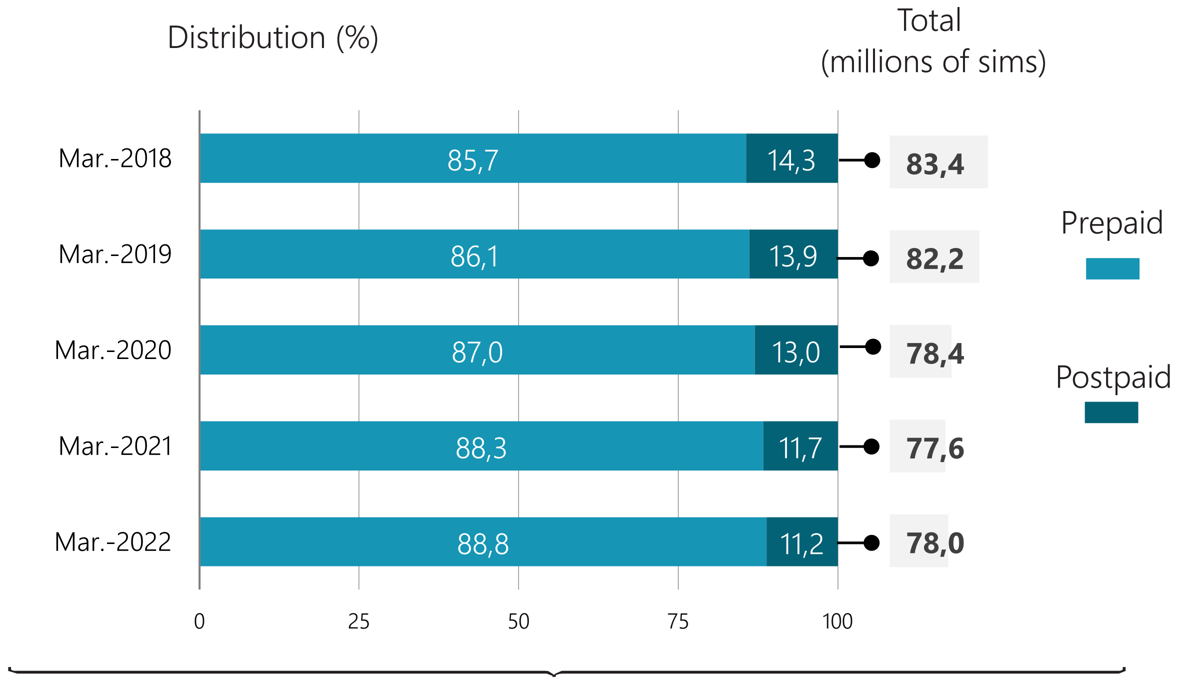
Differences vs. Mar. 2021 (percentage points)



Business

Differences vs. Mar. 2021 (percentage points)

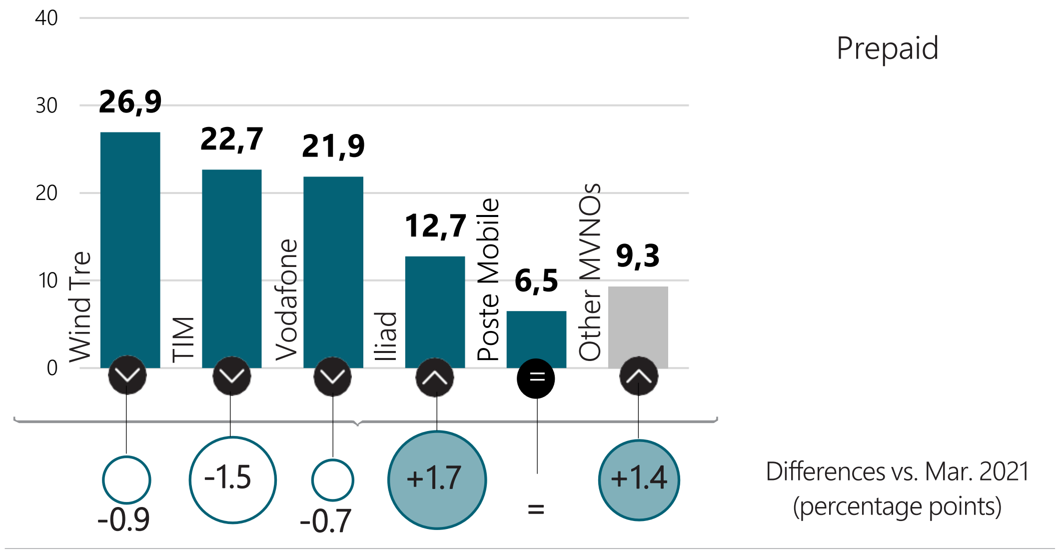
1.8 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT

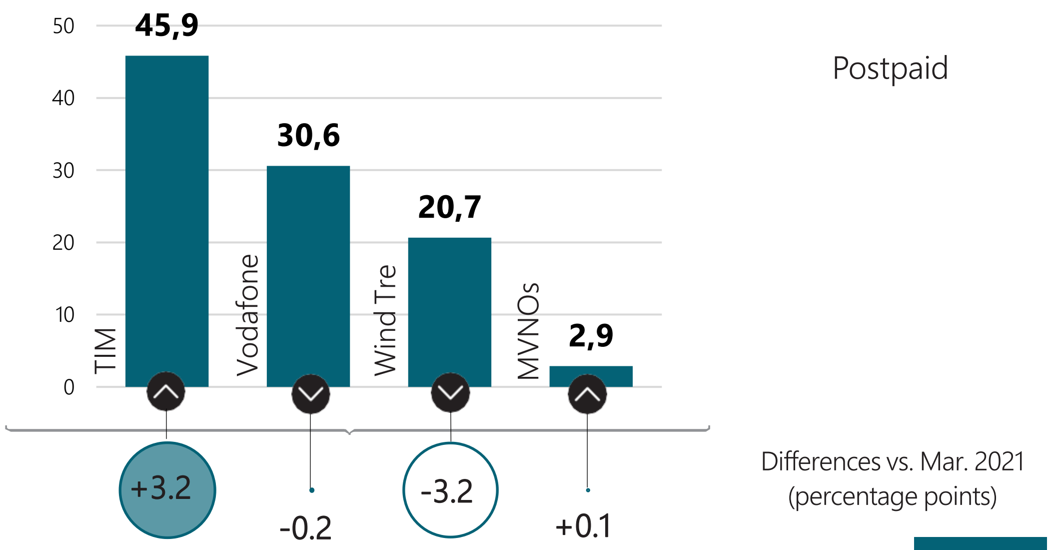


	Annual change (Mar. 2021 – Mar. 2022) (no of sim in thousand)		Annual change (Δ %)	4-Year change (Mar. 2018 – Mar. 2022) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	+409	↑	+0.5	-5,379	↓	-6.5
Prepaid sim cards:	+756	↑	+1.1	-2,126	↓	-3.0
Postpaid sim cards:	-347	↓	-3.8	-3,253	↓	-27.2

MARKET SHARES (%)

MARCH 2022

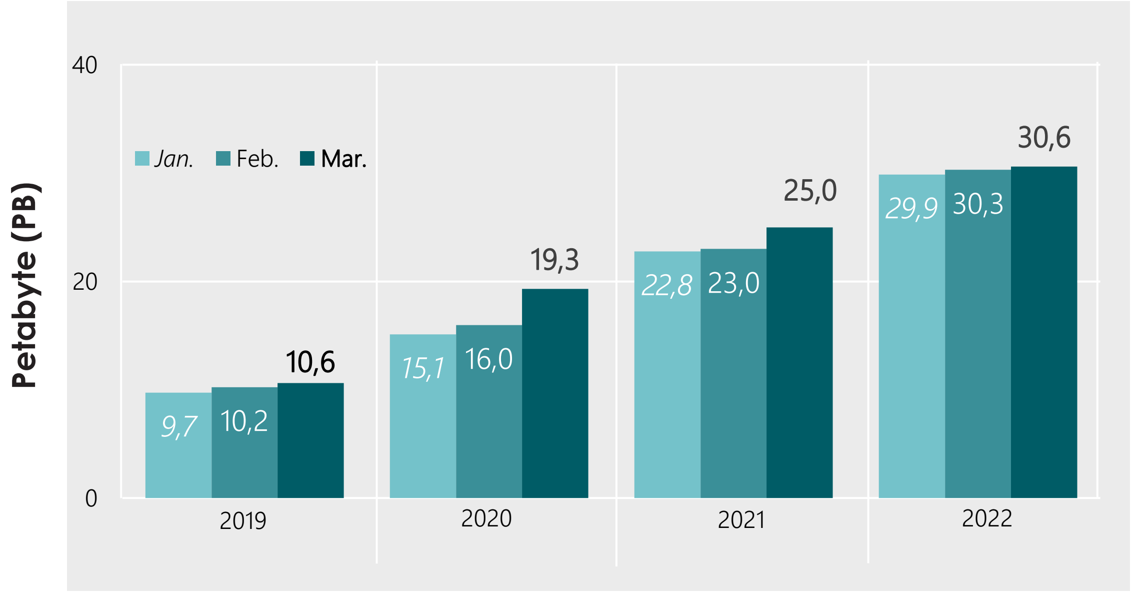




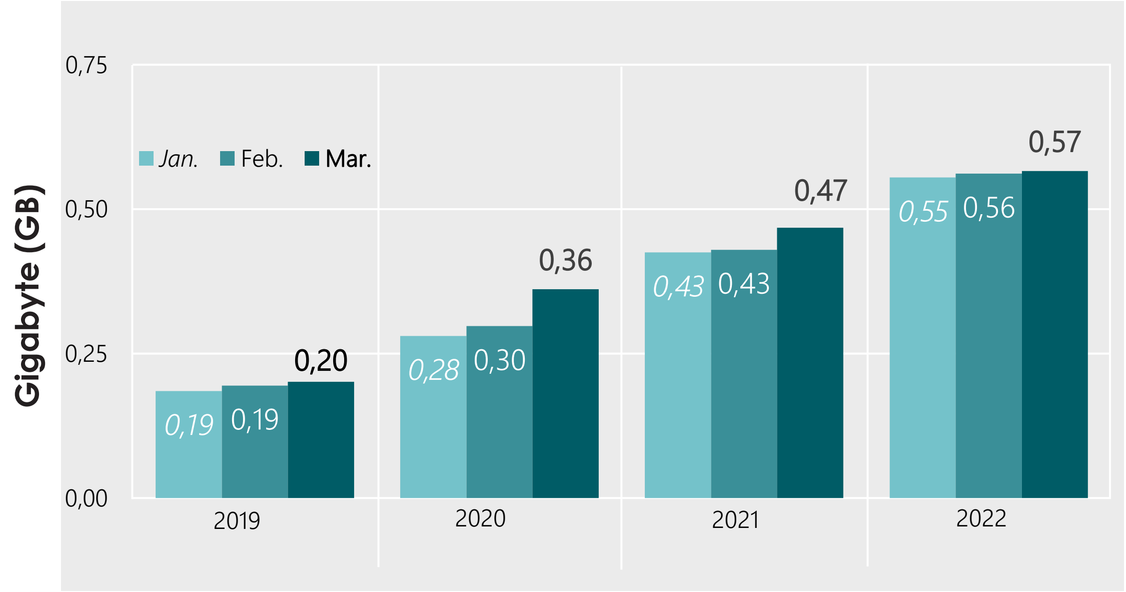
1.9 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload) (1/2)

AGCOM

TOTAL TRAFFIC



PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



1 Average monthly comparison from the beginning of the year

Petabyte (2019) 10.2 → (+65.0%) → (2020) 16.8 → (+40.3%) → (2021) 23.6 → (+28.2%) → (2022) 30.3

2019 → 2022: +196.9%

2 Monthly comparison (change in %)

	YoY 2019/2020	YoY 2020/2021	YoY 2021/2022	Whole period 2019/2022
January	+55.4	+50.6	+31.1	+206.9
February	+55.9	+44.0	+31.8	+195.9
March	+82.1	+29.3	+22.6	+188.6

1 Average monthly comparison from the beginning of the year

Giga byte (2019) 0.19 → (+61.8%) → (2020) 0.31 → (+40.8%) → (2021) 0.44 → (+27.1%) → (2022) 0.56

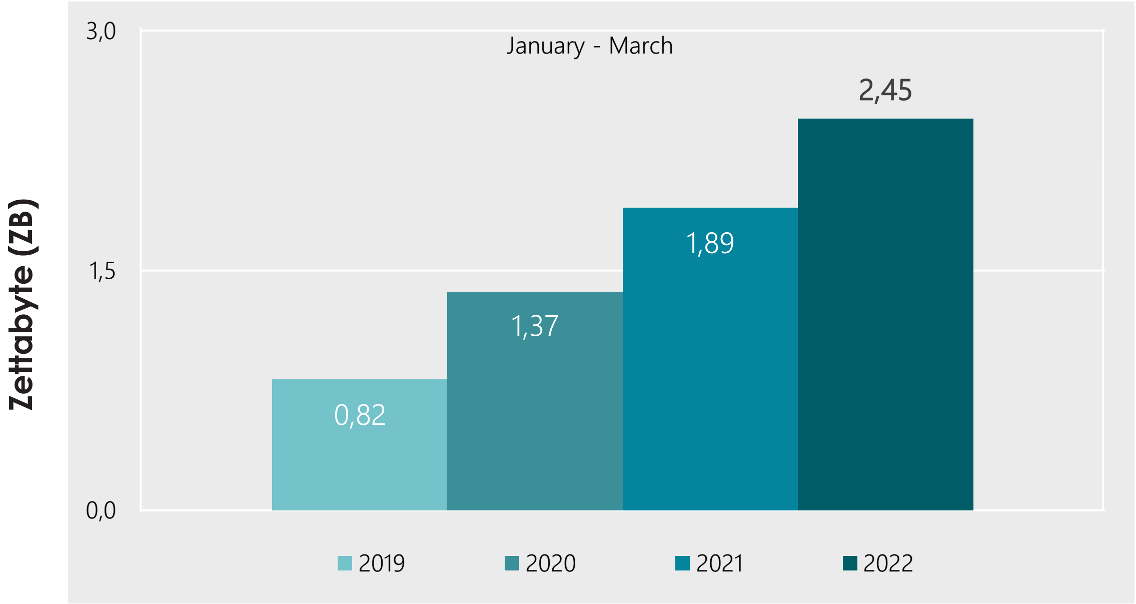
2019 → 2022: +189.6%

2 Monthly comparison (change in %)

	YoY 2019/2020	YoY 2020/2021	YoY 2021/2022	Whole period 2019/2022
January	+51.5	+51.5	+30.5	+199.7
February	+52.9	+44.5	+30.6	+188.6
March	+79.5	+29.5	+21.0	+181.3

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

DOWNLOAD

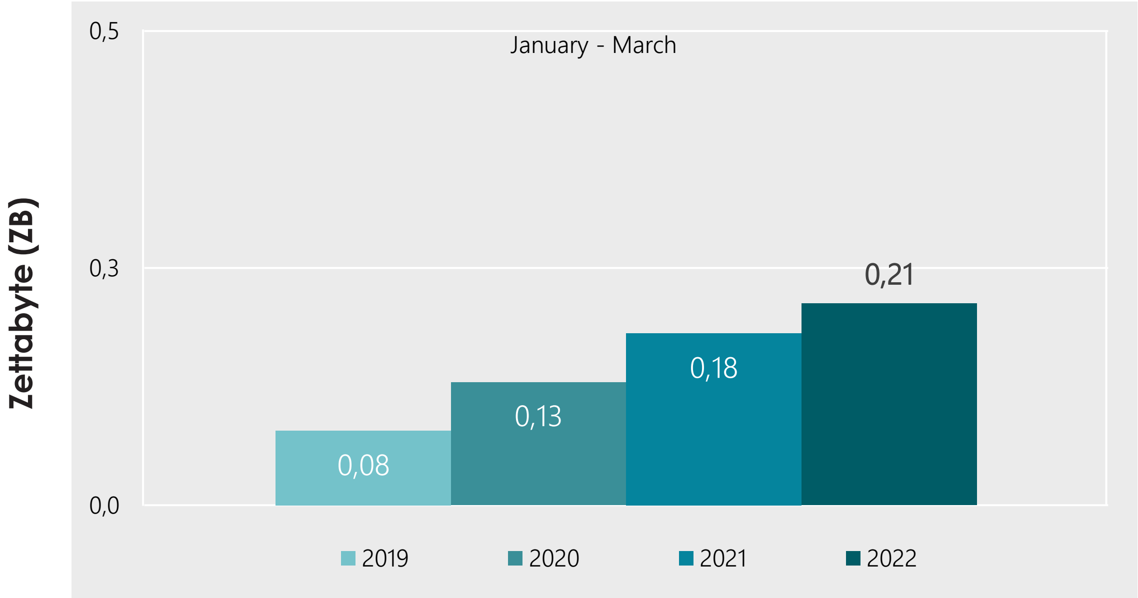


1 **Average monthly comparison from the beginning of the year**

	(2019)		(2020)		(2021)		(2022)
Zettabyte	0.82	**(+67.1%)**	1.37	**(+38.6%)**	1.89	**(+29.3%)**	2.45

(2019) → (2022): **+199.5%**

UPLOAD

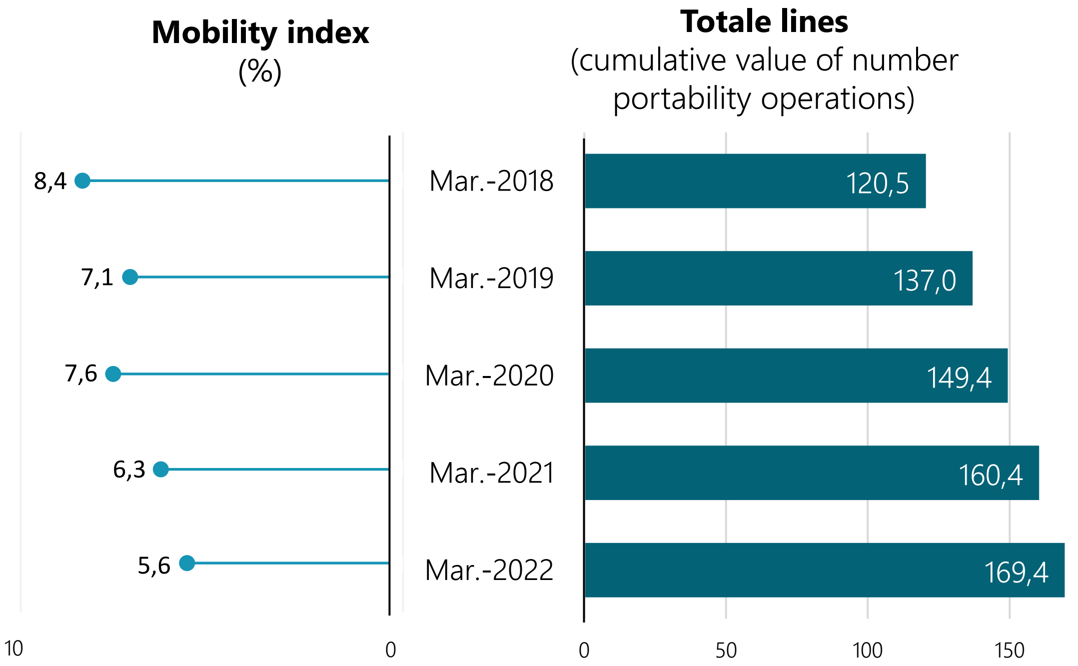


1 **Average monthly comparison from the beginning of the year**

	(2019)		(2020)		(2021)		(2022)
Zettabyte	0.08	**(+64.6%)**	0.13	**(+40.1%)**	0.18	**(+17.2%)**	0.21

(2019) → (2022): **+170.2%**

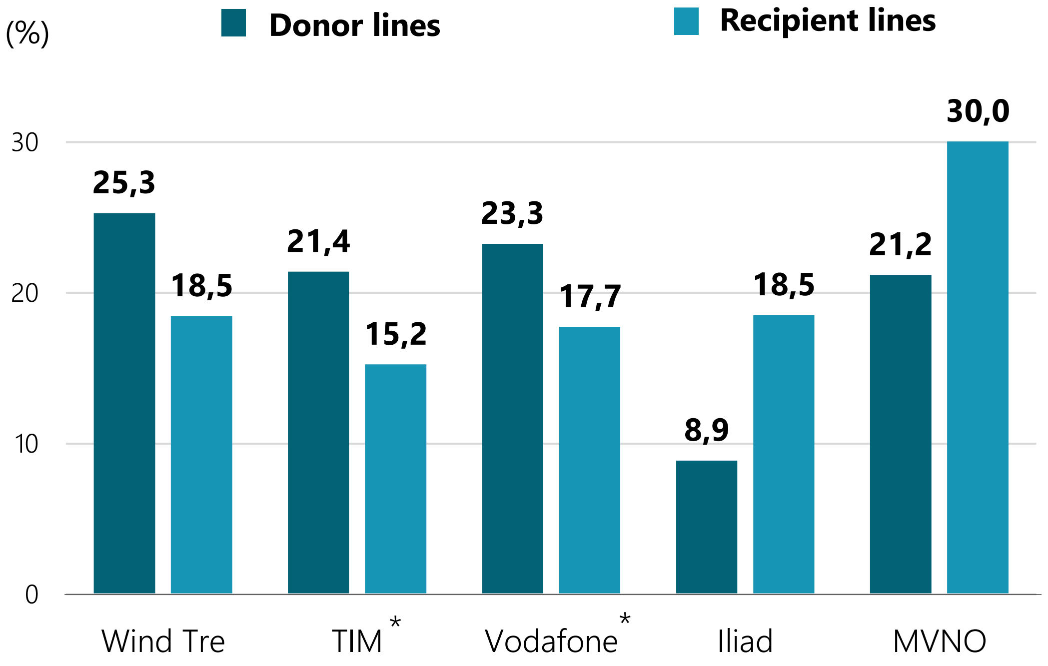
In one year (Mar. 2021 – Mar. 2022), there have been
9 million of Mobile Number Portability (MNP) operations



Mobility index: the ratio between (i) total donating lines plus total recipient lines since the beginning of the year, and (ii) the corresponding average costumer base (net off M2M sims)

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

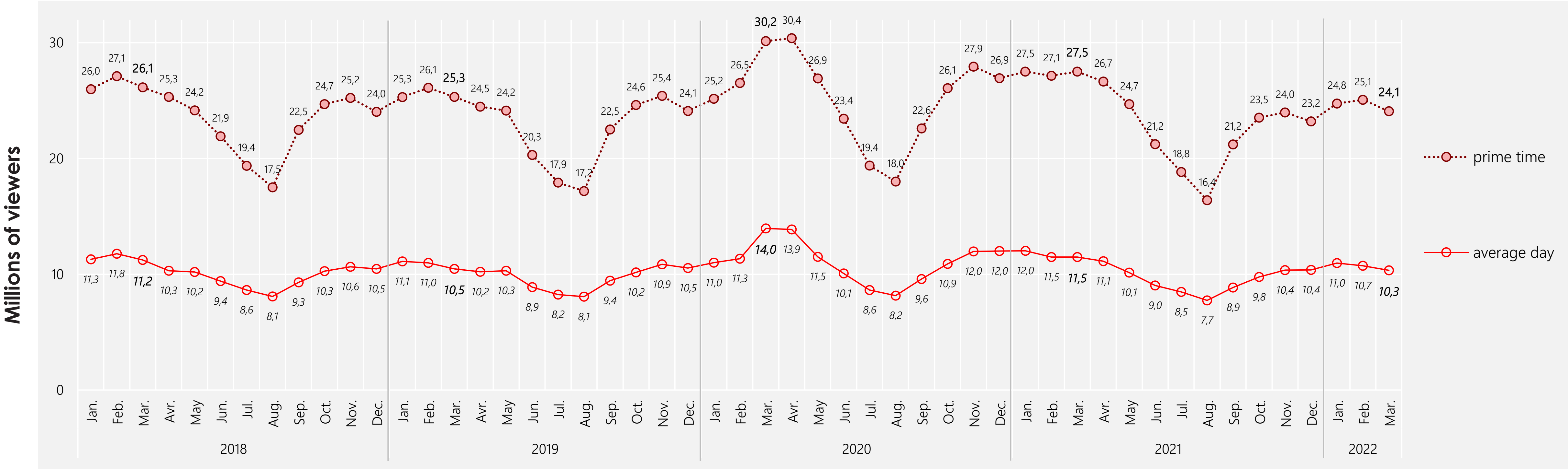
MARCH 2022



(*) 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

JANUARY 2018 – MARCH 2022



Change in the number of viewers (average value 1Q in millions)	(2018)	→	(2019)	→	(2020)	→	(2021)	→	(2022)
Prime time audience (Time slot: 20:30 – 22.30)	26.42	-3.2%	25.58	+6.6%	27.28	+0.4%	27.39	-10.1%	24.64
2018 → 2022									-6.7%
Average daily audience (Time slot: whole day)	11.43	-5.0%	10.86	+11.5%	12.10	-3.6%	11.67	-8.5%	10.68
2018 → 2022									-6.5%

Source: Agcom elaboration on data from Auditel

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

PRIME TIME AUDIENCE

Broadcasters	Average audience 1Q in millions					Change in %	
	2018	2019	2020	2021	2022	'18-'22	'21-'22
RAI	10.28	9.85	10.45	10.27	9.23	-10.2	-10.1
Mediaset	8.45	8.07	8.99	8.82	8.40	-0.5	-4.7
Comcast / Sky	1.88	2.01	1.87	1.81	1.41	-25.3	-22.5
Discovery	1.38	1.39	1.55	1.55	1.39	+0.9	-10.1
Cairo Comm. / La 7	1.34	1.36	1.38	1.47	1.23	-8.2	-16.9
Others	3.09	2.91	3.04	3.47	2.98	-3.5	-14.0

Broadcasters	Share medio 1° trimestre in %					Var. punti percentuali	
	2018	2019	2020	2021	2022	'18-'22	'21-'22
RAI	38.9	38.5	38.3	37.5	37.5	-1.5	0,0
Mediaset	32.0	31.5	32.9	32.2	34.1	+2.1	+1,9
Comcast / Sky	7.1	7.8	6.9	6.6	5.7	-1.4	-0.9
Discovery	5.2	5.4	5.7	5.7	5.7	+0.4	0.0
Cairo Comm. / La 7	5.1	5.3	5.1	5.4	5.0	-0.1	-0.4
Others	11.7	11.4	11.1	12.7	12.1	+0.4	-0.6

AVERAGE DAILY AUDIENCE

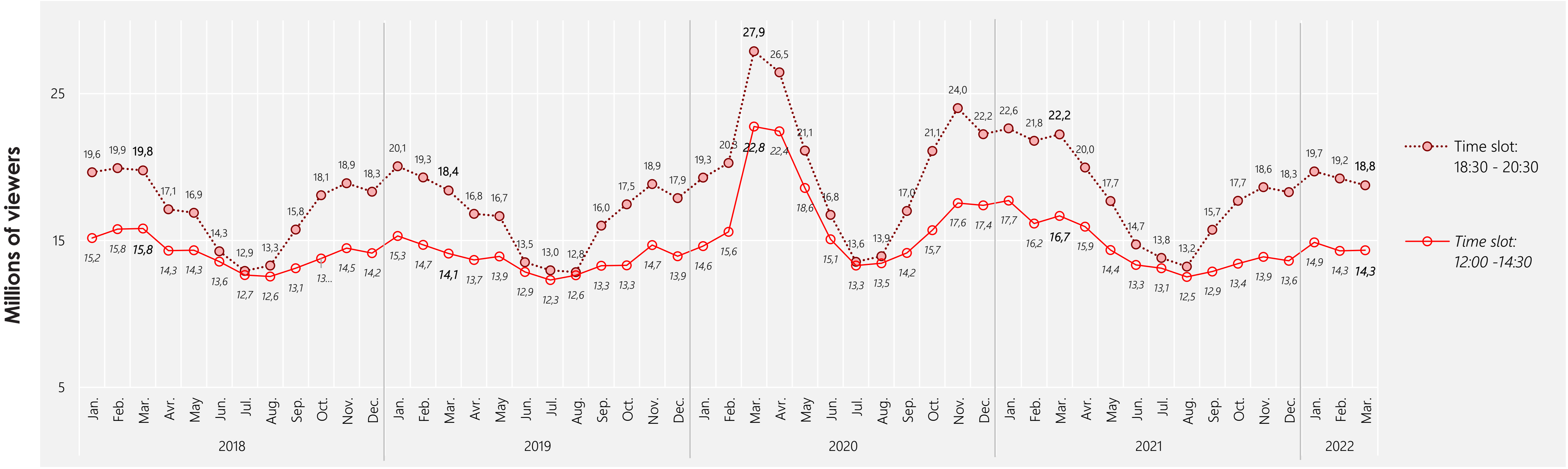
Broadcasters	Average audience 1Q in millions					Change in %	
	2018	2019	2020	2021	2022	'18-'22	'21-'22
RAI	4.27	4.05	4.49	4.23	3.83	-10.3	-9.5
Mediaset	3.62	3.41	3.87	3.75	3.60	-0.5	-4.0
Discovery	0.72	0.71	0.87	0.82	0.73	+1.4	-11.0
Comcast / Sky	0.75	0.75	0.80	0.70	0.63	-15.2	-9.5
Cairo Comm. / La 7	0.46	0.45	0.49	0.49	0.42	-7.7	-13.3
Others	1.60	1.48	1.58	1.67	1.45	-9.4	-12.9

Broadcasters	Share medio 1° trimestre in %					Var. punti percentuali	
	2018	2019	2020	2021	2022	'18-'22	'21-'22
RAI	37.4	37.3	37.1	36.3	35.9	-1.5	-0.4
Mediaset	31.7	31.4	32.0	32.2	33.7	+2.1	+1.6
Discovery	6.3	6.6	7.2	7.0	6.9	+0.5	-0.2
Comcast / Sky	6.5	6.9	6.6	6.0	5.9	-0.6	-0.1
Cairo Comm. / La 7	4.0	4.2	4.0	4.2	4.0	+0.0	-0.2
Others	14.0	13.6	13.1	14.3	13.6	-0.4	-0.7

Source: Agcom elaboration on data from Auditel

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

JANUARY 2017 – MARCH 2022



Change in the number of viewers
(average value 1Q in millions)

	(2018)		(2019)		(2020)		(2021)		(2022)	
Time slot: 18:30 – 20.30	19.79	-2.7%	19.26	+16.8%	22.49	-1.2%	22.22	-13.4%	19.24	-2.8%
Time slot: 12:00 – 14:30	15.59	-5.7%	14.71	+20.1%	17.66	-4.6%	16.86	-13.9%	14.51	-6.9%

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

Source: Agcom elaboration on data from Auditel

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

TIME SLOT: 12:00 – 14:30

		Average viewers 1Q (in millions)					Change (in thousand)		Change (in %)	
	National news programs	**2018**	**2019**	**2020**	**2021**	**2022**	**'21 – '22**	**'18 – '22**	**'21 – '22**	**'18 – '22**
RAI	Tg 1 (13:30 edition)	3.96	3.61	4.27	4.31	3.89	-422	-72	-9.8	-1.8
RAI	Tg 2 (13:00 edition)	2.34	2.23	2.53	2.23	1.93	-298	-409	-13.4	-17.5
RAI	Tg 3 (12:00 edition)	0.95	0.95	1.24	1.14	0.91	-228	-46	-20.1	-4.8
RAI	Tg 3 Regionale (14:00 edition)	2.67	2.52	3.08	3.17	2.50	-664	-167	-21.0	-6.3
Mediaset	Tg 5 (13:00 edition)	3.12	2.98	3.52	3.33	3.05	-278	-67	-8.3	-2.2
Mediaset	Tg 4 (12:00 edition)	0.36	0.38	0.44	0.35	0.31	-36	-44	-10.3	-12.3
Mediaset	Studio Aperto (12:25 edition)	1.49	1.39	1.81	1.62	1.24	-378	-253	-23.3	-17.0
La 7	Tg La 7 (13:30 edition)	0.70	0.65	0.77	0.72	0.61	-113	-92	-15.7	-13.1

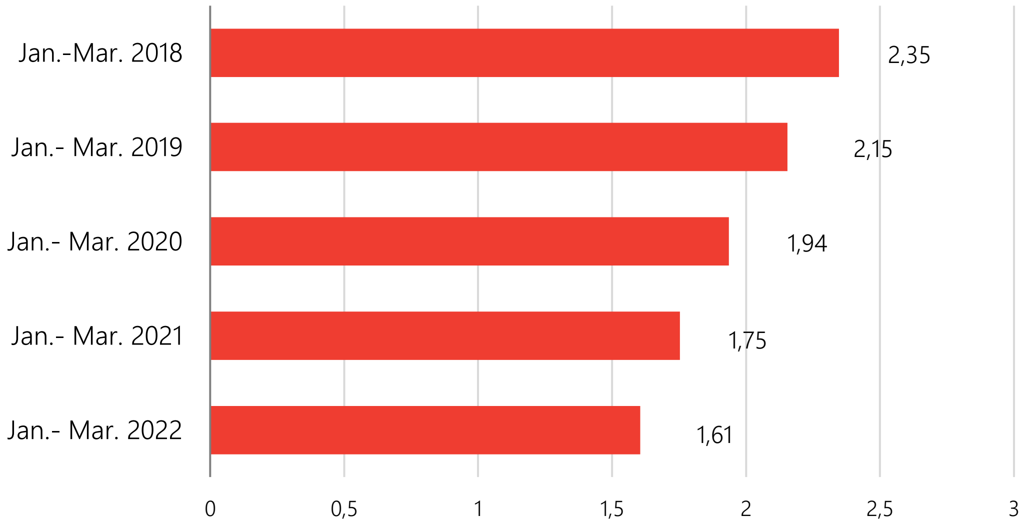
TIME SLOT: 18:30 – 20:30

		Average viewers 1Q (in millions)					Change (in thousand)		Change (in %)	
	National news programs	**2018**	**2019**	**2020**	**2021**	**2022**	**'21 – '22**	**'18 – '22**	**'21 – '22**	**'18 – '22**
RAI	Tg 1 (20:00 edition)	5.68	5.56	6.34	6.23	5.65	-581	-39	-9.3	-0.7
RAI	Tg 2 (20:30 edition)	1.83	1.70	1.94	1.79	1.41	-383	-419	-21.4	-22.9
RAI	Tg 3 (19:00 edition)	2.06	2.12	2.54	2.66	2.23	-434	+161	-16.3	+7.8
RAI	Tg 3 Regionale (19:30 edition)	2.60	2.65	3.29	3.44	2.78	-665	+180	-19.3	+6.9
Mediaset	Tg 5 (20:00 edition)	4.70	4.43	5.13	4.97	4.51	-452	-186	-9.1	-4.0
Mediaset	Tg 4 (19:00 edition)	0.80	0.67	0.81	0.74	0.75	+15	-45	+2.1	-5.7
Mediaset	Studio Aperto (18:30 edition)	0.85	0.83	1.05	0.95	0.69	-253	-155	-26.7	-18.3
La 7	Tg La 7 (20:00 edition)	1.26	1.30	1.38	1.44	1.22	-227	-46	-15.7	-3.7

Source: Agcom elaboration on data from Auditel

AGCOM

CUMULATIVE SALES
(copies sold in millions)

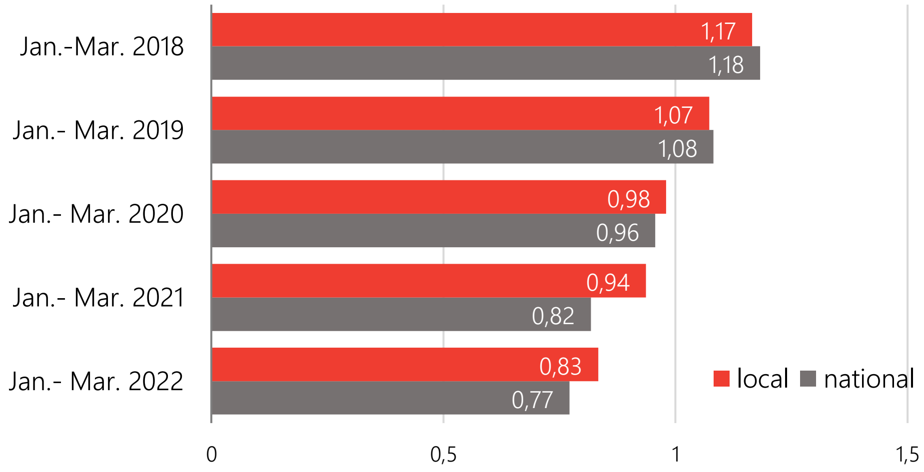


Change in %

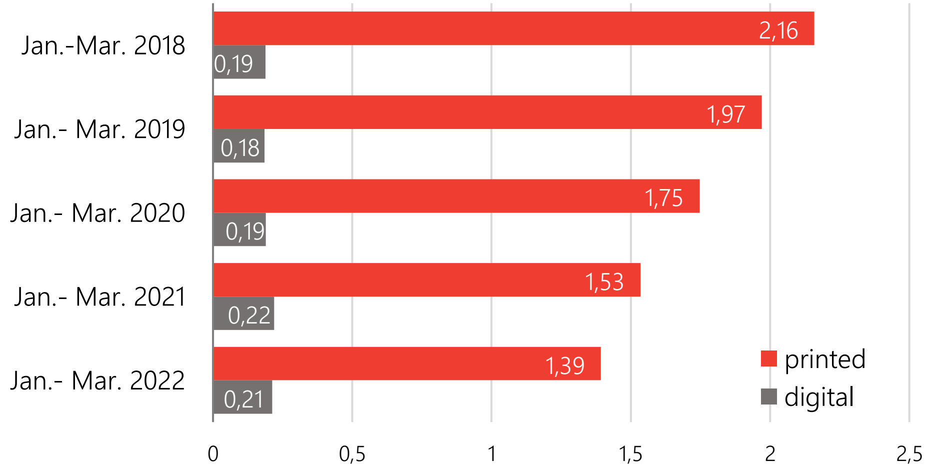
	(1Q 2021 – 1Q 2022)	(1Q 2018 – 1Q 2022)
Total copies:	**-6.9** ↓	**-31.6** ↓
Paper copies:	**-9.3** ↓	**-35.5** ↓
Digital copies:	**-2.7** ↓	**+12.7** ↑
National newspapers copies:	**-5.6** ↓	**-34.7** ↓
Local newspapers copies:	**-11.0** ↓	**-28.4** ↓

CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



PAPER vs. DIGITAL COPIES



Source: Agcom elaboration on data from ADS

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

PAPER COPIES BY NEWSPAPER MACRO-CATEGORY

(copies sold in thousands)

	(1Q)	2018	2019	2020	2021	2022
National newspapers	General press - Top 5	683	629	568	493	448
	Other general press	150	136	127	129	113
	Business	103	90	78	63	56
	Sport	263	237	189	136	145
Local newspapers	Top 10	435	407	368	347	310
	Other	524	470	417	367	320

Change in %	(1Q)	('21 – '22)	('18 – '22)
National newspapers	General press Top 5	-9.2 ↓	-34.5 ↓
	Other general press	-12.0 ↓	-24.3 ↓
	Business	-11.5 ↓	-45.8 ↓
	Sports	+7.1 ↑	-44.8 ↓
Local newspapers	Top 10	-10.6 ↓	-28.6 ↓
	Other	-12.8 ↓	-39.0 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in thousands)

	(1Q)	2018	2019	2020	2021	2022
National newspapers	General press - Top 5	75	75	78	89	89
	Other general press	14	17	21	32	31
	Business	49	42	36	30	28
	Sport	9	8	7	7	6
Local newspapers	Top 10	16	17	19	26	25
	Other	26	25	28	35	34

Variazione in %	(1Q)	('21 – '22)	('18 – '22)
Testate nazionali	General press Top 5	-1.1 ↓	+18.4 ↑
	Other general press	-1.6 ↓	+119.9 ↑
	Business	-3.9 ↓	-42.0 ↓
	Sports	-10.6 ↓	-32.4 ↓
Testate locali	Top 10	-5.1 ↓	+50.7 ↑
	Other	-3.8 ↓	+32.0 ↑

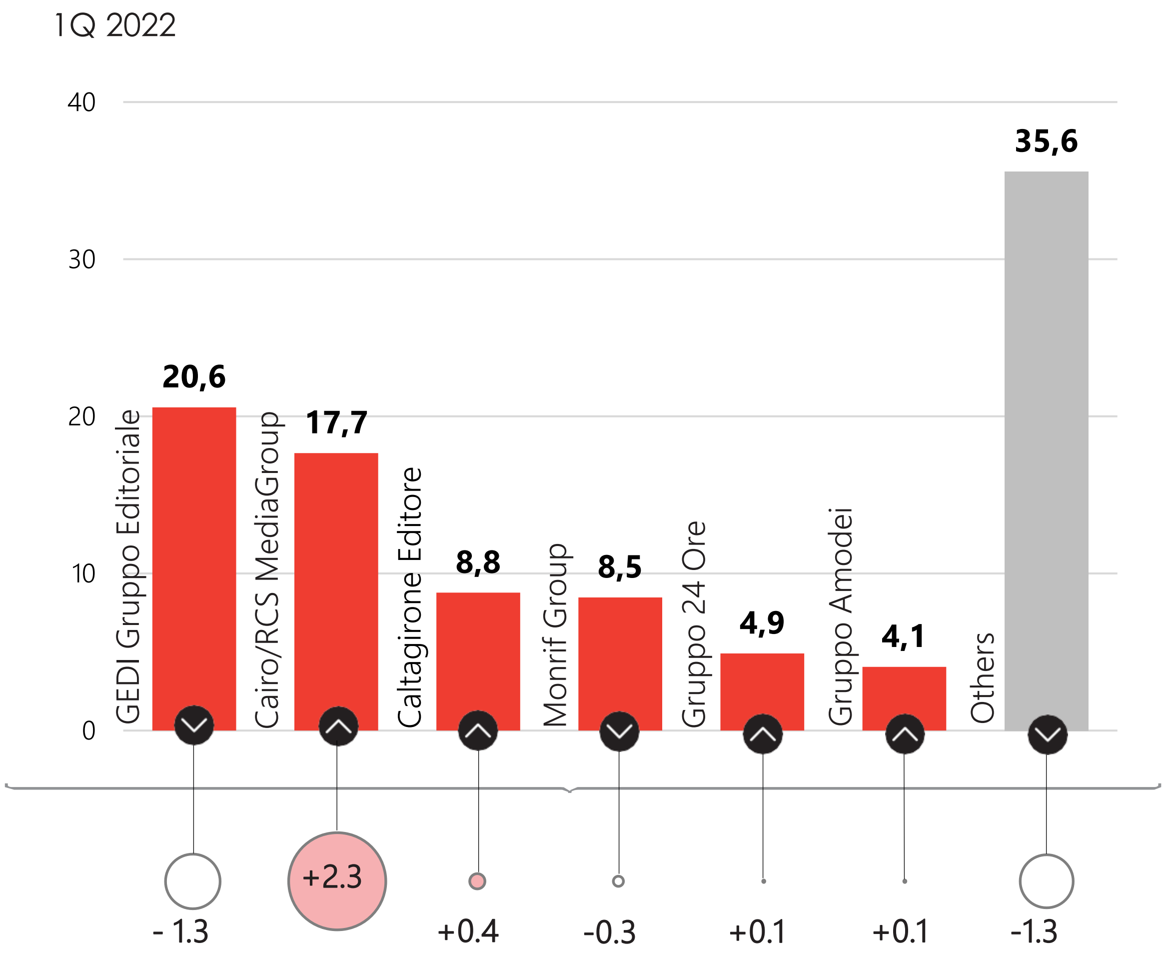
Newspapers categories

- 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

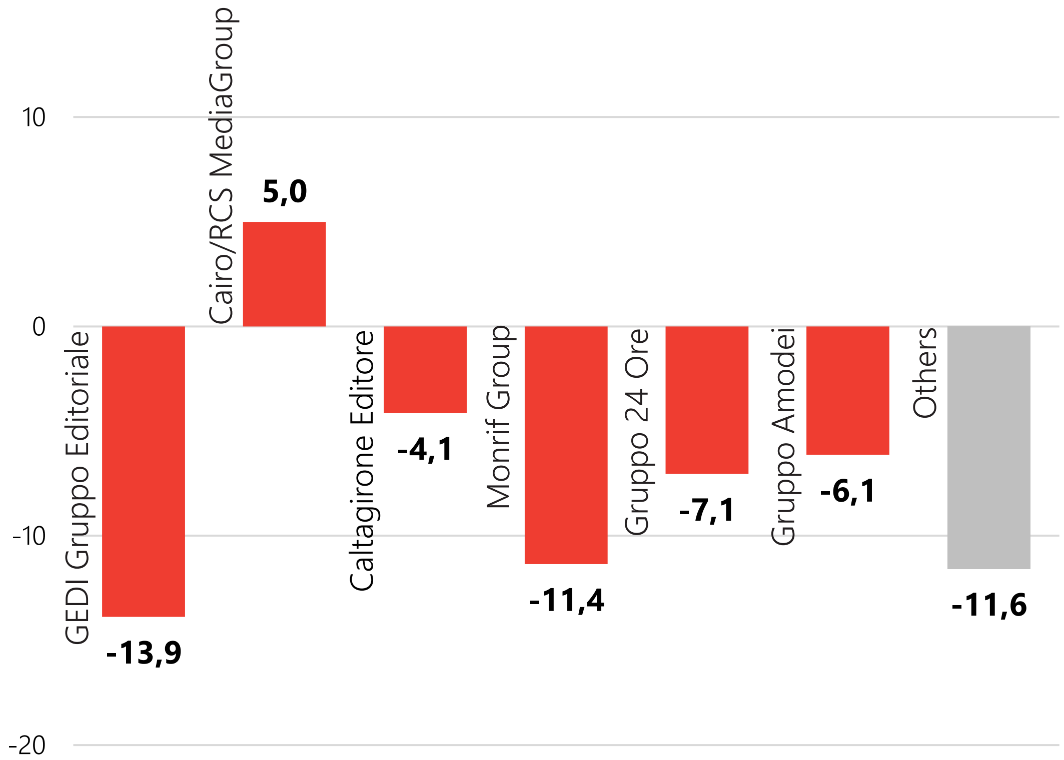
AGCOM

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



Difference vs. 1Q. 2021
(punti percentuali)

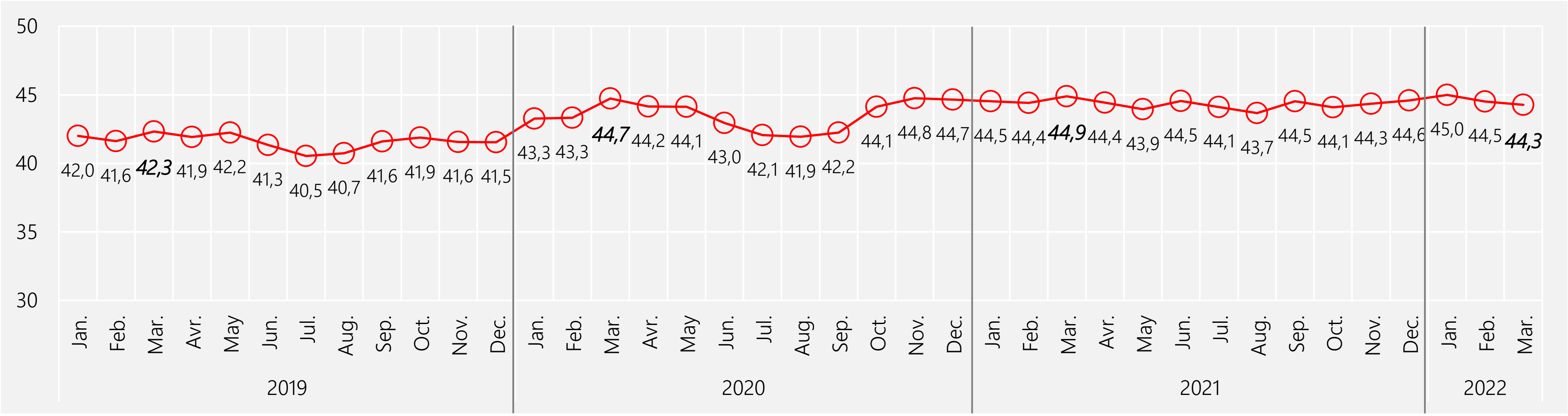
CHANGE IN TOTAL COPIES SOLD (%)



Source: Agcom elaboration on data from ADS

2.8 PLATFORMS: WEBSITES/APP UNIQUE USERS

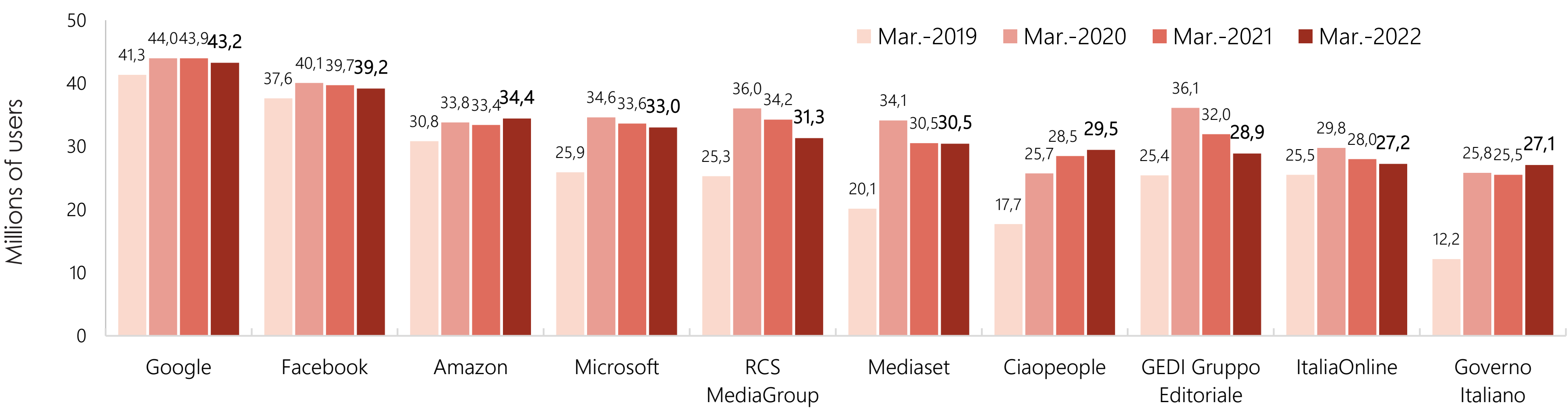
UNIQUE USERS IN MILLIONS (January 2019 – March 2022)



44.3 million unique users logged on to the internet in December 2021 (**-621** thousand compared to March 2021)

Approximately **67** total hours spent, on average, by each user surfing the Internet in March 2022

UNIQUE USERS OF THE MAIN OPERATORS (Parent*)



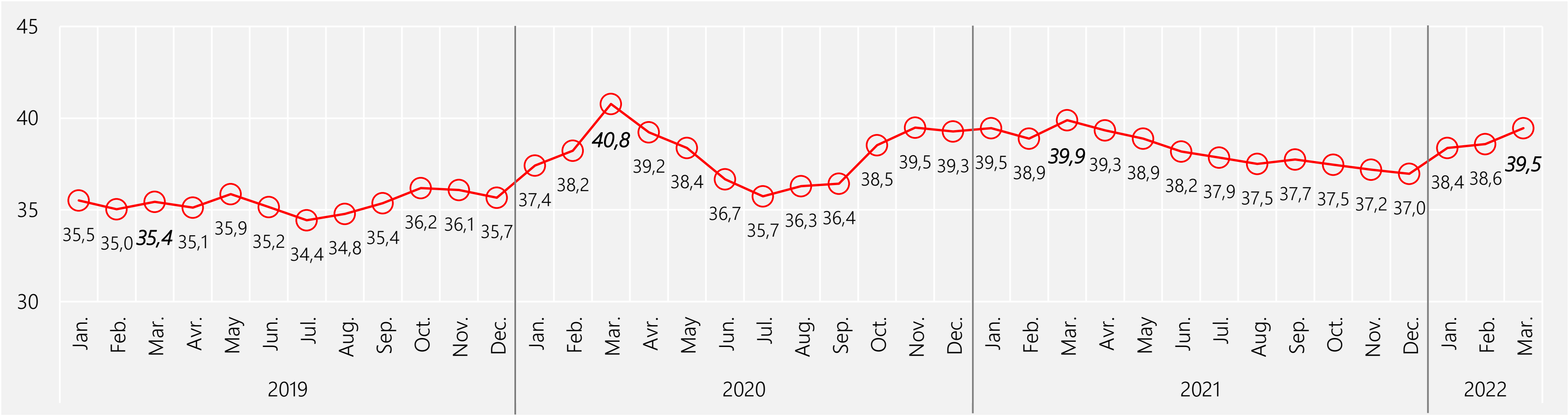
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

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

Source: Agcom elaboration on data from Audiweb

2.9 PLATFORMS: GENERAL PRESS WEBSITE/APP UNIQUE USERS

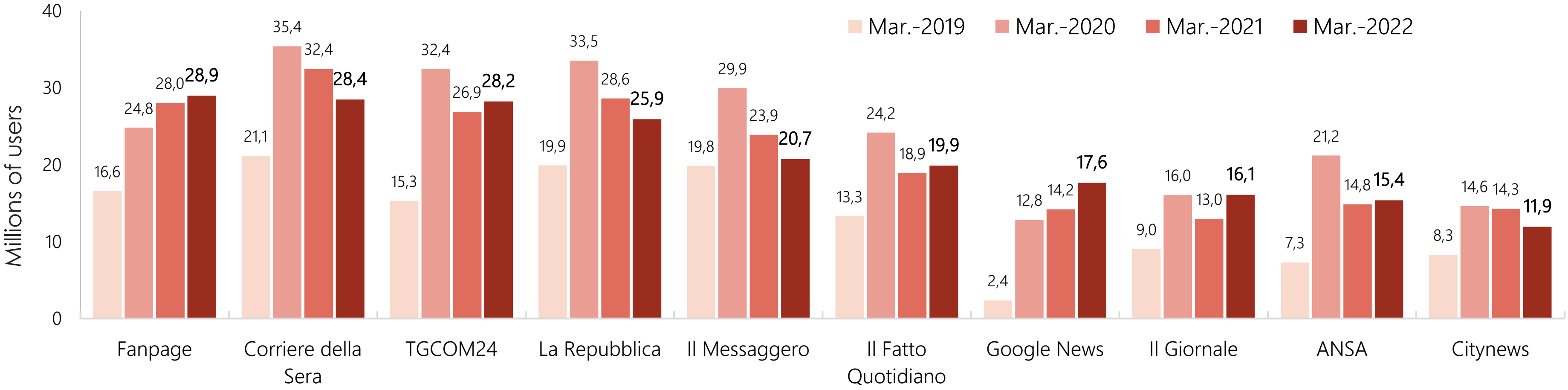
UNIQUE USERS IN MILLIONS (January 2019 – March 2022)



39.5 million unique users logged on to the generalist news sites/APPs in December 2021 (**-434** thousand users compared to March 2021)

About **1 hour and 28 minute** spent, on average, by each user browsing general news websites/APPs in March 2022

UNIQUE USERS OF THE MAIN WEBSITES

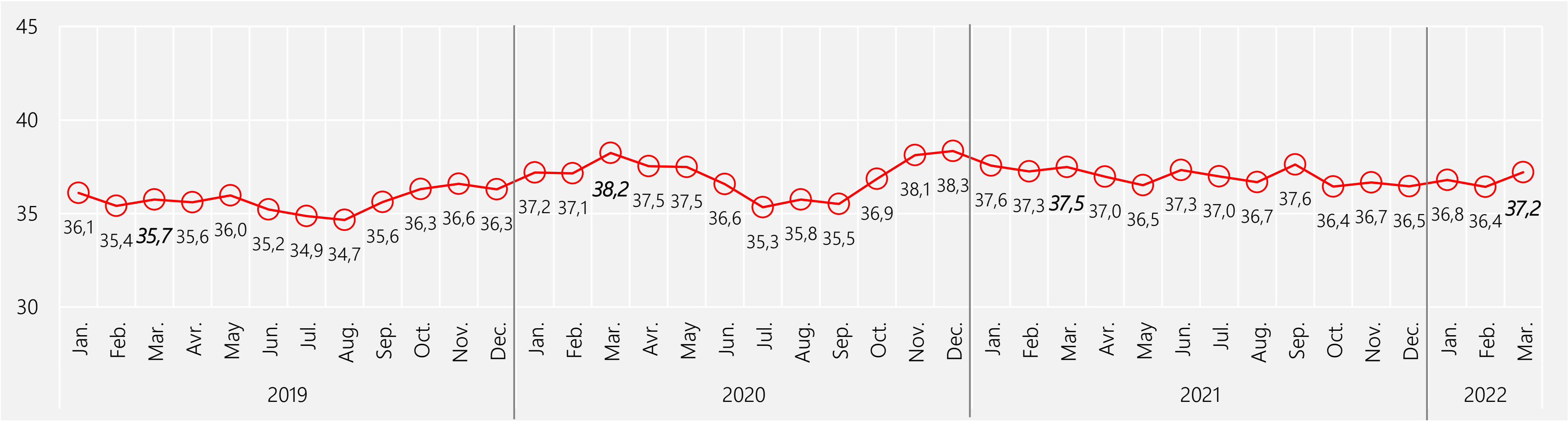


Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

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

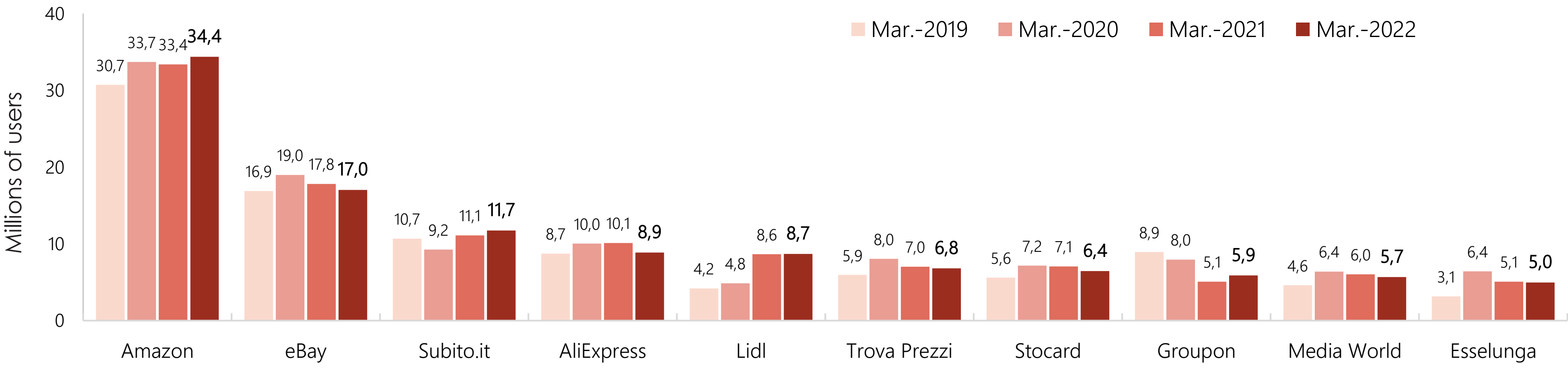
UNIQUE USERS IN MILLIONS (January 2019 – March 2022)



37.2 million unique users logged on to e-commerce sites/APPs in March 2022 (**-276** thousand users compared to March 2021)

2 hour and 29 minute spent, on average, by each user browsing e-commerce websites/APPs in March 2022

UNIQUE USERS OF THE MAIN WEBSITES

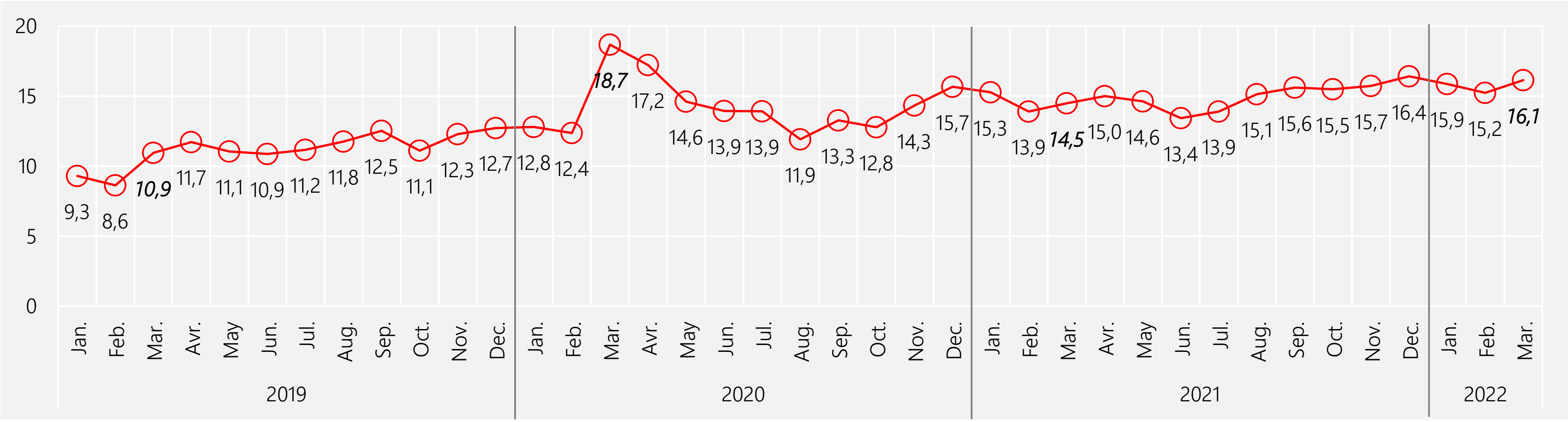


Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

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

2.11 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

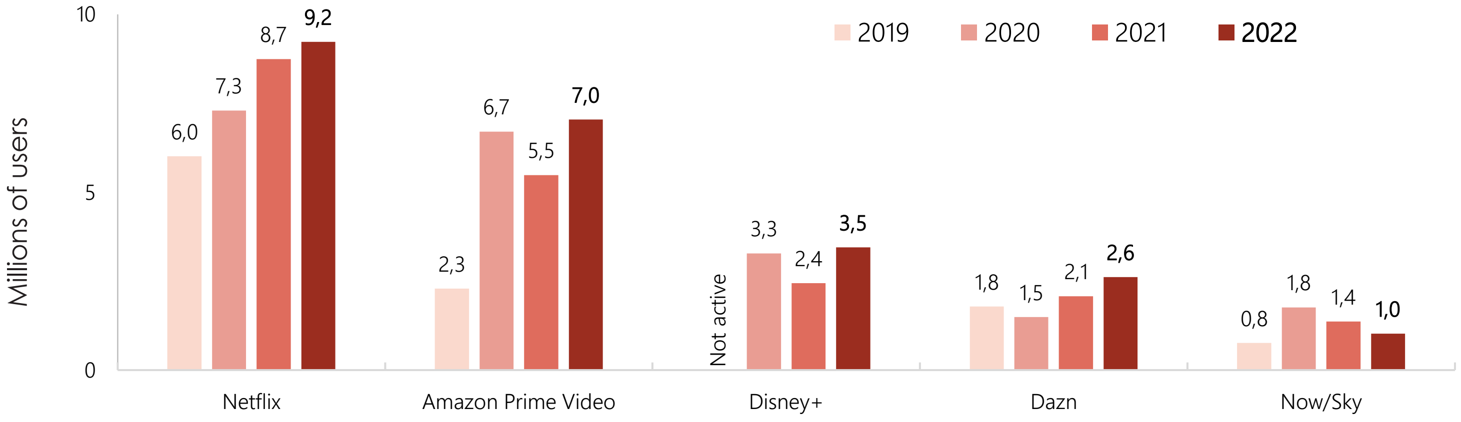
UNIQUE USERS IN MILLIONS (January 2019 – March 2022)



16.1 million unique users logged on to video-on-demand sites/APPs in March 2022 (**+1.7** million compared to March 2021)

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* (1Q average)



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

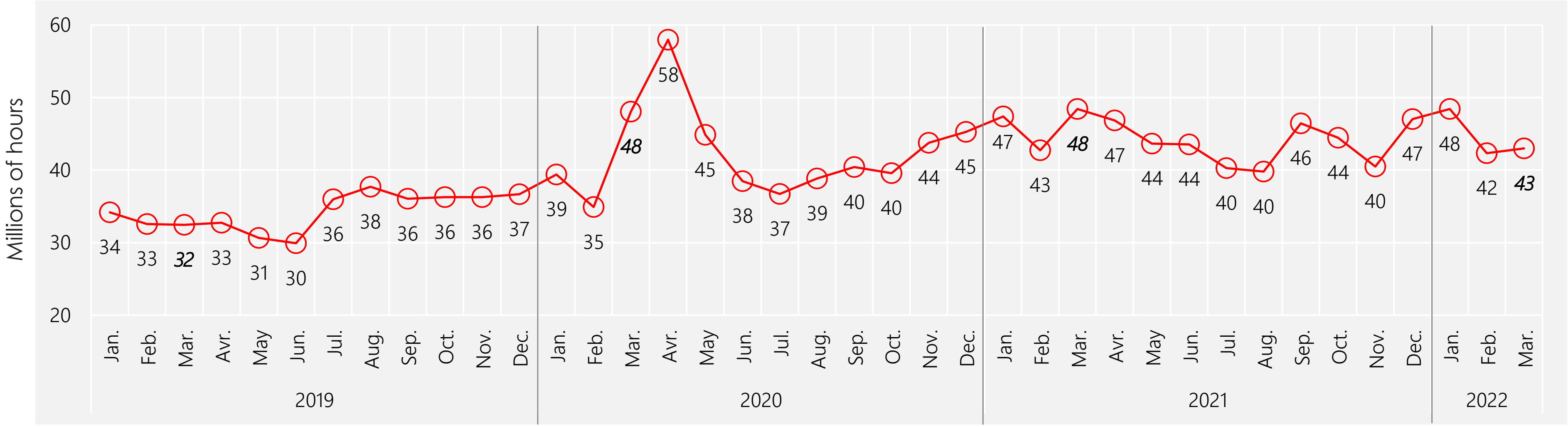
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

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

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

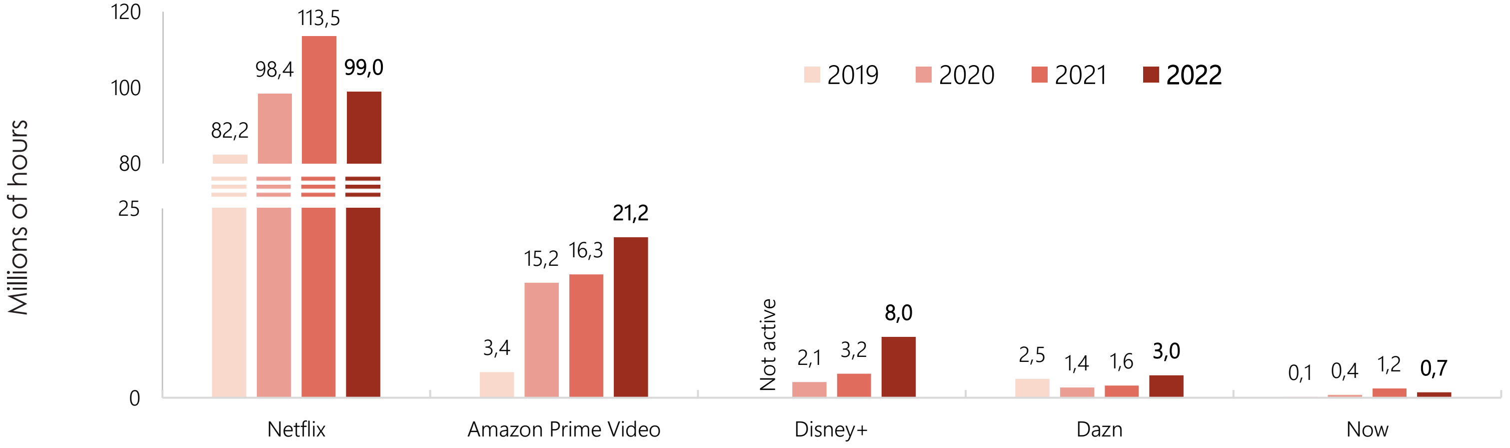
AGCOM

TOTAL HOURS SPENT (in millions of hours) (January 2019 – March 2022)



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 58 minute** in March 2022

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



Source: Agcom elaboration on data from Comscore

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

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

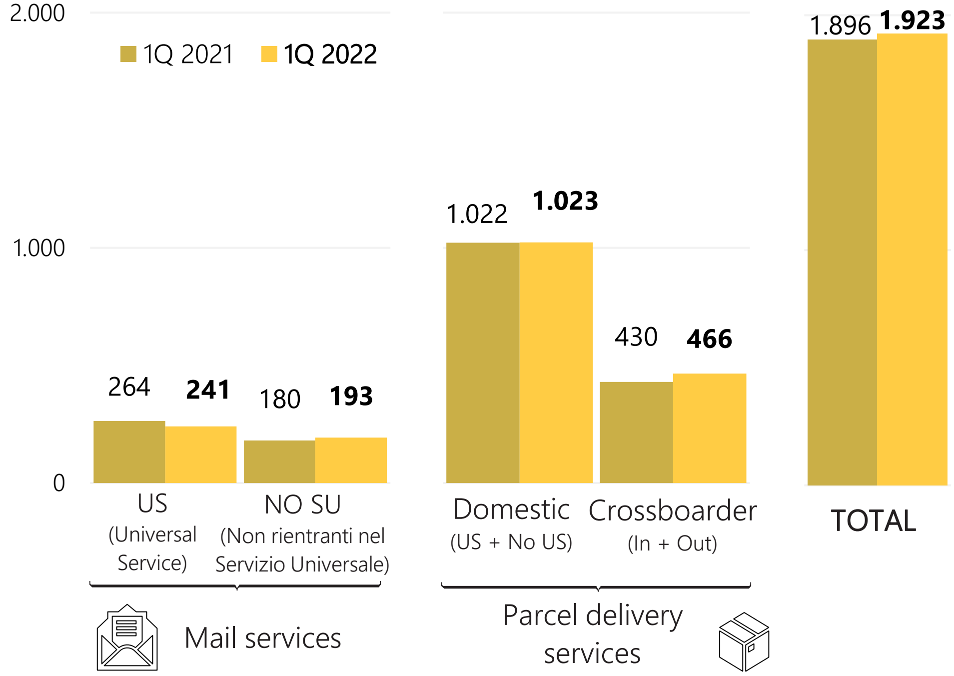
* Note: platforms with more than 1 million unique uisers and with an average time spent more than 2 minute are represented

Source: Agcom elaboration on data from Comscore

3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €

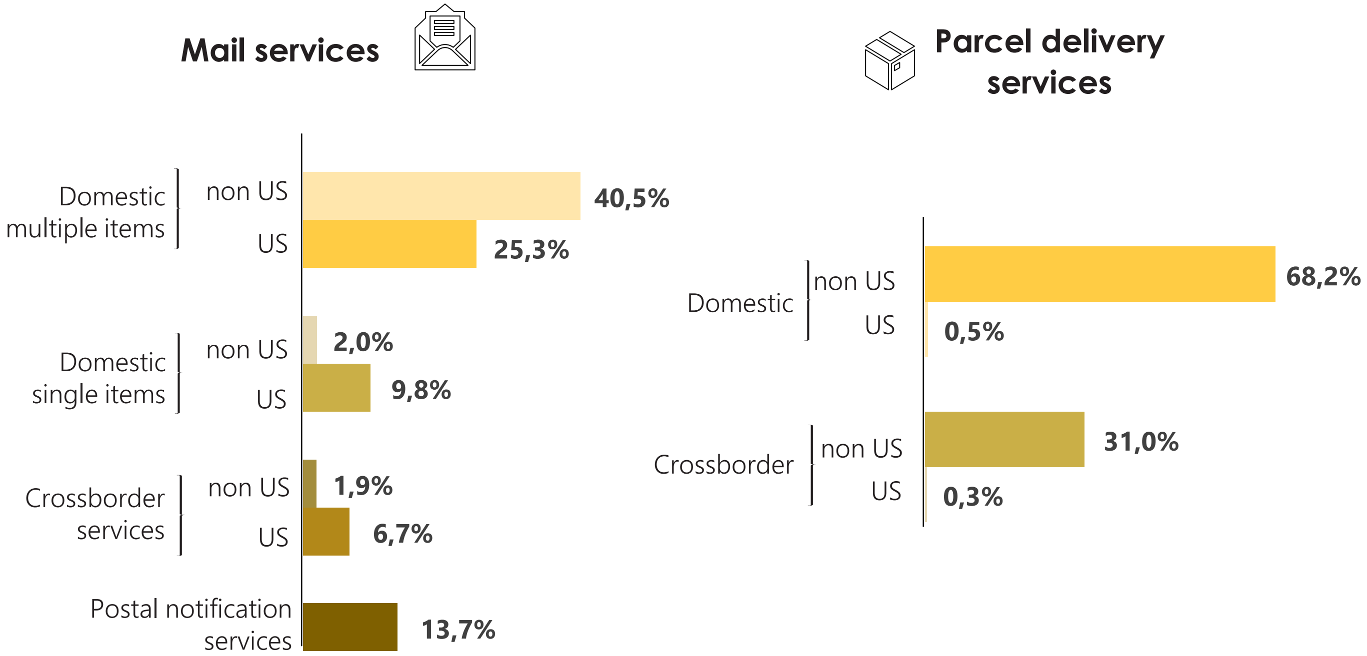


Annual change in % (1Q 2021) – (1Q 2022)

Mail services	Parcel delivery services	Total
-2.4	+2.6	+1.4

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

1 Q 2022



Annual change in % (1Q. 2021 – 1Q. 2022)

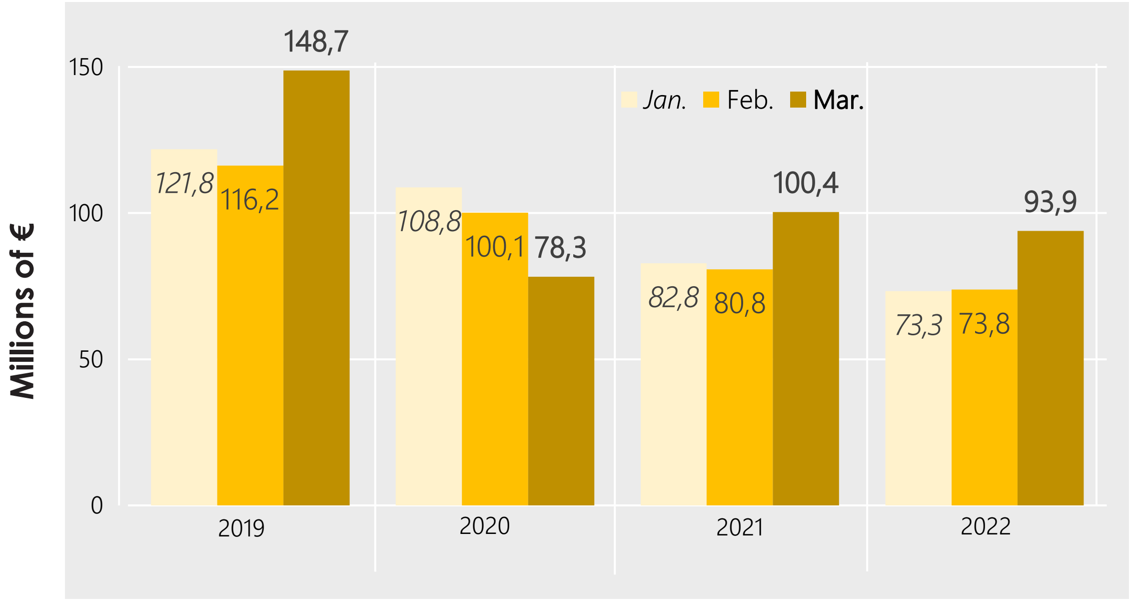
Domestic multiple items	Domestic single items	Crossborder services	Postal notification services	Domestic	Crossborder
+1.6	-16.8	-22.9	+6,4	+0.1	+8.4

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., 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 (US/NO US)

UNIVERSAL SERVICE (US)



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

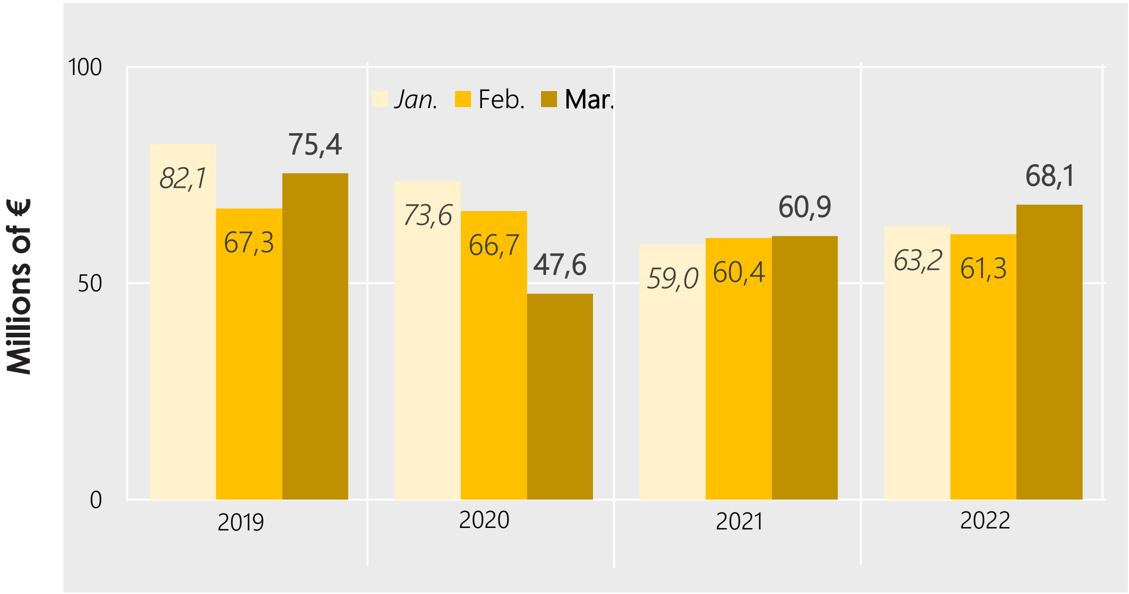
millions of € (2019) 387 → -25.8% → (2020) 287 → -8.1% → (2021) 264 → -8.7% → (2022) 241

2019 → 2022: -37.7%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	-10.7	-23.9	-11.5	-39.8
February	-13.8	-19.3	-8.6	-36.5
March	-47.4	+28.3	-6.5	-36.9

OTHER SERVICES (NON US)



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

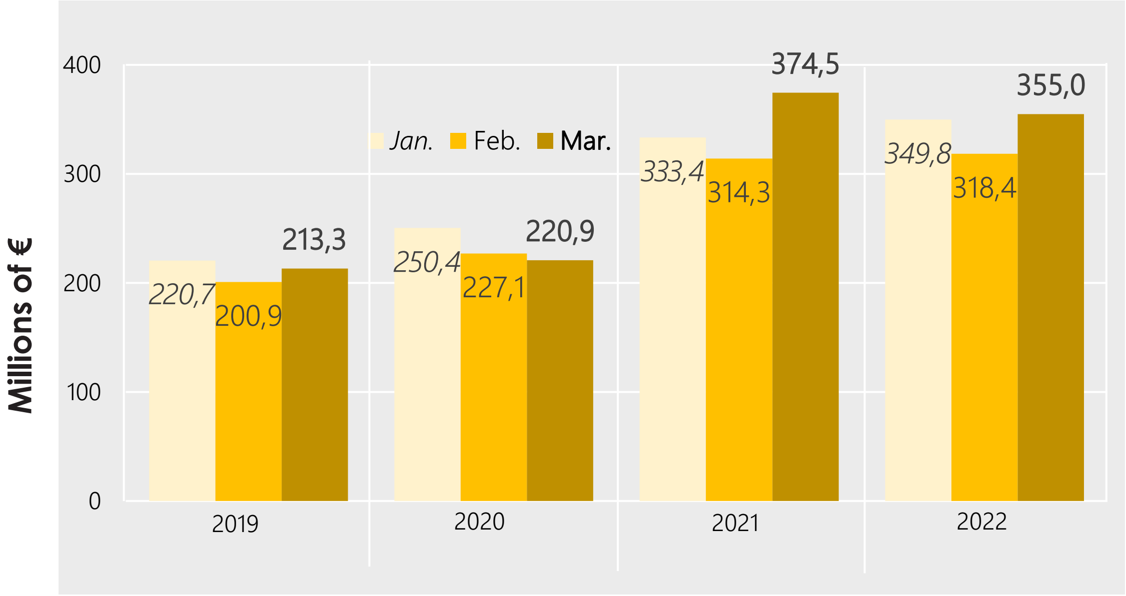
millions of € (2019) 225 → -16.4% → (2020) 189 → -4.0% → (2021) 180 → +6.8% → (2022) 193

2019 → 2022: -14.3%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	-10.4	-19.9	+7.1	-23.1
February	-1.0	-9.3	+1.5	-8.9
March	-36.9	+28.1	+11.8	-9.6

DOMESTIC



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

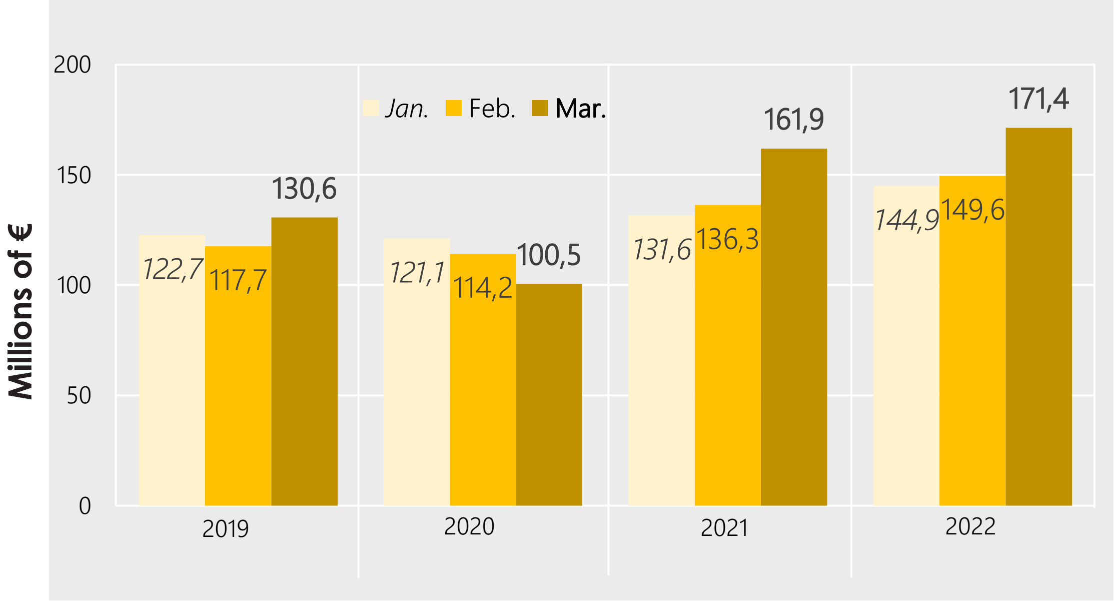
millions of € (2019) 635 → +10.0% → (2020) 698 → +46.4% → (2021) 1.022 → +0.1% → (2022) 1.023

2019 → 2022: +61.2%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	+13.4	+33.2	+4.9	+58.5
February	+13.0	+38.2	+1.3	+58.5
March	+3.6	+69.6	-5.2	+66.5

CROSSBORDER



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

millions of € (2019) 371 → -9.5% → (2020) 336 → +28.0% → (2021) 430 → +8.4% → (2022) 466

2019 → 2022: +25.6%

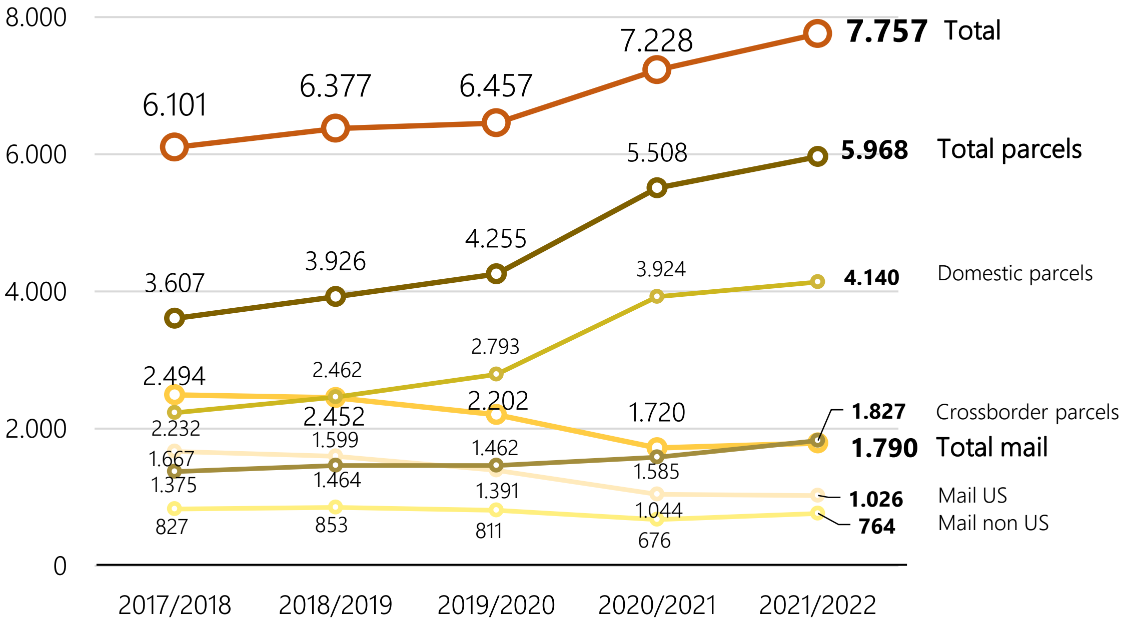
2 **Monthly comparison (change in %)**

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	-1.3	+8.7	+10.1	+18.1
February	-3.0	+19.3	+9.8	+27.1
March	-23.0	+61.1	+5.8	+31.2

3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

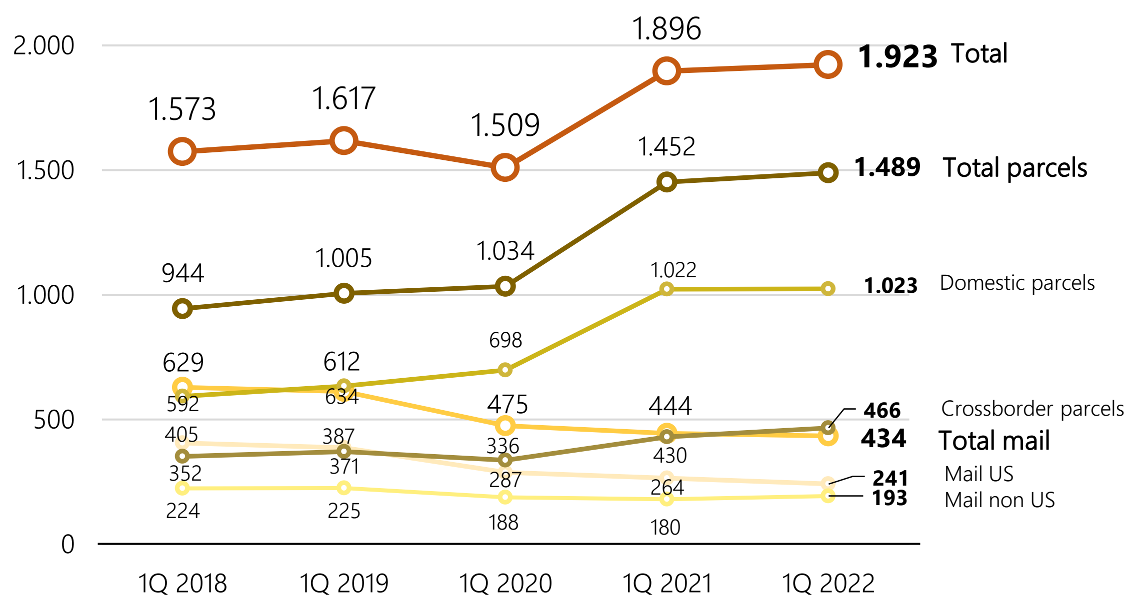
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



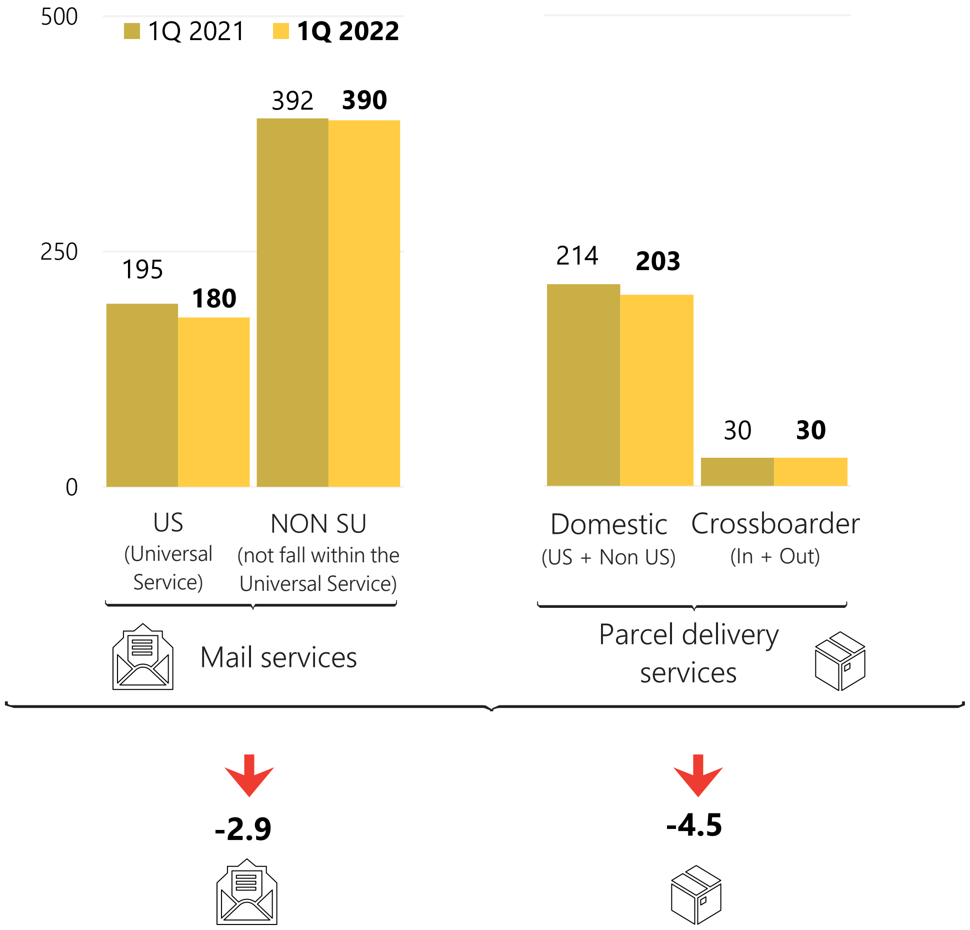
	Change in % (2017/2018 – 2021/2022)		Change in % (2020/2021 – 2021/2022)	
Total:	**+27.2**	↑	**+7.3**	↑
Mail services:	**-28.2**	↓	**+4.1**	↑
- Universal Service:	-38.4	↓	-1.7	↓
- No Universal Service:	-7.7	↓	+12.9	↑
Parcel delivery services:	**+65.4**	↑	**+8.3**	↑
- Domestic:	+85.5	↑	+5.5	↑
- Crossborder:	+32.9	↑	+15.3	↑

	Change in % (1Q 2018 – 1Q 2022)		Change in % (1Q 2021 – 1Q 2022)	
Total:	**+22.2**	↑	**+1.4**	↑
Mail services:	**-31.1**	↓	**-2.4**	↓
- Universal Service:	-40.6	↓	-8.7	↓
- No Universal Service:	-13.9	↓	+6.8	↑
Parcel delivery services:	**+57.7**	↑	**+2.6**	↑
- Domestic:	+72.7	↑	+0.1	↑
- Crossborder:	+32.3	↑	+8.4	↑

3.5: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

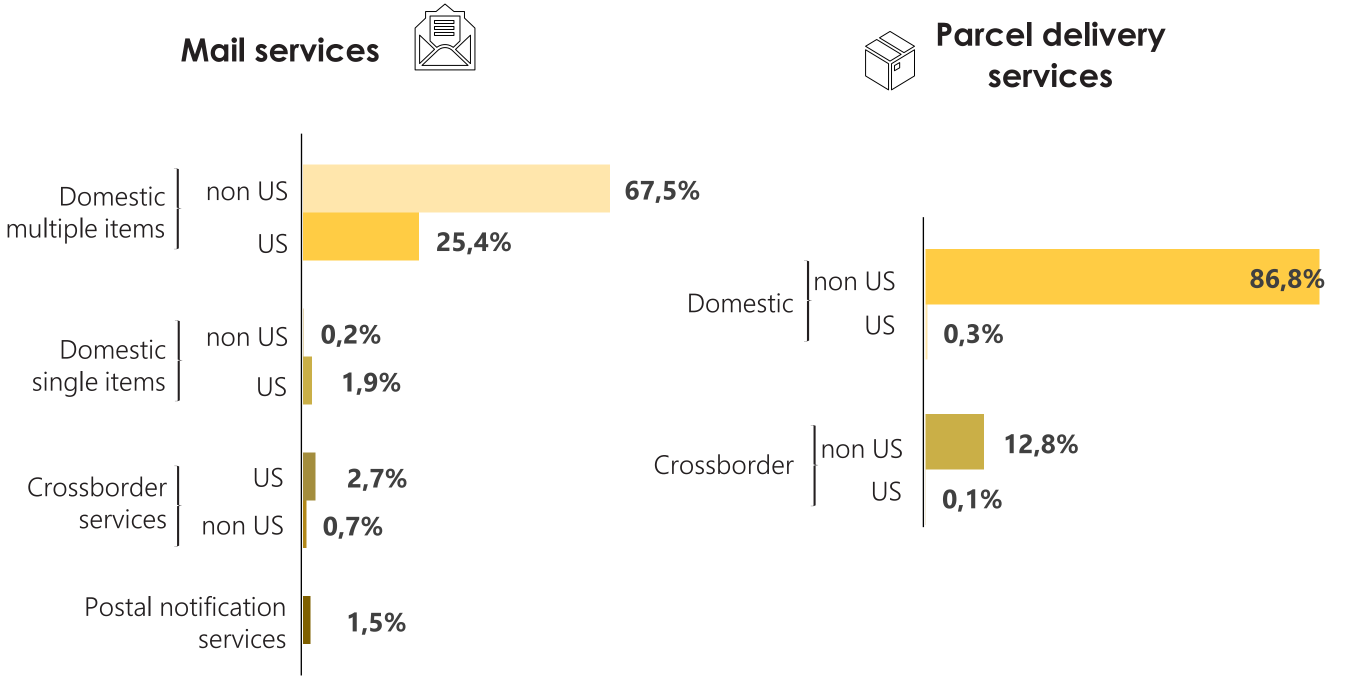
MILLIONS OF UNITS



Annual change in %
(1Q 2021) – (1Q 2022)

VOLUMES BY SOURCE TYPE (%)

1Q 2022

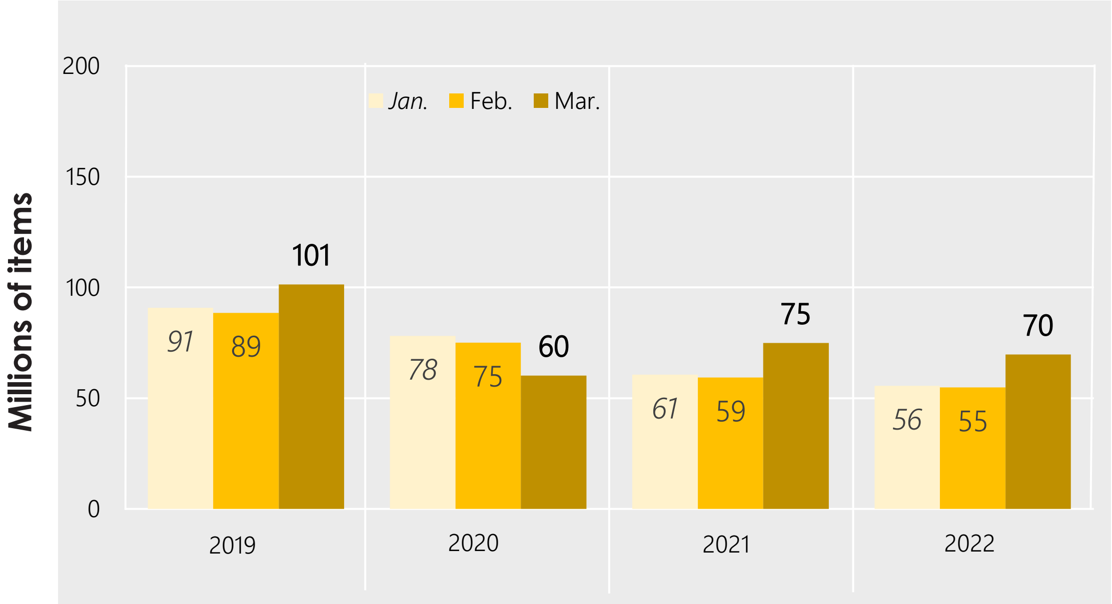


Annual change in %
(1Q 2021 – 1Q 2022)

-1.8	19.3	-21.8	+17.5	-5.2	+0.9
Domestic multiple items	Domestic single items	Crossborder services	Postal notification services	Domestic	Crossborder

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

UNIVERSAL SERVICE



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

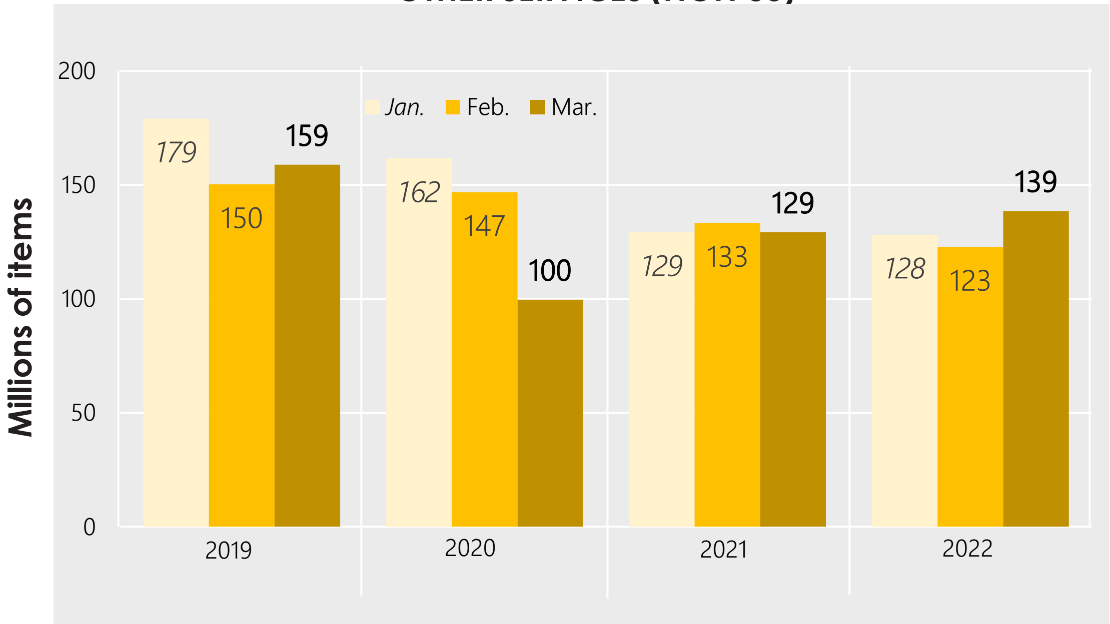
	(2019)		(2020)		(2021)		(2022)
millions of items	281	-24.0%	213	-8.7%	195	-7.5%	180

2019 → 2022: -35.8%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	-14.0	-22.5	-8.2	-38.8
February	-15.2	-21.0	-7.5	-38.0
March	-40.6	+24.4	+7.0	-31.3

OTHER SERVICES (NON US)



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

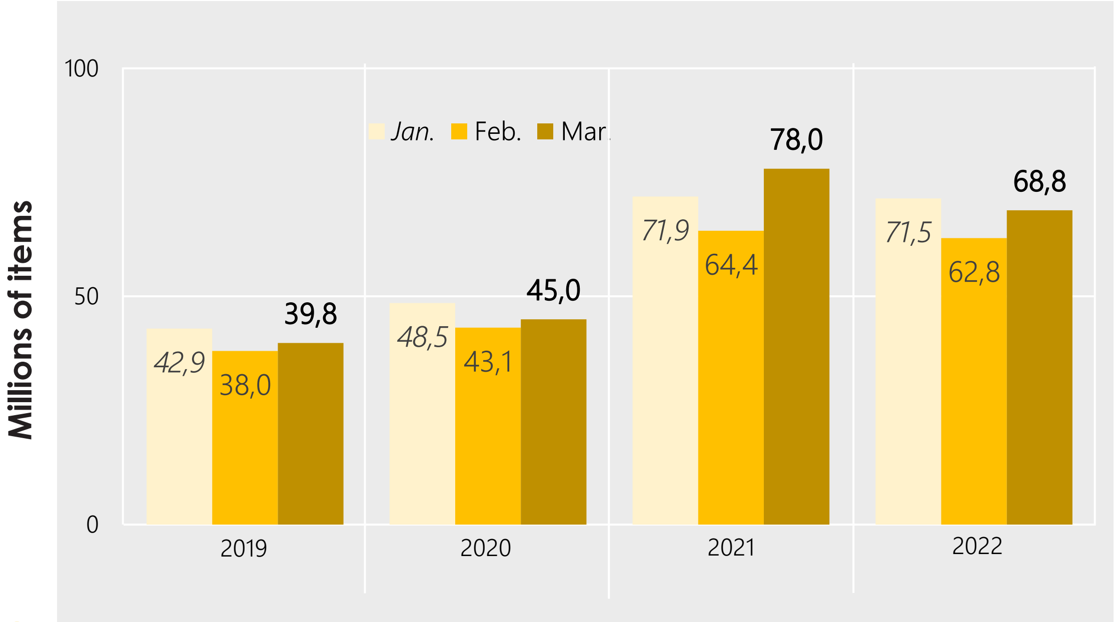
	(2019)		(2020)		(2021)		(2022)
millions of items	488	-16.4%	408	-4.0%	392	-0.6%	390

2019 → 2022: -20.2%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	-9.7	-20.1	-0.8	-28.4
February	-2.3	-9.2	-7.9	-18.3
March	-37.2	+29.7	+7.2	-12.8

DOMESTIC



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

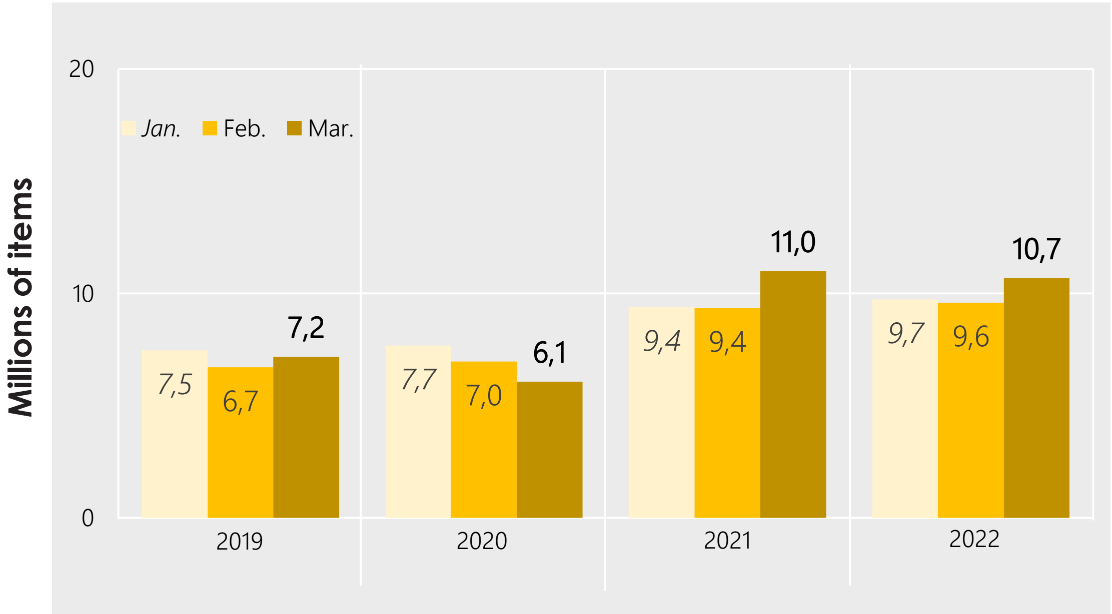
	(2019)		(2020)		(2021)		(2022)
millions of items	121	+13.2%	137	+56.8%	214	-5.2%	203

2019 → 2022: +68.2%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	+13.0	+48.1	-0.6	+66.5
February	+13.5	+49.3	-2.5	+65.2
March	+13.0	+73.4	-11.7	+72.9

CROSSBORDER



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

	(2019)		(2020)		(2021)		(2022)
millions of items	21,4	-3.0%	20,7	+43.5%	29,8	+0.9%	30,0

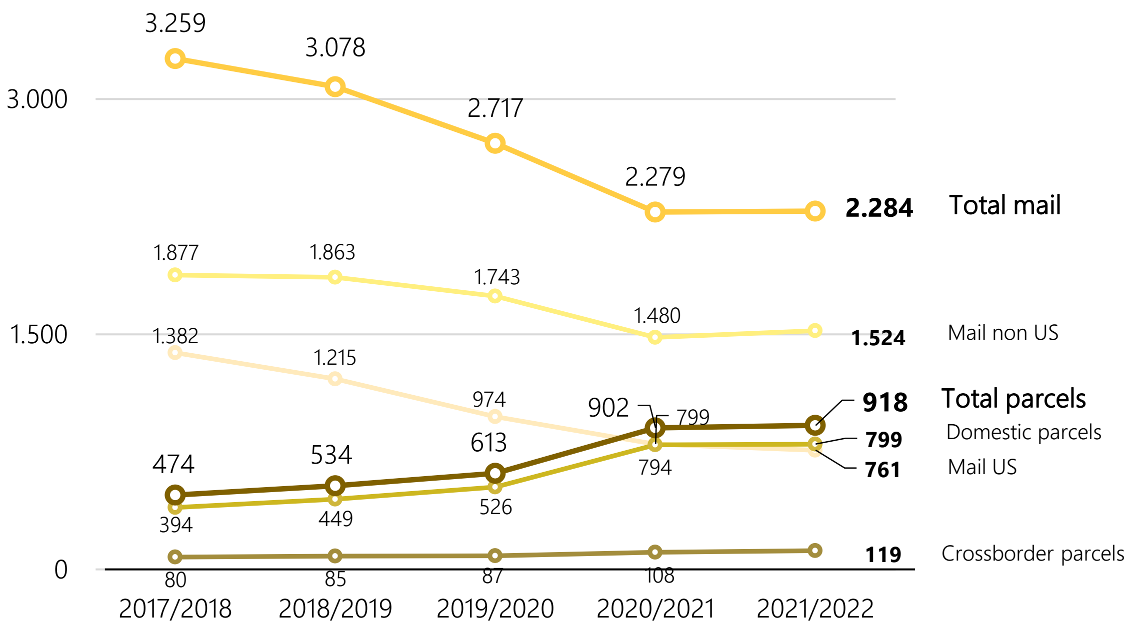
2019 → 2022: +40.5%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
January	+2.9	+22.3	+3.6	+30.4
February	+3.9	+34.2	+2.6	+43.1
March	-15.5	+81.0	-2.8	+48.7

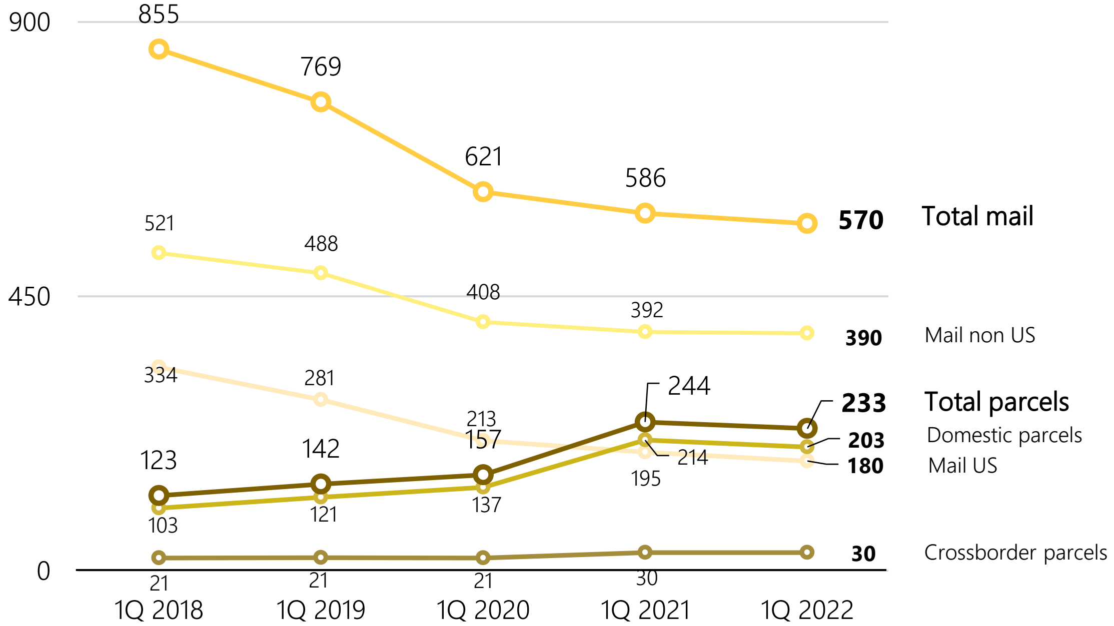
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



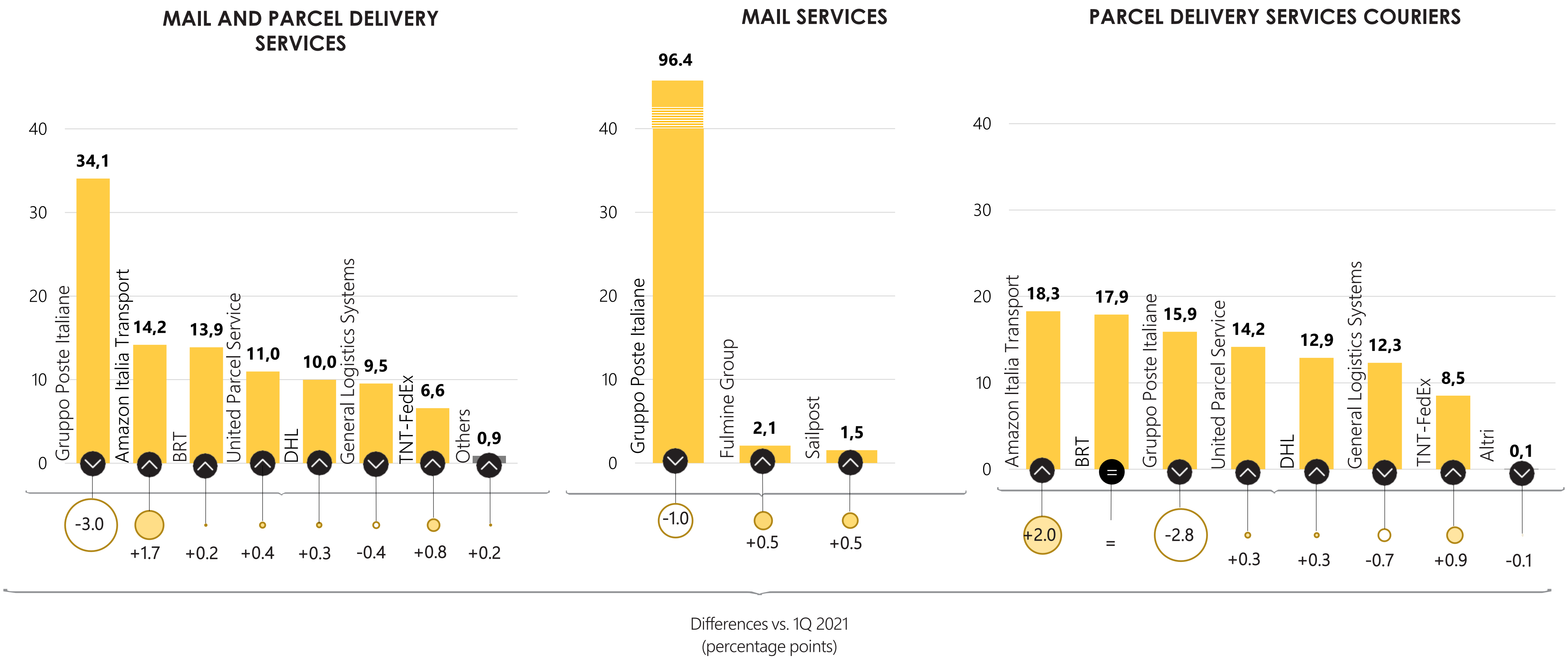
Change in %

	(2017/2018 – 2021/2022)		(2020/2021 – 2021/2022)	
Mail services:	**-29.9**	↓	**+0.3**	↑
- Universal Service:	-45.0	↓	-4.8	↓
- Non Universal Service:	-18.8	↓	+3.0	↑
Parcel delivery services:	**+93.9**	↑	**+1.8**	↑
- Domestic:	+102.9	↑	+0.7	↑
- Crossborder:	+49.5	↑	+9.5	↑

Change in %

	(1Q 2018 – 1Q 2022)		(1Q 2021 – 1Q 2022)	
Mail services:	**-33.4**	↓	**-2.9**	↓
- Universal Service:	-46.0	↓	-7.5	↓
- Non Universal Service:	-25.3	↓	-0.6	↓
Parcel delivery services:	**+89.0**	↑	**-4.5**	↓
- Domestic:	+98.0	↑	-5.2	↓
- Crossborder:	+44.2	↑	+0.9	↑

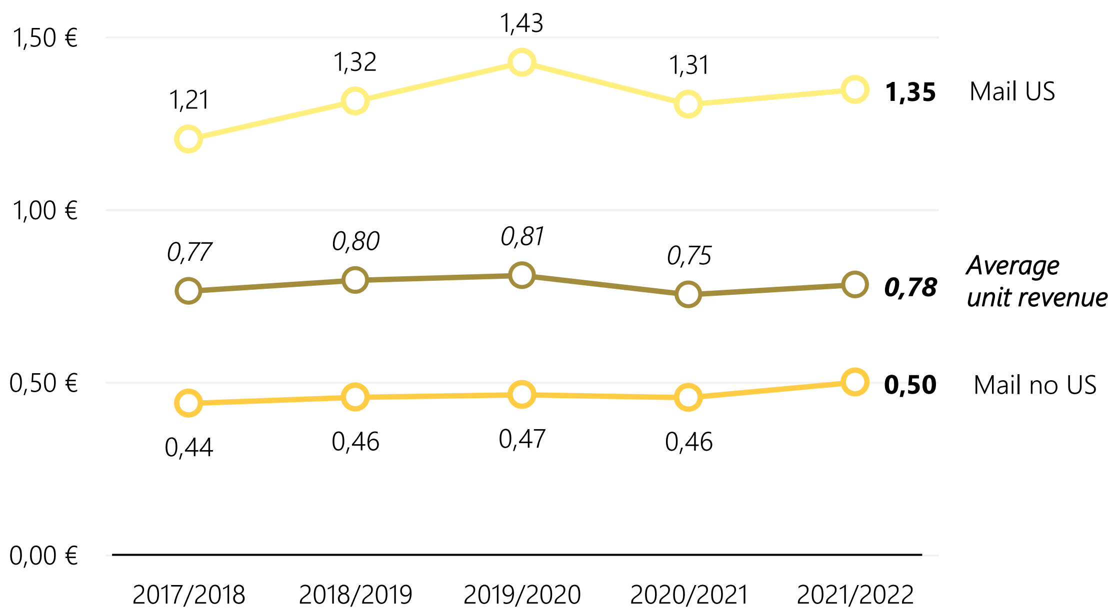
1Q 2022 – IN % OF TOTALE REVENUES (Universal service + Non Universal service)



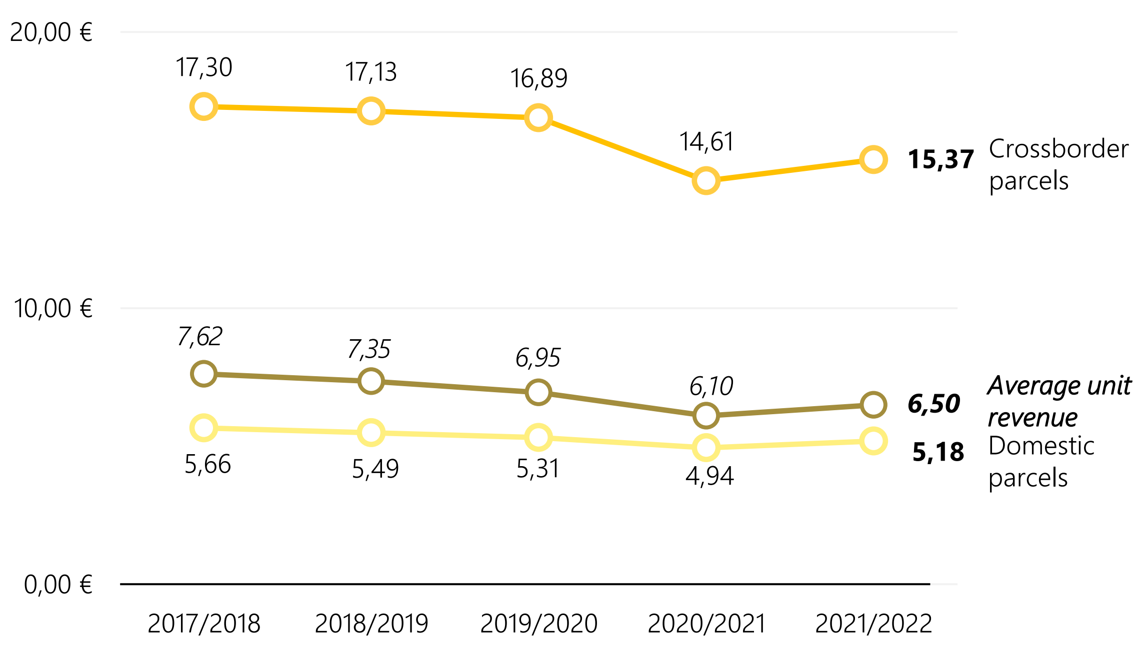
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group, Nexive Group S.r.l. and SDA Express Courier S.p.A.

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

MAIL SERVICES



PARCELS DELIVERY SERVICES



Mail services – Change in %

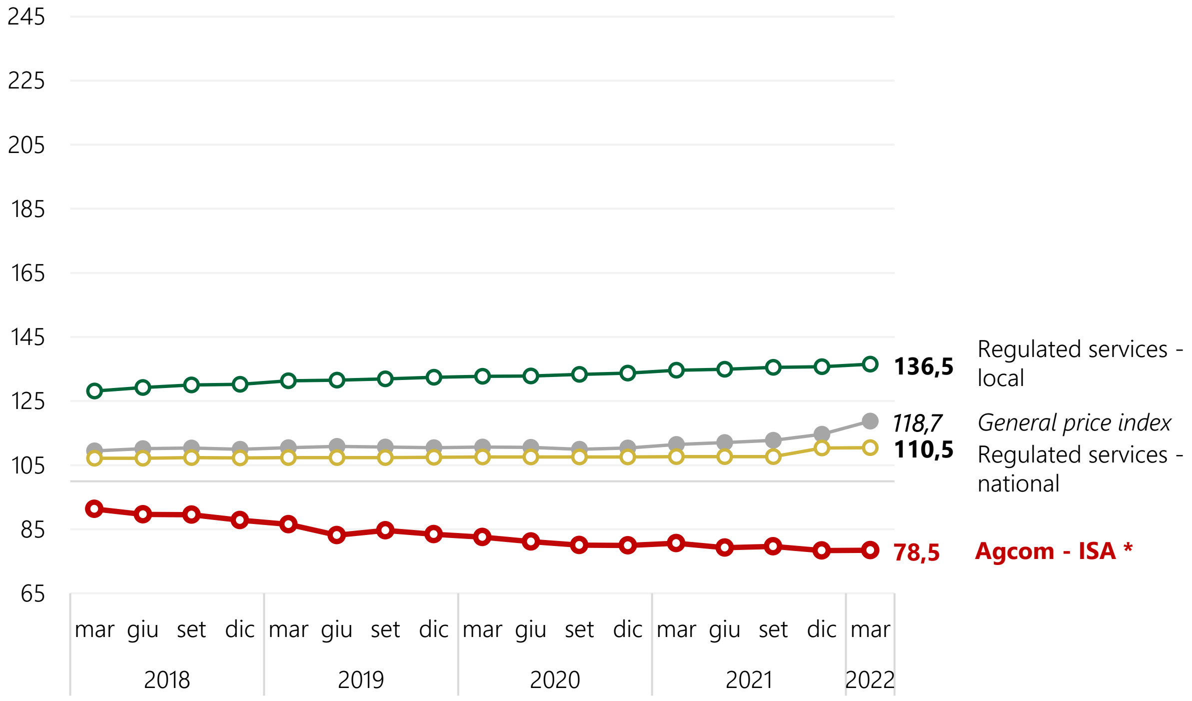
	(2017/2018 – 2021/2022)	(2020/2021 – 2021/2022)
Average unit revenue:	**+2.4** ↑	**+3.8** ↑
- Mail US:	+11.9 ↑	+3.2 ↑
- Mail non US:	+13.7 ↑	+9.6 ↑

Parcels delivery services – Change in %

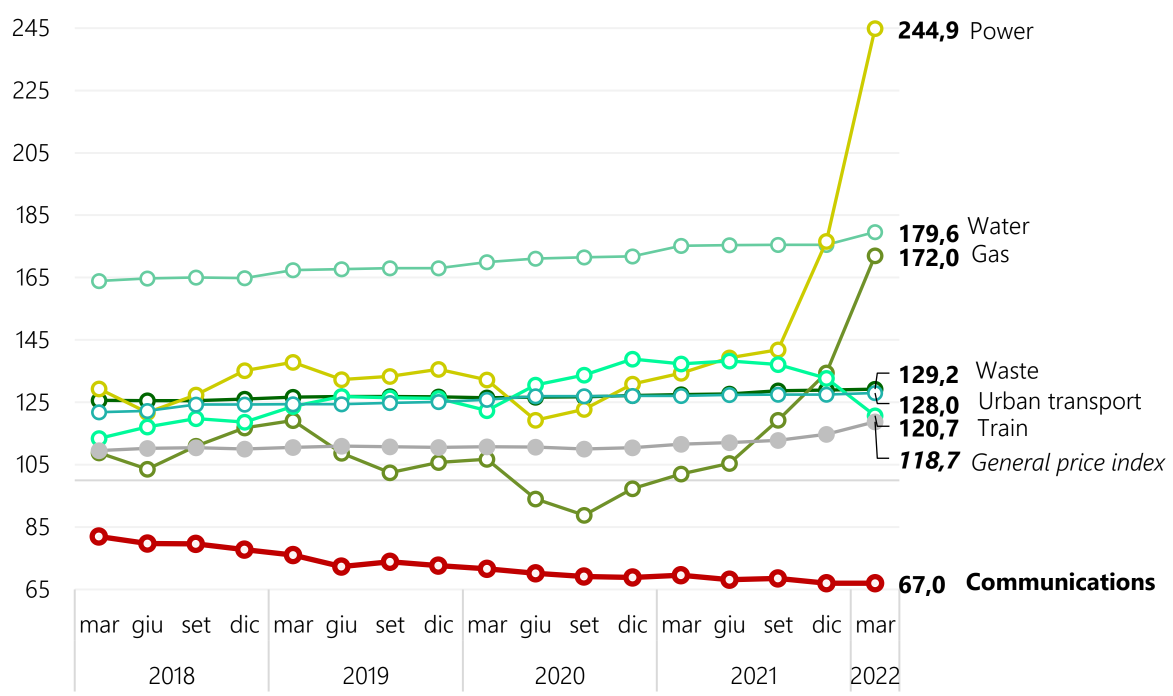
	(2017/2018 – 2021/2022)	(2020/2021 – 2021/2022)
Average unit revenue:	**-14.7** ↓	**+6.5** ↑
Crossborder parcels:	-11.1 ↓	+5.3 ↑
- US:	*-2.6* ↓	*+9.9* ↑
- Non US:	*-11.0* ↓	*+5.3* ↑
Domestic parcels:	-8.6 ↓	+4.8 ↑
- US:	*+1.1* ↑	*+3.7* ↑
- Non US:	*-8.6* ↓	*+4.9* ↑

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):	-14.0 ↓	-2.7 ↓
General price index:	+8.4 ↑	+6.5 ↑
Regulated services - local:	+6.6 ↑	+1.4 ↑
Regulated services - national:	+3.1 ↑	+2.6 ↑

	Change in % 4-Year	Change in % YoY
Water *(04.4.1)*:	+9.6 ↑	+2.5 ↑
Waste *(04.4.2)*:	+2.9 ↑	+1.3 ↑
Power *(04.5.1)*:	+89.4 ↑	+82.4 ↑
Gas *(04.5.2)*:	+58.1 ↑	+68.6 ↑

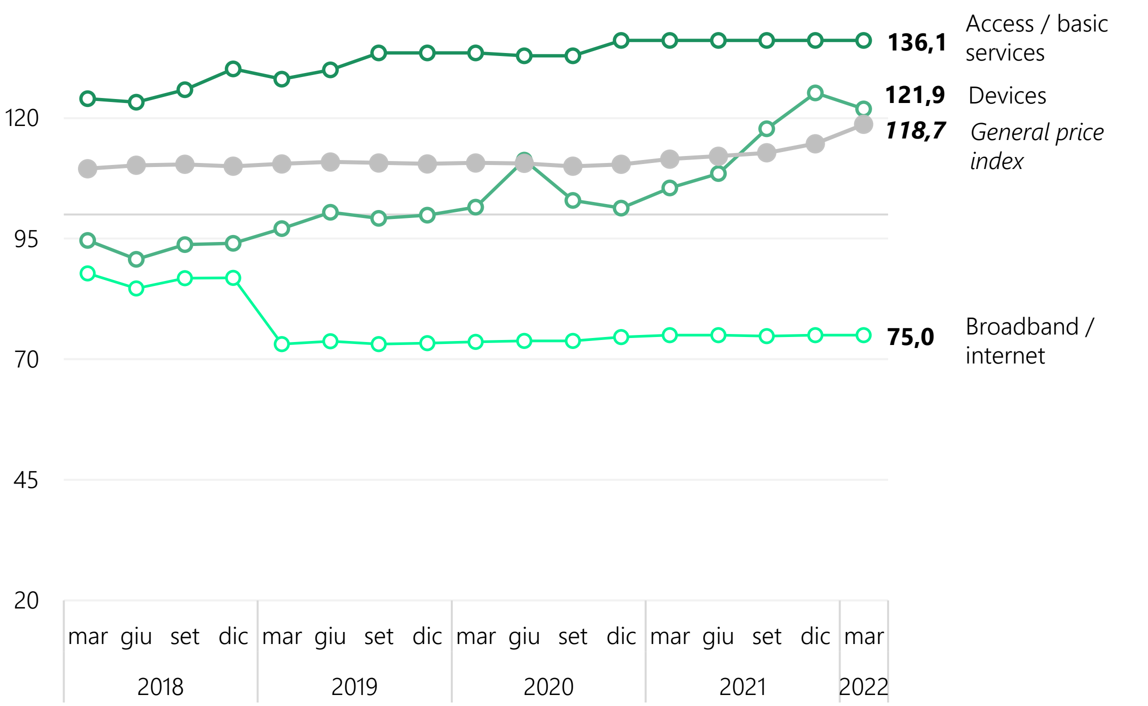
	Change in % 4-Year	Change in % YoY
Train *(07.3.1)*:	+6.4 ↑	-12.1 ↓
Urban transport *(07.3.2.1.1)*:	+5.1 ↑	+0.7 ↑
Communications *(08)*:	-18.2 ↓	-3.6 ↓

(*) **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).

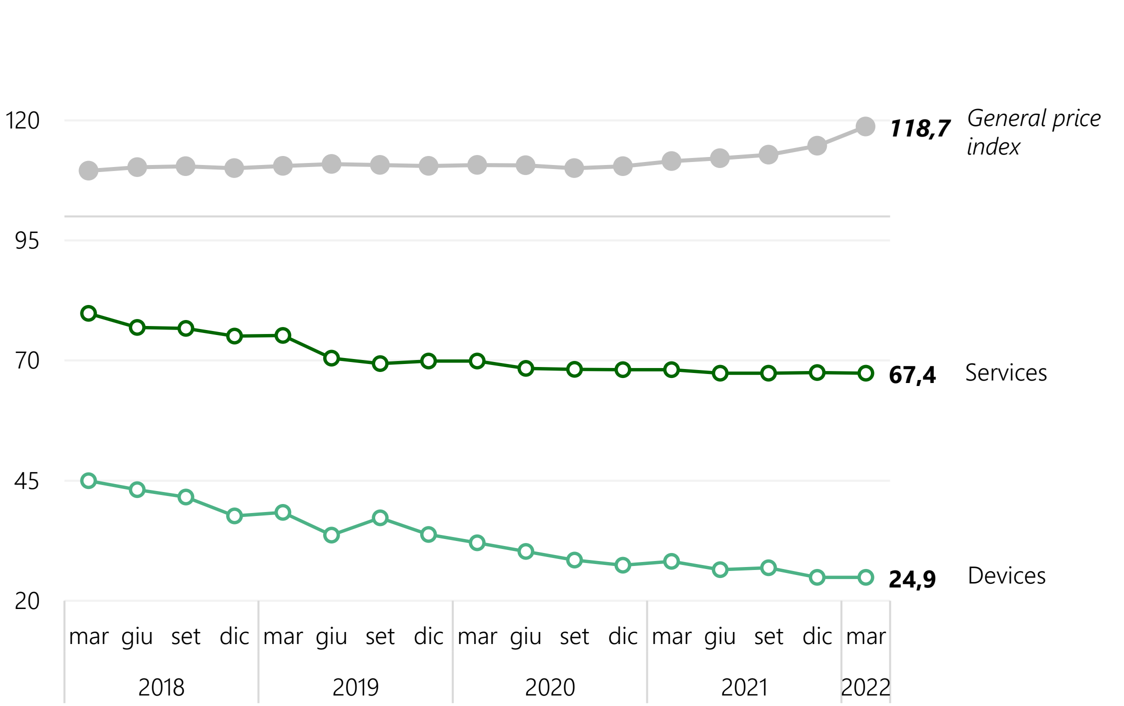
(COICOP - Classification of Individual Consumption by Purpose)

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

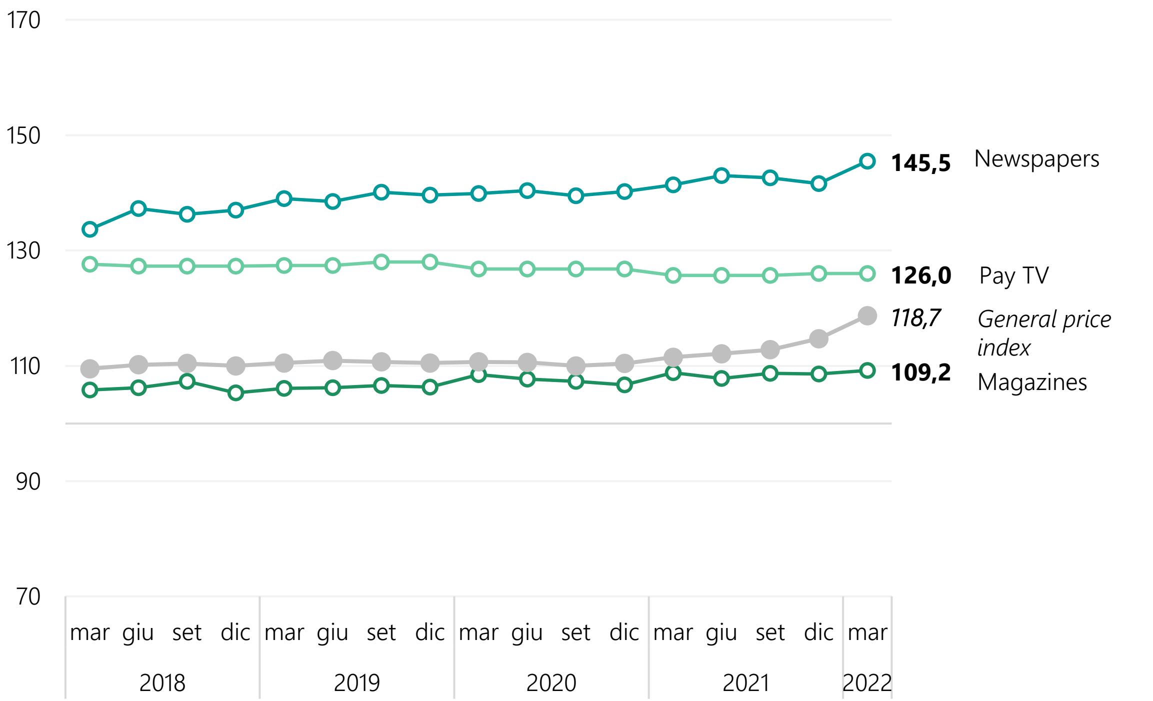
	Change in % 4-Year	Change in % YoY
Access / basic services *(08.3.0.1)*:	**+9.8** ↑	=
Devices *(08.2.0.1)*:	**+28.9** ↑	**+15.5** ↑
Broadband / internet *(08.3.0.3.0.01)*:	**-14.6** ↓	=

	Change in % 4-Year	Change in % YoY
Servces *(08.3.0.2)*:	**-15.5** ↓	**-1.0** ↓
Devices *(08.2.0.2)*:	**-44.7** ↓	**-11.7** ↓

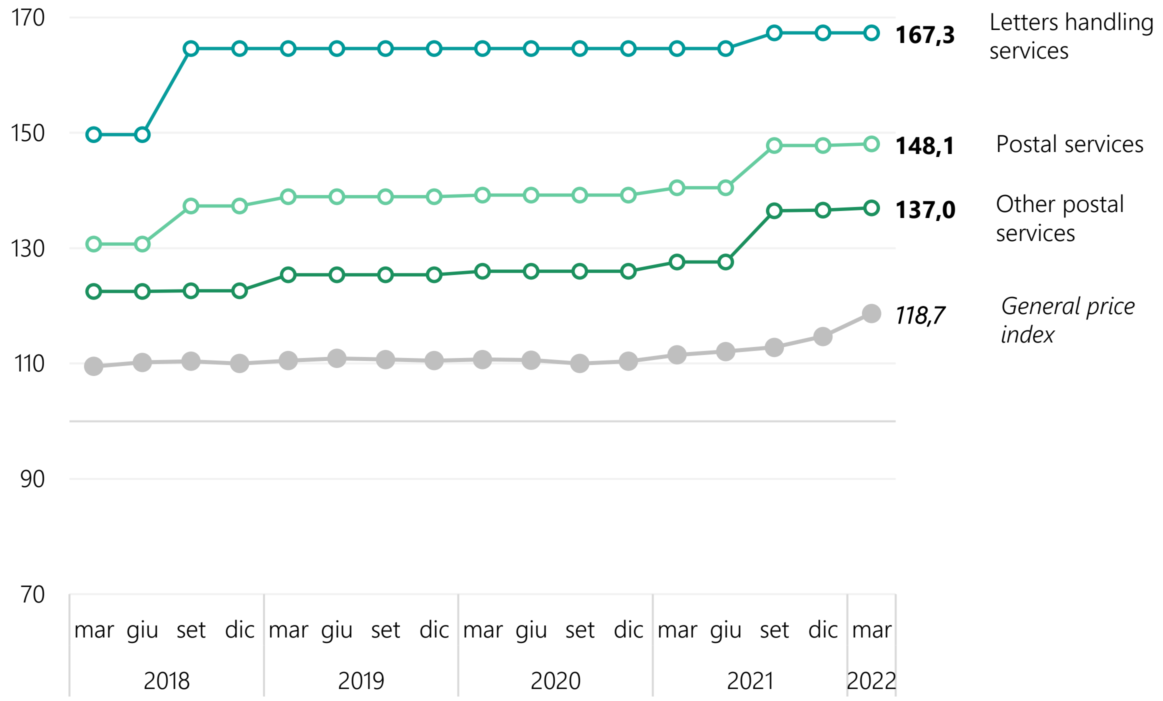
(COICOP - Classification of Individual Consumption by Purpose)

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)*:	**+8.8** ↑	**+2.9** ↑
Pay TV *(09.4.2.3.0.02)*:	**-1.3** ↓	**+0.2** ↑
Magazines *(09.5.2.2.0)*:	**+3.2** ↑	**+0.4** ↑

	Change in % 4-Year	Change in % YoY
Postal services *(08.1)*:	**+13.3** ↑	**+5.4** ↑
Letters handling services *(08.1.0.1.0.00)*:	**+11.8** ↑	**+1.6** ↑
Other postal services *(08.1.0.9.0.00)*:	**+11.8** ↑	**+7.4** ↑

(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

Source: Agcom elaboration on data from Eurostat

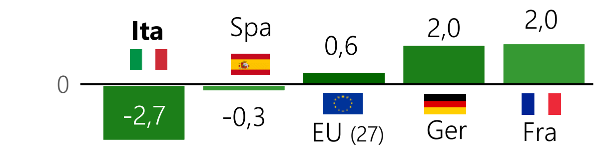
TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)

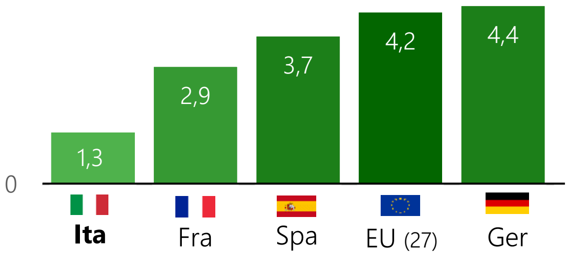
NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)

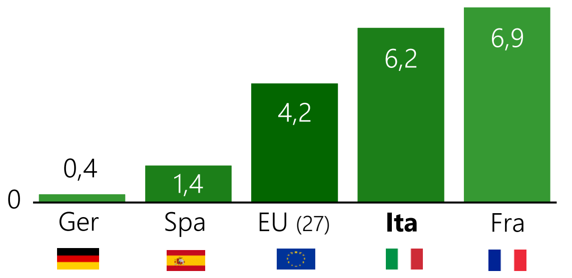
POSTAL SERVICES
(COICOP 08.1)

1-Year change %

Mar. 2021 - Mar. 2022

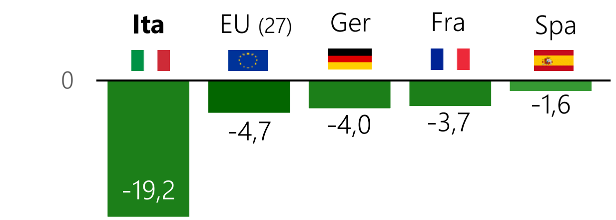


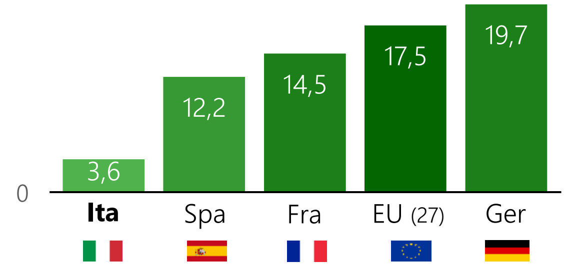


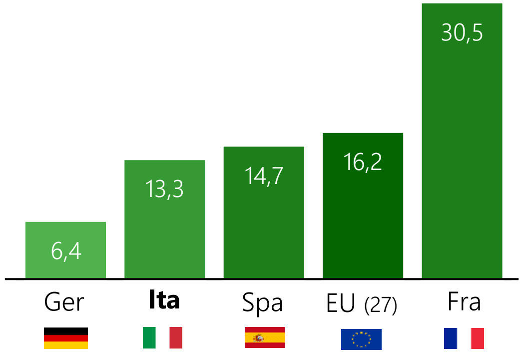


5-Year change %

Mar. 2017 - Mar. 2022

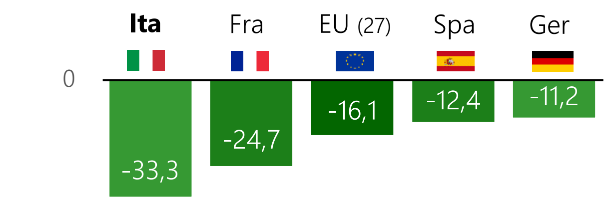


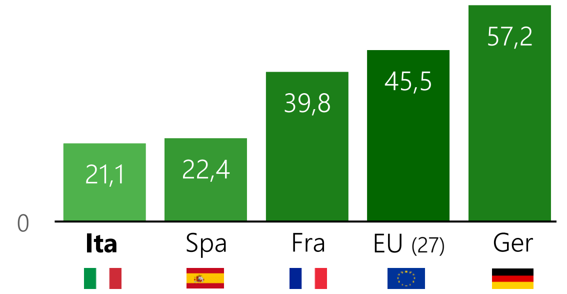


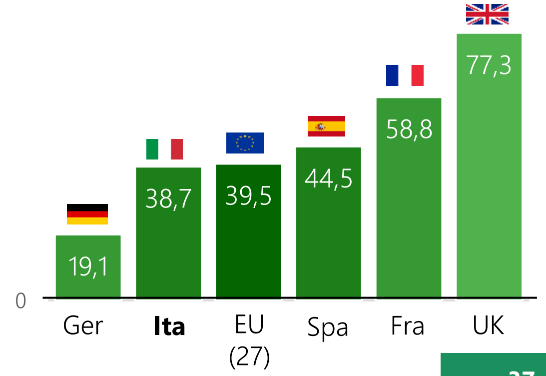


10-Year change %

Mar. 2012 - Mar. 2022







AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 2/2022

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