AGCOM
AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2024

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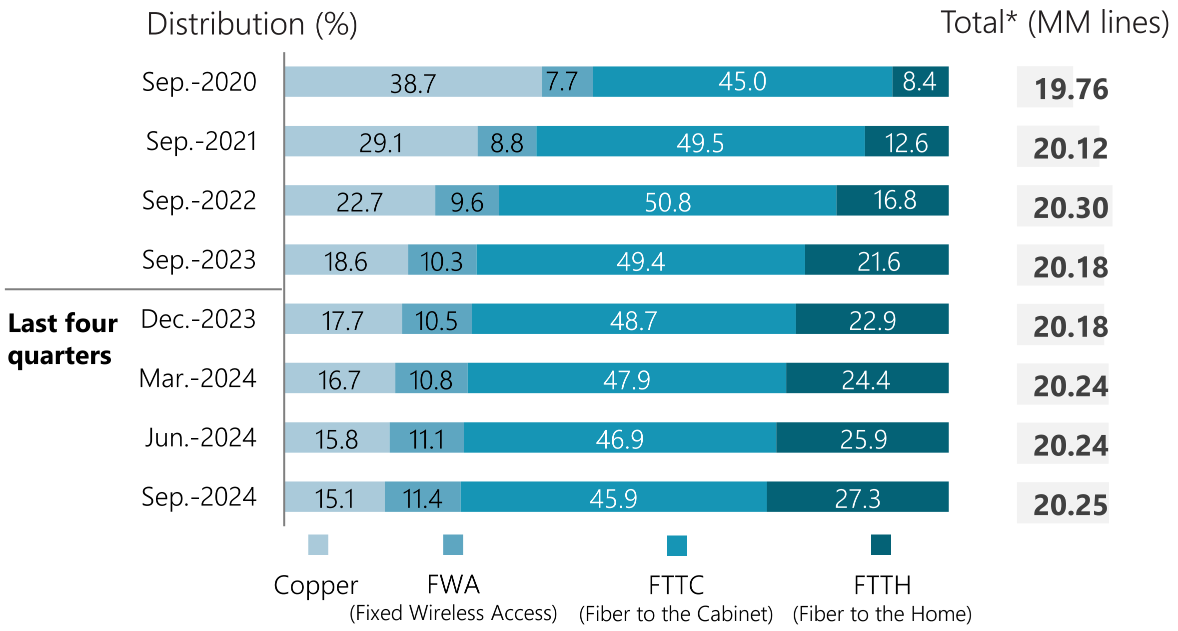
The **Communication Markets Monitoring System** is a quarterly pubblication edited by AGCOM.

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 September 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.

1.1 FIXED NETWORK: TOTAL LINES



* **Totale lines**, in line with European reporting, also includes those indicated in the categories "other NGA", "other not NGA" and "Satellite". Overall, as of September 2024, these lines are estimated to be approximately 0.3% of the total, i.e. slightly more than 65,000 lines, mainly satellite lines.

Total lines	(no. of lines)	(Δ %)	
Quarterly change (Jun. 2023 – Sep 2023)	**+3 k** accesses	+0.01	↑
Annual change (Sep. 2022 – Sep. 2022)	**+64 k** accesses	+0.32	↑
4-Year change (Sep. 2019 – Sep. 2023)	**+487 k** accesses	+2.46	↑

Distribution

(Δ set. 23-set. 24, percentage points)

Copper: -3.5 ↓

FWA: +1.0 ↑

FTTC: -3.5 ↓

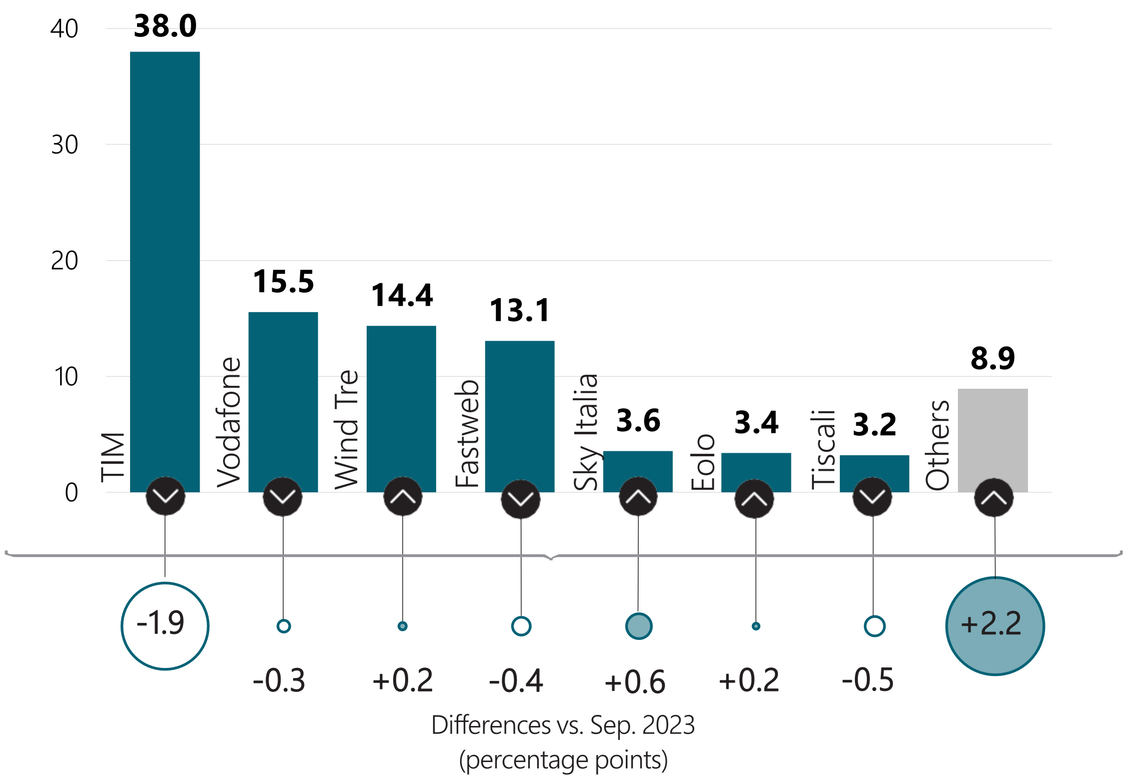
FTTH: +5.7 ↑

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

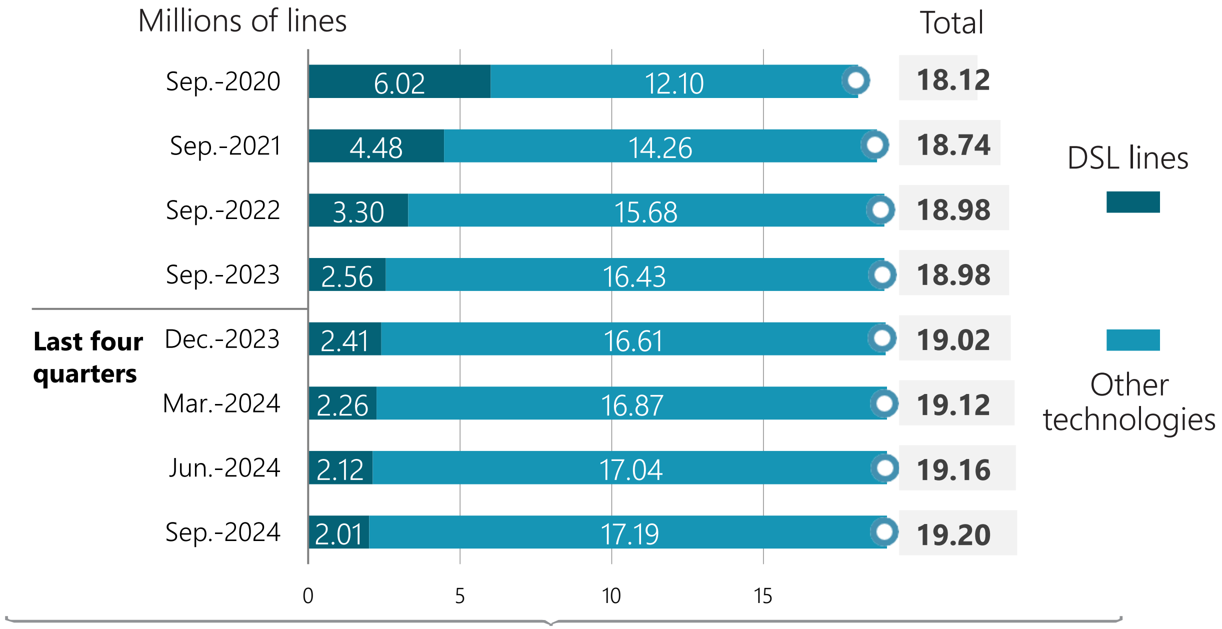
MARKET SHARES (%)

SEPTEMBER 2024



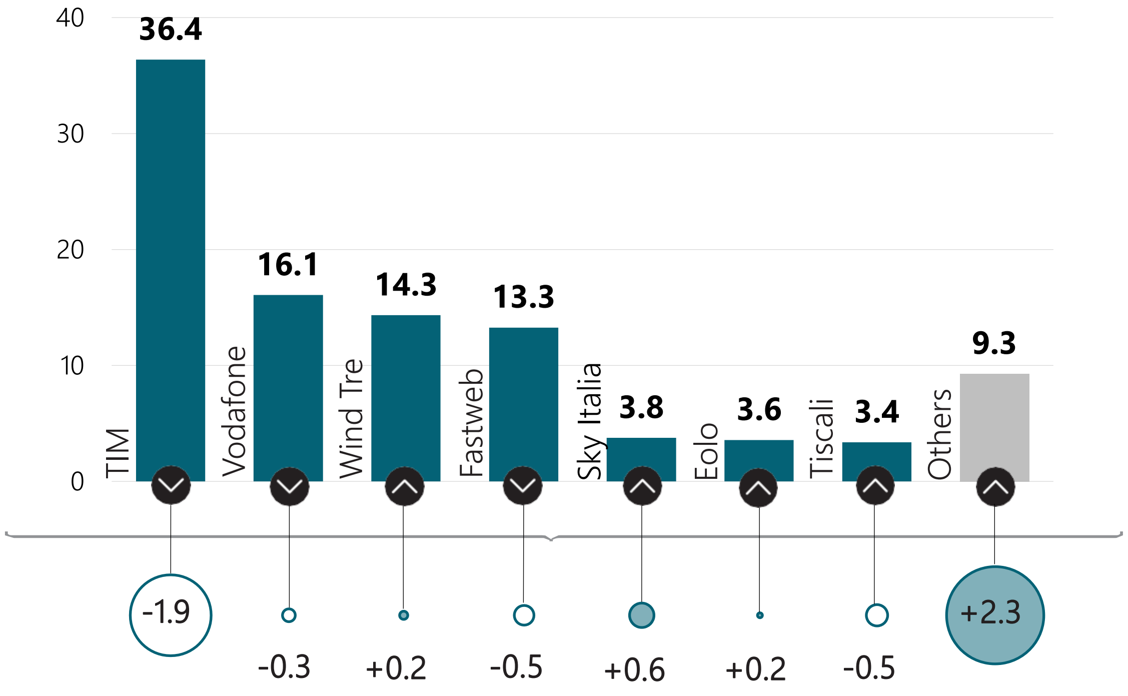
Data refers to the following electronic communications operators: APS Senza fili senza confini, Aruba, BBBell, Brennercomm, BT Italia, Colt Technology Services, Compagnia Italia Mobile, Coop Italia (CoopVoce), Convergenze, Daily Telecom Mobile, DIGI Italy, Enel Energia (Enel Fibra), Eolo, FastAlp, Fastweb, Go Internet, Green TLC, Hal Services, Iccom, Iliad, Informatica System, Infranet, Intred, Irideos, Lycamobile, Mavianmax, Megaweb, Micso, Mordacchini S.r.l., Newtec S.r.l., Open Fiber, Opiquad, Planetel, PostePay,, Retelit, Sky Italia, Stadtwerke ASM, Stel, Tecno Adsl, Tesselis (Tiscali), TIM, Unidata, Vianova, Virgin Fibra, Vodafone Italia, Wind Tre.

1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES



MARKET SHARES (%)

SEPTEMBER 2024



Differences vs. Sep. 2023
(percentage points)

Quarterly change
(Jun. 2024 – Sep. 2024)

Total lines

↑

+38 k
lines
(+0.2%)

Annual change
(Sep. 2023 – Sep. 2024)

Total lines	DSL lines	Other technologies
↑	↓	↑
+217 k lines (+1.1 %)	**-549 k** lines (-21.5%)	**+766 k** lines (+4.7%)

k = thousand

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

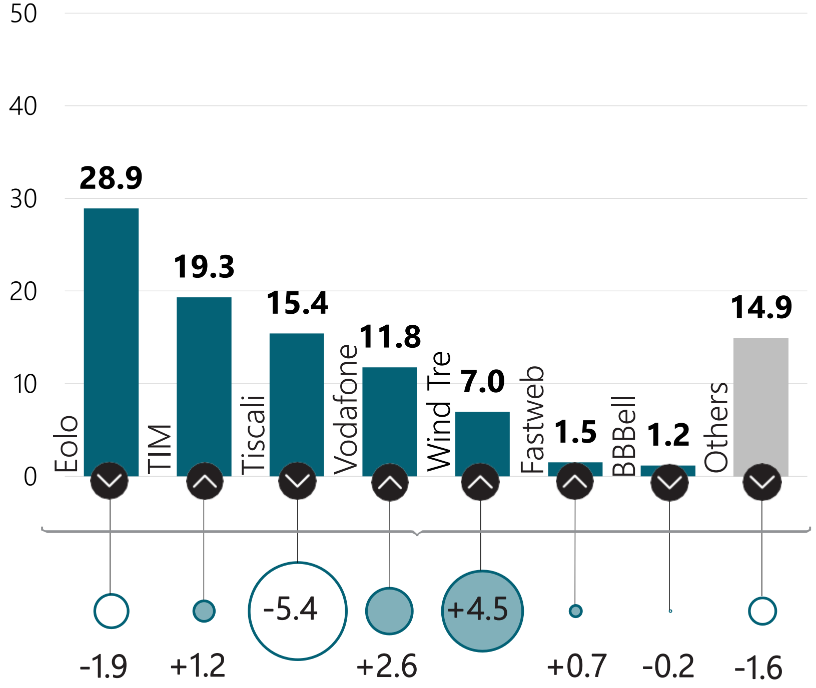
SEPTEMBER 2024

FWA

Total lines: **2.30** million access

Annual change
(Sep. 2023 – Sep. 2024)

+10.5% ↑

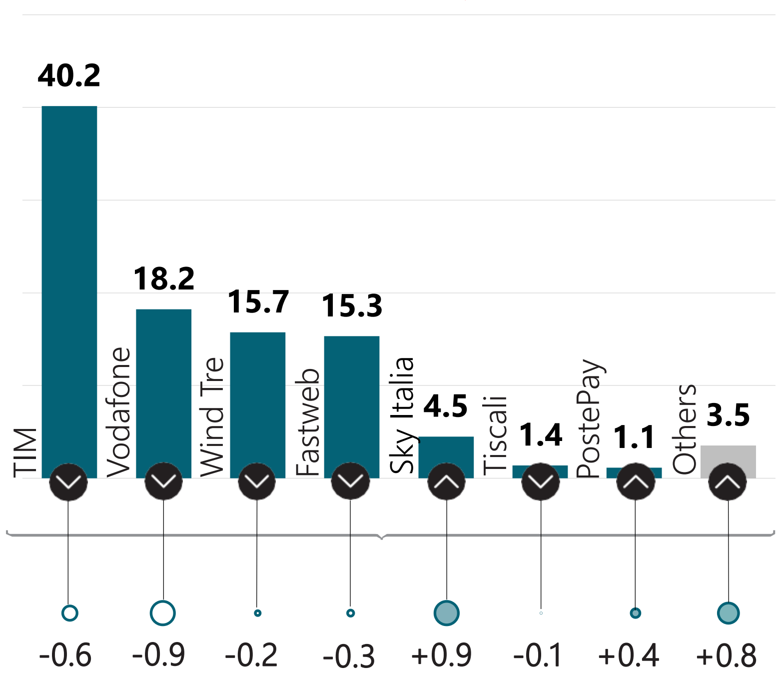


FTTC

Total lines: **9.30** million access

Annual change
(Sep. 2023 – Sep. 2024)

-6.7% ↓

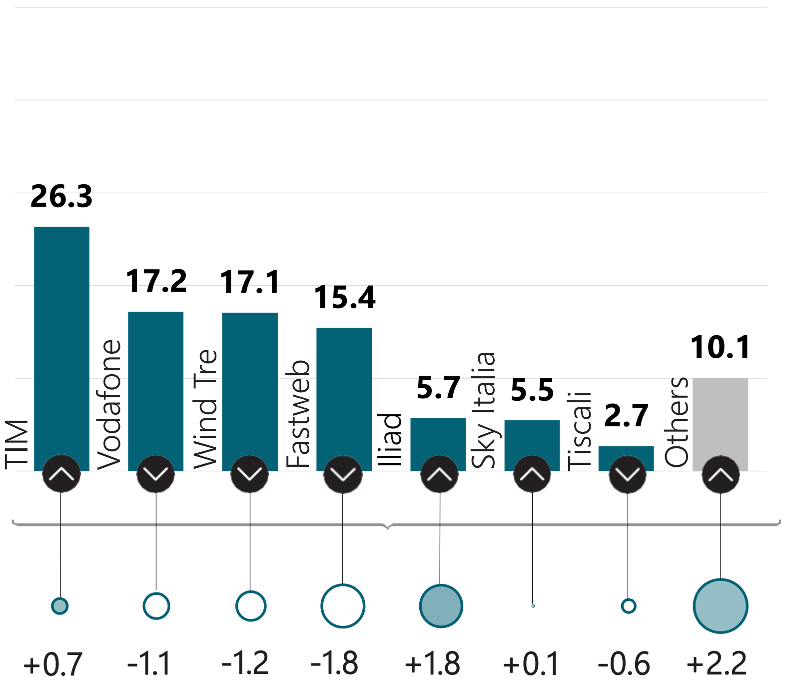


FTTH

Total lines: **5.53** million access

Annual change
(Sep. 2023 – Sep. 2024)

+27.0% ↑

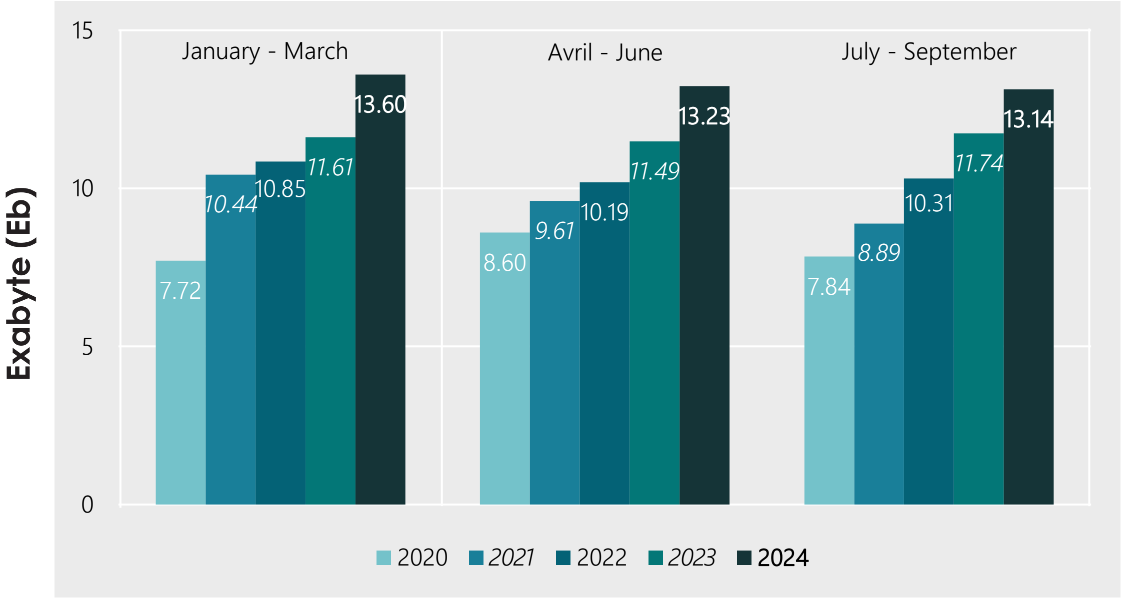


Differences vs. Sep. 2023
(percentage points)

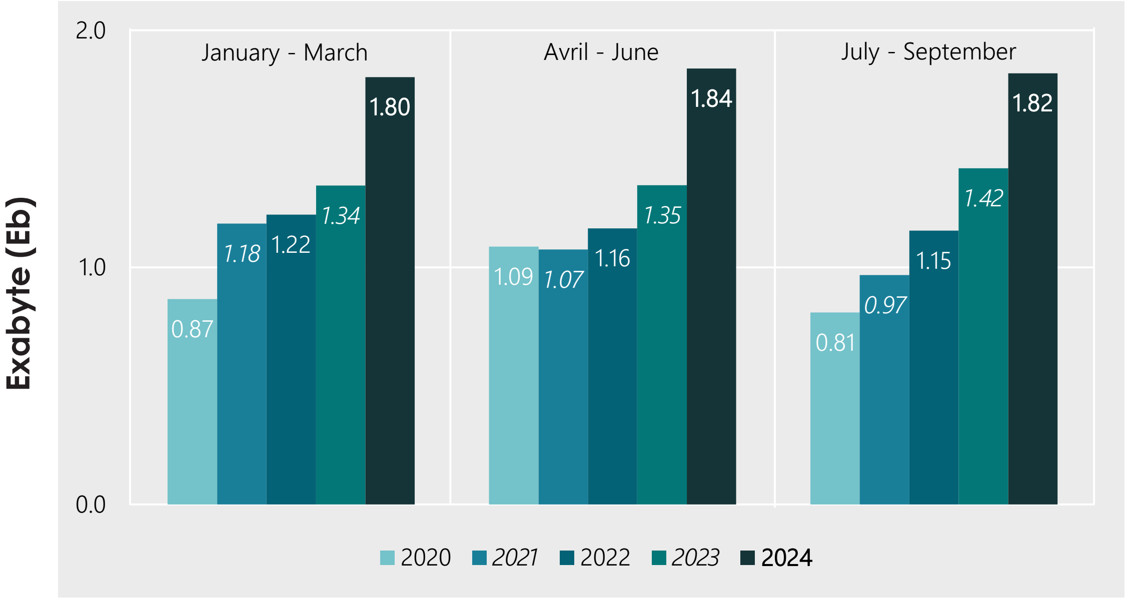
Note: elaborations based on data provided by companies in the context of the preparation of European reporting A few thousand lines allocated by the companies in the categories "Other non-NGA" and "Other NGA" are excluded from the analysis.

1.4 FIXED NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD

DOWNLOAD (cumulative monthly data)



UPLOAD (cumulative monthly data)



① **Cumulative data since the beginning of the year** (January – September)

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

Exabyte 24.16 ↑ **+19.8%** 28.94 ↑ **+8.3%** 31.35 ↑ **+11.1%** 34.84 ↑ **+14.7%** 39.97

↑ **+65.5%**

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+35.3	+3.9	+7.0	+17.1	+76.3
Q 2 (Avr. - Jun.)	+11.7	+6.1	+12.7	+15.2	+53.9
Q 3 (Jul. - Set.)	+13.4	+15.9	+13.9	+11.9	+67.5

① **Cumulative data since the beginning of the year** (January – September)

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

Exabyte 2.76 ↑ **+16.8%** 3.23 ↑ **+9.7%** 3.54 ↑ **+16.1%** 4.11 ↑ **+32.9%** 5.46

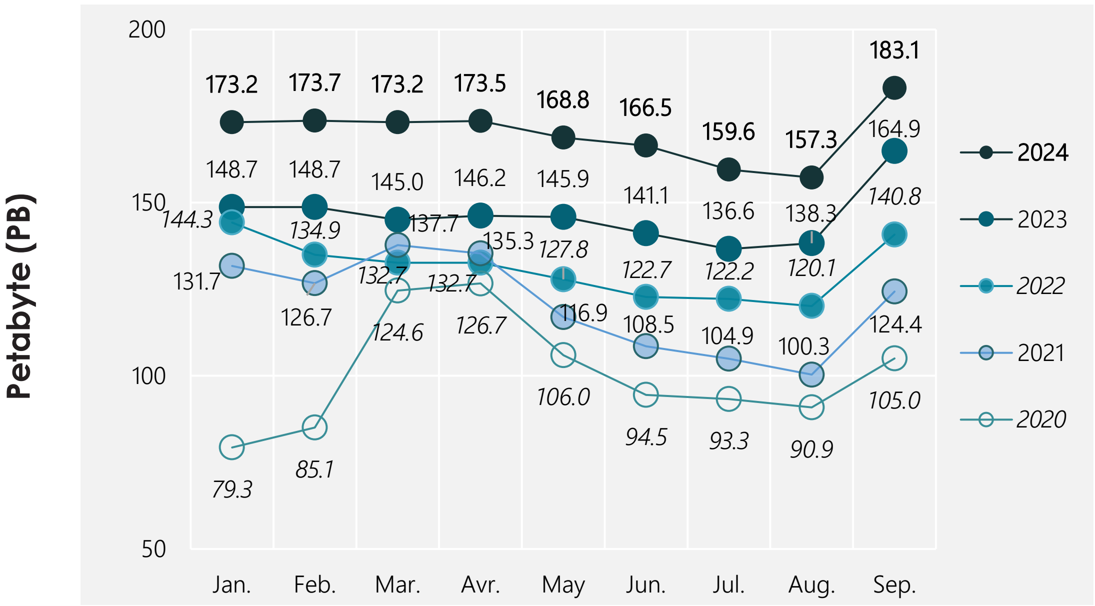
↑ **+97.6%**

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

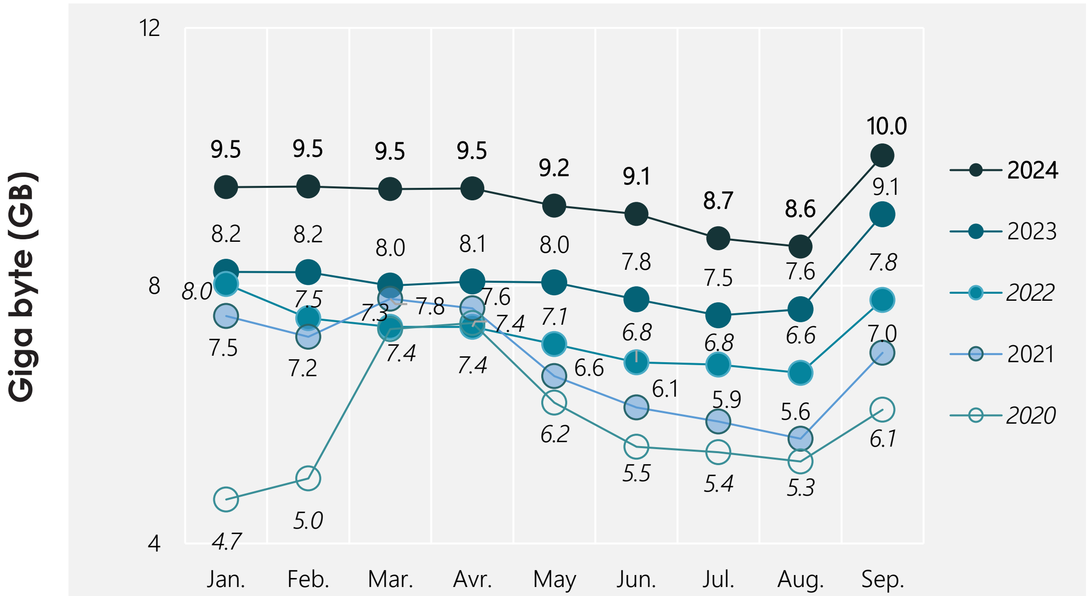
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+36.8	+3.2	+10.0	+34.1	+108.1
Q 2 (Avr. - Jun.)	-1.2	+8.1	+15.8	+36.6	+69.0
Q 3 (Jul. - Set.)	+19.4	+19.4	+22.8	+28.3	+124.6

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** (January – September)

	(2020)		(2021)		(2022)		(2023)		(2024)
Petabyte	100.6	**+19.9%**	120.6	**+8.5%**	130,9	**+11.6%**	146.1	**+16.2%**	169.8
									+68.8%

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+26.9	+3.9	+7.3	+17.6	+79.5
Q 2 (Avr. - Jun.)	+10.3	+6.3	+13.0	+17.4	+140.8
Q 3 (Jul. - Set.)	+13.9	+16.3	+14.8	+13.7	+72.9

① **Average daily comparison since the beginning of the year** (January – September)

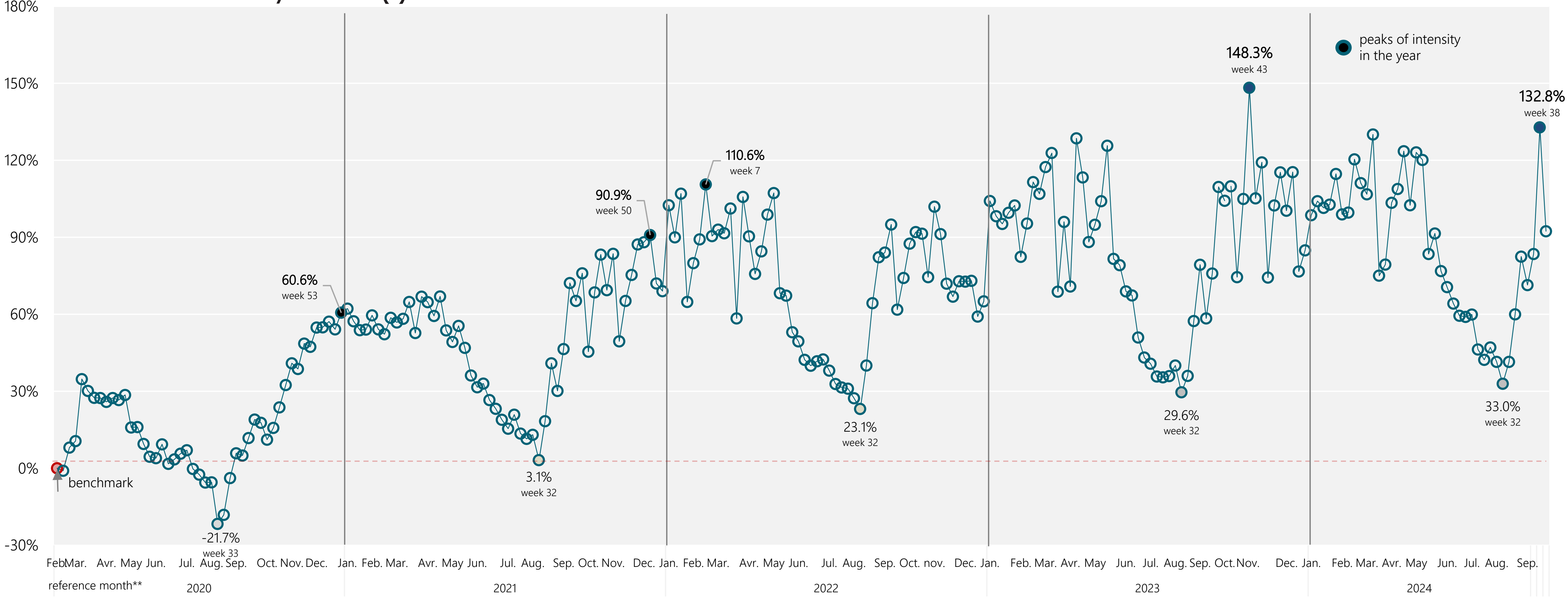
	(2020)		(2021)		(2022)		(2023)		(2024)
Gigabyte	5.88	**+15.8%**	6.81	**+6.6%**	7.26	**+11.1%**	8.06	**+15.4%**	9.30
									+58.3%

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+32.2	+1.5	+6.6	+17.0	+67.3
Q 2 (Avr. - Jun.)	+6.5	+4.6	+12.4	+16.6	+45.9
Q 3 (Jul. - Set.)	+10.2	+14.8	+14.5	+12.7	+63.2

1.6 FIXED NETWORK: WEEKLY DATA TRAFFIC INTENSITY

Data traffic intensity variation (*)



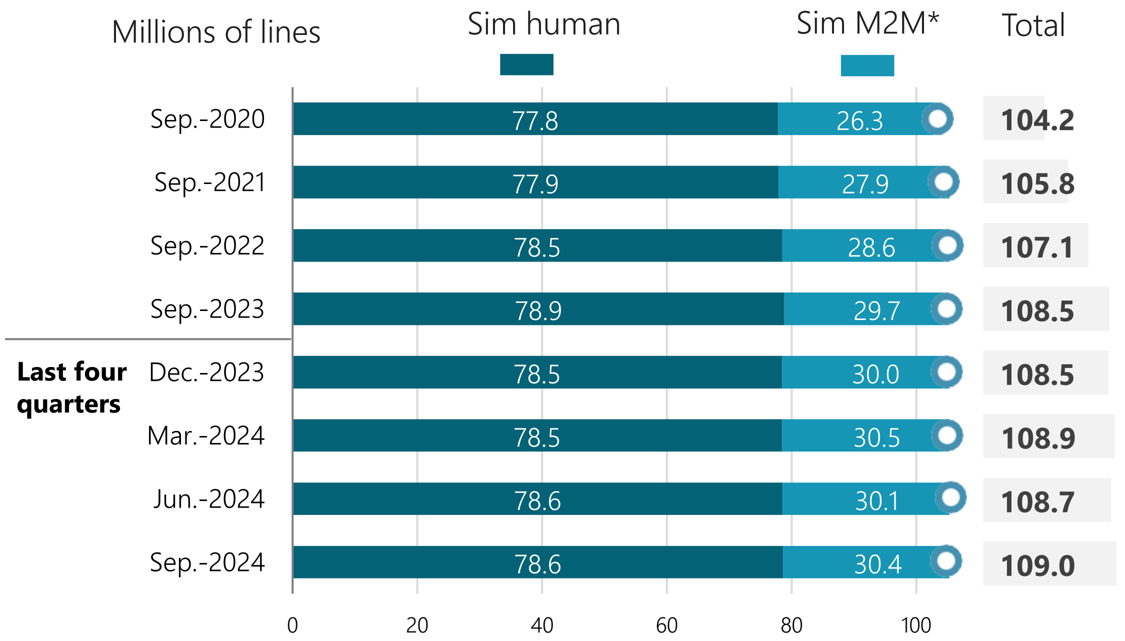
Definition: data traffic intensity (Gbps) represents the peak inbound traffic volume registered in a timespan of 5 to 60 minutes.

*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



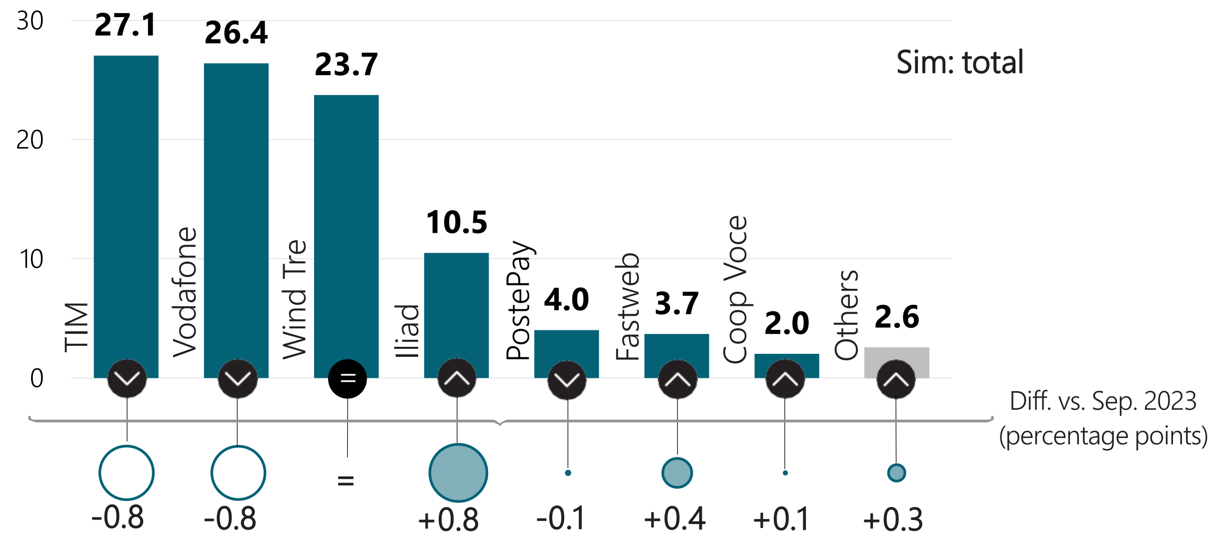
(*) **Note**: Machine-to-Machine sims are based on the technologies that enable devices and sensors or "things" (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

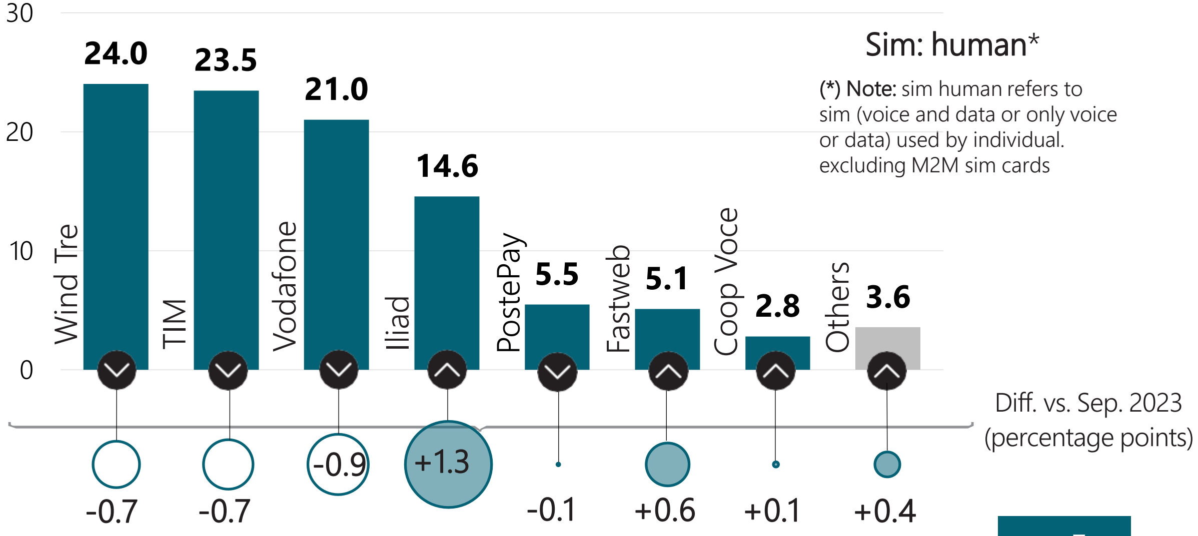
	Quarterly change (June 2024 – Sep. 2024)			Annual change (Sep. 2023 – Sep. 2024)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
Total sim cards:	+359	↑	+0.3	+509	↑	+0.5
Sim human:	+44	↑	-0.1	-221	↓	-0.3
Sim M2M:	+315	↑	+1.0	+730	↑	+2.5

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 (%)

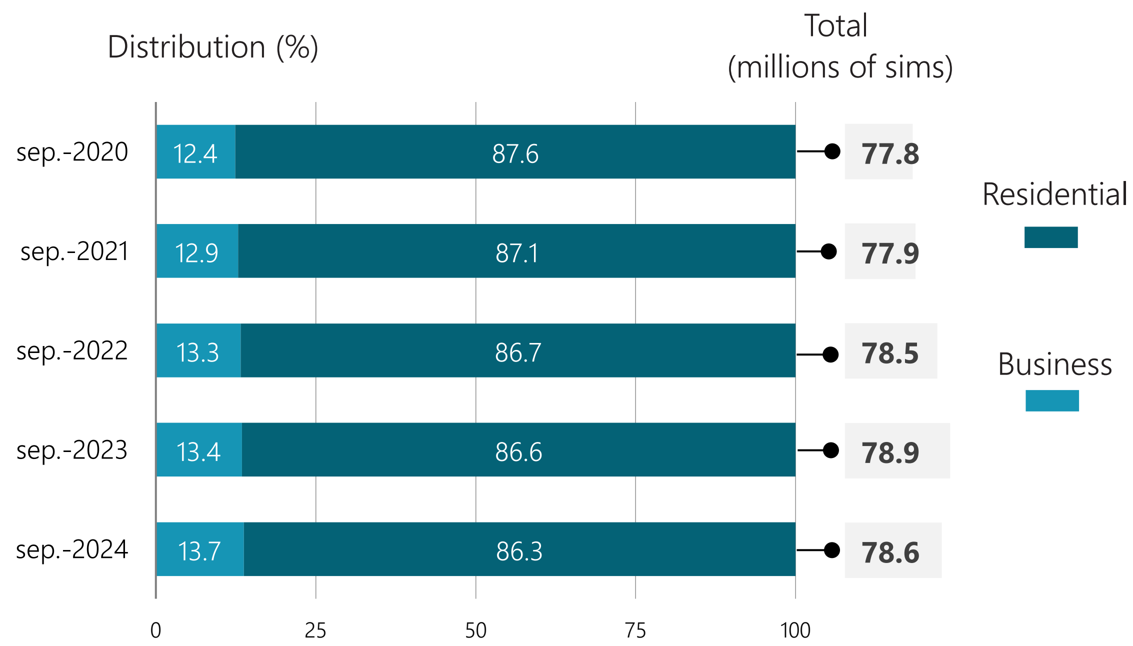
SEPTEMBER 2024





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

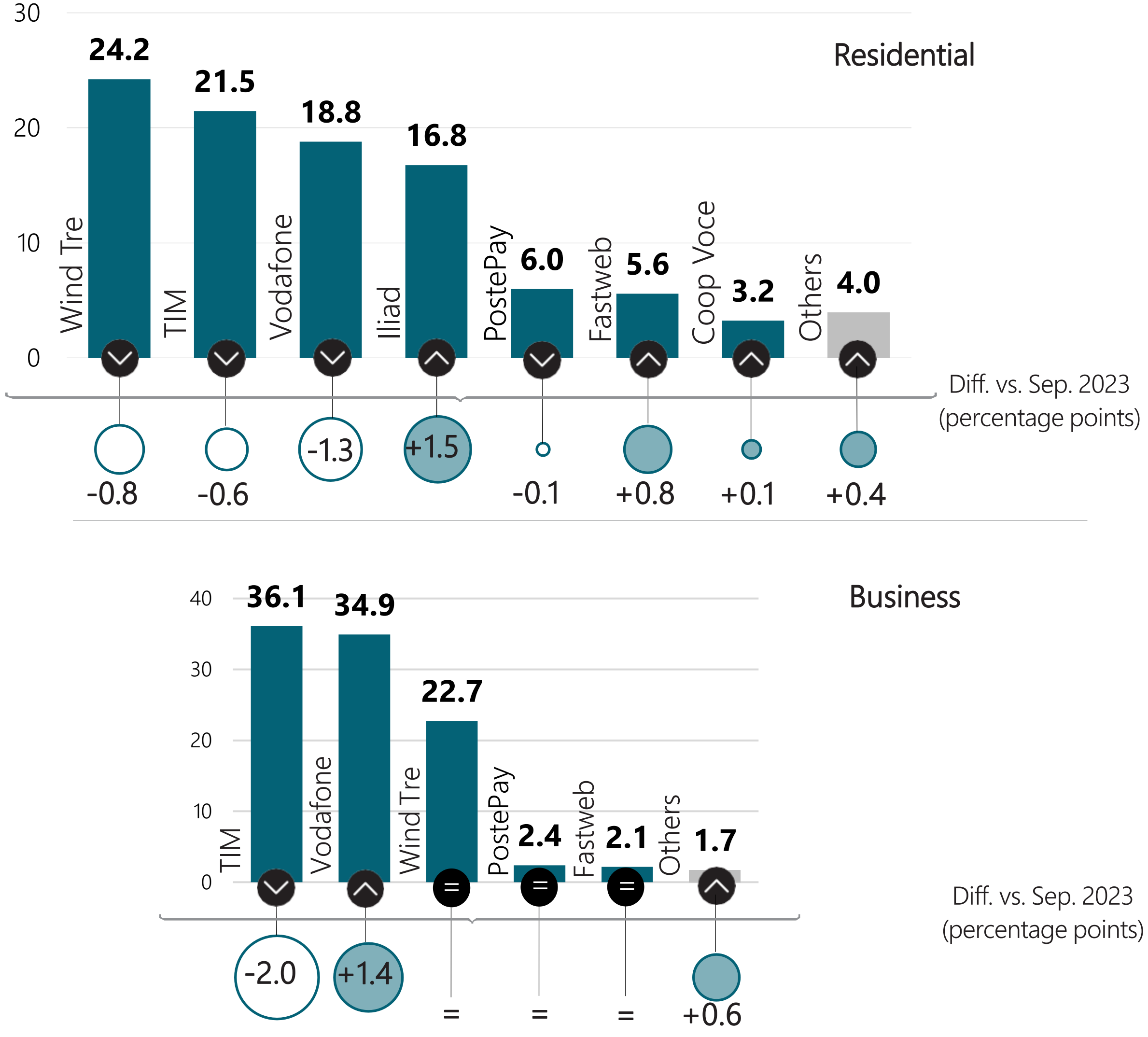
1.8 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



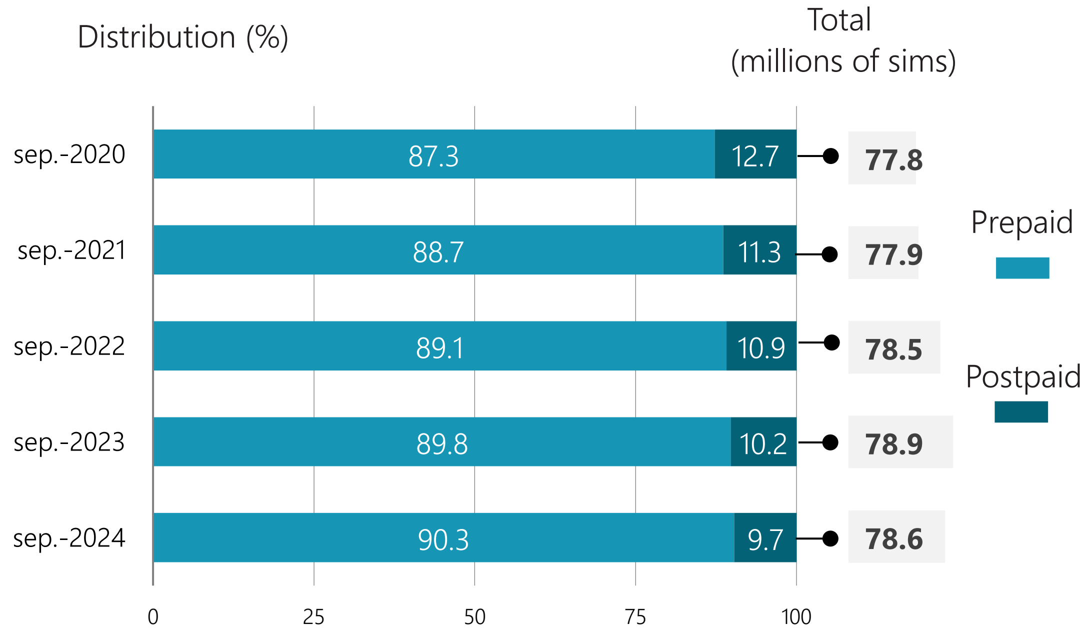
	Annual change (Sep. 2023 – Sep. 2024) (no of sim in thousand)		(Δ %)	4-Year change (Sep. 2020 – Sep. 2024) (no of sim in thousand)		(Δ %)
Total human sim cards:	-221	↓	-0.3	+793	↑	+1.0
Residential sim card:	-425	↓	-0.6	-357	↓	-0.5
Business sim cards:	+204	↑	+1.9	1,151	↑	+11.9

MARKET SHARES (%)

SEPTEMBER 2024



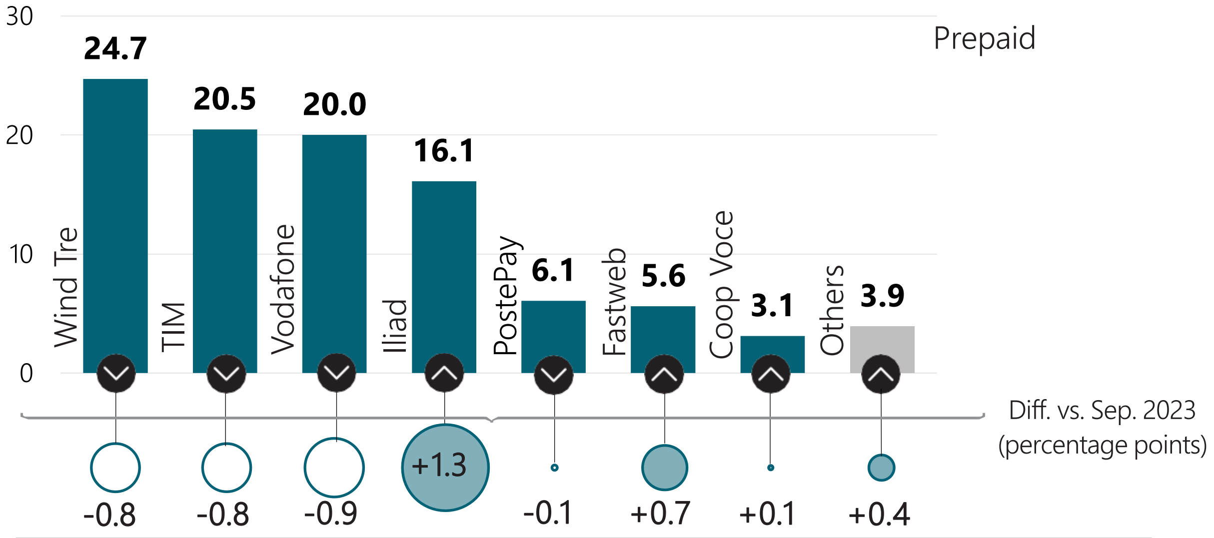
1.9 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT

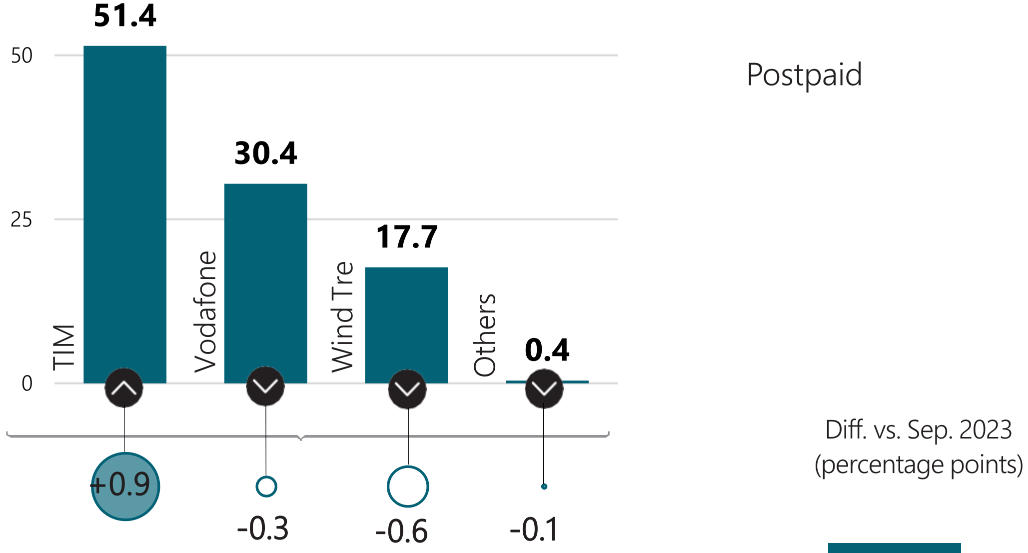


	Annual change (Sep. 2023 – Sep. 2024)			4-Year change (Sep. 2020 – Sep. 2024)		
	(no of sim in thousand)		(Δ %)	(no of sim in thousand)		(Δ %)
Total human sim cards:	-221	↓	-0.3	+793	↑	+1.0
Prepaid sim cards:	+202	↑	+0.3	+3.095	↑	+4.6
Postpaid sim cards:	-423	↓	-5.3	-2,301	↓	-23.2

MARKET SHARES (%)

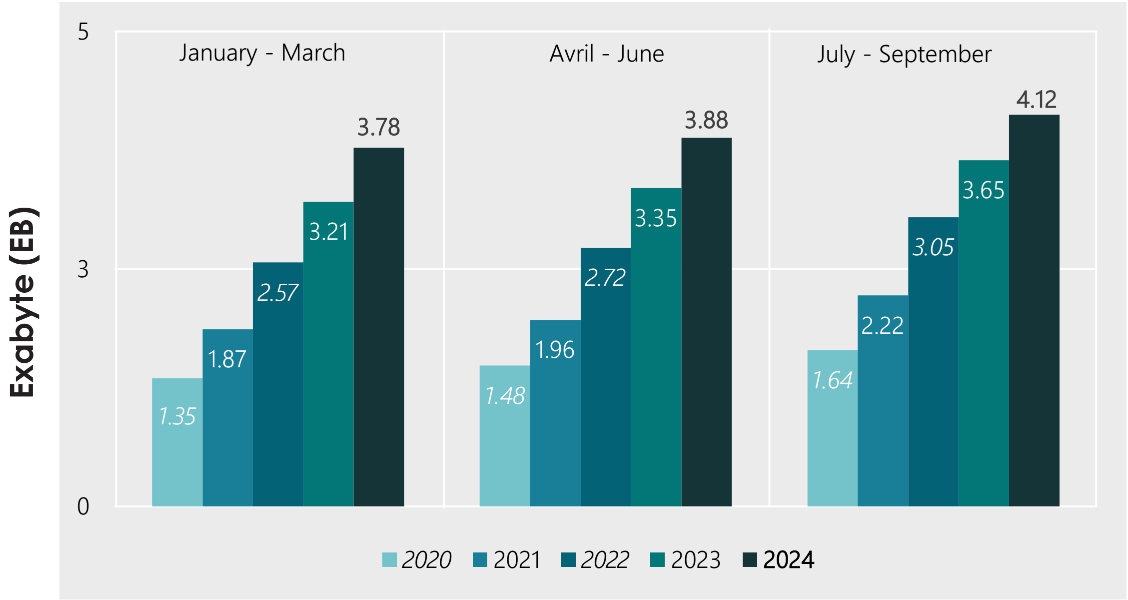
SEPTEMBER 2024



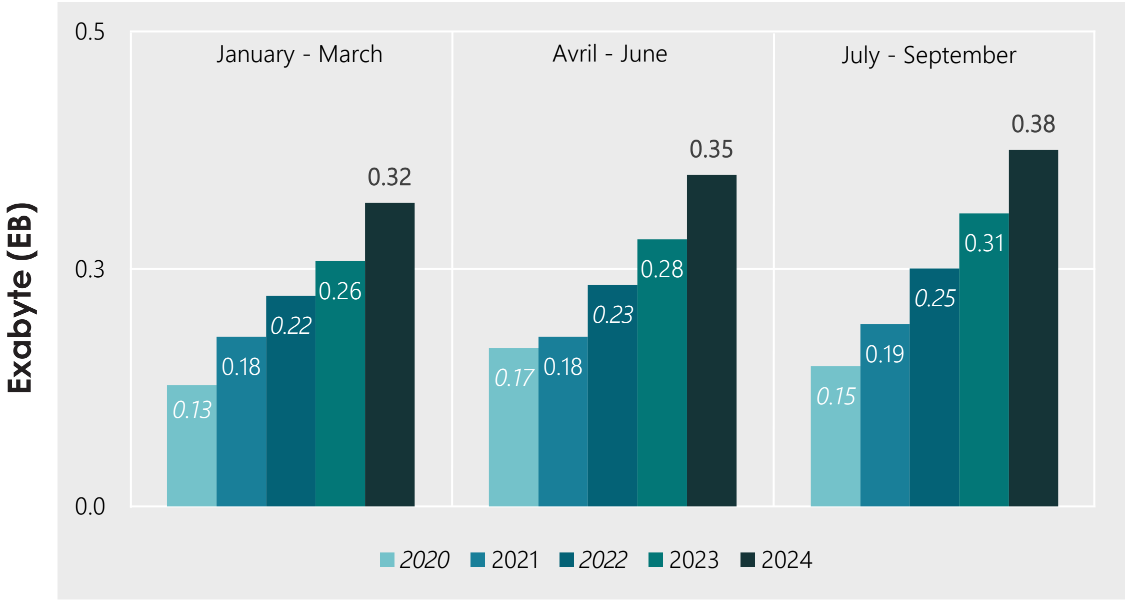


1.10 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD

DOWNLOAD (cumulative monthly data)



UPLOAD (cumulative monthly data)



① **Cumulative data since the beginning of the year** (January – September) — Download

	(2020)		(2021)		(2022)		(2023)		(2024)
Exabyte	4.47	+35.2%	6.05	+37.8%	8.33	+22.4%	10.20	+15.4%	11.78

(2020) → (2024): +163.2%

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+38.4	+37.6	+24.9	+17.8	+180.1
Q 2 (Avr. - Jun.)	+32.5	+38.6	+23.1	+15.8	+161.8
Q 3 (Jul. - Set.)	+35.0	+37.2	+19.7	+13.1	+150.7

① **Cumulative data since the beginning of the year** (January – September) — Upload

	(2020)		(2021)		(2022)		(2023)		(2024)
Exabyte	0.44	+24.2%	0.55	+28.4%	0.71	+20.2%	0.85	+23.1%	1.04

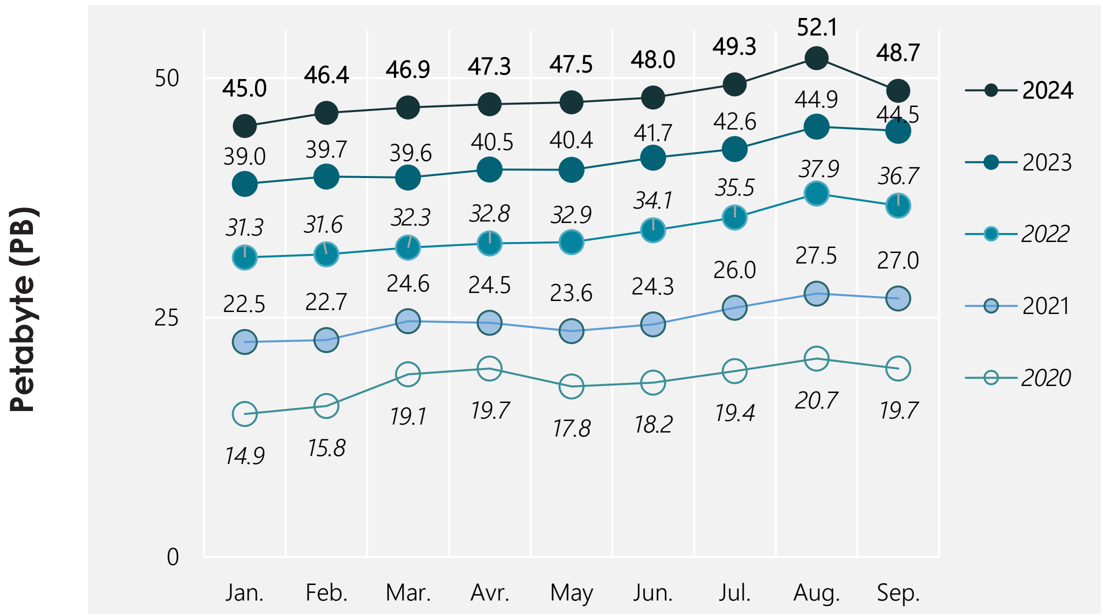
(2020) → (2024): +135.9%

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

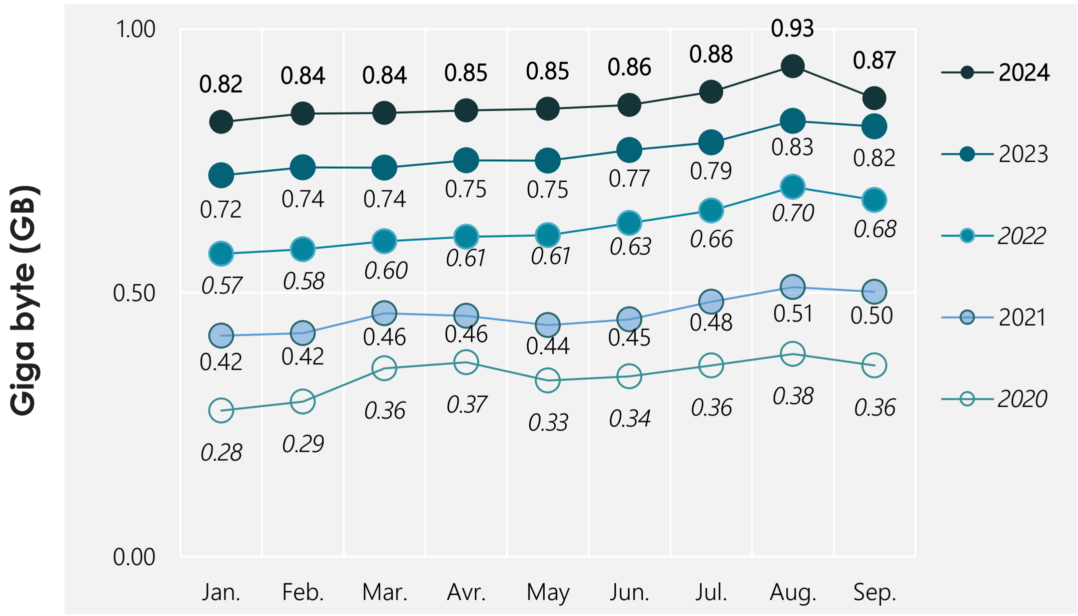
	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+39.9	+24.0	+16.5	+23.7	+149.9
Q 2 (Avr. - Jun.)	+7.1	+30.4	+20.5	+24.1	+108.9
Q 3 (Jul. - Set.)	+30.0	+30.6	+23.1	+21.6	+154.2

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

TOTAL TRAFFIC



PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



① **Average daily comparison since the beginning of the year** (January – September)

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

Petabyte 18.4 **+34.7%** 24.8 **+37.0%** 33.9 **+22.2%** 41.4 **+15.6%** 47.9

+160.8%

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+40.0	+36.4	+24.2	+16.9	+177.5
Q 2 (Avr. - Jun.)	+29.9	+37.9	+22.9	+16.4	+156.4
Q 3 (Jul. - Set.)	+34.6	+36.6	+20.0	+13.7	+151.0

① **Average daily comparison since the beginning of the year** (January – September)

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

Giga byte 0.34 **+34.5%** 0.46 **+35.9%** 0.63 **+22.4%** 0.77 **+12.1%** 0.86

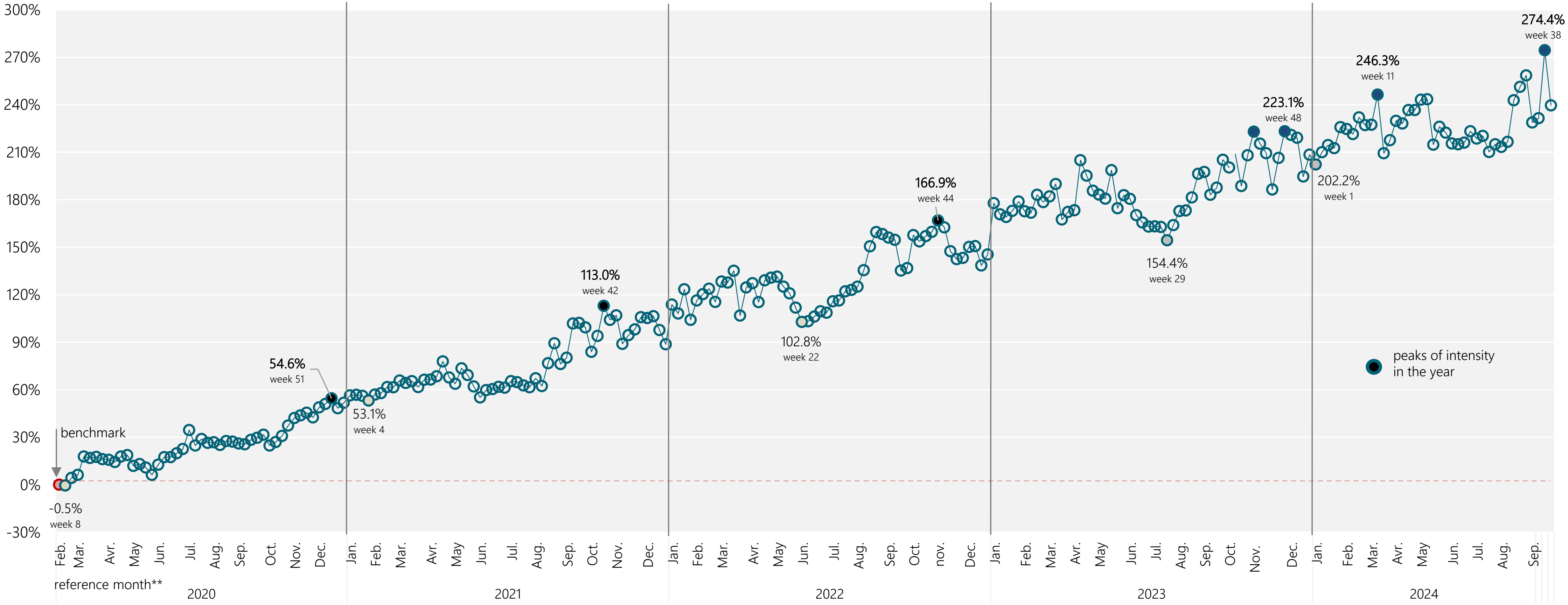
+150.9%

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+40.5	+34.4	+25.2	+14.0	+169.7
Q 2 (Avr. - Jun.)	+28.8	+37.4	+23.0	+12.2	+144.2
Q 3 (Jul. - Set.)	+34.8	+35.9	+19.4	+10.5	+141.5

1.12 MOBILE NETWORK: WEEKLY DATA TRAFFIC INTENSITY

Data trafiic intensity variation (*)



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

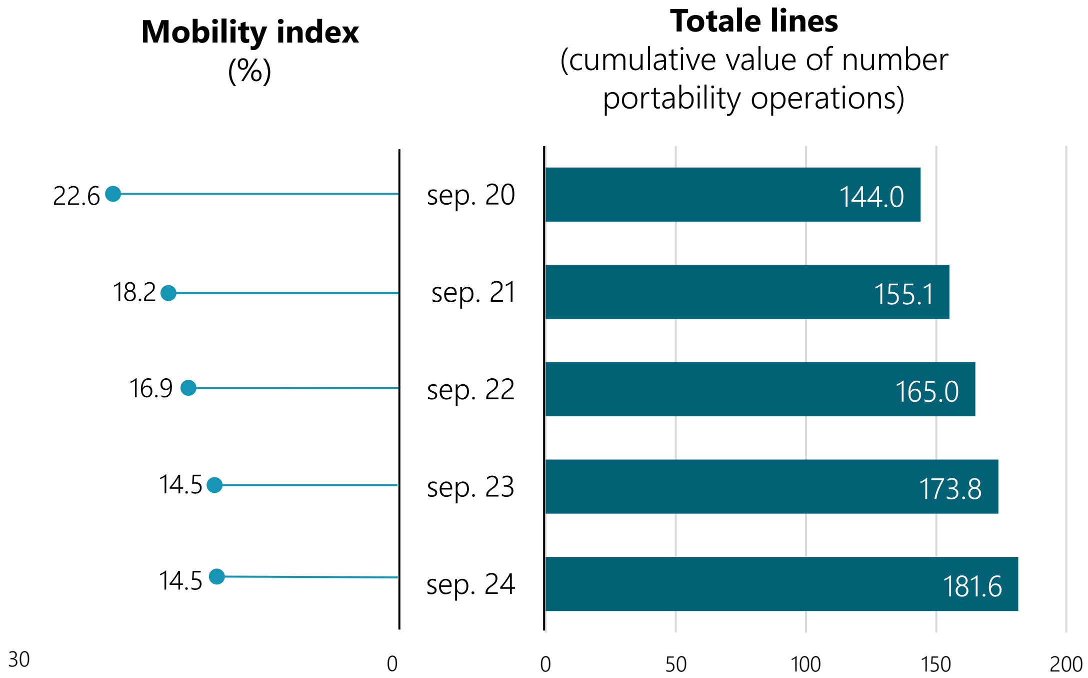
*For each week, the intensity indicator is represented by the percentage change, compared to the 7th week of 2020 (10 to 16 February - red dot in the graph), of the weighted average of the traffic data calculated on the operators' data using, as weighting coefficient, the percentual market share of each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

1.13 MOBILE NETWORK: NUMBER PORTABILITY

In one year (Sep. 2023 – Sep. 2024), there have been
7.7 million of Mobile Number Portability (MNP) operations

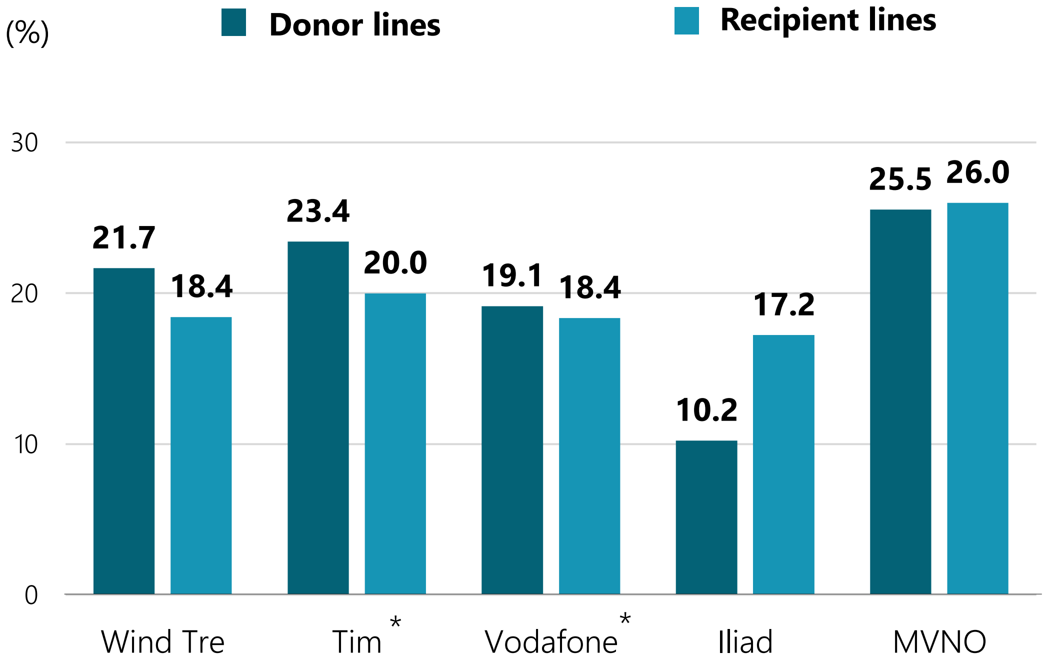

Mobility index (%)

Totale lines (cumulative value of number portability 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)

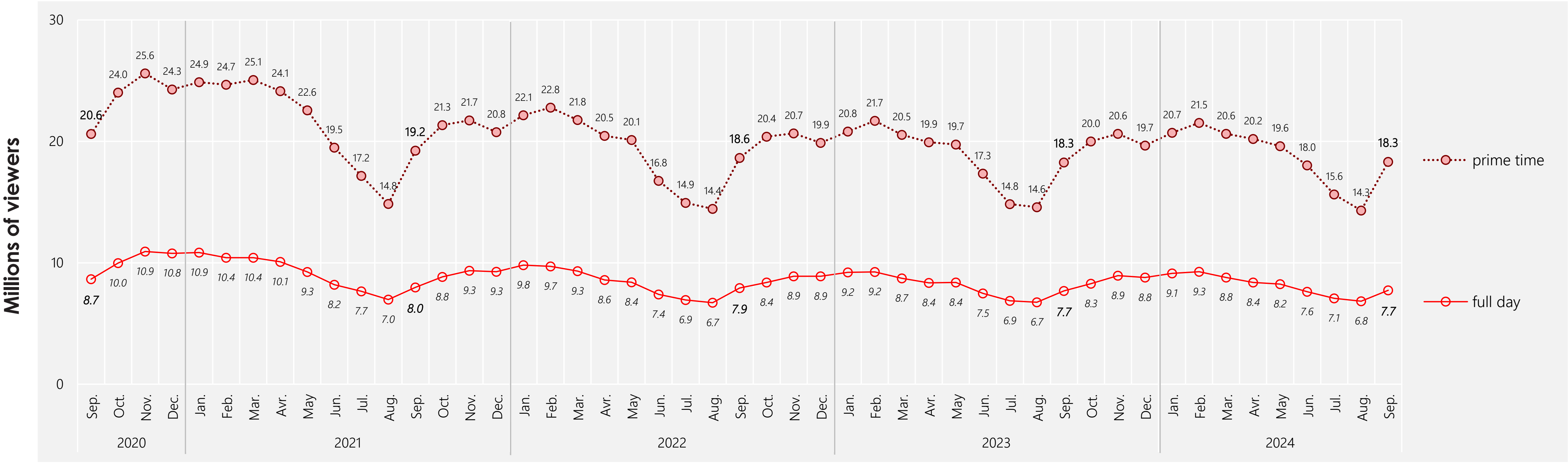
SEPTEMBER 2024



(*) 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)

2.1 TELEVISION (DVB-T E SAT): TOTAL AUDIENCE OF NATIONAL BROADCASTER

SEPTEMBER 2020 – SEPTEMBER 2024 (average daily audince)



Change in the number of viewers (average daily value Jan. – Sep. in millions)	(2020)	→	(2021)	→	(2022)	→	(2023)	→	(2024)	
Prime time audience (Time slot: 20:30 – 22.30)	22.73	↓ **-6.1%**	21.34	↓ **-10.4%**	19.12	↓ **-2.5%**	18.64	↑ **+0.7%**	18.78	↓ **-17.4%**
Average daily audience (Time slot: 02:00 – 25:59)	9.96	↓ **-8.7%**	9.09	↓ **-8.6%**	8.31	↓ **-2.8%**	8.07	↑ **+0.5%**	8.12	↓ **-18.5%**

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. – Sep.) in million

						Change in %	
Broadcasters	**2020**	**2021**	**2022**	**2023**	**2024**	**'20-'24**	**'23-'24**
RAI	8.92	8.85	7.53	7.13	7.26	-18.5	+1.9
Mediaset	8.24	7.46	7.19	7.00	6.63	-19.5	-5.4
Comcast / Sky	1.53	1.43	1.29	1.36	1.68	+9.9	+23.5
Warner Bros. Discovery	1.68	1.56	1.36	1.42	1.40	-16.8	-1.3
Cairo Comm. / La 7	1.28	1.14	1.04	0.95	1.09	-14.9	+14.3
Others	1.09	0.90	0.71	0.78	0.72	-34.3	-7.9

Average share Jan. – Sep. (in %)

						Change in p.p.	
Broadcasters	**2020**	**2021**	**2022**	**2023**	**2024**	**'20-'24**	**'23-'24**
RAI	39.2	41.5	39.4	38.2	38.7	-0.5	+0.5
Mediaset	36.2	35.0	37.6	37.6	35.3	-0.9	-2.3
Comcast / Sky	6.7	6.7	6.7	7.3	9.0	+2.2	+1.7
Warner Bros. Discovery	7.4	7.3	7.1	7.6	7.4	=	-0.2
Cairo Comm. / La 7	5.6	5.3	5.4	5.1	5.8	+0.2	+0.7
Others	4.8	4.2	3.7	4.2	3.8	-1.0	-0.4

AVERAGE DAILY AUDIENCE

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

						Change in %	
Broadcasters	**2020**	**2021**	**2022**	**2023**	**2024**	**'20-'24**	**'23-'24**
RAI	3.83	3.66	3.16	3.01	3.01	-21.5	+0.1
Mediaset	3.47	3.15	3.07	3.03	2.96	-14.6	-2.2
Warner Bros. Discovery	0.86	0.75	0.67	0.68	0.76	-11.0	+12.1
Comcast / Sky	0.72	0.63	0.61	0.61	0.61	-14.4	+1.0
Cairo Comm. / La 7	0.42	0.37	0.37	0.31	0.34	-20.9	+9.8
Others	0.66	0.53	0.42	0.44	0.43	-34.7	-2.9

Average share Jan. – Sep. (in %)

						Change in p.p.	
Broadcasters	**2020**	**2021**	**2022**	**2023**	**2024**	**'20-'24**	**'23-'24**
RAI	38.5	40.2	38.0	37.2	37.1	-1.4	-0.1
Mediaset	34.8	34.7	37.0	37.5	36.5	+1.7	-1.0
Warner Bros. Discovery	8.6	8.3	8.1	8.4	9.4	+0.8	+1.0
Comcast / Sky	7.2	6.9	7.4	7.5	7.6	+0.4	=
Cairo Comm. / La 7	4.3	4.1	4.4	3.8	4.1	-0.1	+0.4
Altri	6.6	5.8	5.1	5.5	5.3	-1.3	-0.2

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. – Sep.) in million

							Change in %	
Broadcasters	**TV channels**	**2020**	**2021**	**2022**	**2023**	**2024**	**’20-’24**	**‘23-’24**
RAI	Rai 1	4.68	4.59	4.07	3.78	4.11	-12.3	+8.5
	Rai 2	1.47	1.30	1.06	0.99	1.03	-29.8	+4.3
	Rai 3	1.23	1.49	1.24	1.22	1.03	-16.3	-15.9
Mediaset	Canale 5	3.63	3.25	3.05	2.99	2.84	-21.8	-5.2
	Italia 1	1.32	1.17	1.14	1.11	1.12	-14.9	+0.6
	Rete 4	1.19	1.09	0.95	0.82	0.80	-33.0	-3.5
Cairo Comm.	La7	1.19	1.06	0.97	0.86	0.99	-16.6	+15.7
Comcast / Sky	TV8	0.38	0.41	0.35	0.39	0.57	+49.8	+47.7
Warner Bros. Discovery	Nove	0.52	0.48	0.43	0.49	0.45	-13.3	-7.7

Average share Jan. – Sep. (in %)

							Change in p.p.	
Broadcasters	**TV channels**	**2020**	**2021**	**2022**	**2023**	**2024**	**’20-’24**	**‘23-’24**
RAI	Rai 1	20.6	21.5	21.3	20.3	21.9	+1.3	+1.6
	Rai 2	6.5	6.1	5.5	5.3	5.5	-1.0	+0.2
	Rai 3	5.4	7.0	6.5	6.6	5.5	+0.1	-1.1
Mediaset	Canale 5	16.0	15.2	16.0	16.1	15.1	-0.8	-0.9
	Italia 1	5.8	5.5	6.0	6.0	6.0	+0.2	=
	Rete 4	5.2	5.1	5.0	4.4	4.2	-1.0	-0.2
Cairo Comm.	La7	5.2	5.0	5.1	4.6	5.3	+0.1	+0.7
Comcast / Sky	TV8	1.7	1.9	1.8	2.1	3.1	+1.4	+1.0
Warner Bros. Discovery	Nove	2.3	2.2	2.3	2.6	2.4	+0.1	-0.2

AVERAGE DAILY AUDIENCE

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

							Change in %	
Broadcasters	**TV channels**	**2020**	**2021**	**2022**	**2023**	**2024**	**’20-’24**	**‘23-’24**
RAI	Rai 1	1.79	1.71	1.57	1.48	1.48	-17.4	-0.3
	Rai 2	0.54	0.54	0.43	0.43	0.48	-12.2	+11.1
	Rai 3	0.73	0.71	0.59	0.55	0.51	-29.6	-6.4
Mediaset	Canale 5	1.60	1.51	1.44	1.41	1.38	-14.0	-2.6
	Italia 1	0.52	0.44	0.40	0.38	0.38	-26.3	+0.2
	Rete 4	0.42	0.38	0.35	0.32	0.33	-20.8	+3.7
Cairo Comm.	La7	0.37	0.32	0.32	0.26	0.30	-19.4	+13.0
Comcast / Sky	TV8	0.18	0.18	0.16	0.15	0.18	+1.1	+24.8
Warner Bros. Discovery	Nove	0.23	0.19	0.18	0.20	0.19	-19.3	-3.5

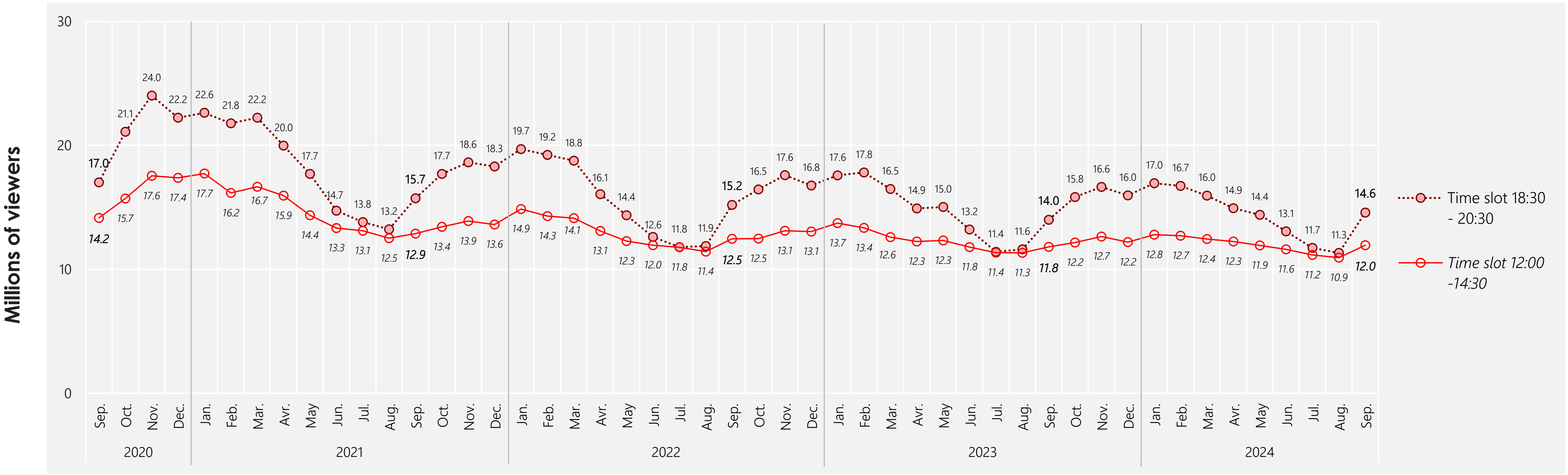
Average share Jan. – Sep. (in %)

							Change in p.p.	
Broadcasters	**TV channels**	**2020**	**2021**	**2022**	**2023**	**2024**	**’20-’24**	**‘23-’24**
RAI	Rai 1	18.0	18.8	18.8	18.4	18.2	+0.2	-0.1
	Rai 2	5.5	5.9	5.2	5.3	5.9	+0.4	+0.6
	Rai 3	7.3	7.8	7.1	6.8	6.3	-1.0	-0.5
Mediaset	Canale 5	16.1	16.6	17.4	17.5	17.0	+0.9	-0.5
	Italia 1	5.2	4.9	4.8	4.7	4.7	-0.5	=
	Rete 4	4.2	4.2	4.3	3.9	4.1	-0.1	+0.1
Cairo Comm.	La7	3.7	3.6	3.9	3.3	3.7	=	+0.4
Comcast / Sky	TV8	1.8	1.9	1.9	1.8	2.3	+0.4	+0.4
Warner Bros. Discovery	Nove	2.4	2.1	2.2	2.4	2.3	=	-0.1

Source: Agcom elaboration on data from Auditel

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

SEPTEMBER 2020 – SEPTEMBER 2024 (average daily audince)



Change in the number of viewers (average daily value Jan. – Sep. in millions)	(2020)	→	(2021)	→	(2022)	→	(2023)	→	(2024)
Time slot: 18:30 – 20.30	19.59	↓ -8.2%	17.98	↓ -13.7%	15.52	↓ -5.4%	14.68	↓ -1.8%	14.41
	→								↓ -26.4%
Time slot: 12:00 – 14:30	16.67	↓ -11.5%	14.75	↓ -12.4%	12.93	↓ -5.0%	12.28	↓ -2.4%	11.98
	→								↓ -28.1%

* **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

		Average audience since the beginning of the year (Jan. – Sep.) in millions						**Change (in thousand)**		**Change (in %)**	
		National news programs	**2020**	**2021**	**2022**	**2023**	**2024**	**'20 -'24**	**'23-'24**	**'20 -'24**	**'23-'24**
TIME SLOT: 12:00 – 14:30	RAI	Tg 1 (13:30 edition)	4.00	3.72	3.40	3.23	3.07	-938	-166	-23.4	-5.1
		Tg 2 (13:00 edition)	2.33	2.01	1.74	1.56	1.53	-800	-34	-34.4	-2.2
		Tg 3 (12:00 edition)	1.11	0.96	0.78	0.69	0.67	-435	-23	-39.4	-3.3
		Tg 3 Regionale (14:00 edition)	3.03	2.76	2.24	2.07	2.09	-941	+23	-31.0	+1.1
	Mediaset	Tg 4 (12:00 edition)	0.41	0.33	0.29	0.29	0.32	-94	+23	-22.8	+7.9
		Tg 5 (13:00 edition)	3.34	2.94	2.77	2.84	2.65	-696	-196	-20.8	-6.9
		Studio Aperto (12:25 edition)	1.76	1.45	1.17	1.10	1.06	-697	-34	-39.6	-3.1
	La 7	Tg La 7 (13:30 edition)	0.68	0.58	0.54	0.49	0.60	-85	+107	-12.5	+21.9

		Average audience since the beginning of the year (Jan. – Sep.) in millions						**Change (in thousand)**		**Change (in %)**	
		National news programs	**2020**	**2021**	**2022**	**2023**	**2024**	**'20 -'24**	**'23-'24**	**'20 -'24**	**'23-'24**
TIME SLOT: 18:30 – 20:30	RAI	Tg 1 (20:00 edition)	5.47	5.14	4.61	4.24	4.08	-1.390	-159	-25.4	-3.7
		Tg 2 (20:30 edition)	1.83	1.63	1.25	1.11	1.03	-803	-82	-43.9	-7.4
		Tg 3 (19:00 edition)	2.16	2.05	1.70	1.64	1.63	-531	-9	-24.6	-0.5
		Tg 3 Regionale (19:30 edition)	2.99	2.75	2.19	2.15	2.15	-833	6	-27.9	+0.3
	Mediaset	Tg 4 (12:00 edition)	0.65	0.61	0.59	0.54	0.49	-160	-50	-24.4	-9.1
		Tg 5 (13:00 edition)	4.42	3.97	3.64	3.54	3.39	-1.034	-150	-23.4	-4.2
		Studio Aperto (18:30 edition)	0.88	0.71	0.54	0.50	0.47	-418	-36	-47.3	-7.2
	La 7	Tg La 7 (20:00 edition)	1.18	1.11	1.00	0.96	1.17	-7	212	-0.6	+22.1

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. – Sep. (in thousand)

	Year	Full day	07:00 09:00	12:00 15:00	18:00 20:30
Totale «all news» channels	2024	108	216	84	160
	2023	118	224	133	173
	2022	139	244	160	200
	2021	160	288	194	223
	2020	193	292	239	275
Change %	2024/2023	*-8.3*	*-3.5*	*-37.2*	*-7.3*
	2024/2020	*-44.1*	*-26.0*	*-65.1*	*-41.8*

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

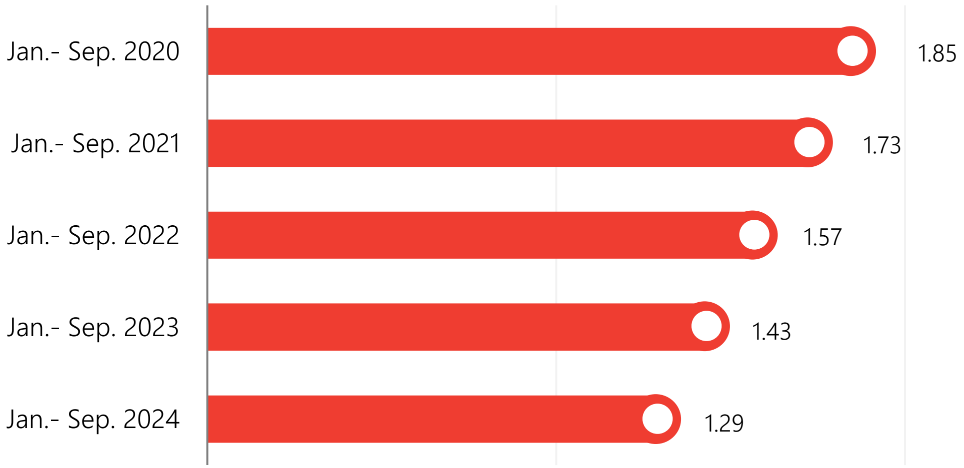
	Year	Full day	07:00 09:00	12:00 15:00	18:00 20:30
Rai News 24	2024	43	87	38	51
	2023	50	97	66	60
	2022	61	116	81	74
	2021	73	149	93	91
	2020	90	161	118	109
Change %	2024/2023	*-14.9*	*-10.2*	*-42.0*	*-15.1*
	2024/2020	*-52.7*	*-45.5*	*-67.4*	*-53.0*
Sky Tg24	2024	39	79	26	65
	2023	40	77	38	68
	2022	44	76	44	70
	2021	49	87	65	72
	2020	51	74	67	82
Change %	2024/2023	*-2.7*	*3.0*	*-32.5*	*-4.1*
	2024/2020	*-24.2*	*6.4*	*-62.0*	*-20.2*
TgCom 24	2024	26	49	19	44
	2023	28	50	29	44
	2022	34	52	35	57
	2021	38	52	36	61
	2020	52	57	54	84
Change %	2024/2023	*-4.2*	*-0.2*	*-32.5*	*-1.6*
	2024/2020	*-48.7*	*-13.0*	*-63.9*	*-48.3*

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 %

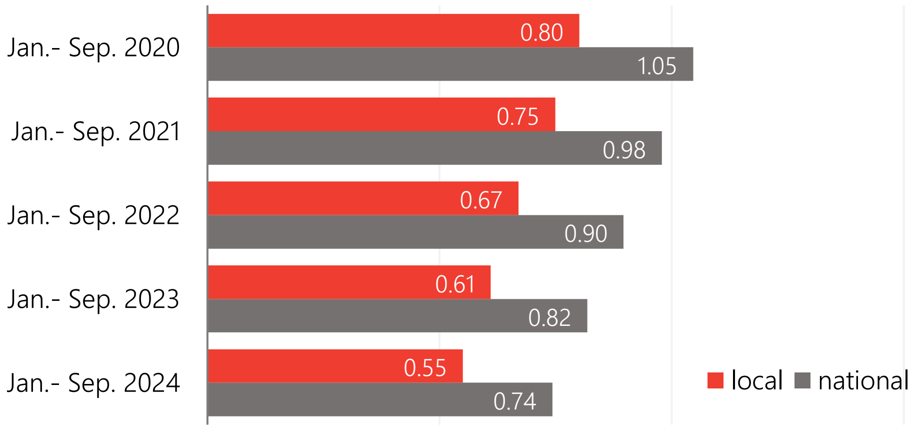
Period Jan. – Sep.

	(2023 – 2024)	(2020 – 2024)
Total copies:	**-9.4** ↓	**-30.0** ↓
Paper copies:	**-9.4** ↓	**-32.8** ↓
Digital copies:	**-9.4** ↓	**-7.5** ↓
National newspapers copies:	**-9.2** ↓	**-29.0** ↓
Local newspapers copies:	**-9.8** ↓	**-31.3** ↓

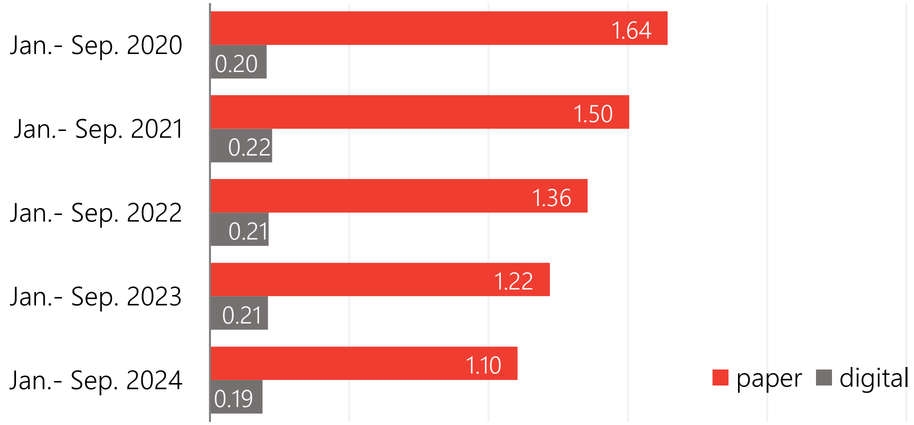
CUMULATIVE SALES BY TYPOLOGY

(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. – Sep.	2020	2021	2022	2023	2024
National newspapers	General press - Top 5	533	480	428	378	345
	Other general press	134	122	111	102	92
	Business	69	59	52	46	38
	Sport	159	155	153	141	130
Local newspapers	Top 10	352	331	298	270	247
	Others	395	356	314	283	251

Change in %	Jan. – Sep.	('23 – '24)	('20 – '24)
National newspapers	General press Top 5	-35.2 ↓	-8.5 ↓
	Other general press	-31.4 ↓	-9.9 ↓
	Business	-44.8 ↓	-17.0 ↓
	Sports	-18.1 ↓	-7.5 ↓
Local newspapers	Top 10	-29.8 ↓	-8.3 ↓
	Others	-36.5 ↓	-11.3 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in thousands)

	Jan. – Sep.	2020	2021	2022	2023	2024
National newspapers	General press - Top 5	82	95	88	92	90
	Other general press	25	31	30	27	15
	Business	37	29	28	28	27
	Sport	7	7	6	5	4
Local newspapers	Top 10	23	27	25	24	22
	Others	30	35	33	33	29

Change in %	Jan. – Sep.	('23 – '24)	('20 – '24)
National newspapers	General press Top 5	+10.0 ↑	-1.6 ↓
	Other general press	-38.5 ↓	-42.4 ↓
	Business	-25.5 ↓	-2.6 ↓
	Sports	-41.2 ↓	-19.9 ↓
Local newspapers	Top 10	-1.6 ↓	-5.4 ↓
	Others	-3.8 ↓	-11.4 ↓

Newspapers categories

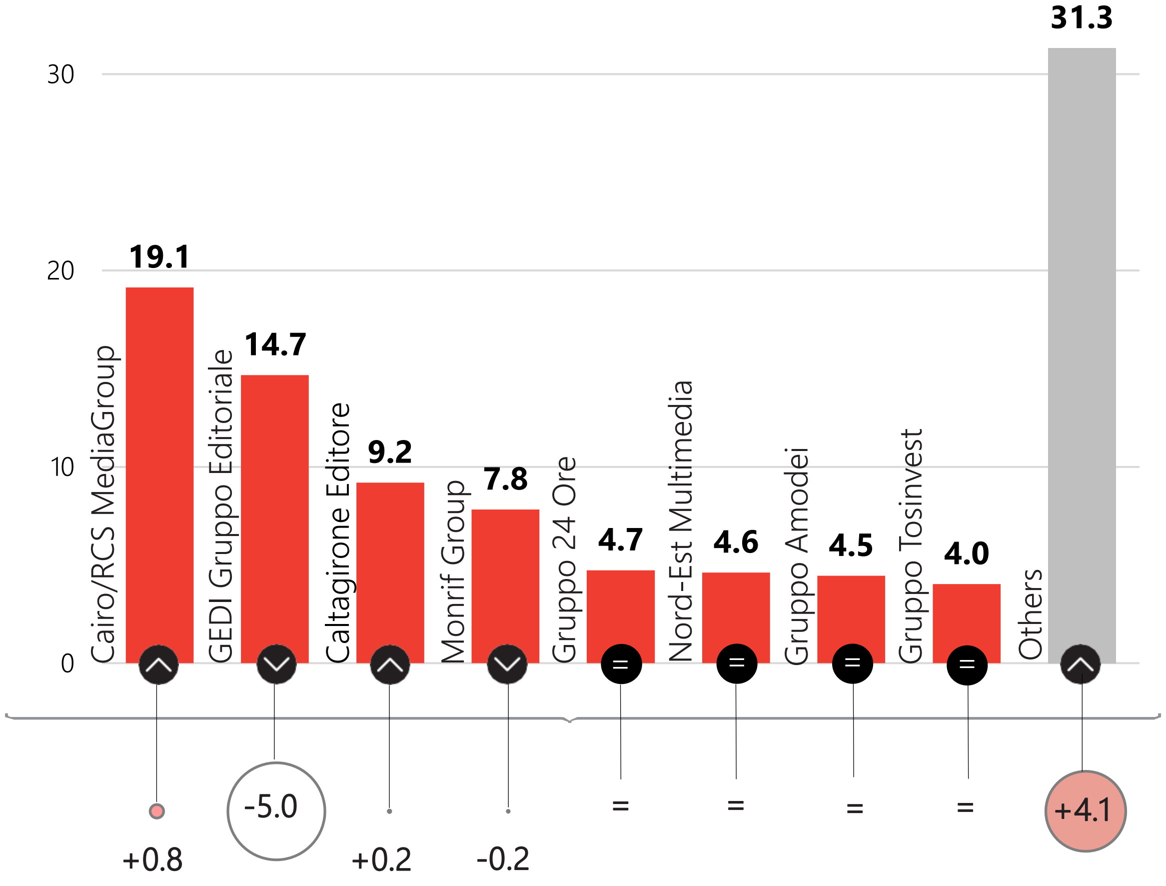
- National general press newspapers – Top 5: in terms of total sales in 2023: Avvenire. Corriere della sera. Messaggero. La Repubblica. La Stampa
- Other national general press: Il Fatto quotidiano. Il Giornale. Libero. Il Manifesto. Il Tempo. La Verità
- National business newspapers: Italia Oggi. Il Sole 24 Ore
- National sports newspapers: Corriere dello Sport. Gazzetta dello sport. Tuttosport
- Local newspapers – Top 10: in terms of total sales in 2023: 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

2.9 NEWSPAPERS: VOLUME SALES AND SHARES BY MAIN PUBLISHING GROUPS

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

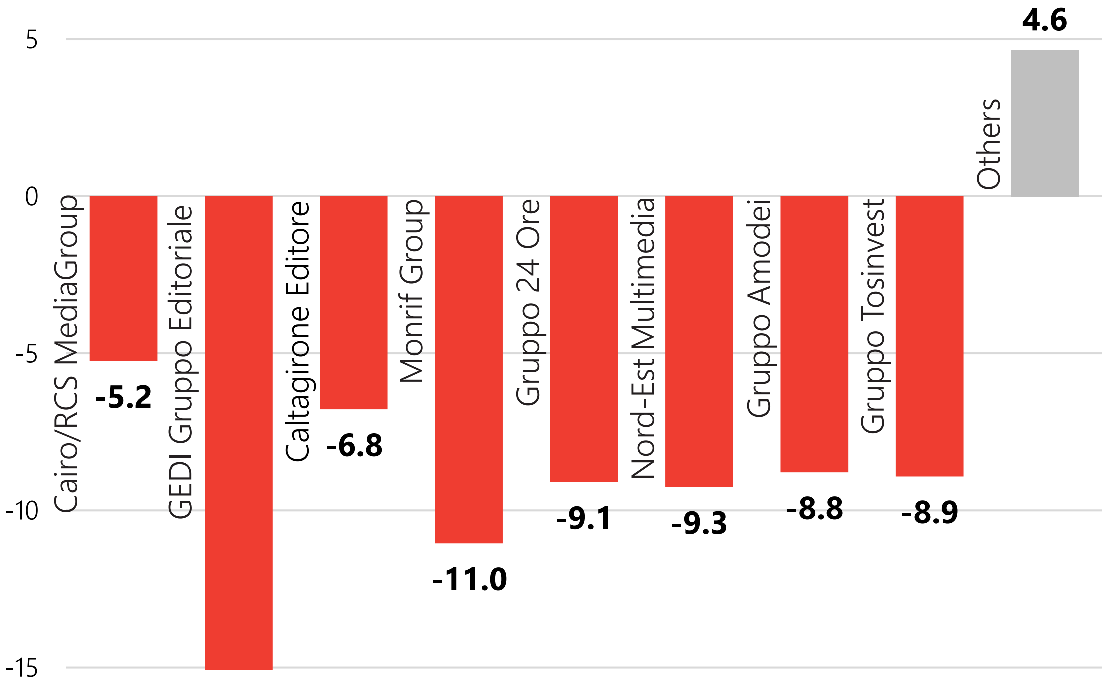
JANUARY – SEPTEMBER 2024



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

CHANGE IN TOTAL COPIES SOLD (%)

Difference vs. Jan. – Sep. 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 Octobre 2023 – September 2024)

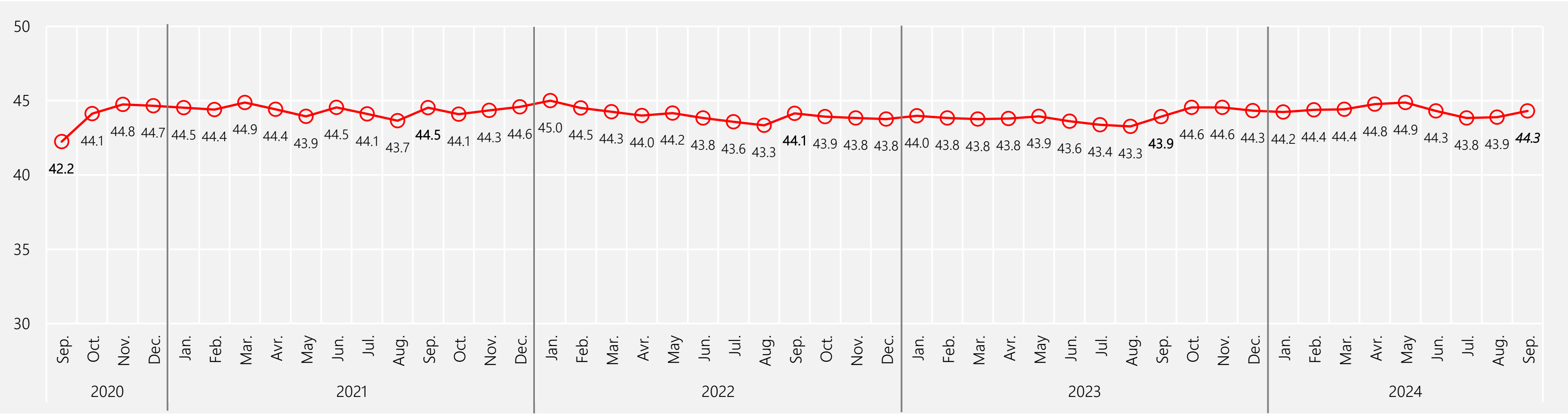
	TOTAL COPIES (paper + digital)							PAPER COPIES			DIGITAL COPIES		
Major Newspapers	19/20	20/21	21/22	22/23	23/24	Change pp. 22/23 vs 23/24	Change pp. 19/20 vs 23/24	23/24	Change pp. 22/23 vs 23/24	Change pp. 19/20 vs 23/24	23/24	Change pp. 22/23 vs 23/24	Change pp. 19/20 vs 23/24
Corriere della sera	11.30	11.32	12.05	12.45	13.1	+0.63	+1.78	11.01	-0.01	+0.32	25.04	+4.13	+8.61
Repubblica (La)	8.73	8.69	7.86	7.25	7.1	-0.13	-1.61	6.19	-0.01	-1.59	12.49	-0.93	-4.28
Gazzetta dello sport (La) (*)	5.23	5.08	5.72	5.73	5.9	+0.13	+0.64	6.65	+0.20	+1.12	1.29	-0.16	-1.31
Stampa (La)	5.44	5.45	5.36	5.17	4.9	-0.22	-0.49	5.04	-0.21	-0.55	4.40	-0.30	+0.29
Sole 24 Ore (Il)	5.10	4.65	4.72	4.77	4.7	-0.02	-0.35	3.24	-0.16	-0.31	13.47	+0.60	-4.78
Avvenire	4.08	4.24	4.01	4.09	4.58	+0.49	+0.51	5.10	+0.54	+0.60	1.60	+0.31	+1.09
QN - Il Resto del Carlino	4.08	4.21	4.20	4.07	3.98	-0.09	-0.10	4.59	-0.06	+0.16	0.47	-0.18	-0.63
Messaggero (Il	3.66	3.61	3.80	3.85	3.89	+0.03	+0.22	3.98	+0.01	+0.19	3.35	+0.18	+0.78
Corriere dello sport (*)	2.55	2.48	2.70	2.83	2.84	+0.01	+0.28	3.25	+0.03	+0.45	0.47	-0.07	=
Gazzettino (Il)	2.34	2.47	2.51	2.57	2.68	+0.11	+0.34	2.59	+0.10	+0.29	3.21	+0.16	+0.47
QN - La Nazione	2.86	2.89	2.76	2.68	2.62	-0.06	-0.24	3.02	-0.04	-0.10	0.31	-0.12	-0.36
Giornale (Il)	2.34	2.34	2.03	1.99	2.05	+0.06	-0.29	2.29	+0.07	-0.22	0.70	+0.05	-0.21

(*) – includes the Monday edition

Source: Agcom elaboration on data from ADS

2.11 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS (Sep. 2020 – Sep. 2024)

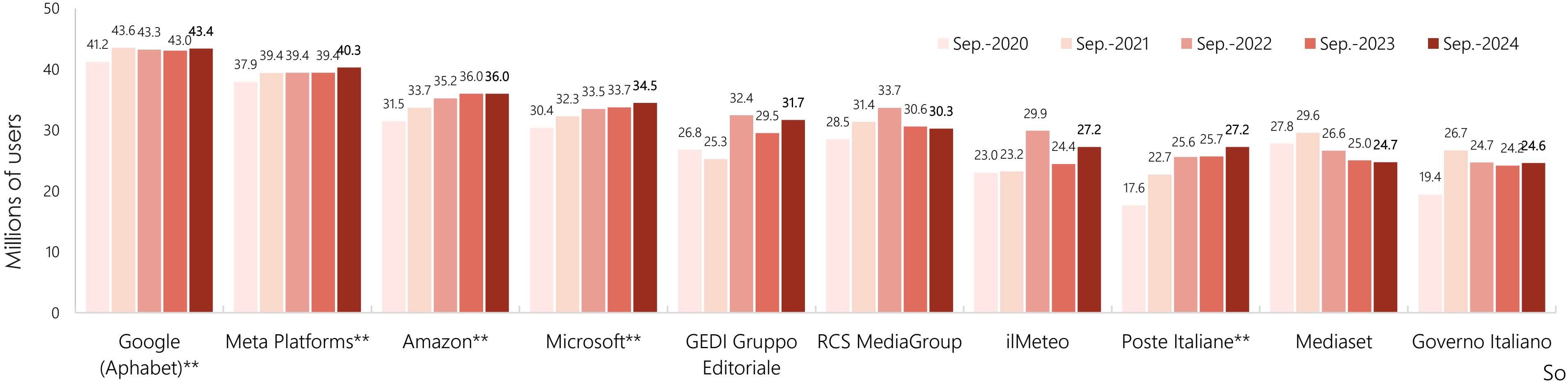


44 million and **317** thousand unique users logged on to the internet in September 2024 (**+383** thousand compared to September 2023)

Approximately 7**1 hour and 20 minute** spent, on average, by each user surfing the Internet in September 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*)



** Google (Alphabet), Meta Platforms (Meta), Amazon, Microsoft and Poste Italiane are detected only through the Audiweb Panel.

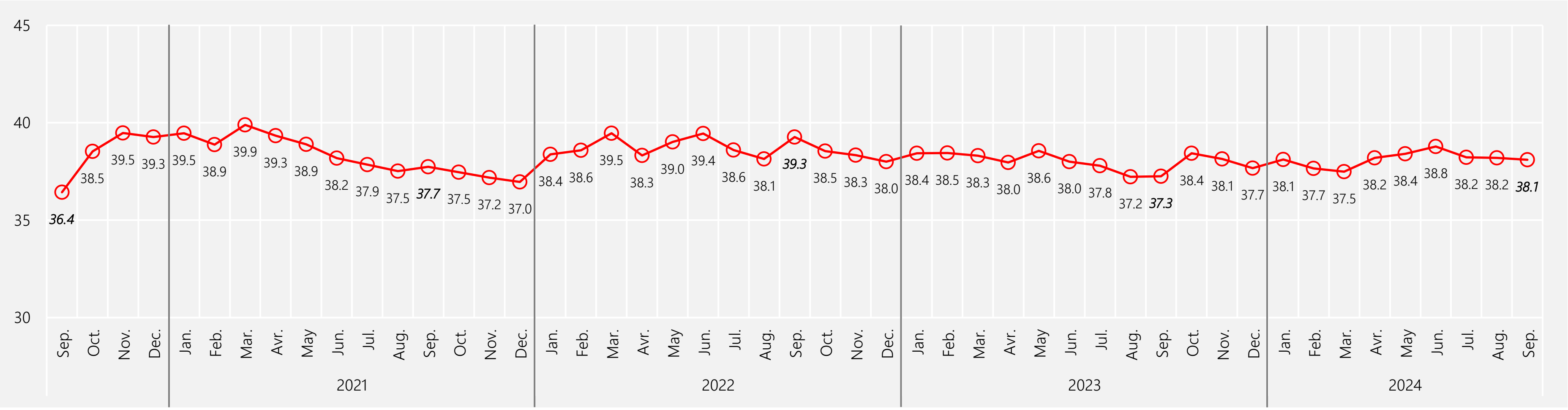
* **Parent** is defined as a group of domains and URLs that are owned by a specific company. its subsidiaries or business units. In addition. a Parent may also be represented by an organisation. government agency. private group. corporation or other institution. which has controlling interests in each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

2.12 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

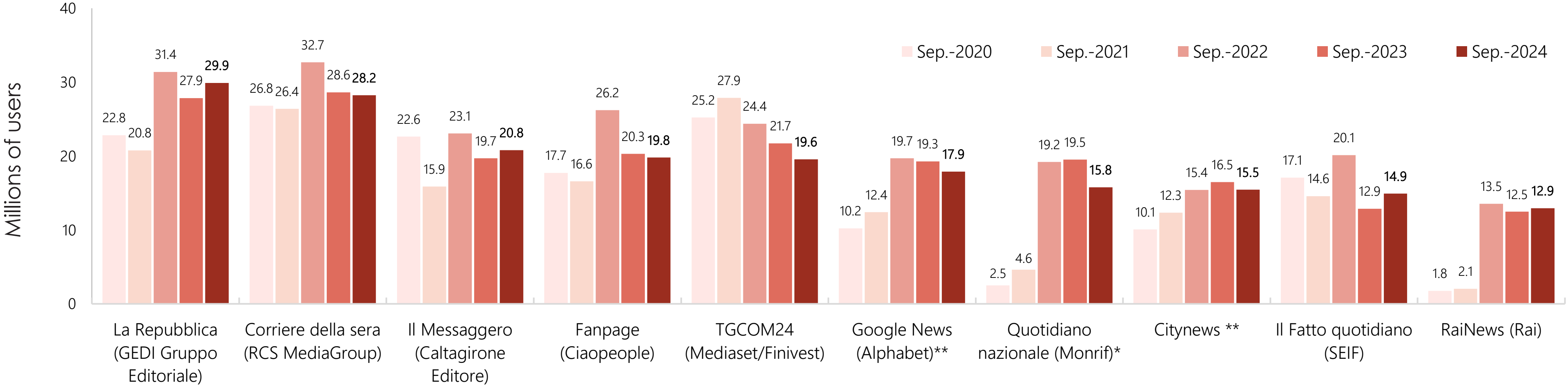
UNIQUE USERS IN MILLIONS (Sep. 2020 – Sep. 2024)



38 million and **101** thousand unique users logged on to the generalist news sites/APPs in September 2024 (over **840** thousand users compared to September 2023)

About **1 hour and 7 minute** spent, on average, by each user browsing general news websites/APPs in September 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.

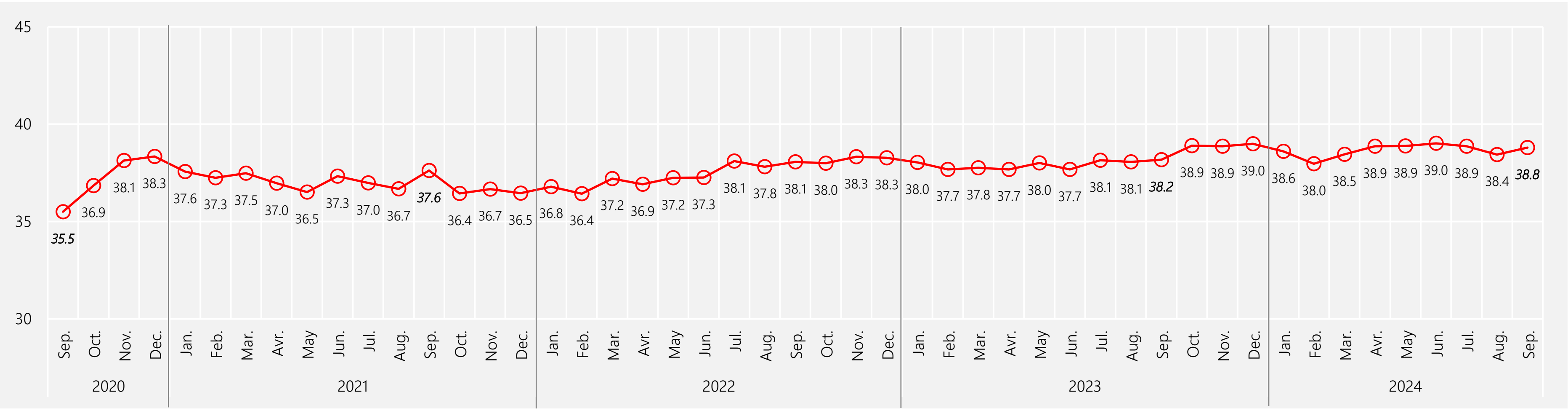
* Starting from April 2022, the Monrif group entered in the Audiweb survey system. This has led to a change in the classification perimeter and the detection method which - in addition to the *Audiweb Panel* - now also uses the census component *Audiweb Census*. For this reason. the values relating to the month of Sep. 2022 and Sep. 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

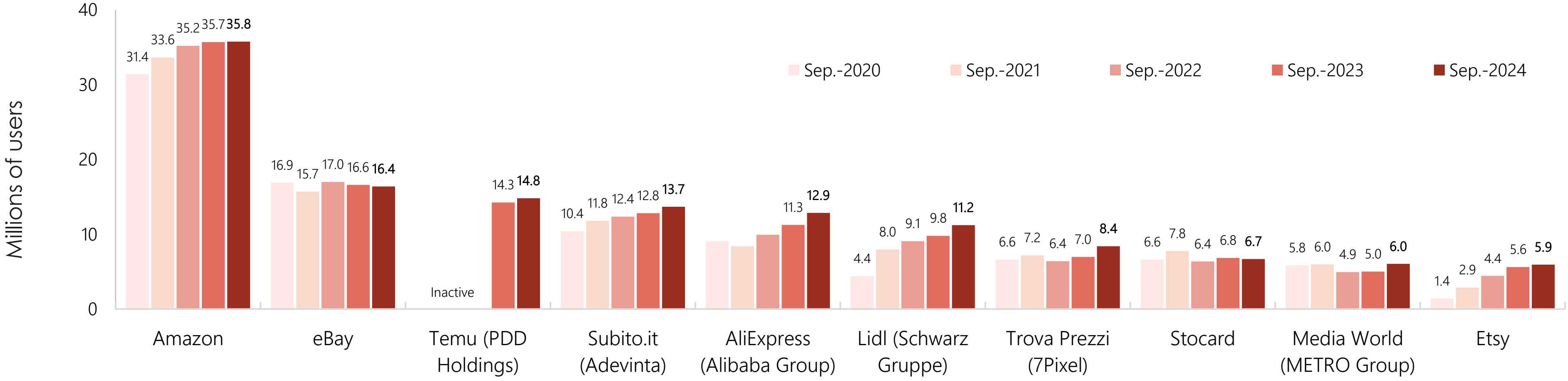
UNIQUE USERS IN MILLIONS (Sep. 2020 – Sep. 2024)



38 million and **803** thousand unique users logged on to e-commerce sites/APPs in September 2024 (**+631** thousand users compared to September 2023)

2 hour and 38 minute spent, on average, by each user browsing e-commerce websites/APPs in September 2024

UNIQUE USERS OF THE MAIN WEBSITES*



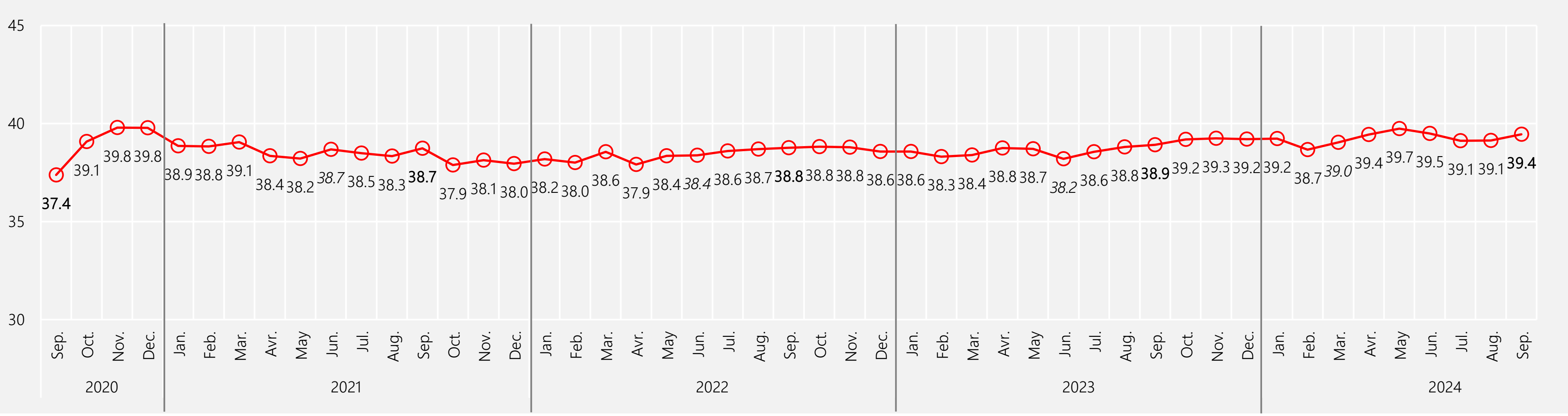
* The brands represented are dectected only through the Audiweb Panel.

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»)*

2.14 PLATFORMS: SOCIAL NETWORK WEBSITES/APP UNIQUE USERS

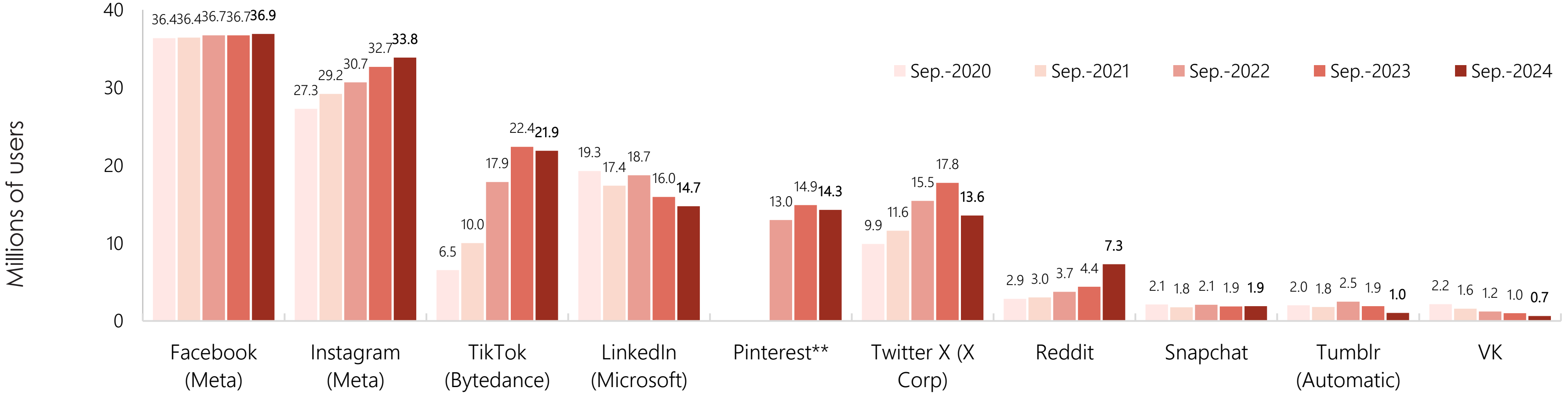
UNIQUE USERS IN MILLIONS (Sep. 2020 – Sep. 2024)



39 million and **447** thousand unique users logged on to social networking sites/APPs in September 2024 (**+538** thousand users compared to September 2023)

23 hour and 15 minute spent, on average, by each user browsing social networking websites/APPs in September 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.

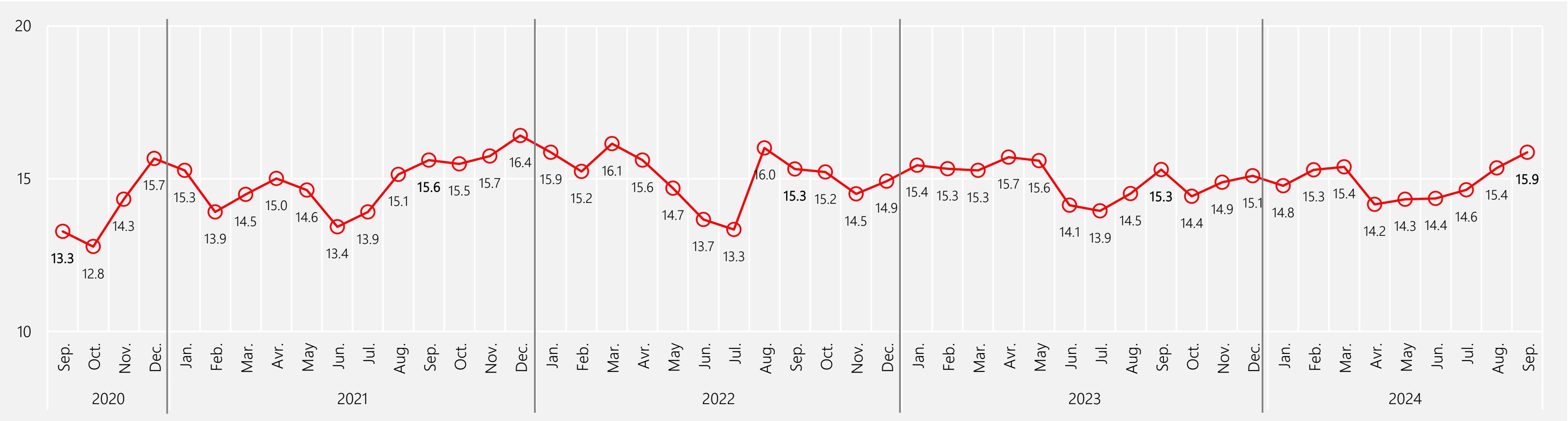
Source: Agcom elaboration on data from Audicom – sistema Audiweb *(Values referring to the category: «Member Communities»)*

* Note: 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

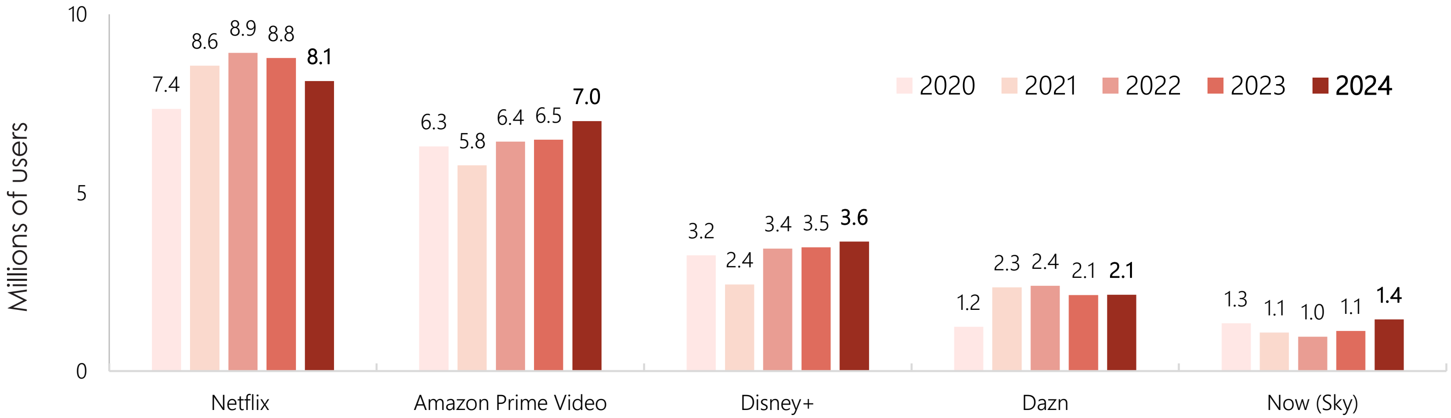
UNIQUE USERS IN MILLIONS (Sep. 2020 – Sep. 2024)



15 million and **867** thousand unique users logged on to video-on-demand sites/APPs in September 2024 (**+567** thousand compared to September 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 Jan. – Sep..)



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: Alphabet/Google (Google Play Movies &TV); Amazon (Primevideo.com Sep. 20 - Jul. 23; Amazon Streaming since Aug. 23); Apple (Apple TV); Chili (CHILI.COM); Comcast/Sky (NOWTV.IT); Dazn (DAZN.COM); Netflix (Netflix Inc.); Rakuten Group (RAKUTEN.TV); The Walt Disney (Disney Digital); TIM (TIMVISION.IT).

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.

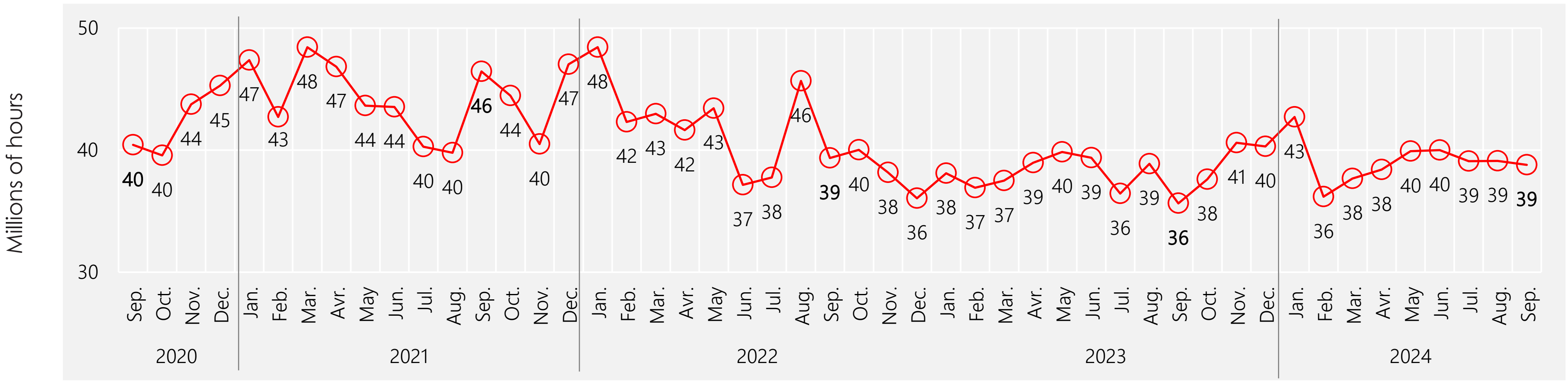
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

Dazn data are collected by Auditel as of August 2022, according to AGCOM resolution no. 18/22/CONS

* Note: platforms with an average time spent by users more than 7 minute are represented

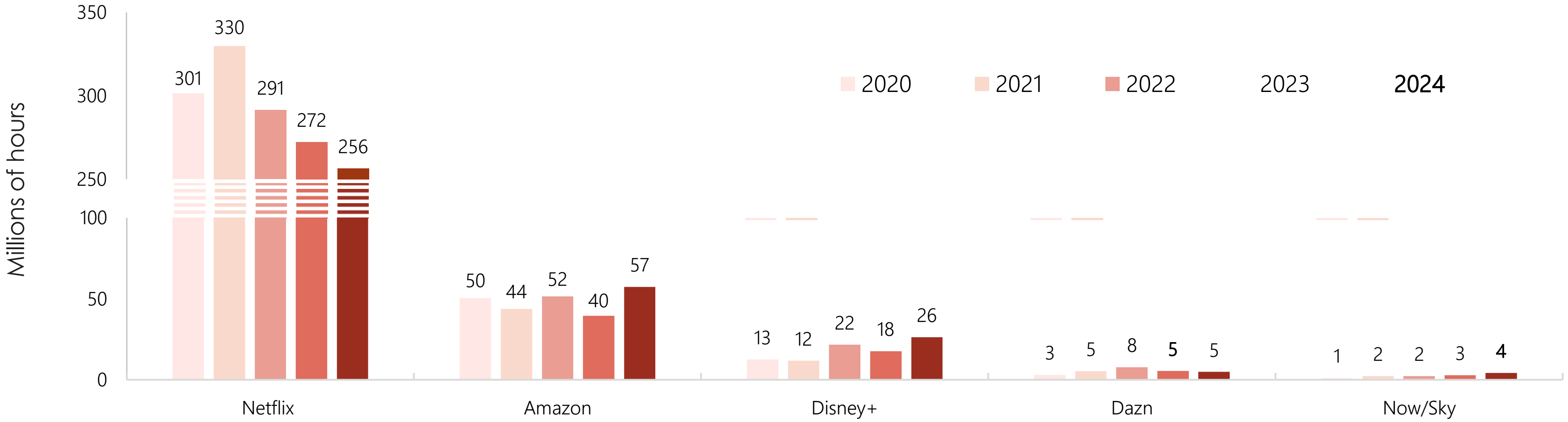
2.16 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT (Sep. 2020 – Sep. 2024)



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 27 minute** in September 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: Alphabet/Google (Google Play Movies &TV); Amazon (Primevideo.com Sep. 20 - Jul. 23; Amazon Streaming since Aug. 23); Apple (Apple TV); Chili (CHILI.COM); Comcast/Sky (NOWTV.IT); Dazn (DAZN.COM); Netflix (Netflix Inc.); Rakuten Group (RAKUTEN.TV); The Walt Disney (Disney Digital); TIM (TIMVISION.IT).

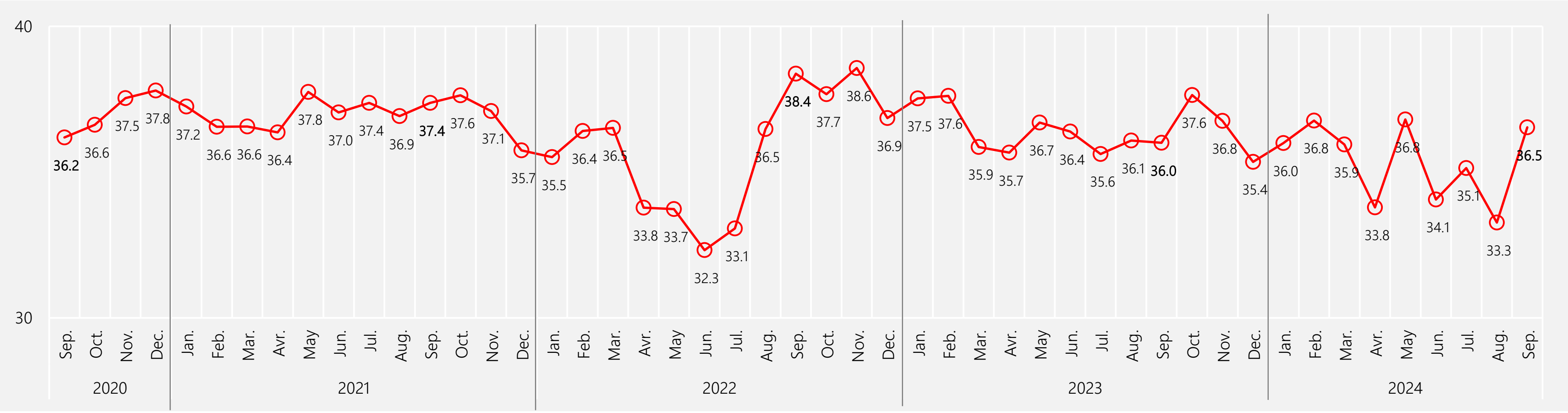
Mediaset Infinity data are not considered due to an editorial choice which does not allow to separate the part of the paid services from the free one.

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

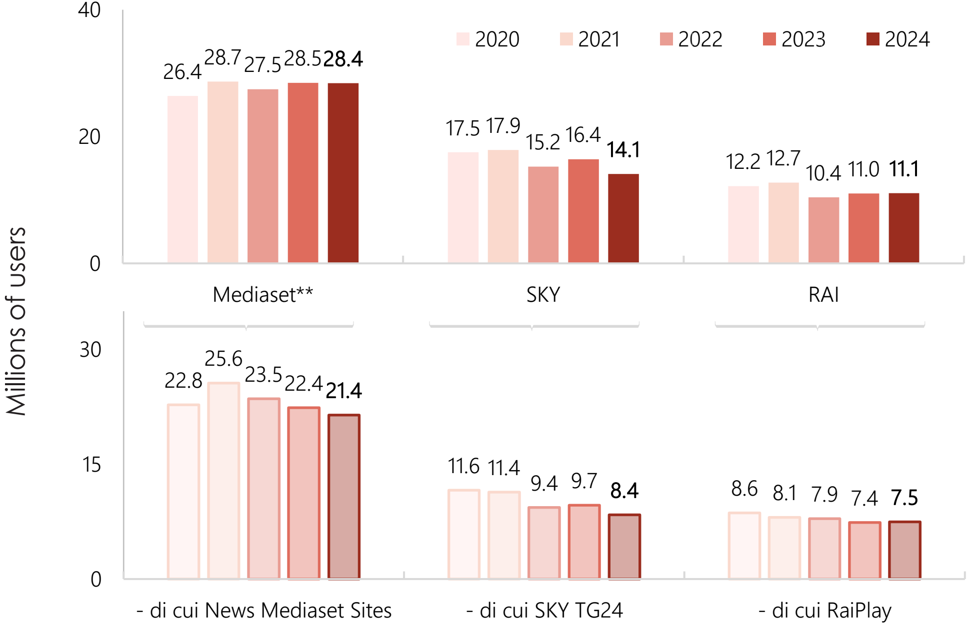
Source: Agcom elaboration on data from Comscore

2.17 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS

UNIQUE USERS IN MILLIONS (Sep. 2020 – Sep. 2024)



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.

** *Mediaset.it Sites* unique users data collection do not allow to separate the traffic of paid VOD services included in *Mediaset Infinity*, that since the beginning of the year has an average of 14 million and 790 thousand of unique users.

36 million unique users logged on to free video-on-demand sites/APPs in September 2024 (**+4** million compared to September 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: MFE/Mediaset (Mediaset Infinity Sites and TGCOM 24 Sites Jan. 20 - Avr. 22; Mediaset.it Sites since May 22); Rai (RaiPlay; Rai News, Rai Sport); Warner Bros. Discovery (Discovery Inc. Sep. 20 – May 23; Warner (TBS Entertainment Digital, until May 23, Warner Bros. Discovery since Jun. 23); Comcast/Sky (Sky Free ToAir; Sky sport; Sky TG24, Sky Entertainment); Cairo Communication/La 7 (La7); Paramount Global/Viacom (Nickelodeon Kids and Family; MTV Italy); Rakuten Group (VIKI.COM); De Agostini (DEABYDAY.TV; DEAKIDS.IT); Mperience (VVVVID.IT); A&E Television Networks Italy (A+E Networks Digital); Italia Sport Communication (SPORTITALIA.COM); Rete Blu (TV2000.IT); Delta Pictures (POPCORNTV.IT); Fascino PGT (WITTYTV.IT).

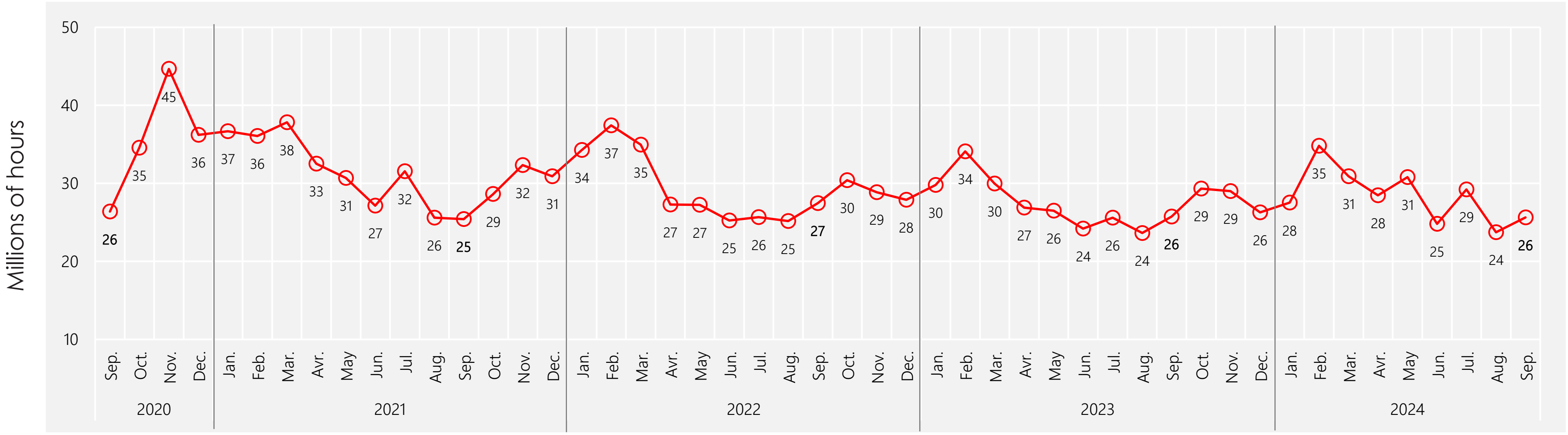
Please note that due to editorial choices for some sites and applications (Mediaset Infinity Sites; Warner Bros. Discovery) it is not possible to unbundle the paid VOD portion.

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

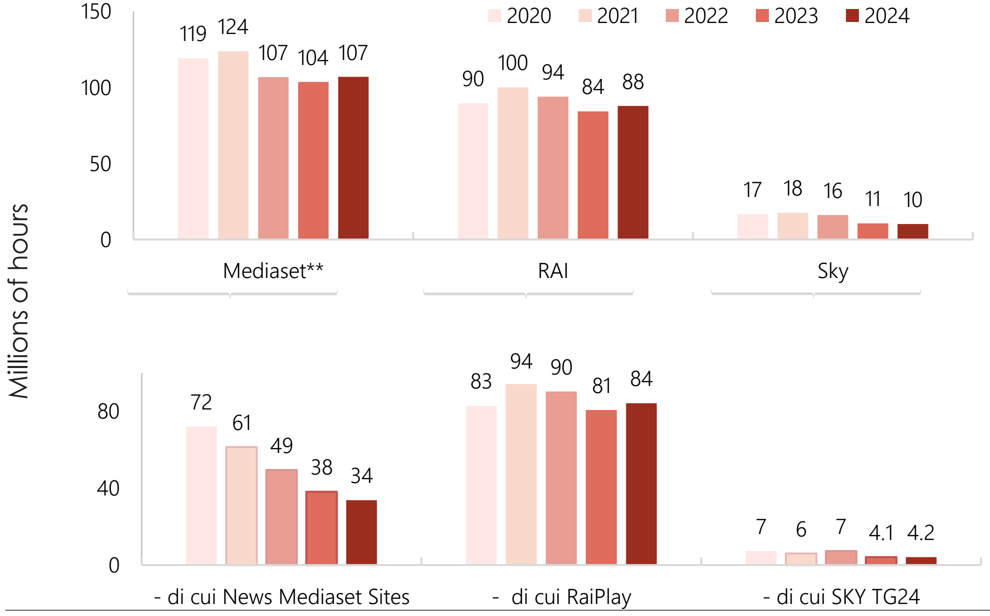
Source: Agcom elaboration on data from ComScore

2.18 PLATFORMS: TIME SPENT ON FREE VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT (in millions of hours) (Sep. 2020 – Sep. 2024)



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



* For each publishers (slide 2.17) it is displayed separately the component, of those considered (News, Sport and Entertainment), that is most relevant in terms of unique audience.

** *Mediaset.it Sites* total hours do not allow to separate those of paid VOD services included in *Mediaset Infinity*. By considering the latter (with an amount just under 51 million of hours since the beginning of the year), *Mediaset.it Sites* reach 104 million total hours in the period Jan.-Sep. 2024.

The average time spent per month by each visitor on free video on demand platforms is **43 minute** in September 2024

The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: MFE/Mediaset (Mediaset Infinity Sites and TGCOM 24 Sites Jan. 20 - Avr. 22; Mediaset.it Sites since May 22); Rai (RaiPlay; Rai News, Rai Sport); Warner Bros. Discovery (Discovery Inc. Sep. 20 – May 23; Warner (TBS Entertainment Digital, until May 23, Warner Bros. Discovery since Jun. 23); Comcast/Sky (Sky Free ToAir; Sky sport; Sky TG24, Sky Entertainment); Cairo Communication/La 7 (La7); Paramount Global/Viacom (Nickelodeon Kids and Family; MTV Italy); Rakuten Group (VIKI.COM); De Agostini (DEABYDAY.TV; DEAKIDS.IT); Mperience (VVVVID.IT); A&E Television Networks Italy (A+E Networks Digital); Italia Sport Communication (SPORTITALIA.COM); Rete Blu (TV2000.IT); Delta Pictures (POPCORNTV.IT); Fascino PGT (WITTYTV.IT).

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

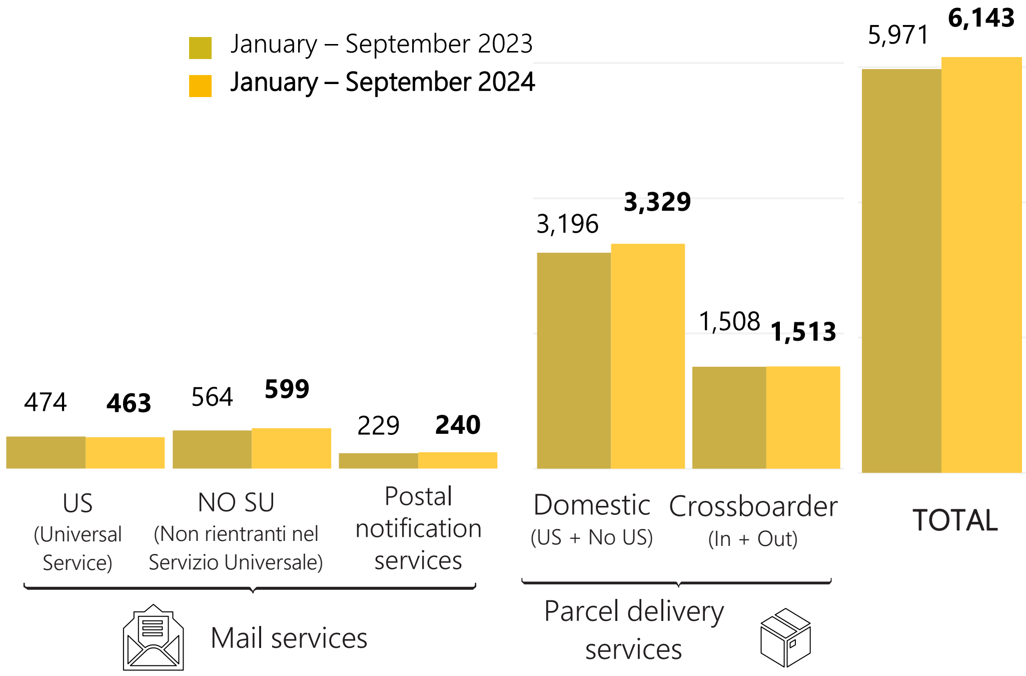
Source: Agcom elaboration on data from ComScore

Source: Agcom elaboration on data from Comscore

3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



↑ **+2.8** (Mail services)

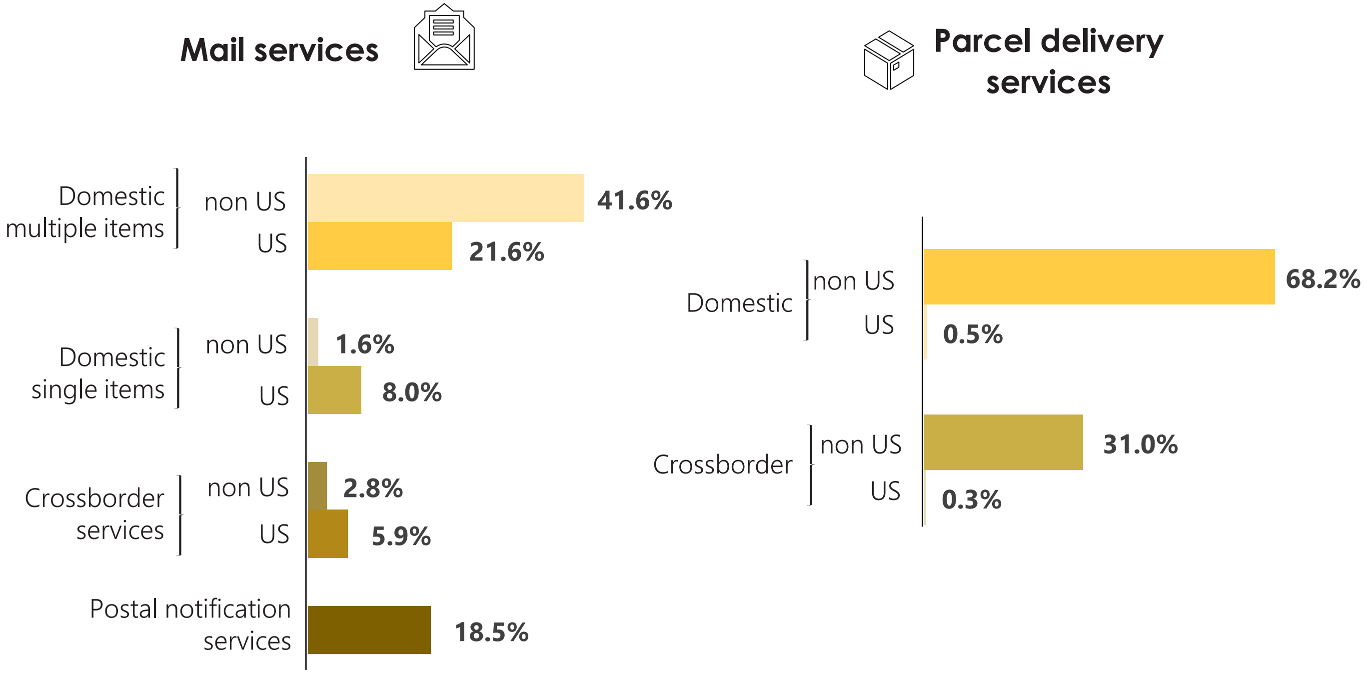
↑ **+2.9** (Parcel delivery services)

↑ **+2.9** Total

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

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

(January - September 2024)



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

↑ **+3.0**	↓ **-6.6**	↑ **+8.3**	↑ **+4.9**	↑ **+4.1**	↑ **+0.3**
Domestic multiple items	Domestic single items	Crossborder services	Postal notification services	Domestic	Crossborder

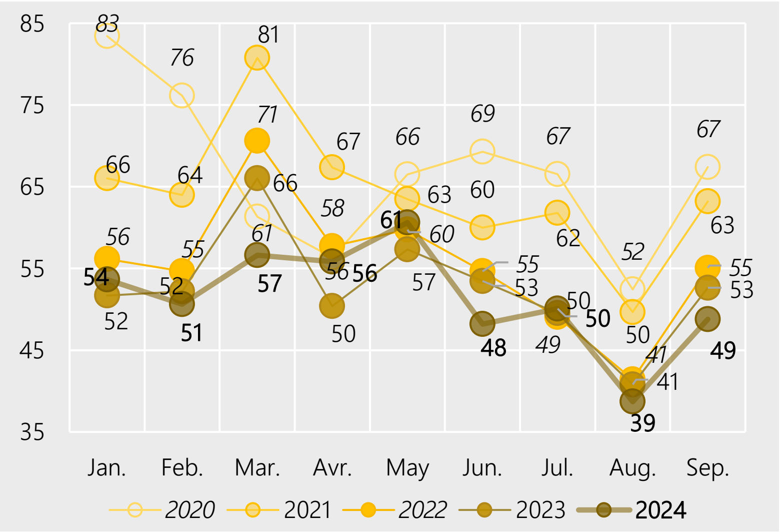
Note: Due to changes in firms' accounting data are not directly comparable with previous versions

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.. 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.

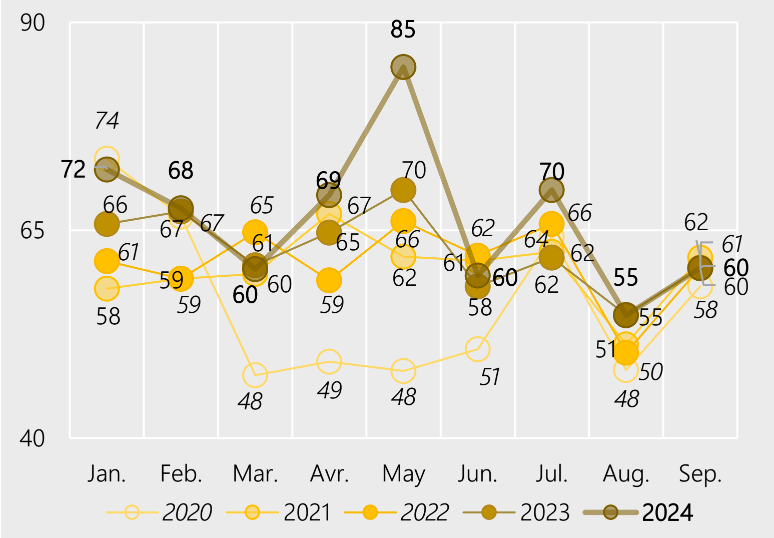
3.2 POSTAL SERVICES: MONTHLY MAIL SERVICES REVENUES

Millions of €

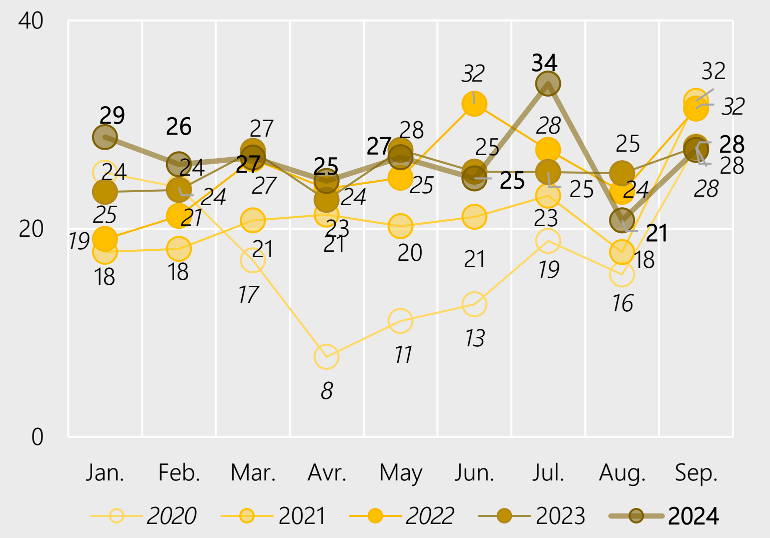
UNIVERSAL SERVICE (US)



OTHER SERVICES (NON US)



POSTAL NOTIFICATION SERVICES



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

mln. €

(2020) 599 → -3.9% → (2021) 576 → -13.4% → (2022) 499 → -5.0% → (2023) 474 → -2.3% → (2024) 463

(2020) → (2024): -22.7%

(2020) 506 → +7.1% → (2021) 542 → +1.2% → (2022) 549 → +2.7% → (2023) 564 → +6.2% → (2024) 599

(2020) → (2024): +18.2%

(2020) 160 → +20.2% → (2021) 192 → +19.6% → (2022) 230 → -0.5% → (2023) 229 → +4.9% → (2024) 240

(2020) → (2024): +50.1%

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

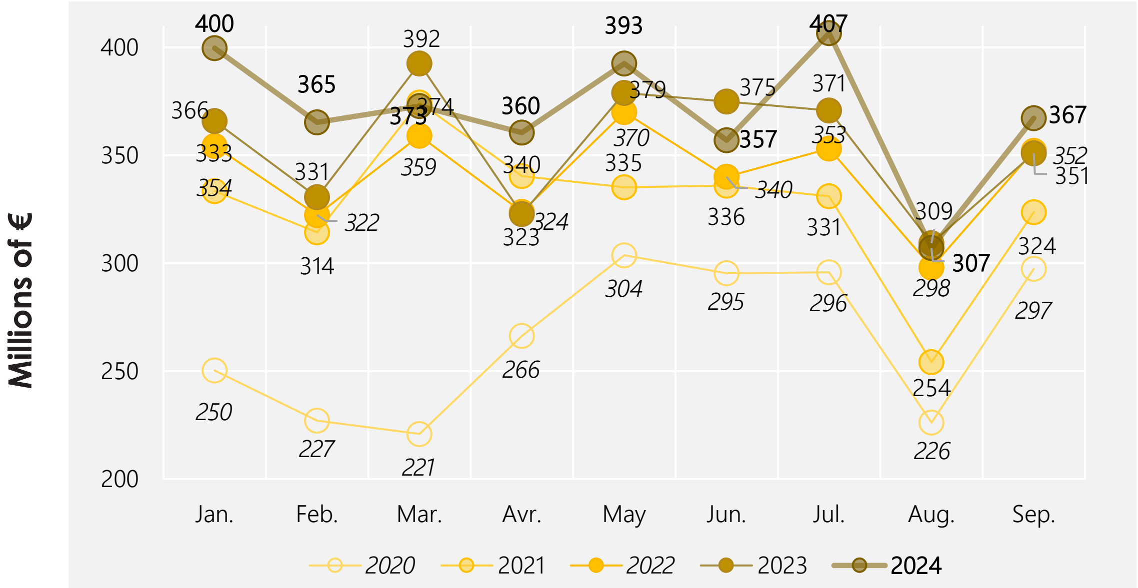
	YoY				Whole period
	20/21	21/22	22/23	23/24	2020/2024
Q 1 (Jan.-Mar.)	-4.6	-13.9	-6.4	-5.3	-27.2
Q 2 (Avr.-Jun.)	-0.7	-9.8	-6.3	+2.1	-14.3
Q 3 (Jul.-Set.)	-6.3	-16.7	-1.8	-3.8	-26.2

	YoY				Whole period
	20/21	21/22	22/23	23/24	2020/2024
Q 1 (Jan.-Mar.)	-5.8	+4.7	+4.6	+3.3	+6.6
Q 2 (Avr.-Jun.)	+28.5	-1.6	+3.1	+10.7	+44.2
Q 3 (Jul.-Set.)	+2.8	+0.7	+0.2	+4.6	+8.5

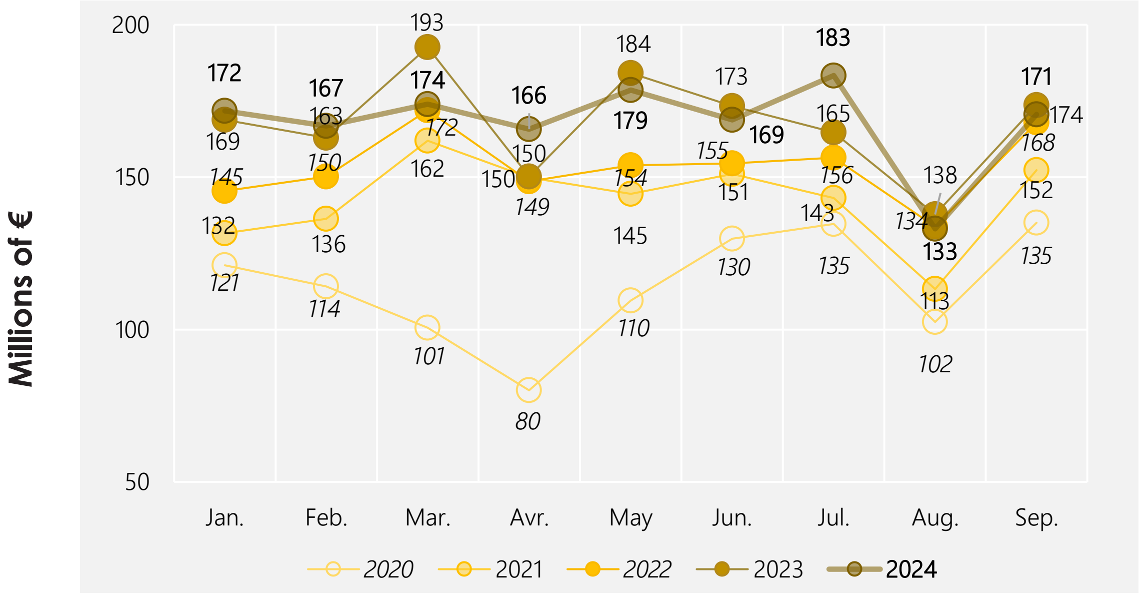
	YoY				Whole period
	20/21	21/22	22/23	23/24	2020/2024
Q 1 (Jan.-Mar.)	-14.6	+18.2	+11.7	+9.4	+23.4
Q 2 (Avr.-Jun.)	+98.8	+28.7	-6.1	+0.6	+141.7
Q 3 (Jul.-Set.)	+17.4	+12.9	-4.9	+4.7	+32.1

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

DOMESTIC



CROSSBORDER



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

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

millions of € 2,383 ↑ **+23,5%** 2,943 ↑ **+4,4%** 3,072 ↑ **+4.0%** 3,196 ↑ **+4,1%** 3,329

↑ **+39,7%**

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

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

millions of € 1,027 ↑ **+25,0%** 1,284 ↑ **+7.7%** 1.383 ↑ **+9.1%** 1,508 ↑ **+0.3%** 1,513

↑ **+47.2%**

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+46.4	+1.3	+5.2	+4.5	+62.9
Q 2 (Avr. - Jun.)	+16.9	+2.2	+4.1	+3.1	+28.3
Q 3 (Jul. - Set.)	+10.9	+10.4	+2.8	+4.8	+31.9

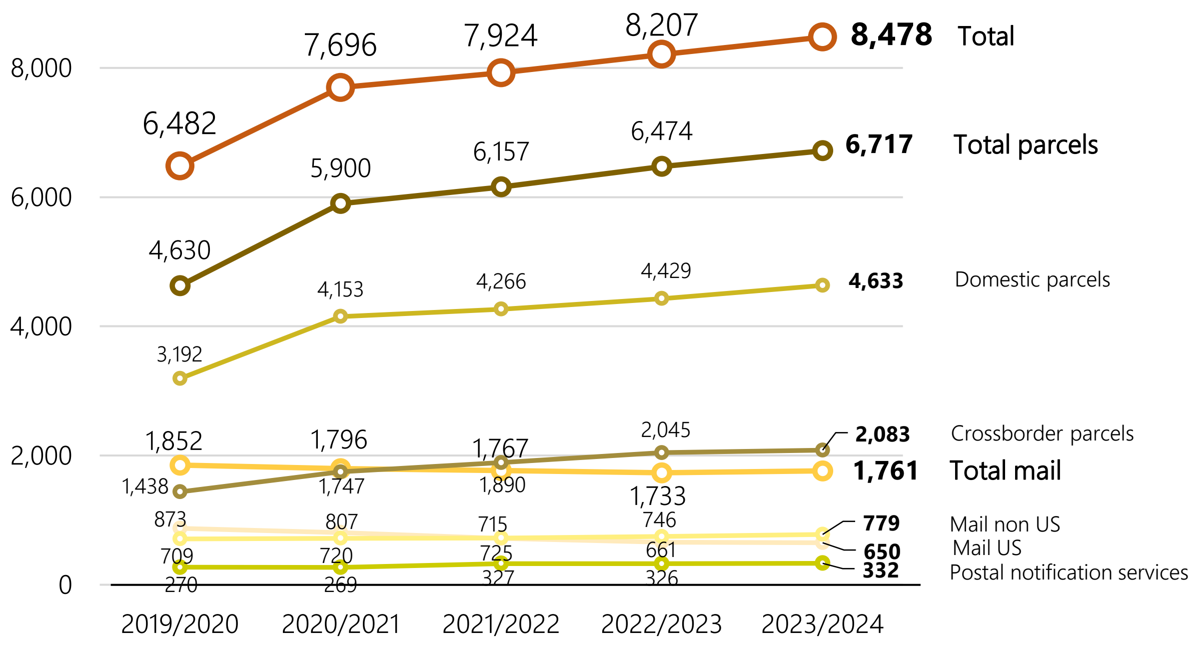
② **Quarterly comparison (change in %)**

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+28.0	+8.8	+12.2	-2.3	+52.6
Q 2 (Avr. - Jun.)	+39.4	+2.6	+11.1	+1.1	+60.6
Q 3 (Jul. - Set.)	+9.8	+12.1	+3.9	+2.3	+30.8

3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

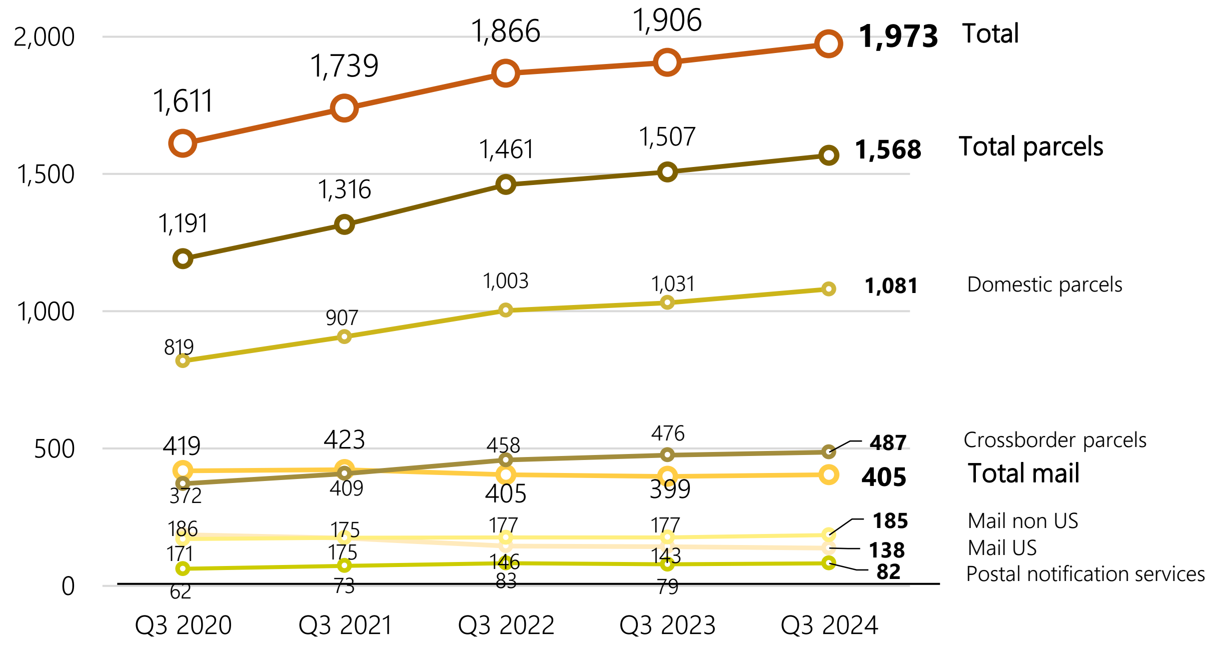
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



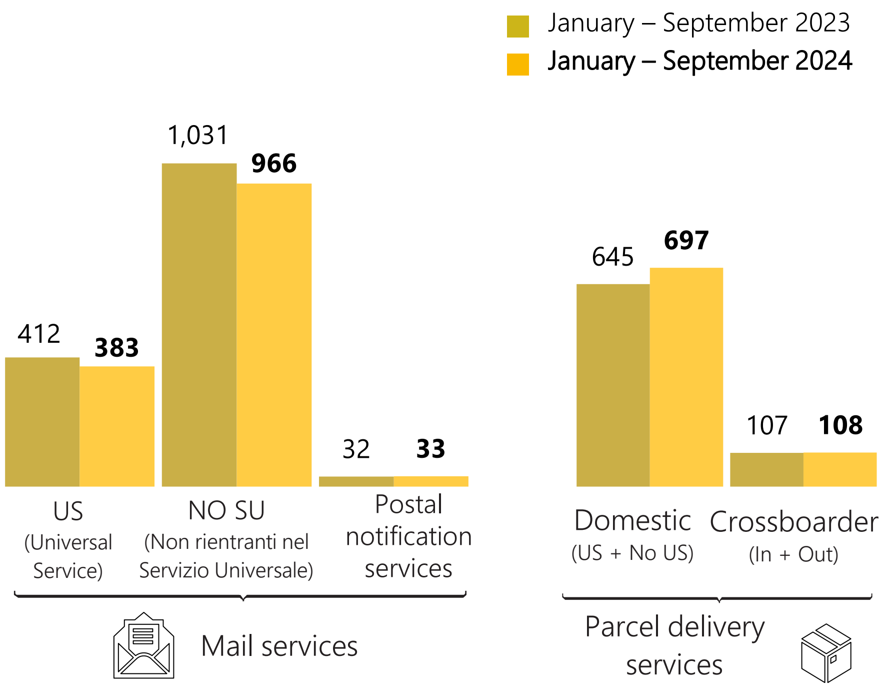
	Change in % (2019/20 – 2023/24)		Change in % (2022/23 – 2023/24)	
Total:	**+30.8**	↑	**+3.3**	↑
Mail services:	**-4.9**	↓	**+1.6**	↑
- Universal Service:	-25.5	↓	-1.6	↓
- No Universal Service:	+9.8	↑	+4.4	↑
- Postal notification services:	+23.0	↑	+1.7	↑
Parcel delivery services:	**+45.1**	↑	**+3.7**	↑
- Domestic:	+45.2	↑	+4.6	↑
- Crossborder:	+44.9	↑	+1.9	↑

	Change in % (Q3 2020 – Q3 2024)		Change in % (Q3 2023 – Q3 2024)	
Total:	**+22.5**	↑	**+3.5**	↑
Mail services:	**-3.4**	↓	**+1.6**	↑
- Universal Service:	-26.2	↓	-3.8	↓
- No Universal Service:	+8.5	↑	+4.6	↑
- Postal notification services:	+32.1	↑	+4.7	↑
Parcel delivery services:	**+31.6**	↑	**+4.0**	↑
- Domestic:	+31.9	↑	+4.8	↑
- Crossborder:	+30.8	↑	+2.3	↑

3.5: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS

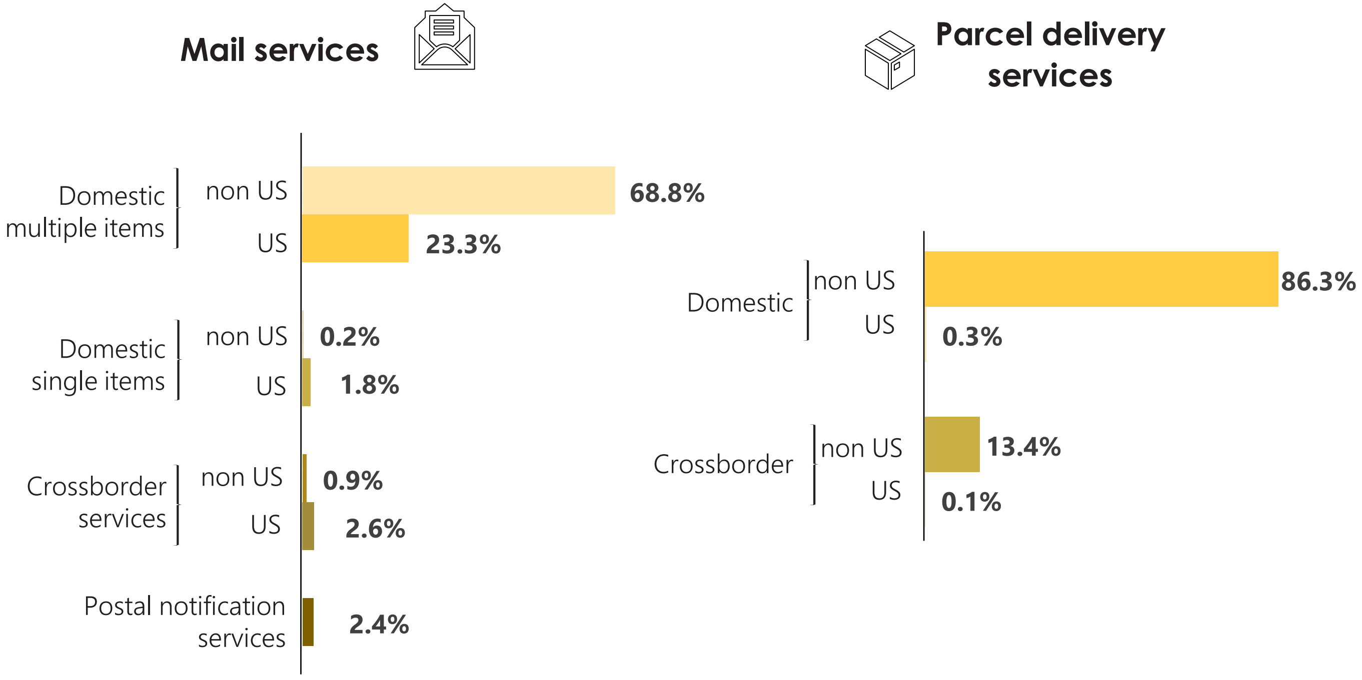


↓ -6.3	↑ +7.0

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

VOLUMES BY SOURCE TYPE (%)

(January – September 2024)

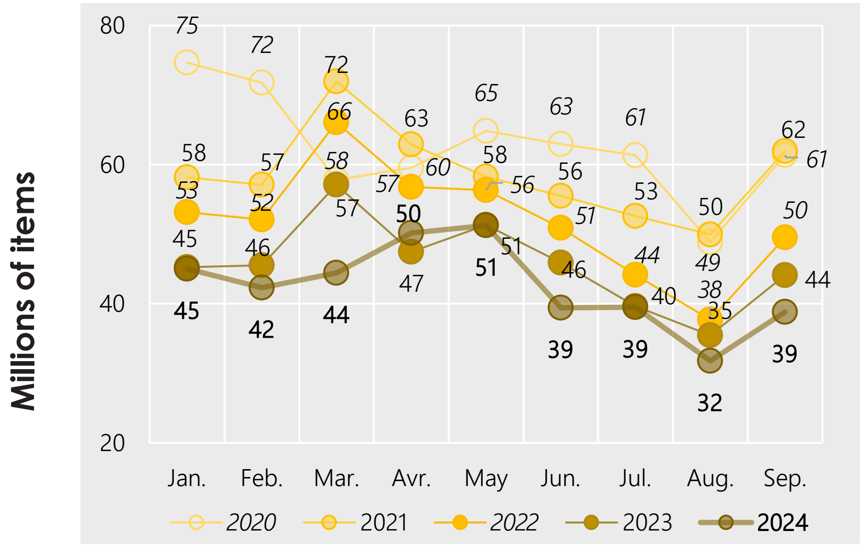


Annual change in %
(Jan. - Sep. 2023) – (Jan. - Sep. 2024)

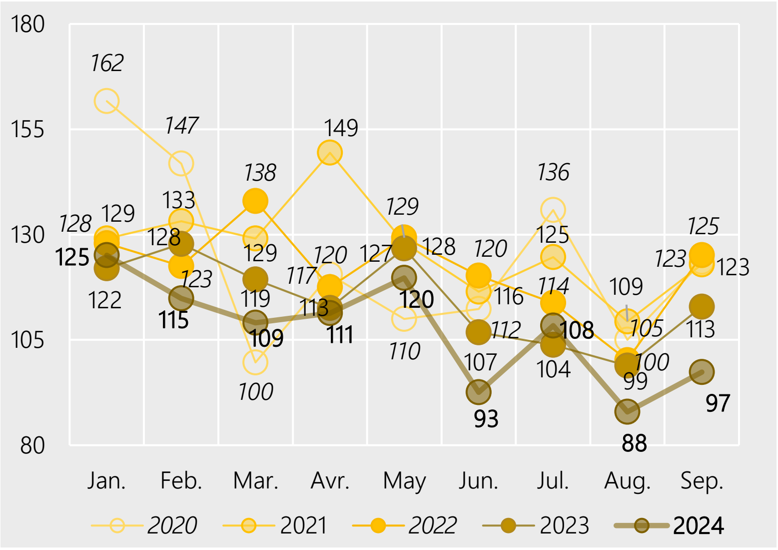
↓ -6.4	↓ -10.9	↓ -5.9	↑ +4.1	↑ +8.1	↑ +0.9
Domestic multiple items	Domestic single items	Crossborder services	Postal notification services	Domestic	Crossborder

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

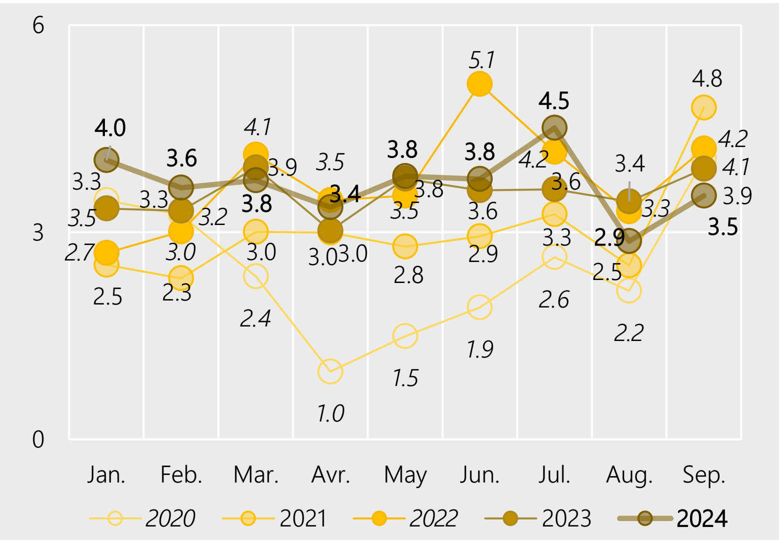
UNIVERSAL SERVICE (US)



OTHER SERVICES (NON US)



POSTAL NOTIFICATION SERVICES



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

mln. of items

(2020) 563 → -6.2% → (2021) 529 → -11.7% → (2022) 467 → -11.8% → (2023) 412 → -7.1% → (2024) 383

(2020) → (2024): -32.0%

(2020) 1,115 → +2.4% → (2021) 1,142 → -4.2% → (2022) 1,094 → -5.8% → (2023) 1,031 → -6.3% → (2024) 966

(2020) → (2024): -13.4%

(2020) 22.3 → +21.8% → (2021) 27.2 → +23.8% → (2022) 33.6 → -4.9% → (2023) 32.0 → +4.1% → (2024) 33.3

(2020) → (2024): +49.2%

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

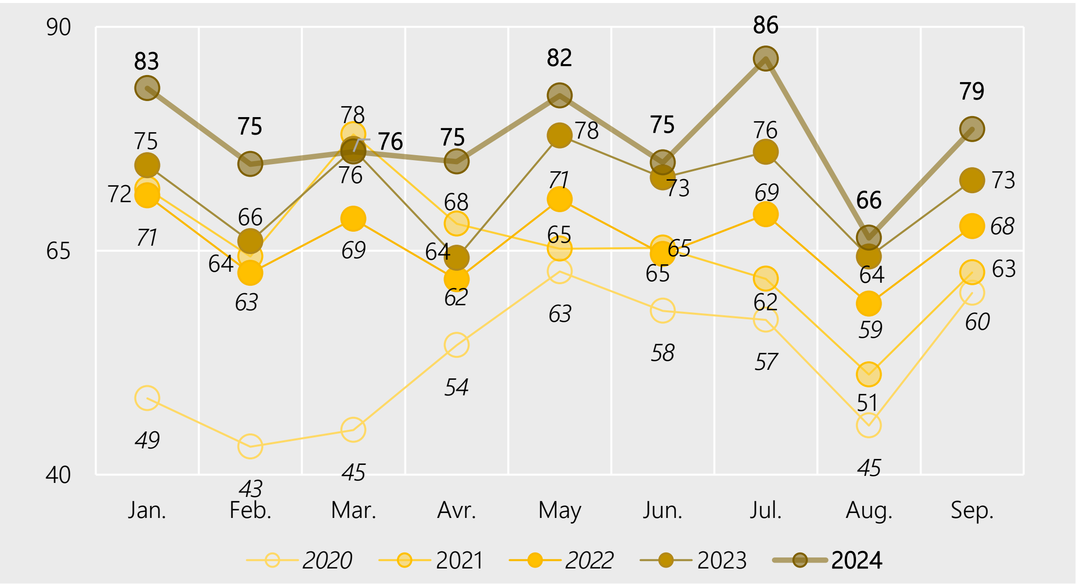
	YoY				Whole period
	20/21	21/22	22/23	23/24	2020/2024
Q 1 (Jan.-Mar.)	-8.3	-8.5	-13.7	-10.9	-35.5
Q 2 (Avr.-Jun.)	-5.7	-7.1	-11.8	-2.6	-24.8
Q 3 (Jul.-Set.)	-4.1	-20.1	-9.3	-7.7	-35.8

	YoY				Whole period
	20/21	21/22	22/23	23/24	2020/2024
Q 1 (Jan.-Mar.)	-4.1	-0.7	-5.0	-5.5	-14.5
Q 2 (Avr.-Jun.)	+14.9	-6.9	-5.7	-6.5	-5.6
Q 3 (Jul.-Set.)	-2.0	-5.0	-6.9	-6.9	-19.4

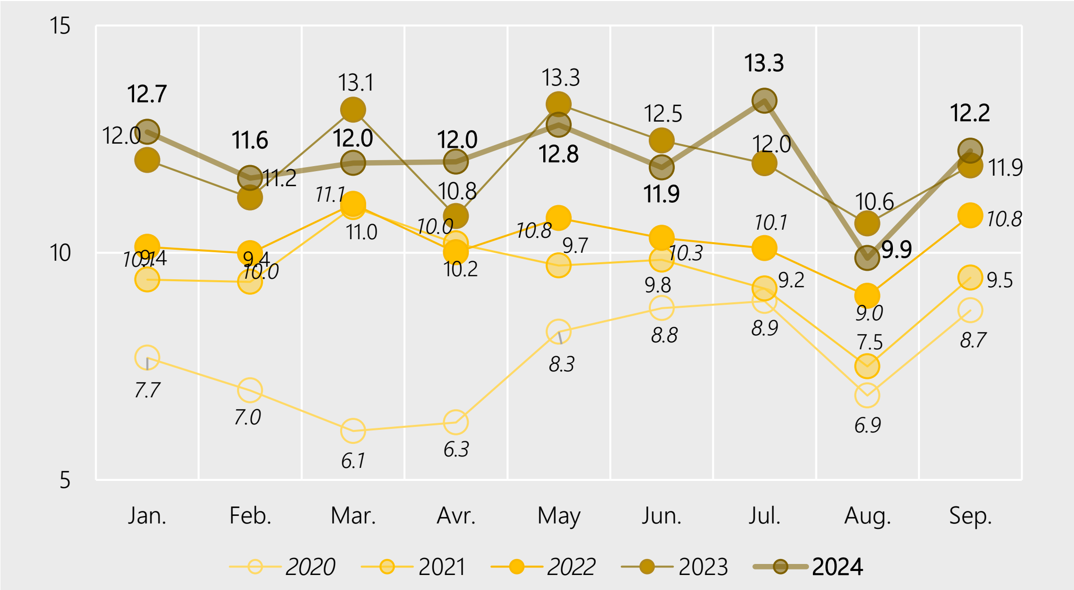
	YoY				Whole period
	20/21	21/22	22/23	23/24	2020/2024
Q 1 (Jan.-Mar.)	-13.3	+25.0	+7.7	+8.0	+26.1
Q 2 (Avr.-Jun.)	+98.9	+39.1	-14.3	+5.2	+149.4
Q 3 (Jul.-Set.)	+19.6	+10.3	-5.9	-0.7	+23.3

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

DOMESTIC



CROSSBORDER



DOMESTIC

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

millions of items

(2020) 475 → **+23.8%** (2021) 588 → **+1.1%** (2022) 595 → **+8.4%** (2023) 645 → **+8.1%** (2024) 697

+46.8%

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

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+56.8	-5.6	+7.3	+7.8	+71.1
Q 2 (Avr. - Jun.)	+13.2	-0.7	+9.2	+7.9	+32.3
Q 3 (Jul. - Set.)	+7.7	+11.5	+8.9	+8.6	+41.9

CROSSBORDER

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

millions of items

(2020) 69 → **+25.0%** (2021) 86 → **+7.6%** (2022) 92 → **+16.5%** (2023) 107 → **+0.9%** (2024) 108

+58.1%

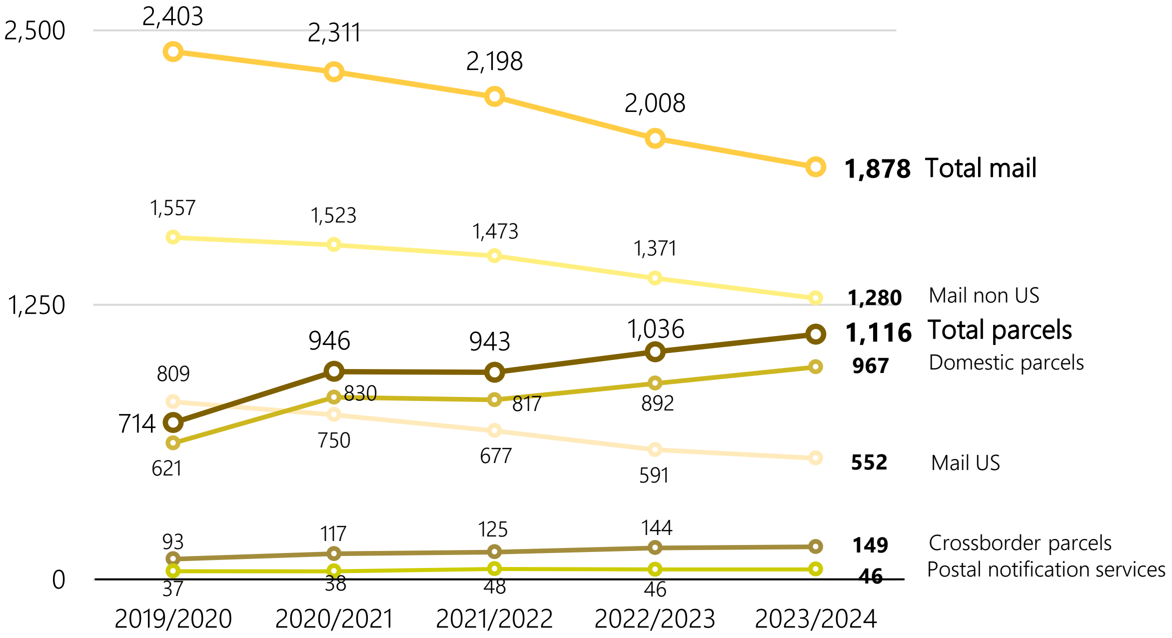
② **Quarterly comparison (change in %)**

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Q 1 (Jan. - Mar.)	+43.6	+4.7	+16.7	-0.3	+75.0
Q 2 (Avr. - Jun.)	+27.8	+4.4	+17.5	+0.4	+57.4
Q 3 (Jul. - Set.)	+6.7	+14.5	+15.2	+2.7	+44.6

3.8: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

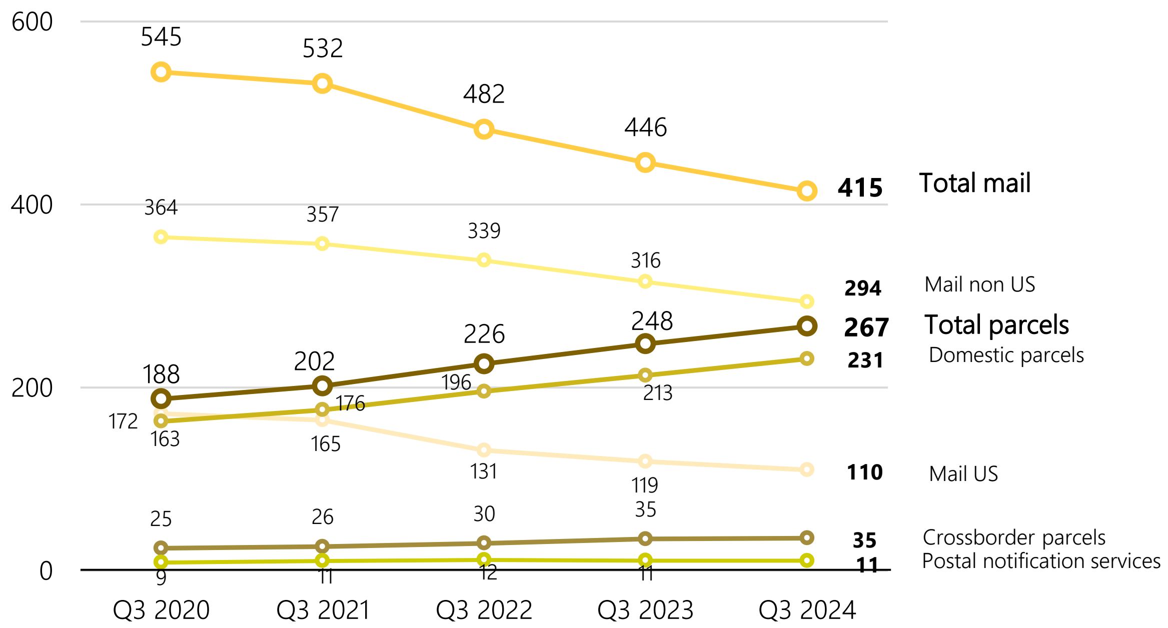
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



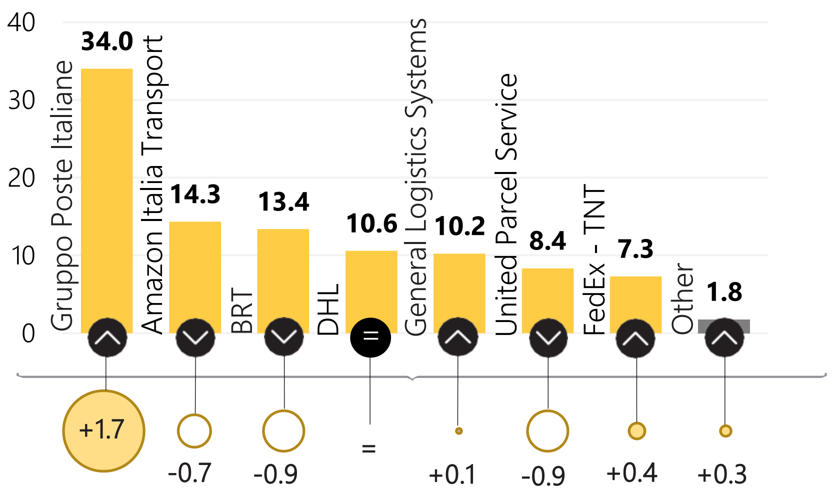
	Variazione in % (2019/20 – 2023/24)		Variazione in % (2022/23 – 2023/24)	
Total:	**-21.9**	↓	**-6.5**	↓
Mail services:	-31.8	↓	-6.6	↓
- Universal Service:	-17.8	↓	-6.7	↓
- No Universal Service:	+23.4	↑	+1.2	↑
- Postal notification services:				
Parcel delivery services:	**+56.3**	↑	**+7.7**	↑
- Domestic:	+55.7	↑	+8.4	↑
- Crossborder:	+60.5	↑	+3.3	↑

	Variazione in % (Q3 2020 – Q3 2024)		Variazione in % (Q3 2023 – Q3 2024)	
Servizi di corrispondenza:	**-23.9**	↓	**-7.0**	↓
- Servizio Universale:	-35.8	↓	-7.7	↓
- No Servizio Universale:	-19.4	↓	-6.9	↓
- Notifiche a mezzo poste:	+23.3	↑	-0.7	↓
Servizi di consegna pacchi:	**+42.3**	↑	**+7.7**	↑
- Pacchi nazionali:	+41.9	↑	+8.6	↑
- Pacchi internazionali:	+44.6	↑	+2.7	↑

3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

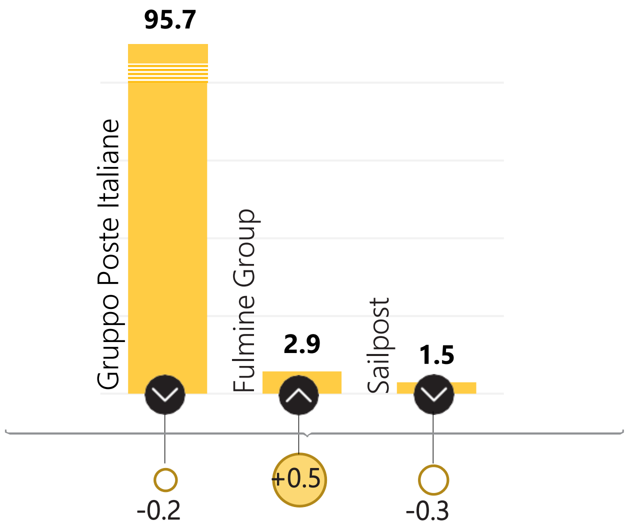
JANUARY - SEPTEMBER 2024 – IN % OF TOTALE REVENUES (Universal service + Non Universal service)

MAIL AND PARCEL DELIVERY SERVICES

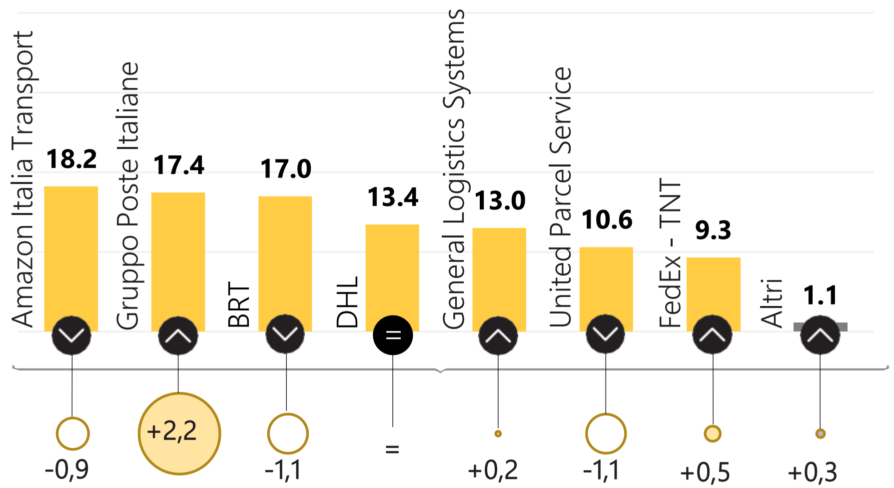


MAIL SERVICES

(single + multiple items)

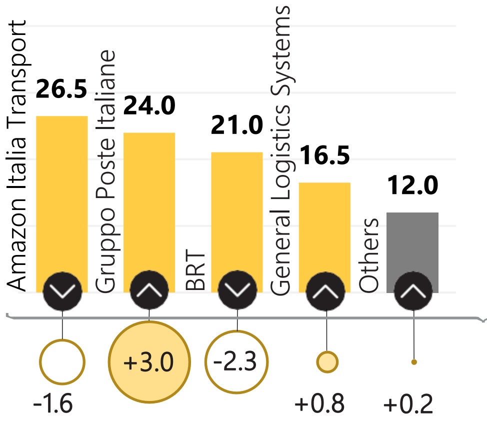


PARCEL DELIVERY SERVICES COURIERS

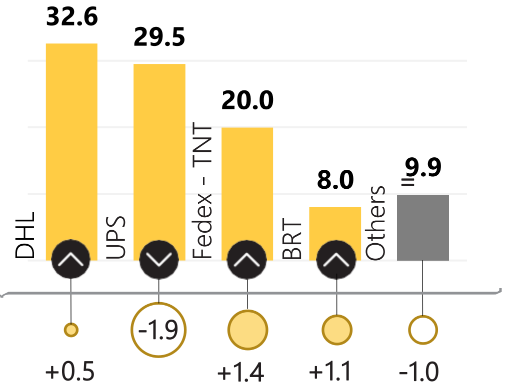


Differences vs. Jan. – Sep. 2023
(percentage points)

-of wich domestic



-of wich crossborder

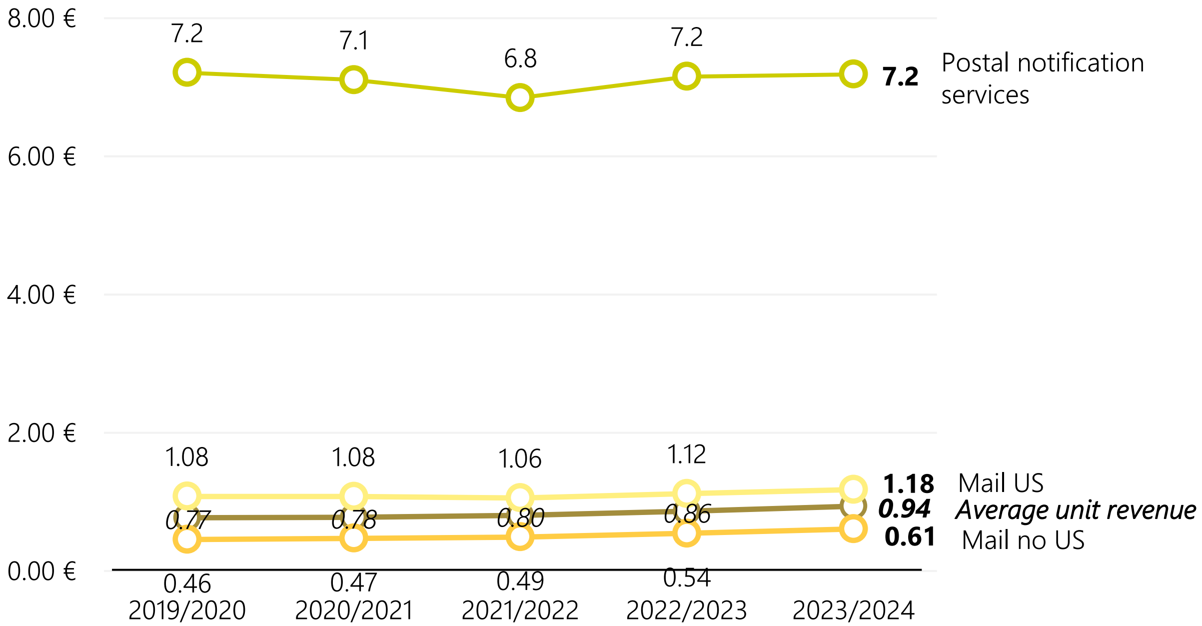


Differences vs. Jan. – Sep. 2023 (percentage points)

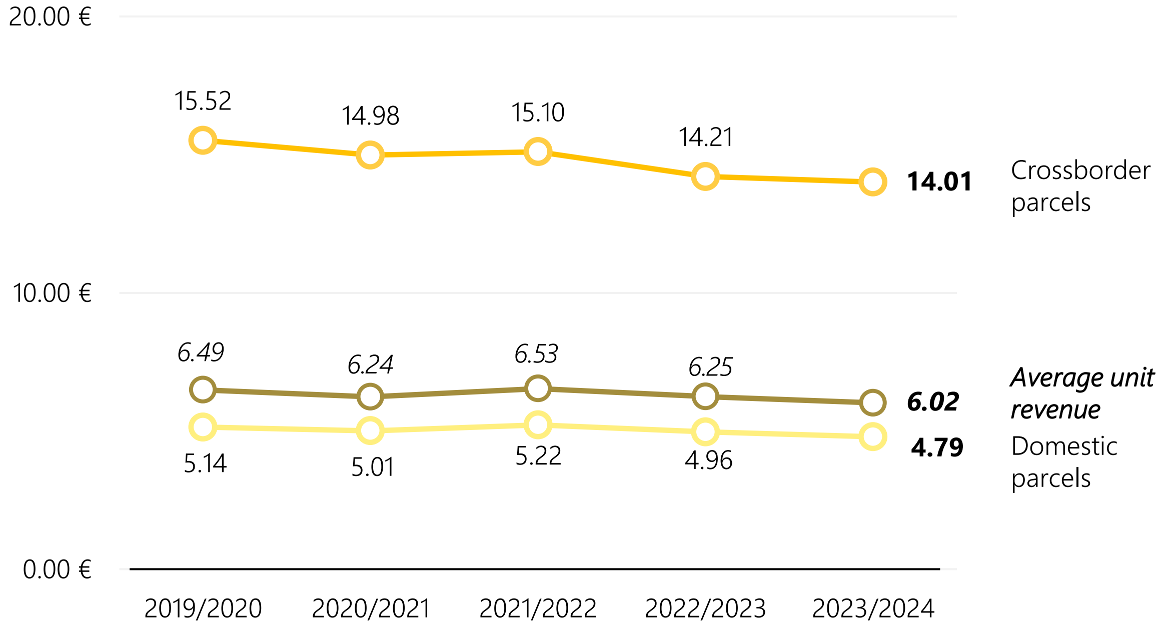
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group. Nexive Group S.r.l. and SDA Express Courier S.p.A.

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

MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

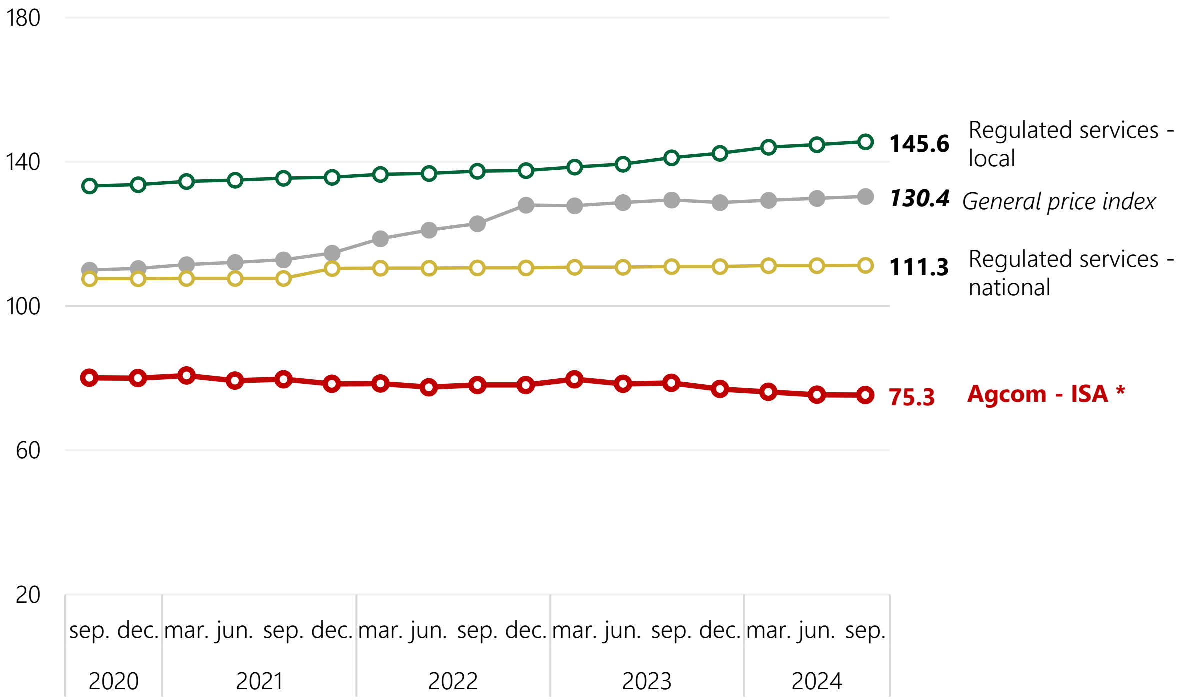
	(2019/20 – 2023/24)		(2022/23 – 2023/24)	
Average unit revenue:	**+21.6**	↑	**+8.6**	↑
- Mail US:	+9.1	↑	+5.3	↑
- Mail non US:	+33.6	↑	+11.9	↑
- Postal notification services:	-0.3	↓	+0.4	↑

Change in %

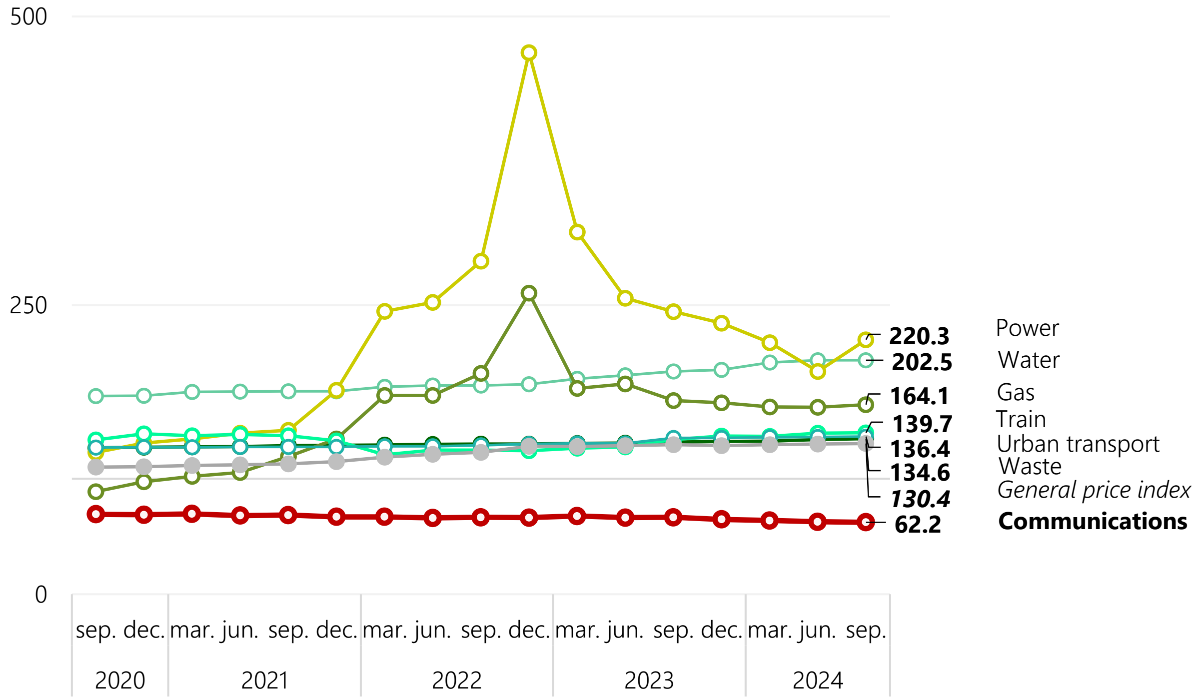
	(2019/20 – 2023/24)		(2022/23 – 2023/24)	
Average unit revenue:	**-7.2**	↓	**-3.6**	↓
Crossborder parcels:	-9.7	↓	-1.4	↓
- US:	*+10.8*	↑	*-0.4*	↓
- Non US:	*-9.8*	↓	*-1.4*	↓
Domestic parcels:	-6.8	↓	-3.5	↓
- US:	*+18.7*	↑	*+4.8*	↑
- Non US:	*-6.8*	↓	*-3.5*	↓

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 %			
	5-Year		YoY	
ISA (Agcom summary price index):	-6.0	↓	-4.3	↓
General price index:	+18.5	↑	+0.8	↑
Regulated services - local:	+9.2	↑	+3.2	↑
Regulated services - national:	+3.4	↑	+0.3	↑

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

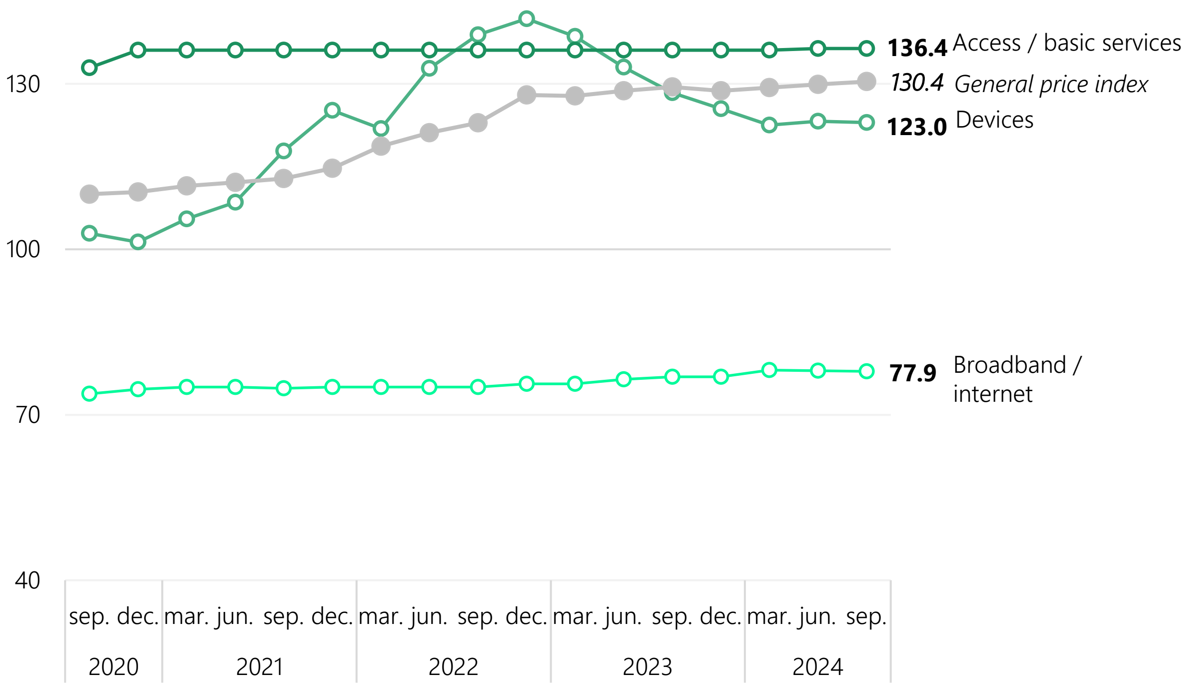
	Change in %			
	5-Year		YoY	
Water *(04.4.1)*:	+18.1	↑	+5.1	↑
Waste *(04.4.2)*:	+6.2	↑	+2.2	↑
Power *(04.5.1)*:	+79.5	↑	-9.9	↓
Gas *(04.5.2)*:	+84.8	↑	-2.1	↓

	Change in %			
	4-Year		YoY	
Train *(07.3.1)*:	+4.5	↑	+4.3	↑
Urban transport *(07.3.2.1.1)*:	+7.5	↑	+0.8	↑
Communications *(08)*:	-10.0	↓	-6.6	↓

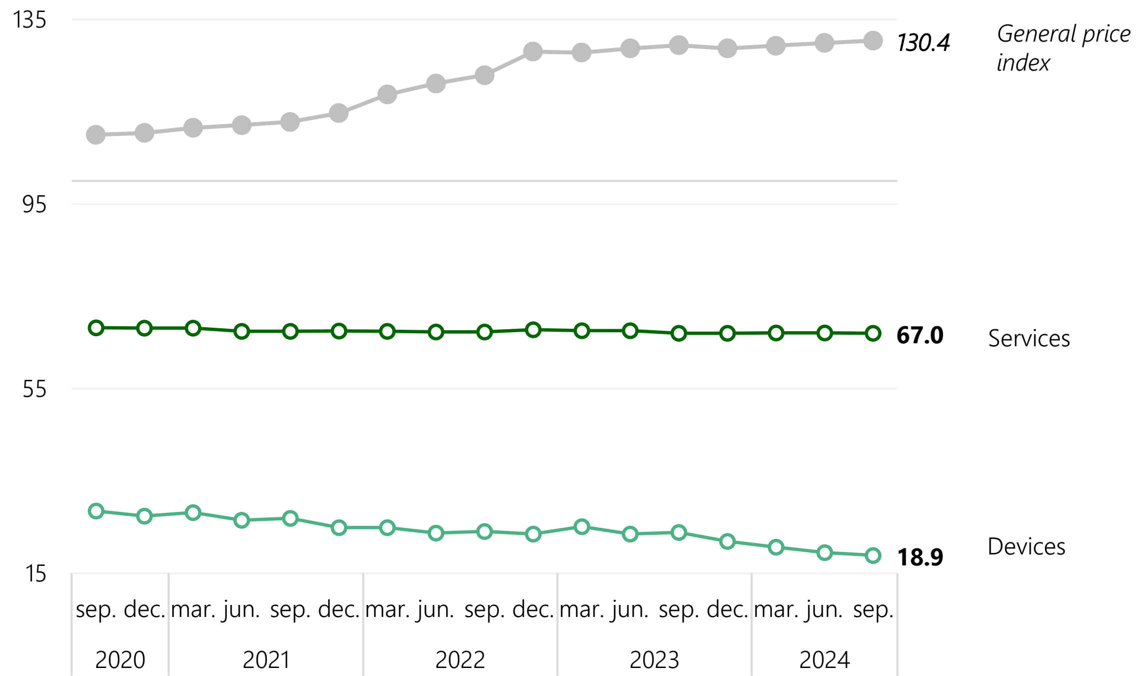
(COICOP - Classification of Individual Consumption by Purpose)

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

FIXED TELEPHONY PRICE INDICES



MOBILE TELEPHONY PRICE INDICES



Source: Agcom elaboration on data from Istat

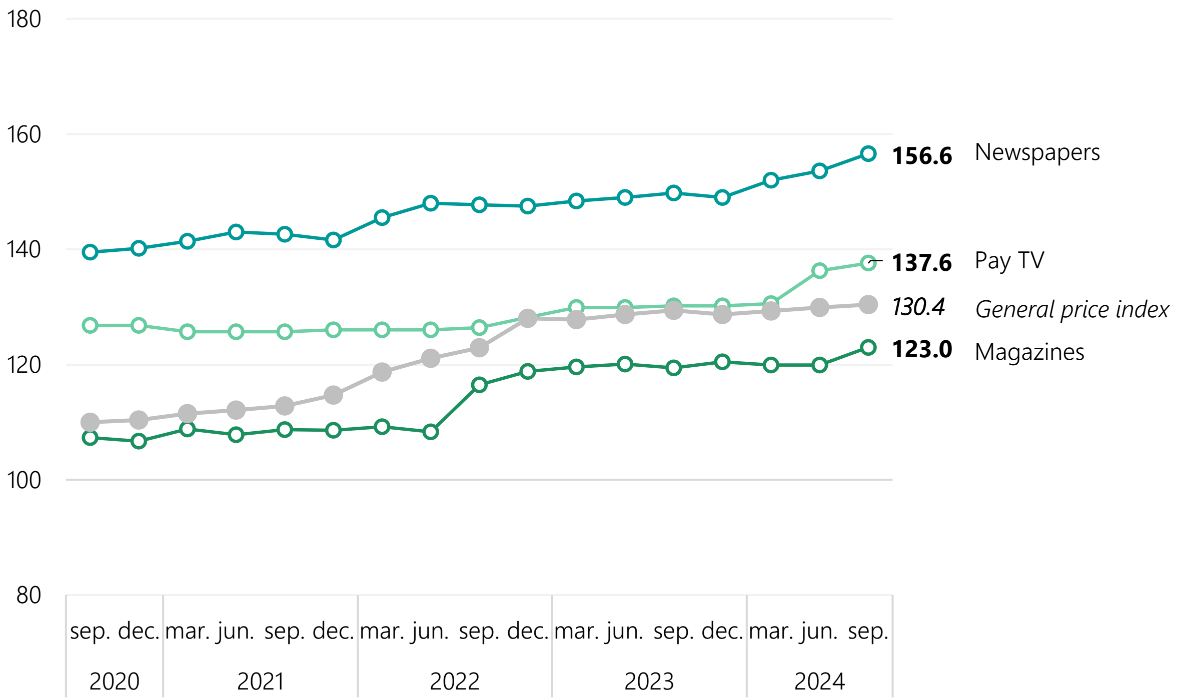
	Change in %	
	5-Year	YoY
Access / basic services *(08.3.0.1)*:	**+2.6** ↑	=
Devices *(08.2.0.1)*:	**+19.5** ↑	**-4.2** ↓
Broadband / internet *(08.3.0.3.0.01)*:	**+5.6** ↑	**+1.3** ↑

	Change in %	
	5-Year	YoY
Servces *(08.3.0.2)*:	**-1.8** ↓	=
Devices *(08.2.0.2)*:	**-33.7** ↓	**-20.9** ↓

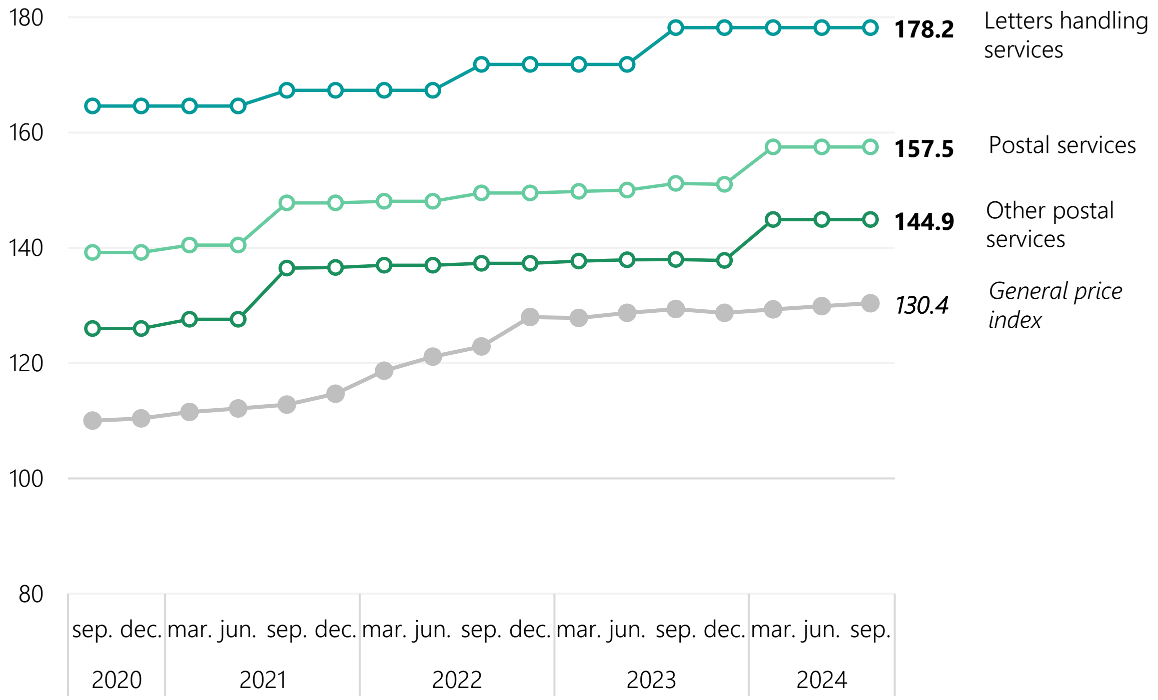
(COICOP - Classification of Individual Consumption by Purpose)

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

NEWSPAPERS. MAGAZINES. TV PRICE INDICES



POSTAL SERVICES PRICE INDEX



Source: Agcom elaboration on data from Istat

	Change in % 5-Year		Change in % YoY	
Newspapers *(09.5.2.1.0)*:	**+12.3**	↑	**+4.5**	↑
Pay TV *(09.4.2.3.0.02)*:	**+8.5**	↑	**+5.7**	↑
Magazines *(09.5.2.2.0)*:	**+ 14.6**	↑	**+3.0**	↑

	Change in % 5-Year		Change in % YoY	
Postal services *(08.1)*:	**+13.1**	↑	**+4.2**	↑
Letters handling services *(08.1.0.1.0.00)*:	**+8.3**	↑	**=**	
Other postal services *(08.1.0.9.0.00)*:	**+13.0**	↑	**+5.0**	↑

(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

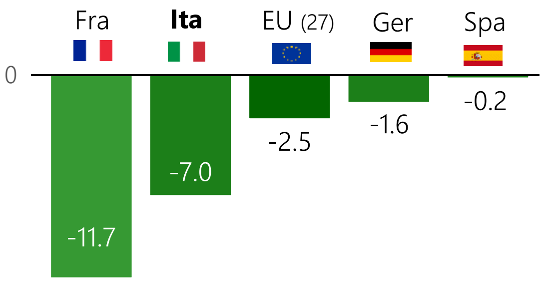
(COICOP 09.5.2)

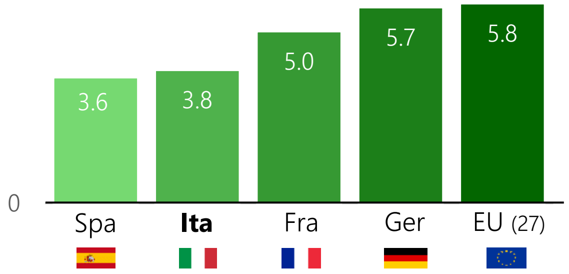
POSTAL SERVICES

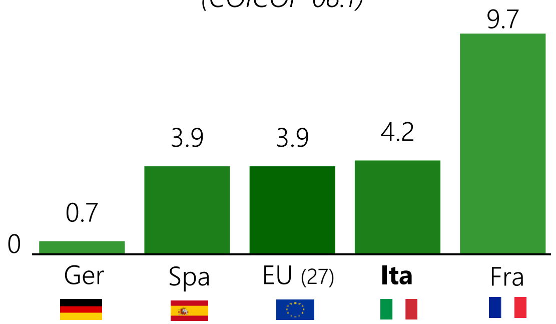
(COICOP 08.1)

1-Year change %

Seo. 2023
-
Sep. 2024

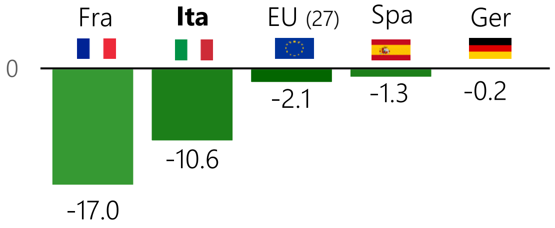


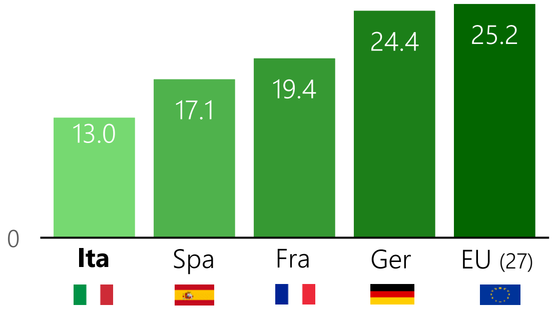


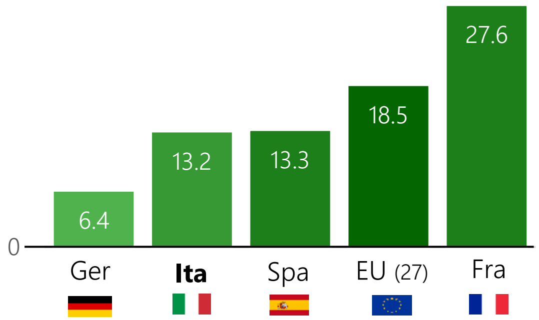


5-Year change %

Sep. 2020
-
Sep. 2024

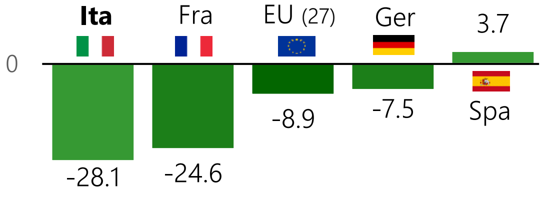


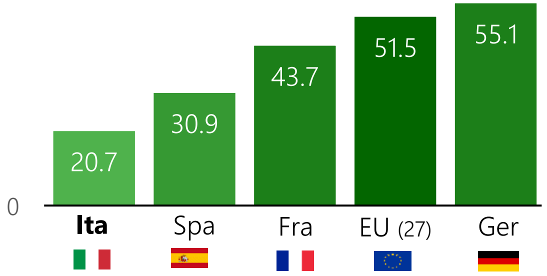


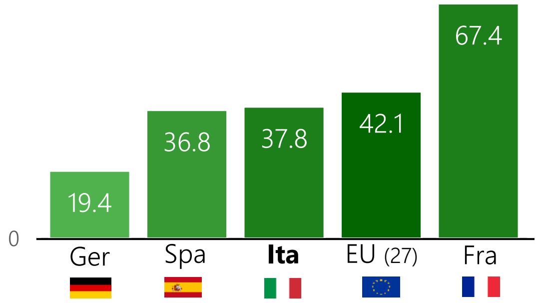


10-Year change %

Sep. 2014
-
Sep. 2024







AUTORITÀ PER LE
GARANZIE NELLE
AGCOM COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2024

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