



AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 3/2024



01 ELECTRONIC COMMUNICATIONS

Fixed network

- 1.1 Total lines
- 1.2 Broadband and ultrabroadband lines
- 1.3 Broadband lines by type of customer and operators
- 1.4 Broadband and ultrabroadband lines by technology and operators
- 1.5 Data traffic in download and upload
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- 1.7 Weekly data traffic intensity

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- 1.12 Average daily data traffic
- 1.13 Weekly data traffic intensity
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- 3.8 Volumes historical trends

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

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

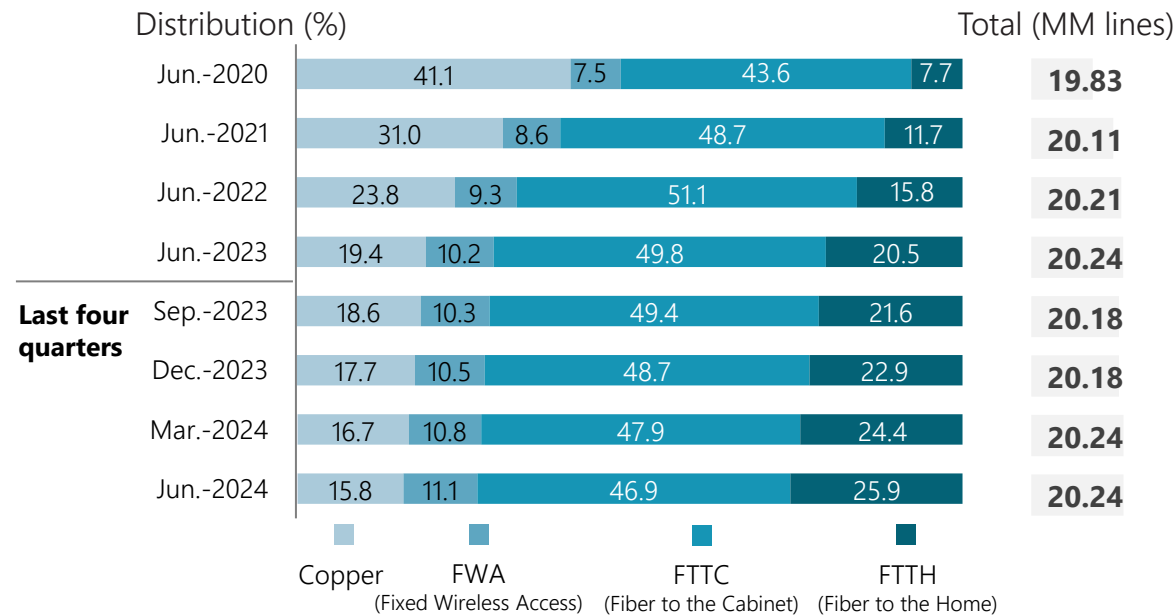
The values indicated in sections 1 and 3 are based on information provided by the main companies present in the electronic communications and mail and parcel delivery services markets. Regarding the section dedicated to media and internet platforms (section 2), the data refer to elaborations on information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

The data collected for this edition are updated to June 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.

04 COMMUNICATION SERVICES' PRICES

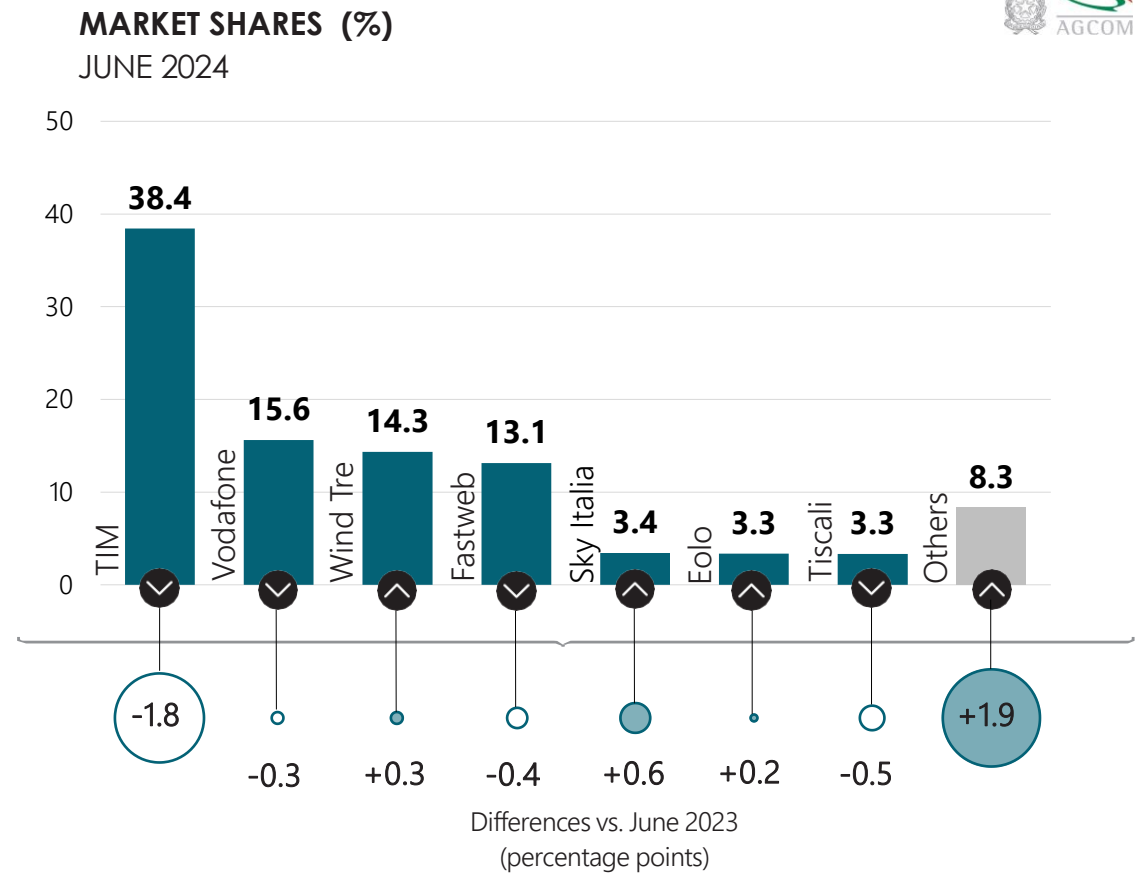
- 4.1 Harmonised consumer price index and other utilities price indices
- 4.2 Mobile and fixed telephony price indices
- 4.3 Daily newspapers, magazines, TV and postal services price indices
- 4.4 International benchmark

1.1 FIXED NETWORK: TOTAL LINES



*Total lines, coherently with European reporting, also includes lines indicated in the "other NGA," "other not NGA," and "Satellite" categories. Overall, as of June 2024, these lines are estimated to be about 0.3 percent of the total lines (about 60,000 line), mostly satellite.

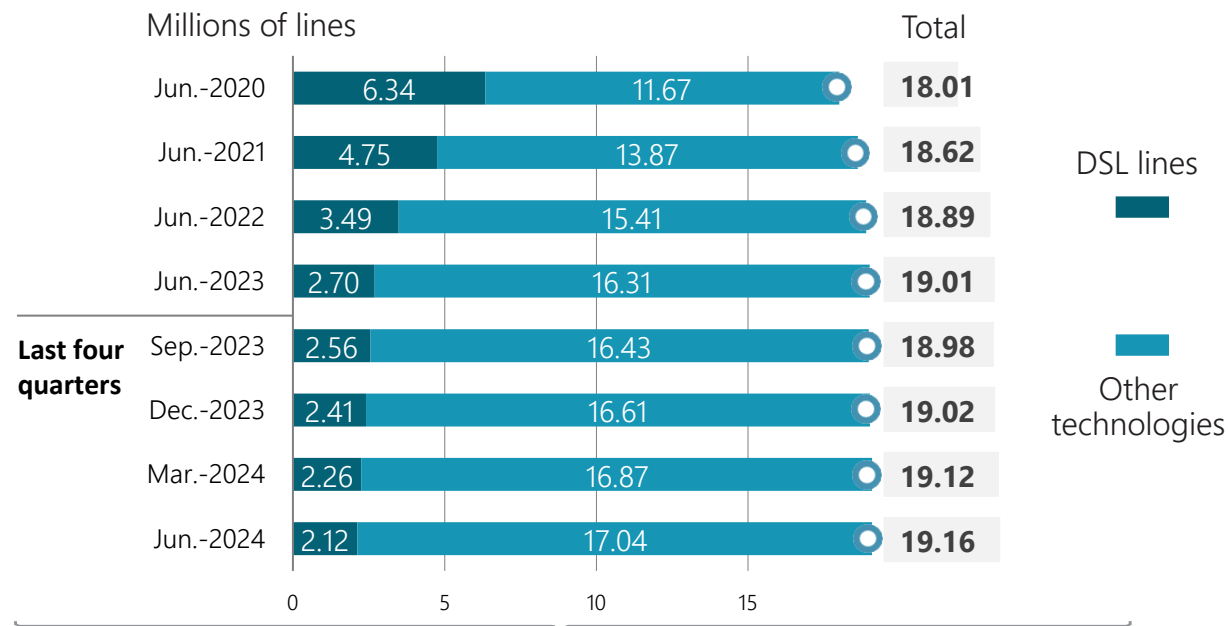
Total lines	(no. of lines)	(Δ %)	Distribution (Δ 2023-2024) percentage points
Quarterly change (Mar. 2024 – Jun. 2024)	+1k accesses	+0.00 ↑	Copper: -3.6 ↓
Annual change (Jun. 2023 – Jun. 2024)	+7k accesses	+0.04 ↑	FWA: +0.9 ↑
4-Year change (Jun. 2020 – Jun. 2024)	+414 k accesses	+2.09 ↑	FTTC: -2.9 ↓
			FTTH: +5.4 ↑



Data provided by: 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, Fidoka, Go Internet, Green TLC, Hal Services, Iccom, Iliad, Informatica System, Infranet, Intred, Irideos, Lycamobile, Mavianmax, Megaweb, Micso, Mordacchini S.r.l., NewTech, Open Fiber, Planetel, PostePay, Retelit, Sky Italia, Stadtwerke ASM, Stel, Tecno Adsl, Tesselis (Tiscali), TIM, Unidata, Vianova, Virgin Fibra, Vodafone Italia, Wind Tre.

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

1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES



Quarterly change
(Mar. 2023 – Jun. 2024)

Total lines



+37 k
lines
(+0.2%)

Annual change
(Jun. 2023 – Jun. 2024)

Total lines



+153 k
lines
(+0.8 %)

DSL lines



-574 k
lines
(-21.3%)

Other technologies

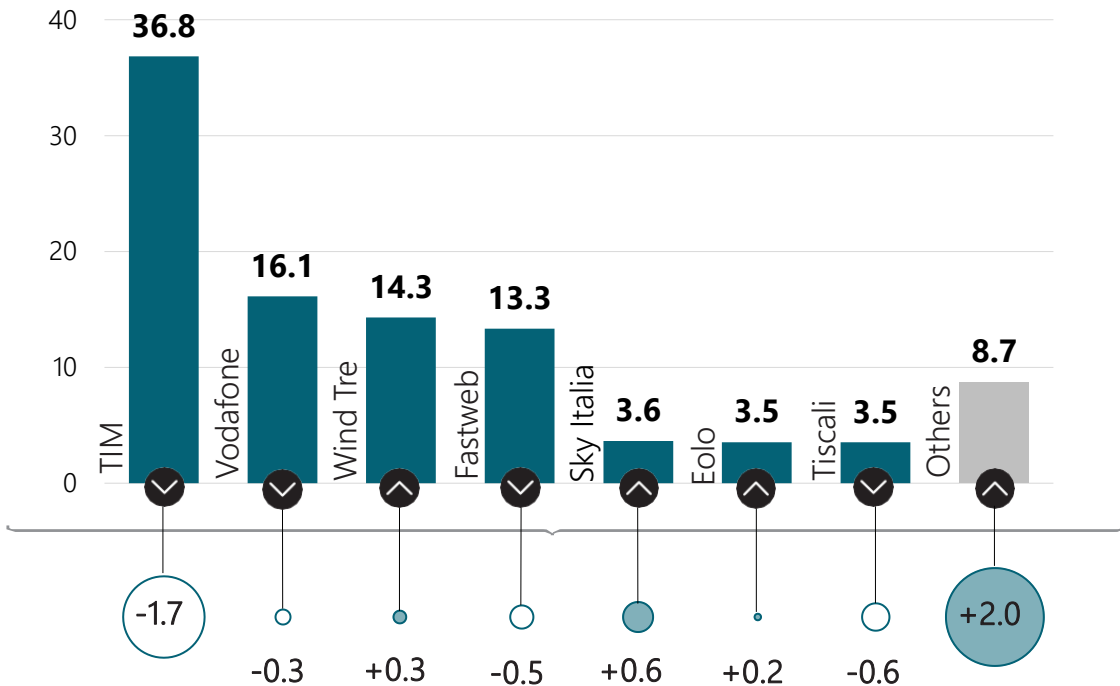


+727 k
lines
(+4.5%)

k = thousand

MARKET SHARES (%)

JUNE 2024



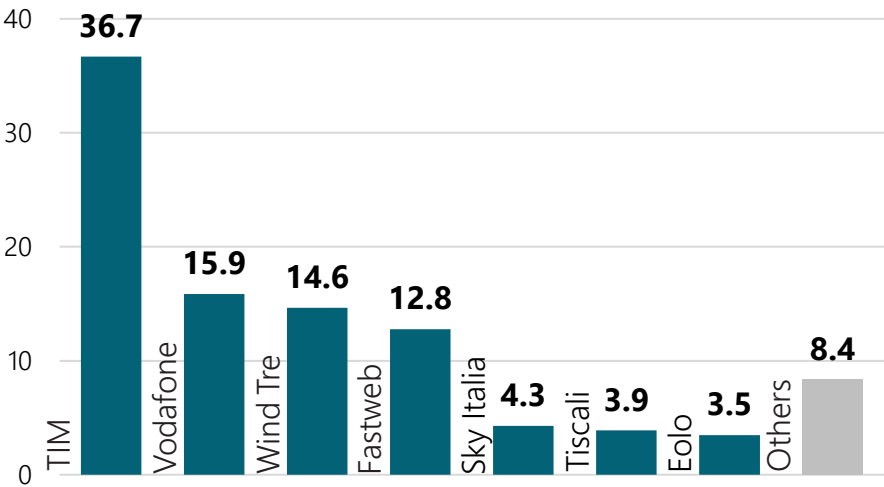
Differences vs. June 2023
(percentage points)

1.4 FIXED LINES: BROADBAND LINES BY TYPE OF CUSTOMER AND OPERATORS

JUNE 2024

RESIDENTIAL CUSTOMERS

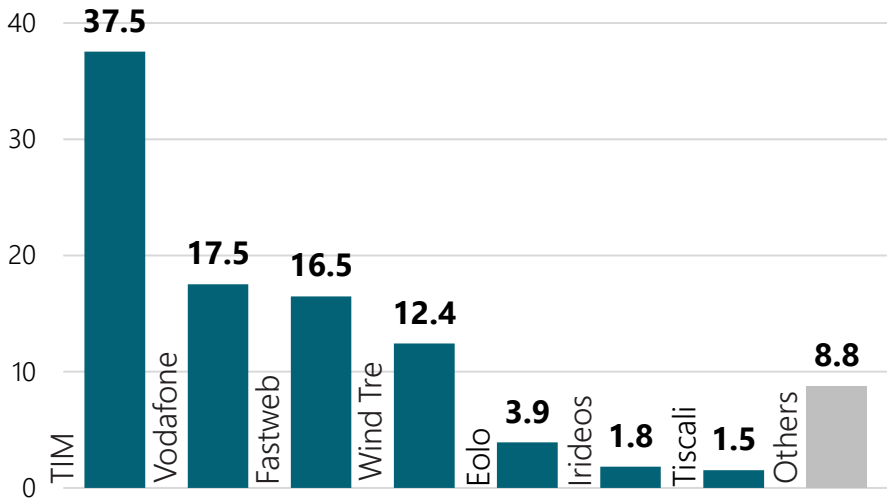
Total lines: 16.214 million lines



by operator (%)

BUSINESS CUSTOMERS

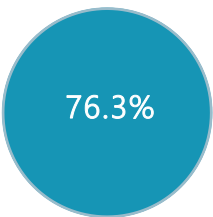
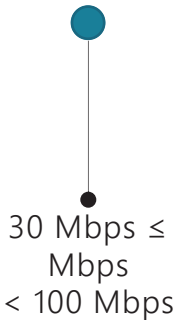
Total lines: 2.948 million lines



11.3%



12.4%



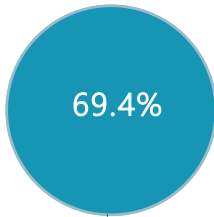
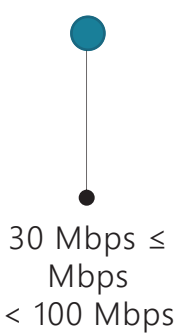
76.3%

by marketed speed classes (%)

19.1%



11.5%



69.4%

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



JUNE 2024

FWA

FTTC

FTTH

Total lines: **2.25** million access

Total lines: **9.50** million access

Total lines: **5.23** million access

Annual change
(Jun. 2023 – Jun. 2024)

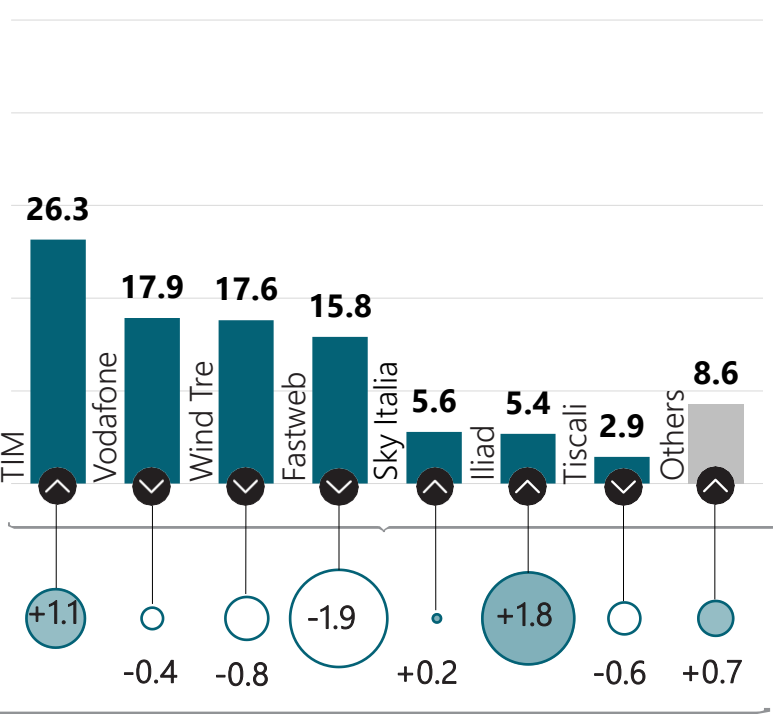
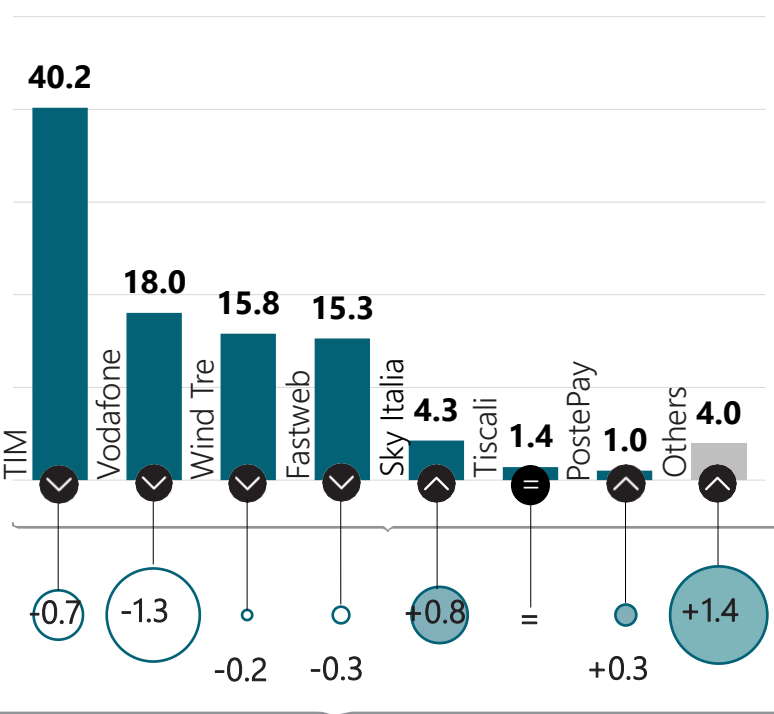
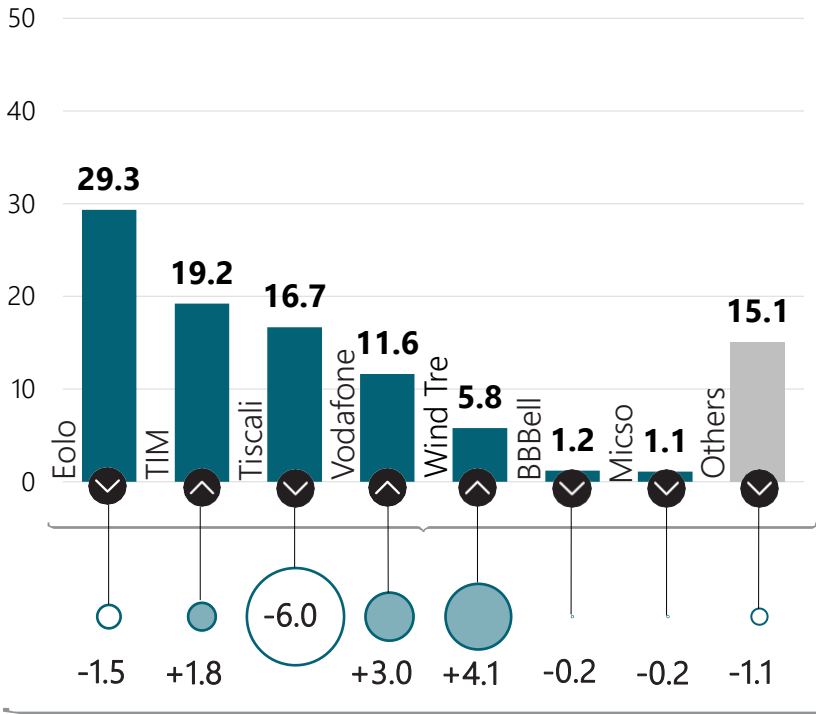
Annual change
(Jun. 2023 – Jun. 2024)

Annual change
(Jun. 2023 – Jun. 2024)

+8.9% ↑

-5.8 ↓

+26.3% ↑



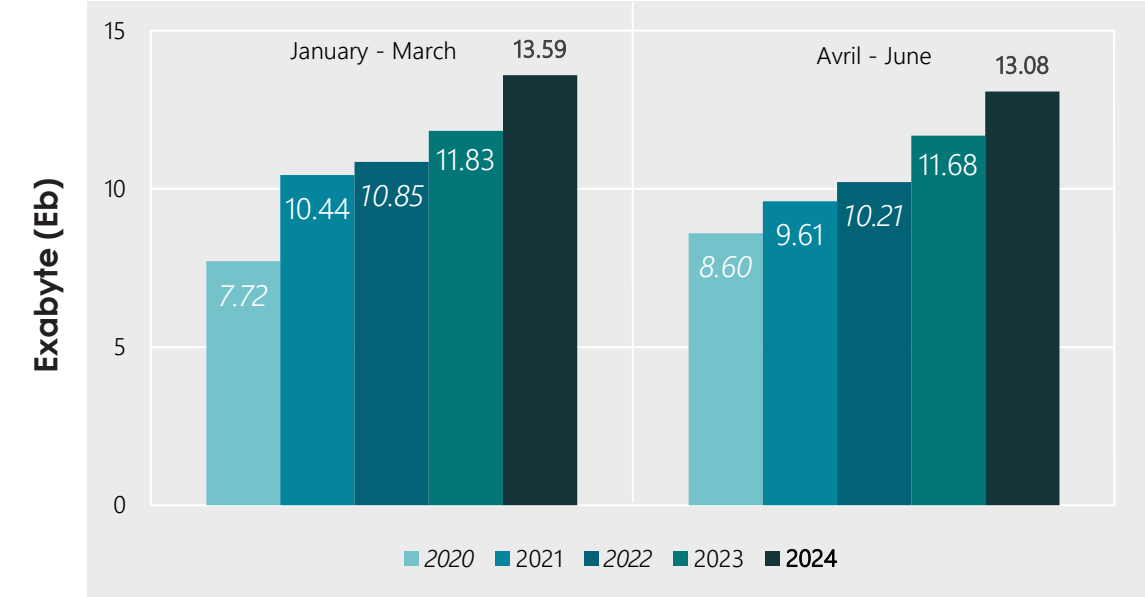
Differences vs. June 2023
(percentage points)

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.

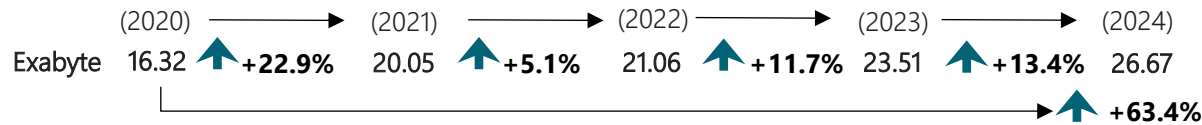
1.5 FIXED NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD



DOWNLOAD (cumulative monthly data)



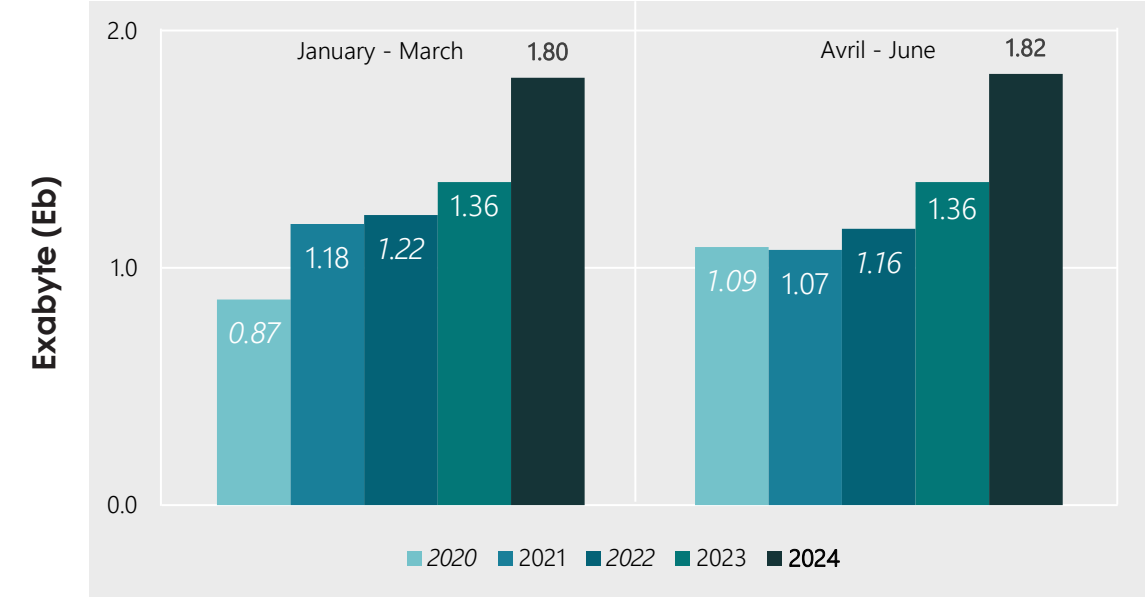
1 Cumulative data since the beginning of the year (Jan. – Jun.)



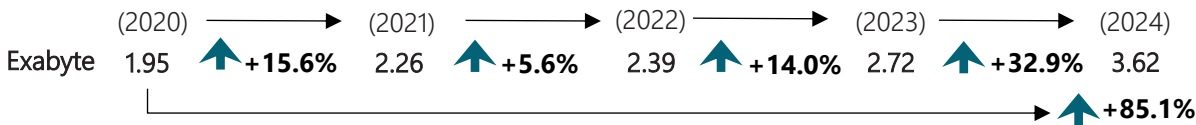
2 Monthly comparison (change %)

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	+66.2	+9.1	+5.1	+12.1	+113.8
February	+43.1	+6.6	+11.3	+17.5	+99.4
March	+10.3	-3.2	+11.3	+15.2	+36.9
Avril	+8.7	-1.4	+11.5	+13.4	+35.5
May	+11.4	+9.4	+15.6	+10.2	+55.3
June	+16.1	+12.3	+16.3	+12.4	+70.4

UPLOAD (cumulative monthly data)



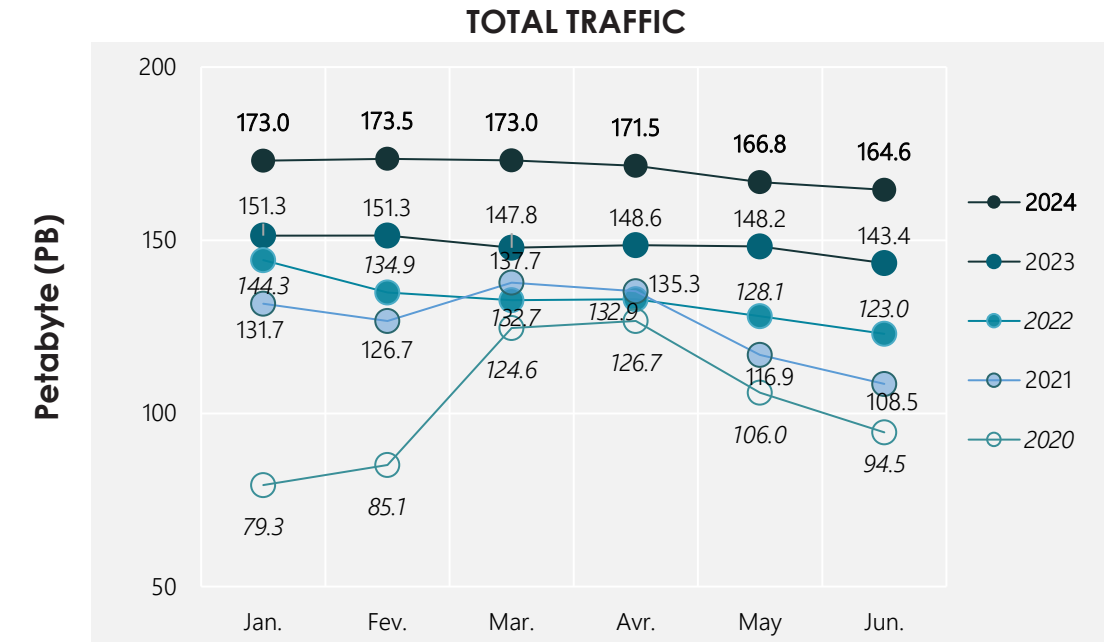
1 Cumulative data since the beginning of the year (Jan. – Jun.)



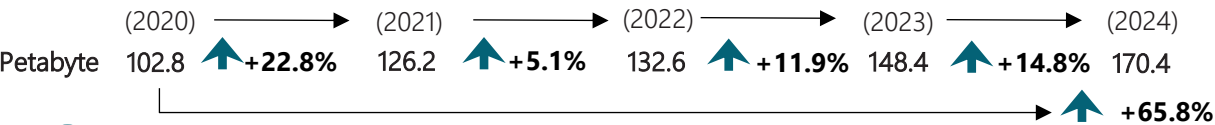
2 Monthly comparison (change %)

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	+64.6	+13.8	+2.9	+34.1	+158.3
February	+50.7	+5.3	+20.2	+29.4	+146.7
March	+12.0	-7.7	+12.5	+33.3	+55.0
Avril	-7.1	-4.6	+14.4	+33.2	+34.9
May	+1.7	+10.6	+17.1	+32.7	+74.8
June	+4.2	+23.0	+19.3	+34.8	+106.0

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

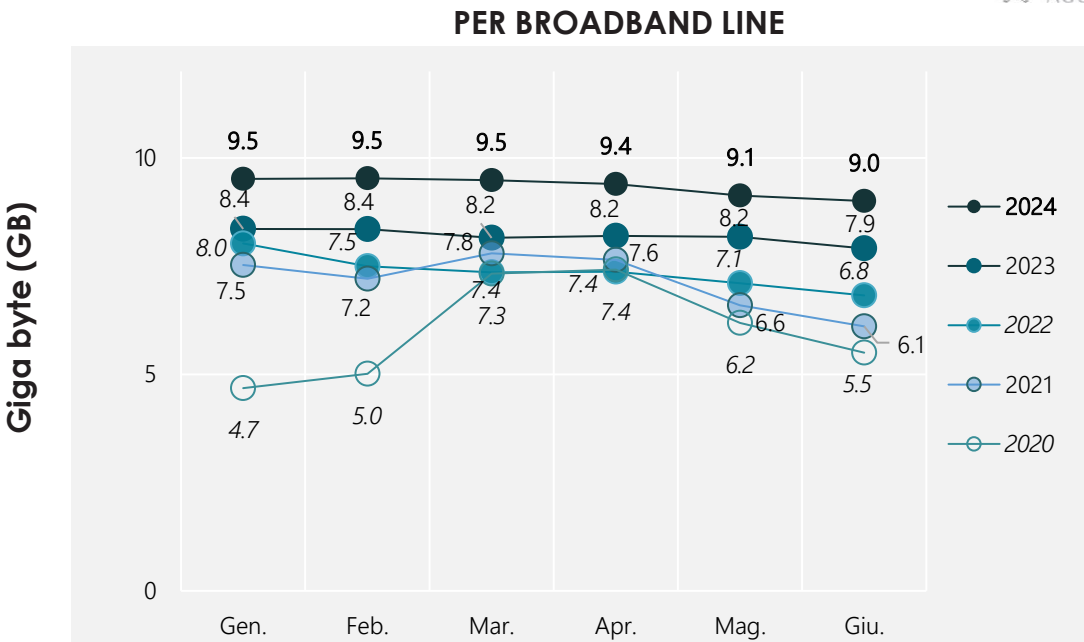


1 Average daily comparison since the beginning of the year (Jan. – Jun.)

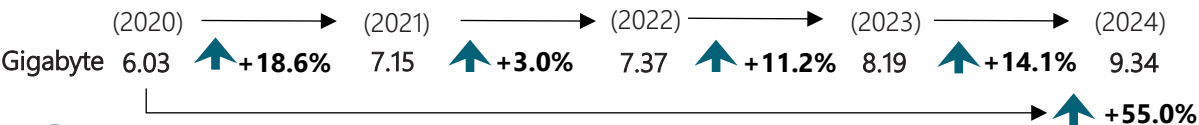


2 Monthly daily average comparison (change %)

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+66.1	+9.5	+4.9	+14.3	+118.2
February	+49.0	+6.5	+12.1	+14.7	+104.0
March	+10.5	-3.7	+11.4	+17.1	+38.8
Avril	+6.8	-1.8	+11.8	+15.4	+35.4
May	+10.3	+9.5	+15.7	+12.5	+57.4
June	+14.8	+13.3	+16.6	+14.8	+74.1



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

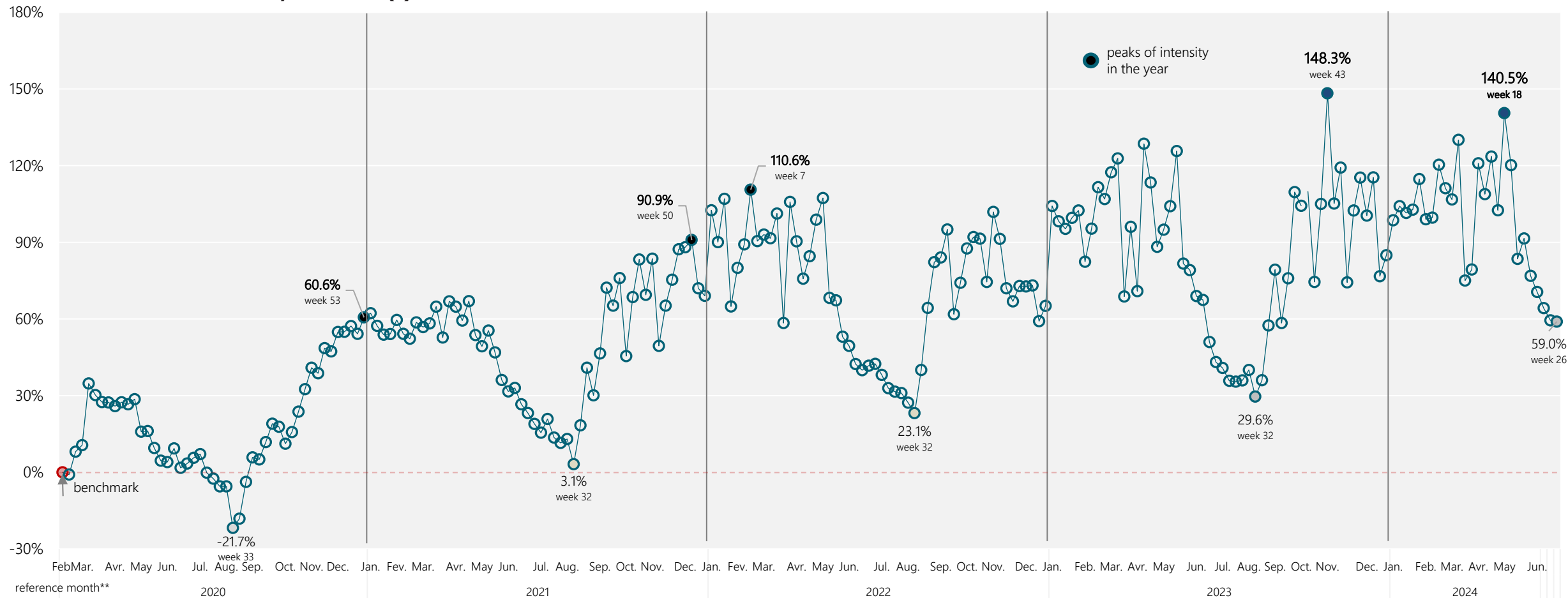


2 Monthly daily average comparison (change %)

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+60.8	+6.6	+4.2	+13.9	+103.3
February	+43.8	+4.0	+11.4	+14.1	+90.2
March	+6.4	-5.6	+10.8	+16.4	+29.5
Avril	+3.0	-3.5	+11.1	+14.6	+26.6
May	+6.6	+7.8	+15.0	+11.7	+47.6
June	+11.1	+11.7	+15.9	+13.8	+63.7

1.7 FIXED NETWORK: WEEKLY DATA TRAFFIC INTENSITY

Data traffic intensity variation (*)



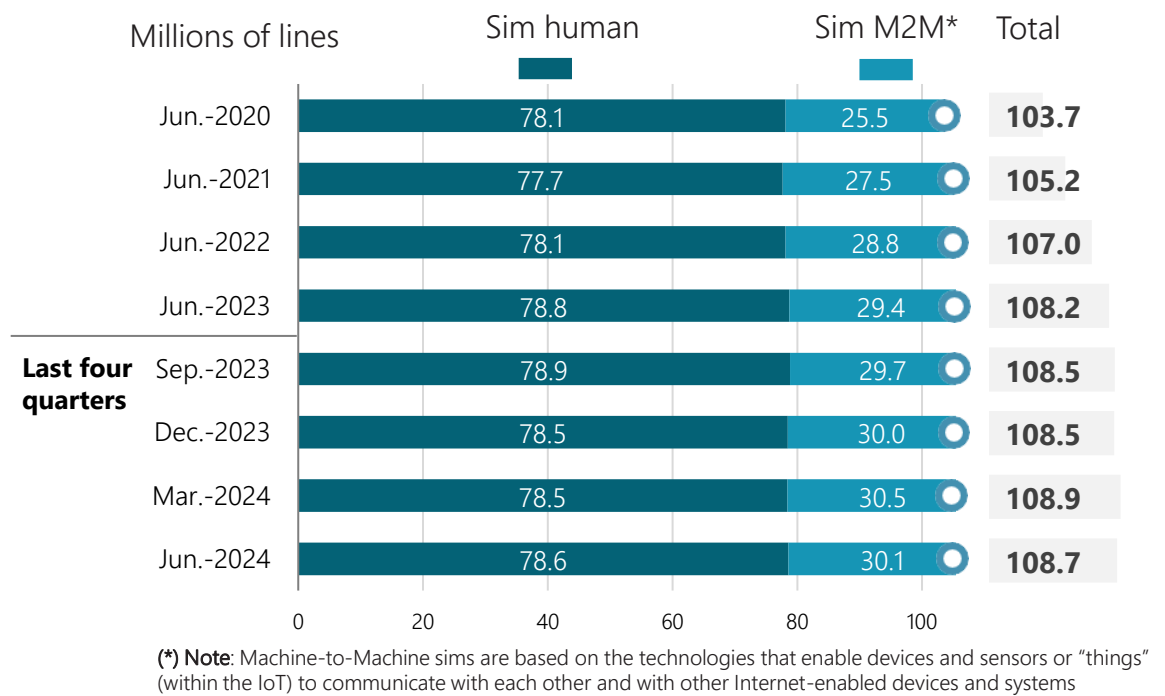
Definition: data traffic intensity (Gbps) represents the peak inbound traffic volume registered in a timespan of 5 to 60 minutes.

*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.

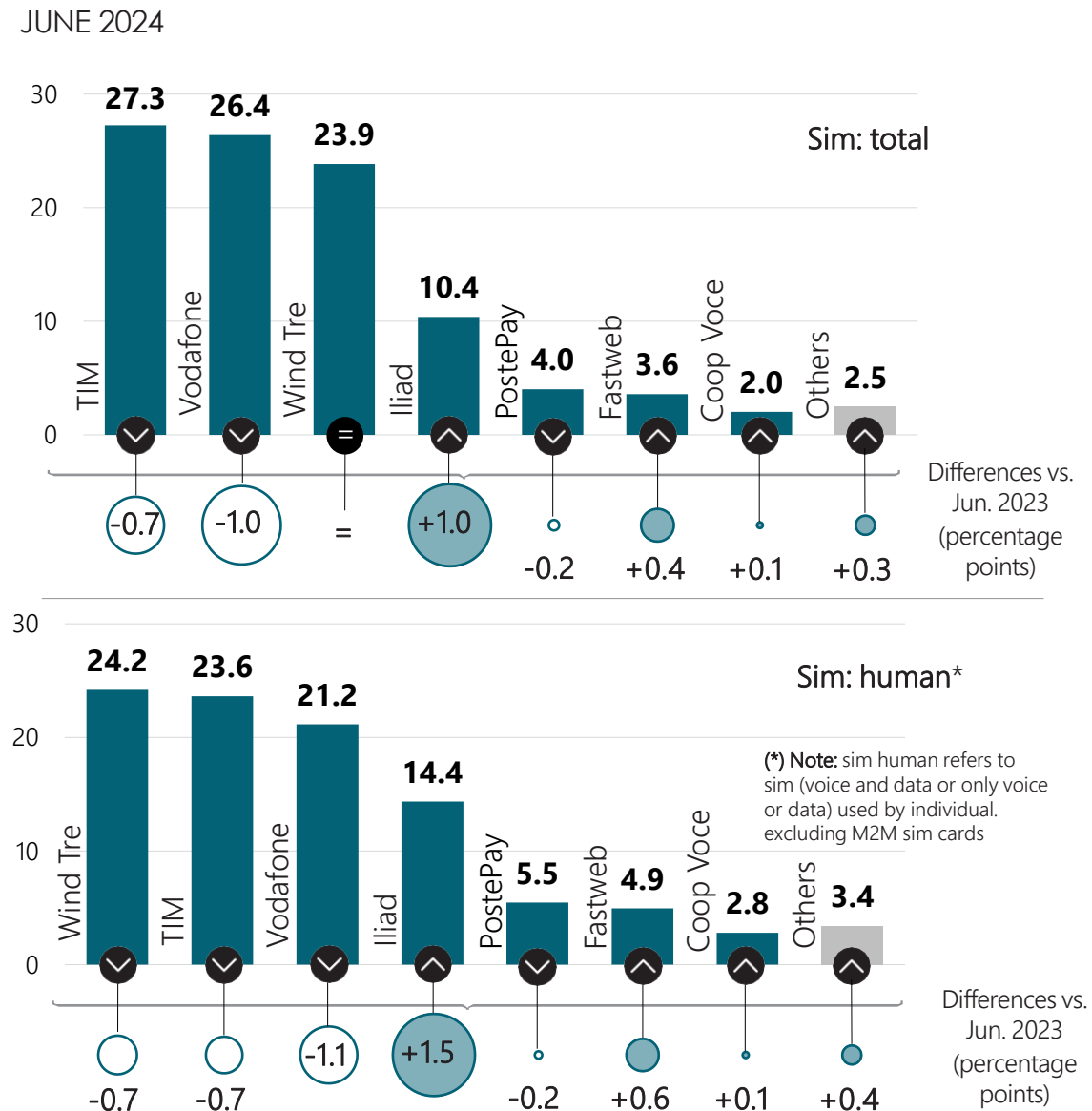
1.8 MOBILE NETWORK: TOTAL SUBSCRIBERS



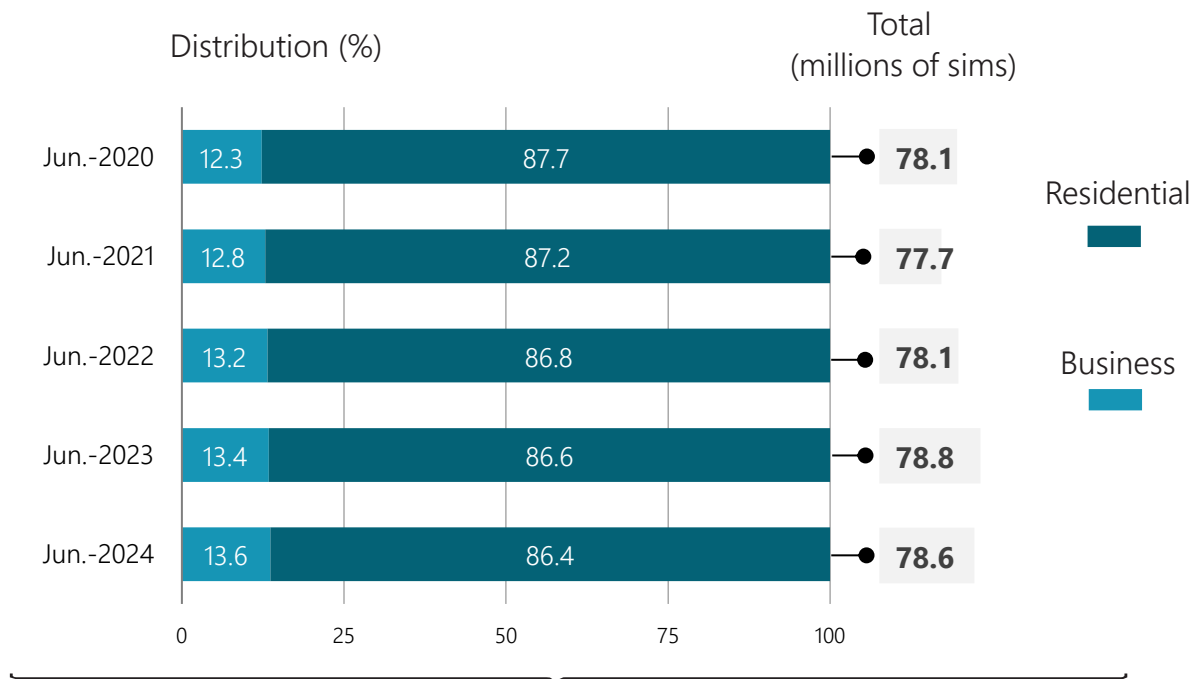
	Quarterly change (Mar. 2023 – Jun. 2024)		Annual change (Jun. 2023 – Jun. 2024)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
Total sim cards:	-250	↓ -0.2	+537	↑ +0.5
Sim human:	+136	↑ +0.2	-160	↓ -0.2
Sim M2M:	-386	↓ -1.3	+697	↑ +2.4

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)

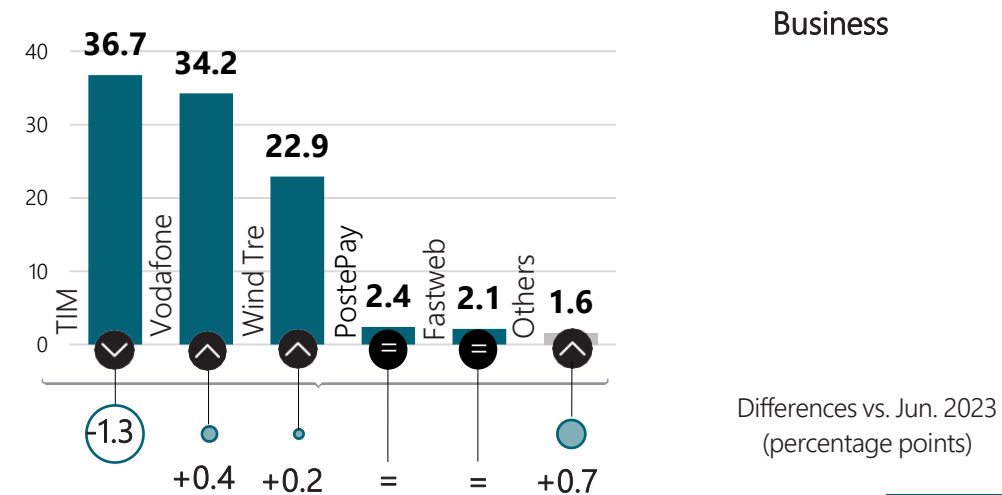
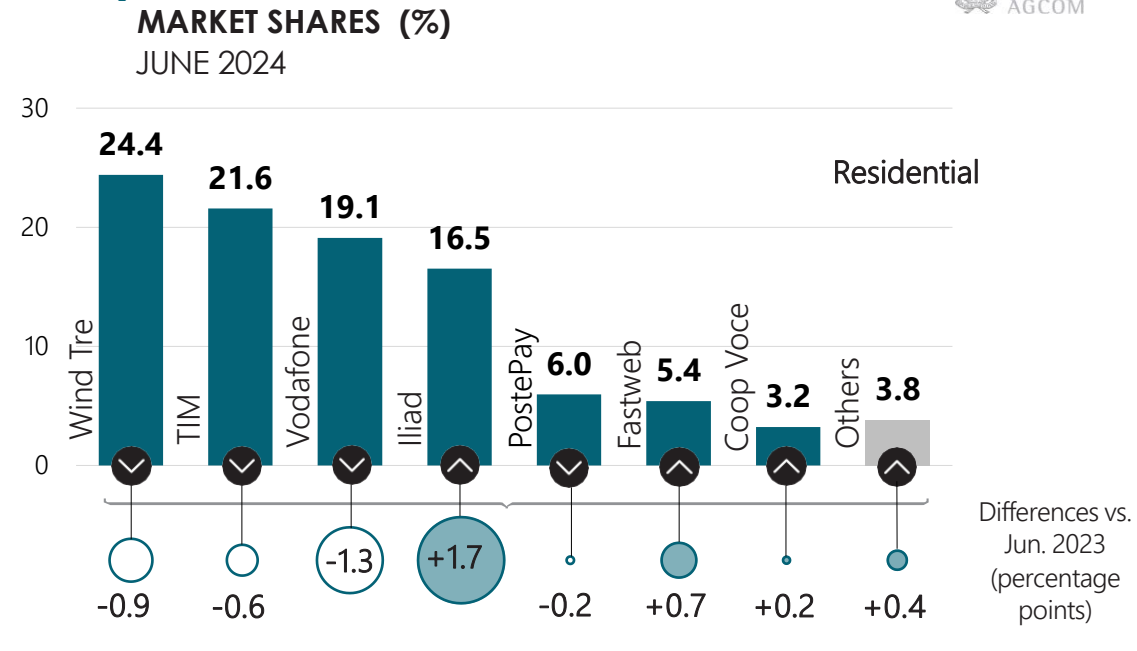
MARKET SHARES (%)



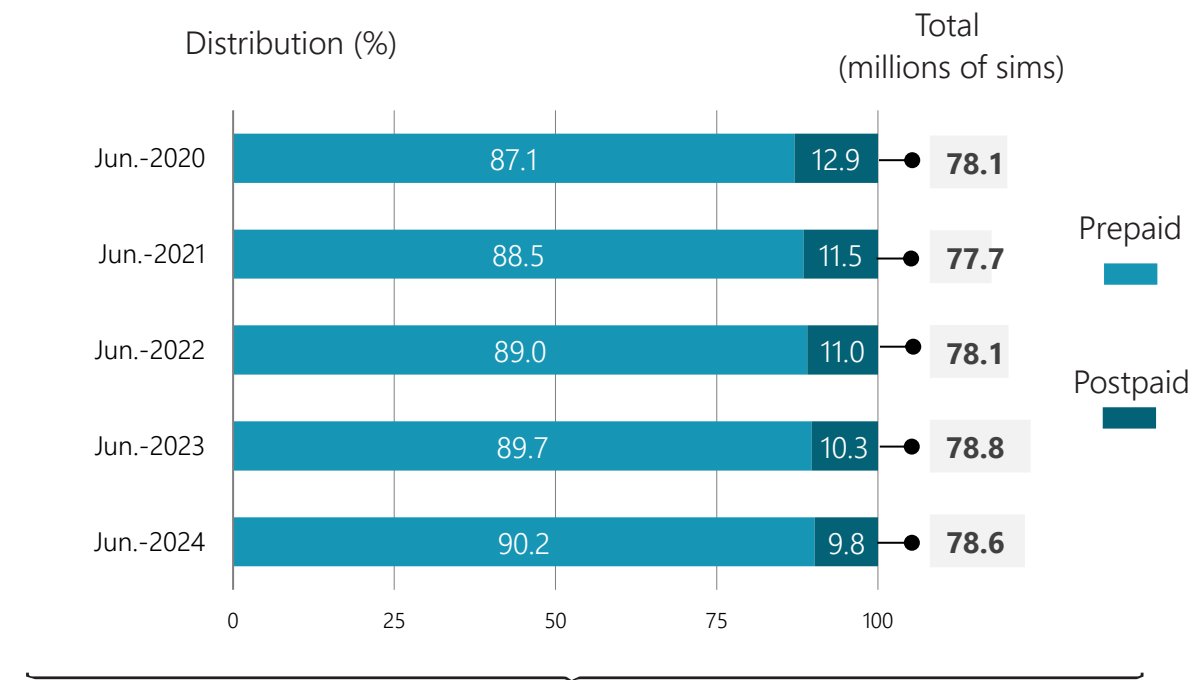
1.9 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



	Annual change (Jun. 2023 – Jun. 2024)			4-Year change (Jun. 2020 – Jun. 2024)		
	(no of sim in thousand)	(Δ %)		(no of sim in thousand)	(Δ %)	
Total human sim cards:	-160	↓ -0.2		+475	↑ +0.6	
Residential sim card:	-340	↓ -0.5		-612	↓ -0.9	
Business sim cards:	+179	↑ +1.7		+1.087	↑ +11.3	



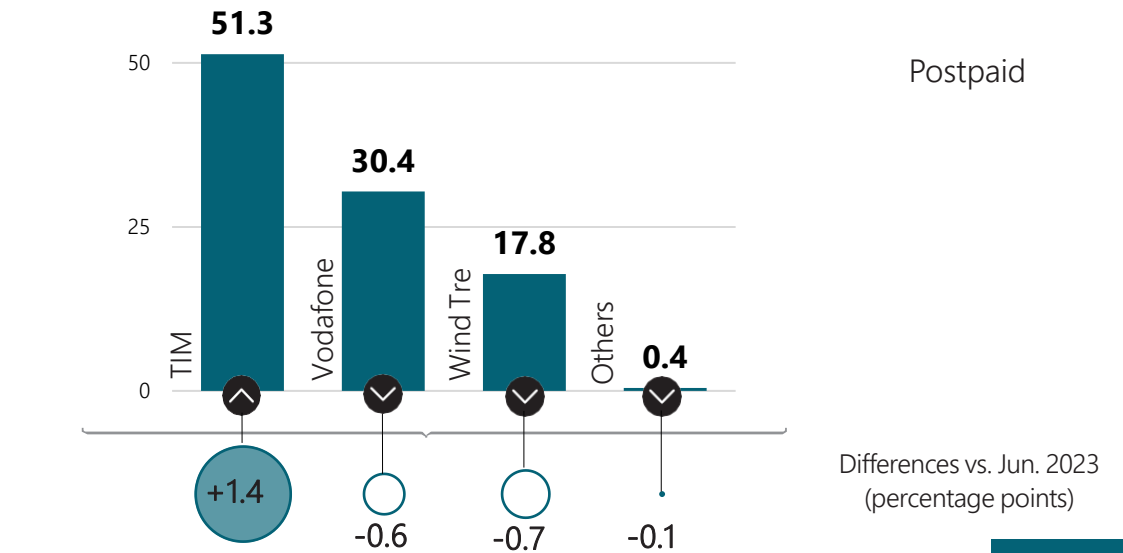
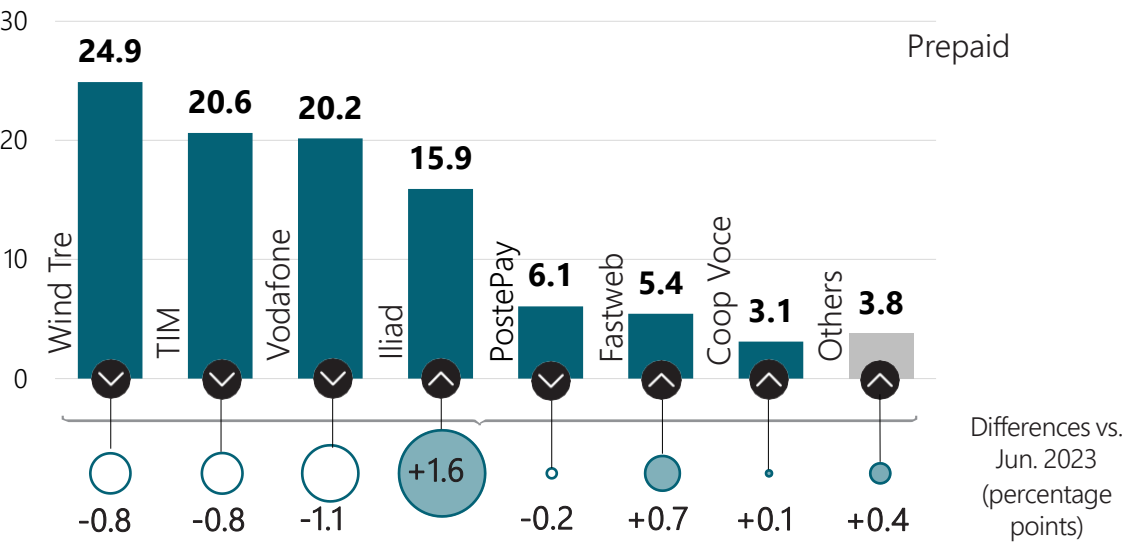
1.10 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT



	Annual change (Jun. 2023 – Jun. 2024)			4-Year change (Jun. 2020 – Jun. 2024)		
	(no of sim in thousand)	(Δ %)		(no of sim in thousand)	(Δ %)	
Total human sim cards:	-160	↓	-0.2	+475	↑	+0.6
Prepaid sim cards:	+206	↑	+0.3	+2.872	↑	+4.2
Postpaid sim cards:	-366	↓	-4.5	-2.261	↓	-23.7

MARKET SHARES (%)

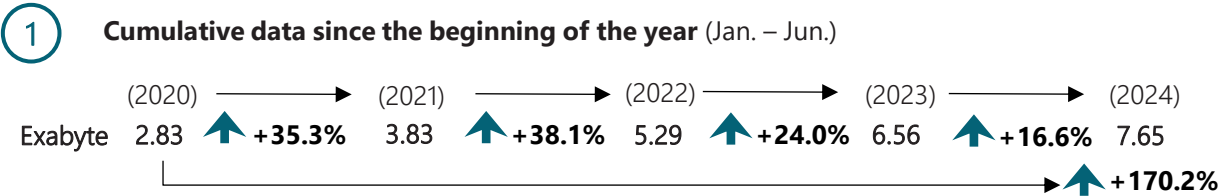
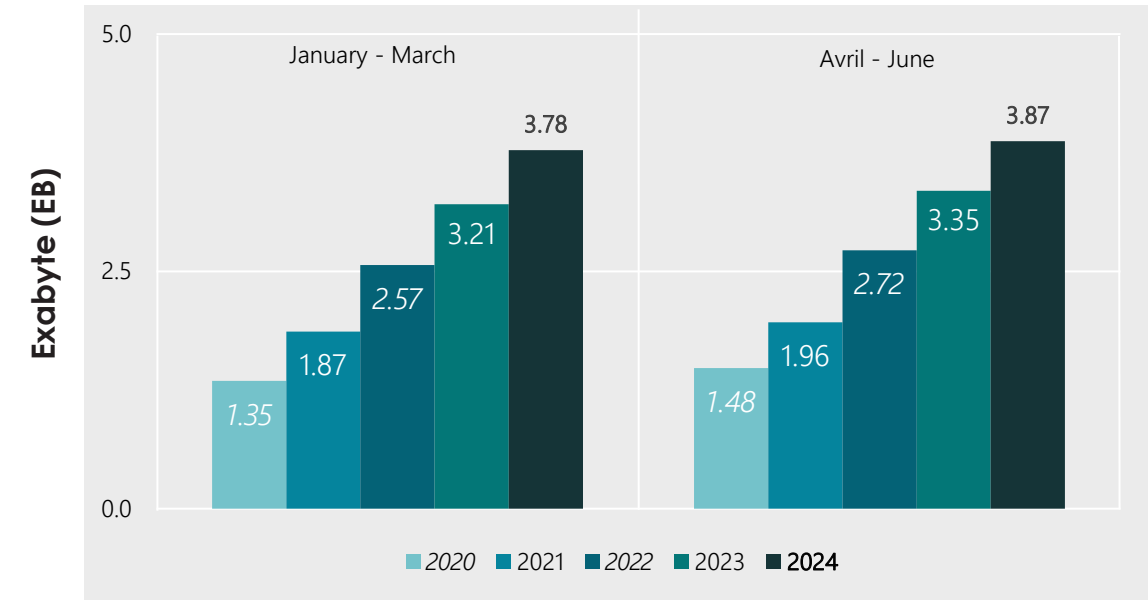
JUNE 2024



1.11 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD



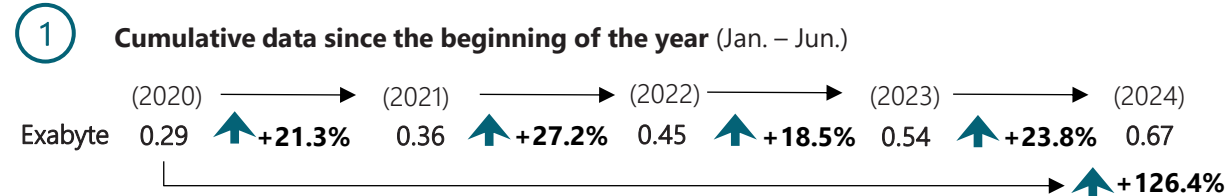
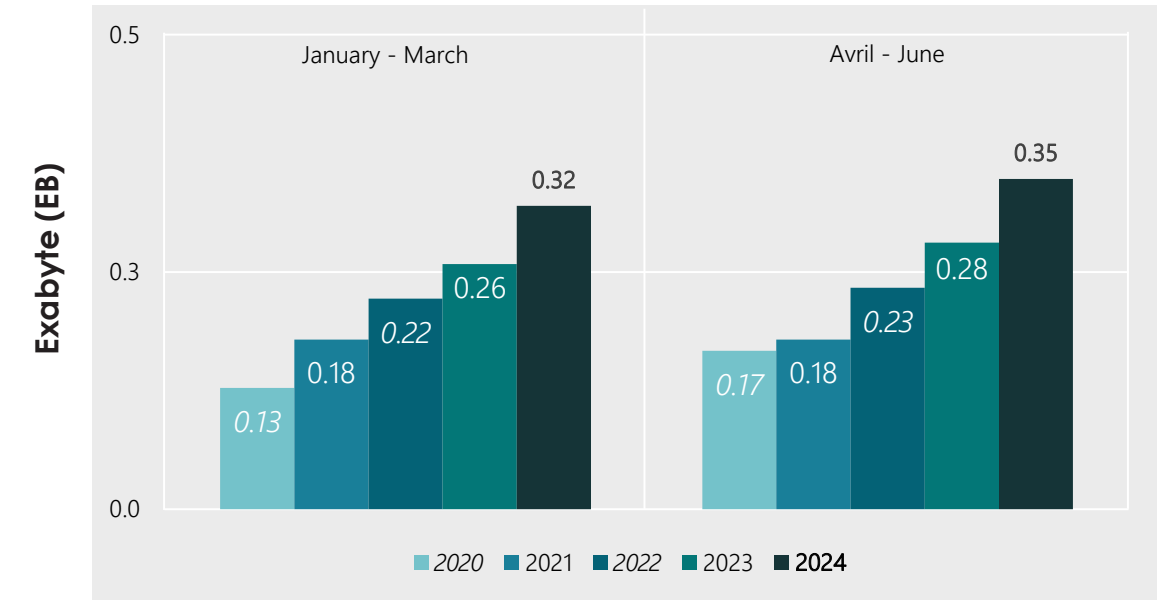
DOWNLOAD (cumulative monthly data)



2 Monthly daily average comparision (change %)

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+49.5	+40.1	+25.5	+14.9	+202.1
February	+37.9	+40.5	+26.3	+20.5	+194.9
March	+29.9	+33.0	+23.1	+18.0	+151.0
Avril	+27.7	+34.9	+24.0	+15.9	+147.4
May	+35.5	+40.2	+23.1	+16.6	+172.9
June	+34.5	+40.8	+22.2	+14.1	+164.1

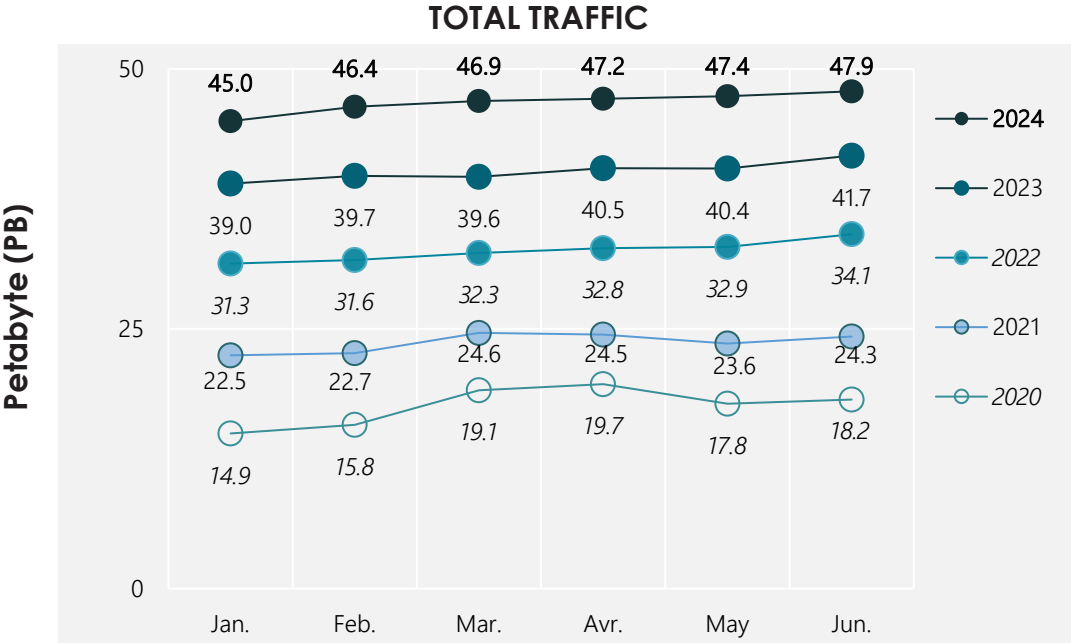
UPLOAD (cumulative monthly data)



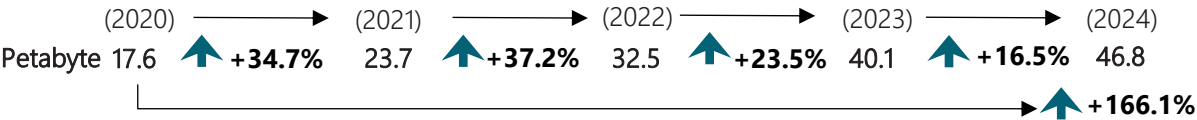
2 Monthly daily average comparision (change %)

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+60.0	+31.0	+14.4	+21.9	+192.4
February	+48.5	+29.0	+17.5	+26.3	+184.5
March	+21.1	+14.0	+17.6	+23.1	+99.7
Avril	-3.0	+23.1	+18.8	+24.4	+76.5
May	+6.7	+31.1	+20.7	+24.0	+109.3
June	+20.9	+37.6	+21.8	+23.4	+149.9

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

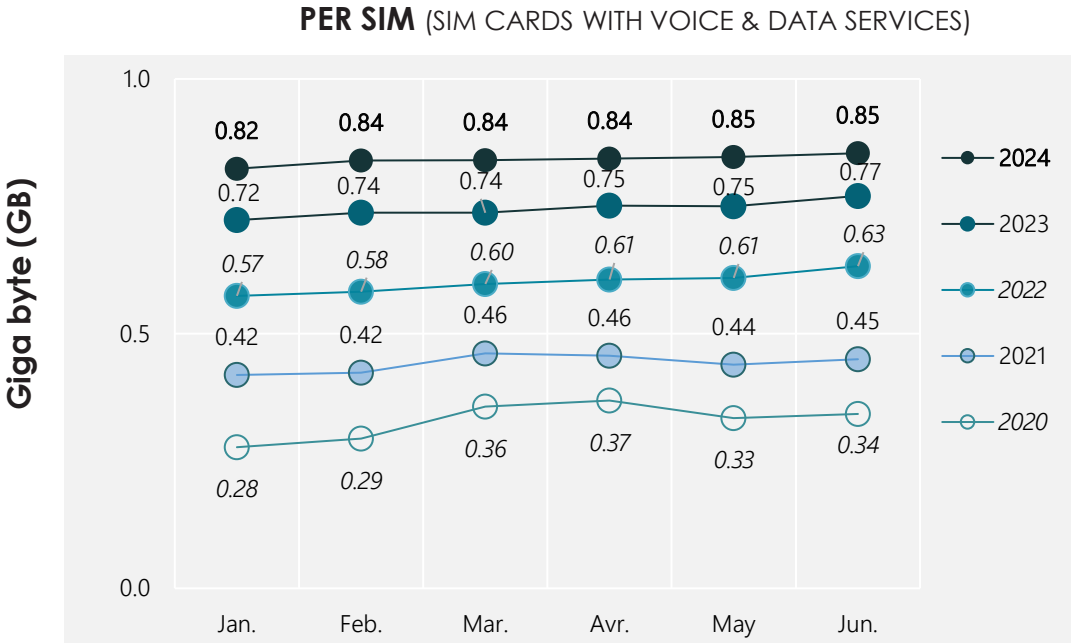


1 Average daily comparison since the beginning of the year (Jan. – Jun.)

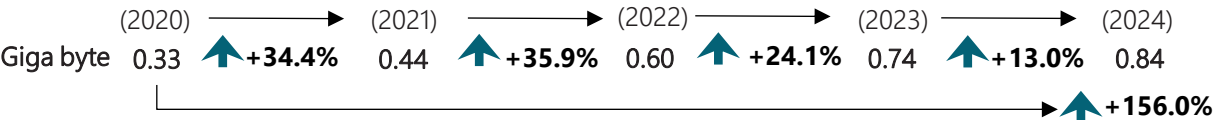


2 Monthly daily average comparison (change %)

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	+50.4	+39.3	+24.6	+15.4	+201.3
February	+43.7	+39.5	+25.6	+16.8	+194.1
March	+29.0	+31.3	+22.7	+18.4	+146.1
Avril	+24.3	+33.9	+23.6	+16.5	+139.6
May	+32.5	+39.4	+22.9	+17.2	+166.2
June	+33.3	+40.5	+22.2	+14.8	+162.8



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

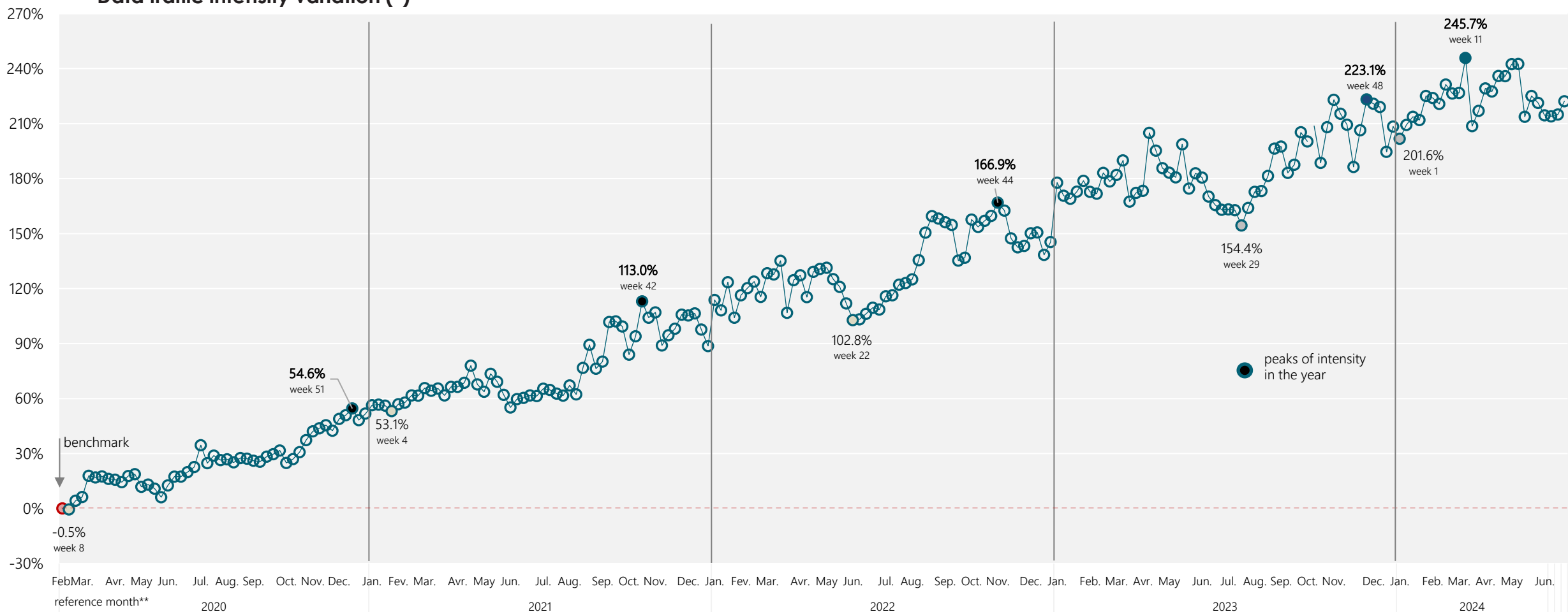


2 Monthly daily average comparison (change %)

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	+51.2	+37.1	+25.9	+14.0	+197.4
February	+44.2	+37.5	+26.6	+13.9	+185.9
March	+29.2	+29.5	+23.4	+14.0	+135.6
Avril	+23.9	+32.7	+23.9	+12.3	+128.8
May	+31.4	+38.9	+23.1	+12.8	+153.5
June	+31.5	+40.6	+21.8	+10.9	+149.7

1.12 MOBILE 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.

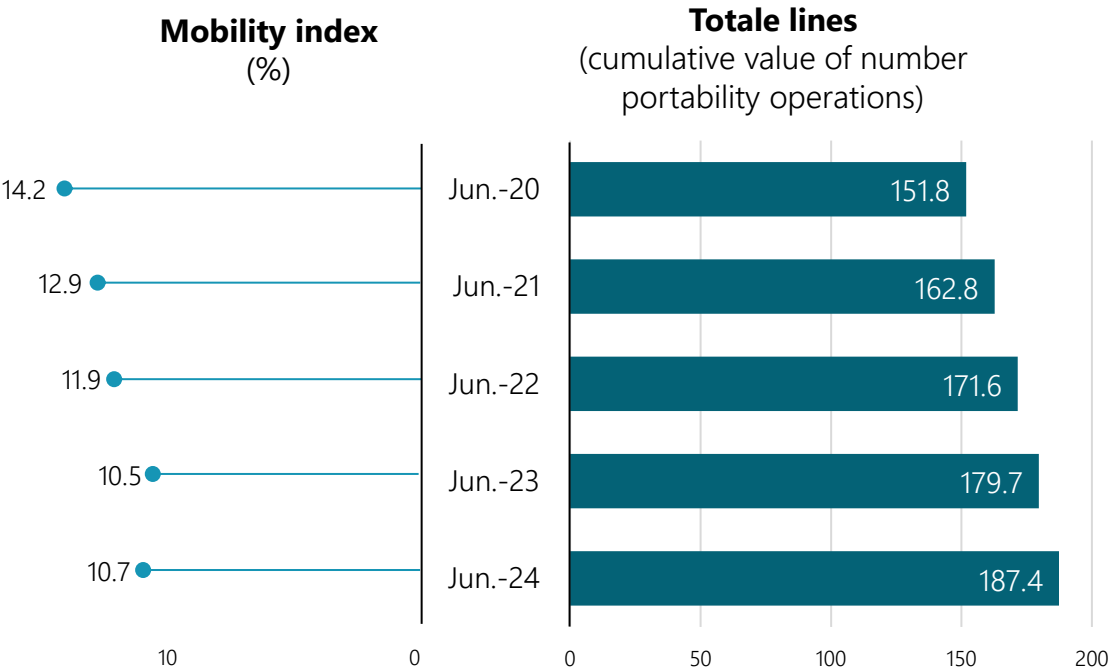
*For each week, the intensity indicator is represented by the percentage change, compared to the 7th week of 2020 (10 to 16 February - red dot in the graph), of the weighted average of the traffic data calculated on the operators' data using, as weighting coefficient, the percentual market share of each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

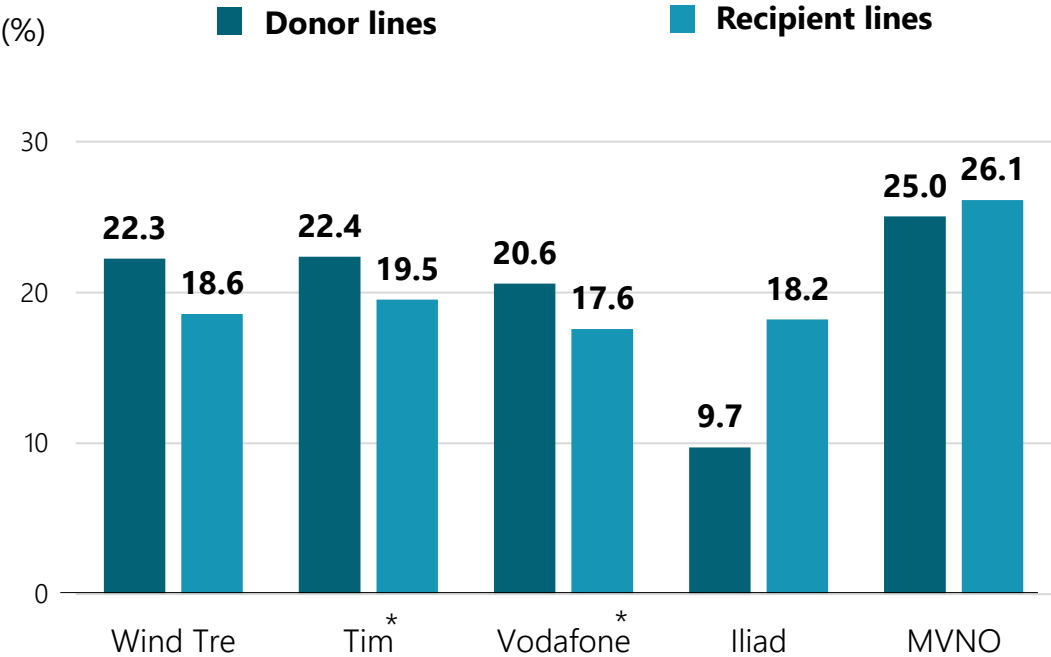
1.14 MOBILE NETWORK: NUMBER PORTABILITY

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



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

DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months)
JUNE 2024

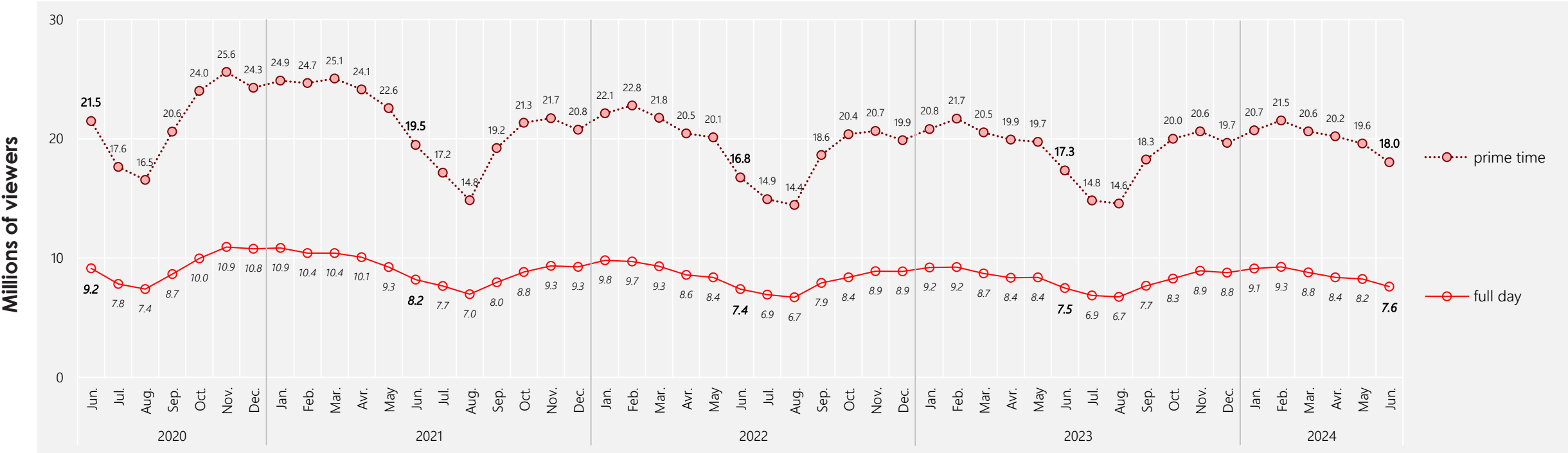


(*) **Note:** the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho)

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



JUNE 2020 – JUNE 2024 (average daily audience)



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

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

Full day audience
(Time slot: 02:00 – 25:59)

	(2020)	→	(2021)	→	(2022)	→	(2023)	→	(2024)
Prime time audience	24.97	↓ -6.0%	23.47	↓ -11.9%	20.67	↓ -3.2%	20.01	↑ +0.5%	20.12
									↓ -19.4%
Full day audience	10.96	↓ -9.9%	9.87	↓ -10.2%	8.87	↓ -3.4%	8.56	↑ +0.03	8.57
									↓ -21.8%

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. – Jun.) in million

Broadcasters	2020	2021	2022	2023	2024	Change in %	
						'20-'24	'23-'24
RAI	9.95	9.71	8.33	7.81	7.88	-20.8	+0.9
Mediaset	9.09	8.23	7.81	7.53	7.13	-21.5	-5.3
Warner Bros. Discovery	1.59	1.55	1.33	1.40	1.74	+9.7	+24.8
Comcast / Sky	1.73	1.71	1.40	1.50	1.47	-15.1	-2.2
Cairo Comm. / La 7	1.48	1.33	1.13	1.01	1.18	-20.3	+17.3
Others	1.14	0.94	0.68	0.77	0.71	-37.2	-7.5

Broadcasters	2020	2021	2022	2023	2024	Change in p.p.	
						'20-'24	'23-'24
RAI	39.9	41.4	40.3	39.0	39.2	-0.7	+0.2
Mediaset	36.4	35.1	37.8	37.6	35.5	-0.9	-2.2
Warner Bros. Discovery	6.4	6.6	6.4	7.0	8.7	+2.3	+1.7
Comcast / Sky	6.9	7.3	6.8	7.5	7.3	+0.4	-0.2
Cairo Comm. / La 7	5.9	5.7	5.4	5.0	5.9	-0.1	+0.8
Others	4.5	4.0	3.3	3.8	3.5	-1.0	-0.3

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year

(Jan. – Jun.) in million

Broadcasters	2020	2021	2022	2023	2024	Change in %	
						'20-'24	'23-'24
RAI	4.28	3.95	3.43	3.27	3.21	-25.1	-2.0
Mediaset	3.82	3.47	3.32	3.21	3.16	-17.3	-1.8
Warner Bros. Discovery	0.90	0.80	0.69	0.68	0.77	-14.6	+13.0
Comcast / Sky	0.76	0.67	0.62	0.62	0.63	-16.6	+1.3
Cairo Comm. / La 7	0.49	0.43	0.40	0.32	0.36	-26.7	+11.2
Others	0.71	0.55	0.41	0.45	0.44	-37.7	-1.8

Broadcasters	2020	2021	2022	2023	2024	Change in p.p.	
						'20-'24	'23-'24
RAI	39.1	40.0	38.6	38.2	37.4	-1.6	-0.8
Mediaset	34.8	35.1	37.4	37.5	36.9	+2.0	-0.7
Warner Bros. Discovery	8.2	8.1	7.8	8.0	9.0	+0.8	+1.0
Comcast / Sky	6.9	6.8	7.0	7.3	7.4	+0.5	+0.1
Cairo Comm. / La 7	4.5	4.4	4.5	3.8	4.2	-0.3	+0.4
Others	6.5	5.6	4.7	5.2	5.1	-1.3	-0.1

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. – Jun.) in million

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in %	
							'20-'24	'23-'24
RAI	Rai 1	5.38	5.11	4.65	4.27	4.71	-12.3	+10.4
	Rai 2	1.62	1.34	1.09	1.00	0.94	-42.1	-6.1
	Rai 3	1.32	1.70	1.42	1.39	1.14	-14.1	-18.5
Mediaset	Canale 5	4.09	3.70	3.45	3.36	3.13	-23.7	-7.1
	Italia 1	1.45	1.28	1.22	1.16	1.20	-17.6	+3.5
	Rete 4	1.29	1.18	0.99	0.84	0.83	-35.7	-1.9
Cairo Comm.	La7	1.38	1.25	1.05	0.91	1.08	-21.8	+18.7
Warner Bros. Discovery	Nove	0.40	0.46	0.36	0.41	0.63	+58.7	+55.2
Comcast / Sky	TV8	0.59	0.51	0.44	0.53	0.47	-19.9	-11.1

Average share Jan. – Jun. (in %)

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in p.p.	
							'20-'24	'23-'24
RAI	Rai 1	21.5	21.8	22.5	21.3	23.4	+1.9	+2.1
	Rai 2	6.5	5.7	5.3	5.0	4.6	-1.8	-0.3
	Rai 3	5.3	7.3	6.9	7.0	5.6	+0.3	-1.3
Mediaset	Canale 5	16.4	15.8	16.7	16.8	15.5	-0.9	-1.3
	Italia 1	5.8	5.4	5.9	5.8	5.9	+0.1	+0.2
	Rete 4	5.2	5.0	4.8	4.2	4.1	-1.0	-0.1
Cairo Comm.	La7	5.5	5.3	5.1	4.6	5.4	-0.2	+0.8
Warner Bros. Discovery	Nove	1.6	1.9	1.8	2.0	3.2	+1.6	+1.1
Comcast / Sky	TV8	2.4	2.2	2.1	2.7	2.4	=	-0.3

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year

(Jan. – Jun.) in million

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in %	
							'20-'24	'23-'24
RAI	Rai 1	2.03	1.89	1.74	1.65	1.65	-18.6	+0.3
	Rai 2	0.60	0.52	0.45	0.46	0.45	-24.0	-0.6
	Rai 3	0.82	0.81	0.66	0.61	0.56	-32.1	-8.0
Mediaset	Canale 5	1.80	1.70	1.60	1.54	1.49	-16.9	-2.8
	Italia 1	0.57	0.48	0.42	0.40	0.40	-29.1	+1.1
	Rete 4	0.46	0.42	0.38	0.33	0.35	-24.7	+4.5
Cairo Comm.	La7	0.44	0.38	0.36	0.28	0.32	-25.7	+14.0
Warner Bros. Discovery	Nove	0.19	0.19	0.16	0.15	0.19	+2.0	+27.8
Comcast / Sky	TV8	0.25	0.19	0.18	0.20	0.19	-21.7	-5.7

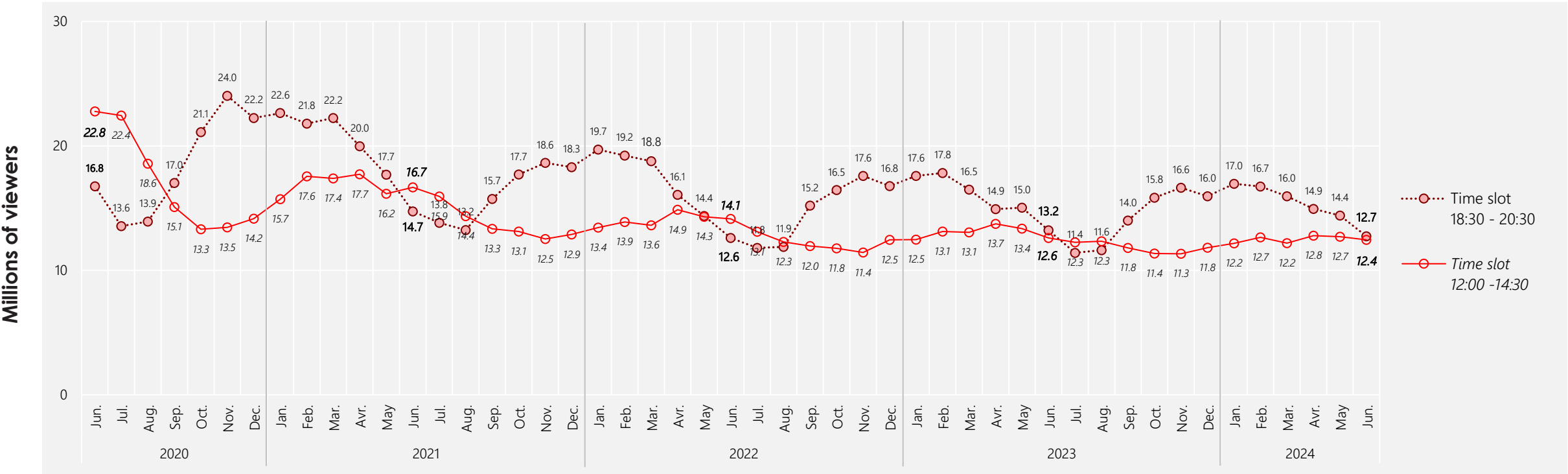
Average share Jan. – Jun. (in %)

Broadcasters	TV channels	2020	2021	2022	2023	2024	Change in p.p.	
							'20-'24	'23-'24
RAI	Rai 1	18.5	19.2	19.6	19.2	19.3	+0.8	+0.05
	Rai 2	5.4	5.2	5.0	5.3	5.3	-0.2	=
	Rai 3	7.5	8.2	7.4	7.1	6.5	-1.0	-0.6
Mediaset	Canale 5	16.4	17.2	18.0	17.9	17.4	+1.0	-0.5
	Italia 1	5.2	4.9	4.8	4.6	4.7	-0.5	+0.1
	Rete 4	4.2	4.2	4.2	3.9	4.0	-0.2	+0.2
Cairo Comm.	La7	4.0	3.9	4.0	3.3	3.8	-0.2	+0.5
Warner Bros. Discovery	Nove	1.7	1.9	1.8	1.8	2.2	+0.5	+0.5
Comcast / Sky	TV8	2.3	1.9	2.1	2.4	2.3	=	-0.1

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



JUNE 2020 – JUNE 2024 (average daily audience)



Change in the number of viewers (average daily value Jan. – Jun. in millions)	(2020)	→	(2021)	→	(2022)	→	(2023)	→	(2024)
Time slot: 18:30 – 20:30	21.97	↓ -9.7%	19.84	↓ -15.4%	16.80	↓ -5.6%	15.85	↓ -3.5%	15.29
	↓ -30.4%								
Time slot: 12:00 – 14:30	18.18	↓ -13.6%	15.70	↓ -14.4%	13.44	↓ -5.7%	12.67	↓ -3.0%	12.30
	↓ -32.4%								

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

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

**TIME SLOT:
12:00 – 14:30**

Average audience since the beginning of the year (Jan. – Jun.) in millions							Change (in thousand)			Change (in %)	
	National news programs	2020	2021	2022	2023	2024	'20-'24	'23-'24		'20-'24	'23-'24
RAI	Tg 1 (13:30 edition)	4.38	4.03	3.58	3.38	3.19	-1,187	-192		-27.1	-5.7
	Tg 2 (13:00 edition)	2.54	2.01	1.80	1.65	1.54	-1,009	-115		-39.6	-6.9
	Tg 3 (12:00 edition)	1.23	1.06	0.83	0.74	0.72	-503	-15		-41.0	-2.1
	Tg 3 Regionale (14:00 edition)	3.31	2.98	2.31	2.11	2.13	-1,179	+17		-35.6	+0.8
Mediaset	Tg 4 (12:00 edition)	0.44	0.34	0.29	0.29	0.32	-122	+29		-27.8	+10.0
	Tg 5 (13:00 edition)	3.65	3.13	2.87	2.91	2.74	-912	-171		-25.0	-5.9
	Studio Aperto (12:25 edition)	1.86	1.51	1.19	1.09	1.06	-798	-34		-43.0	-3.1
La 7	Tg La 7 (13:30 edition)	0.78	0.65	0.50	0.50	0.60	-179	+104		-23.0	+21.0

**TIME SLOT:
18:30 – 20:30**

Average audience since the beginning of the year (Jan. – Jun.) in millions							Change (in thousand)			Change (in %)	
	National news programs	2020	2021	2022	2023	2024	'20-'24	'23-'24		'20-'24	'23-'24
RAI	Tg 1 (20:00 edition)	6.08	5.61	4.99	4.56	4.45	-1,630	-106		-26.8	-2.3
	Tg 2 (20:30 edition)	1.98	1.70	1.28	1.13	0.93	-1,050	-198		-53.1	-17.5
	Tg 3 (19:00 edition)	2.45	2.30	1.84	1.80	1.74	-718	-65		-29.3	-3.6
	Tg 3 Regionale (19:30 edition)	3.36	3.04	2.36	2.32	2.26	-1,097	-54		-32.7	-2.4
Mediaset	Tg 4 (12:00 edition)	0.75	0.66	0.63	0.59	0.50	-248	-90		-33.0	-15.1
	Tg 5 (13:00 edition)	4.99	4.46	4.02	3.90	3.67	-1,317	-228		-26.4	-5.8
	Studio Aperto (18:30 edition)	0.99	0.80	0.57	0.53	0.48	-510	-50		-51.4	-9.5
La 7	Tg La 7 (20:00 edition)	1.35	1.26	1.10	1.02	1.25	-106	+232		-7.8	+22.8

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. – Jun. (in thousand)

	Year	Full day	07:00 09:00	12:00 15:00	18:00 20:30
Totale «all news» channels	2024	111	227	161	135
	2023	117	227	171	160
	2022	148	258	212	208
	2021	167	296	232	249
	2020	216	299	308	368
Change %	2024/2023	-5.2	-0.1	-5.7	-15.4
	2024/2020	-48.6	-24.2	-47.8	-63.2

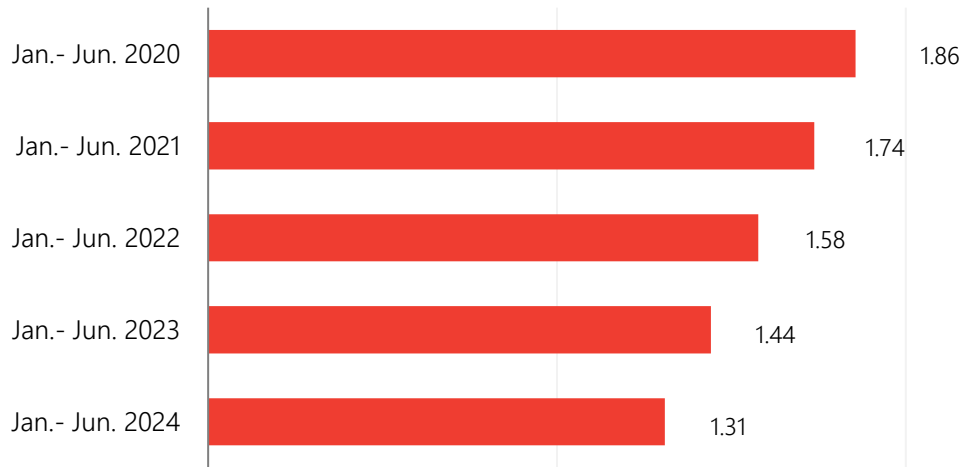
Average audience since the beginning of the year Jan. – Jun. (in thousand)

	Year	Full day	07:00 09:00	12:00 15:00	18:00 20:30
Rai News 24	2024	44	94	51	37
	2023	50	100	59	49
	2022	65	126	78	73
	2021	77	151	95	87
	2020	100	160	119	151
Change %	2024/2023	-10.8	-5.9	-13.3	-24.9
	2024/2020	-55.6	-41.1	-57.3	-75.5
TgCom 24	2024	39	80	65	62
	2023	39	77	67	66
	2022	47	76	74	78
	2021	50	89	72	81
	2020	55	76	88	86
Change %	2024/2023	+0.1	+3.7	-2.2	-5.9
	2024/2020	-28.3	+4.3	-25.4	-27.7
Sky Tg24	2024	28	53	45	36
	2023	28	50	45	45
	2022	37	55	60	57
	2021	41	56	65	81
	2020	61	62	101	131
Change %	2024/2023	-2.9	5.7	-1.1	-18.9
	2024/2020	-55.2	-15.8	-55.9	-72.3

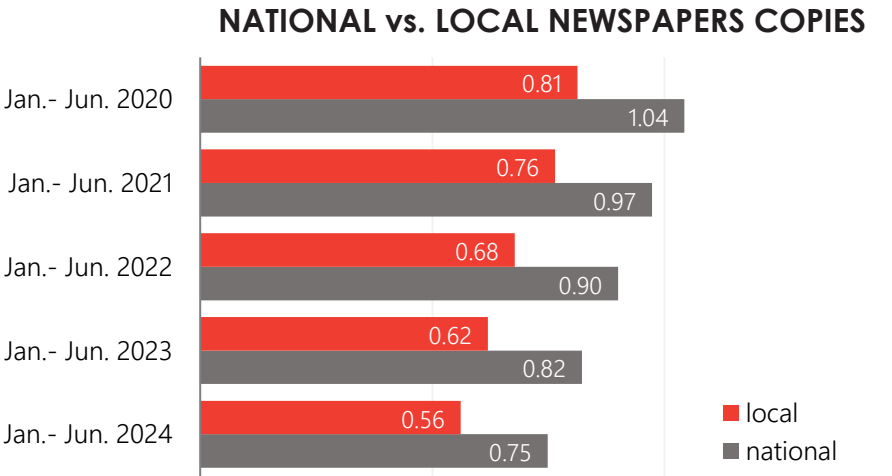
2.7 NEWSPAPERS: DAILY COPIES SOLD SINCE THE BEGINNING YEAR (1/2)



CUMULATIVE SALES
(copies sold in millions)



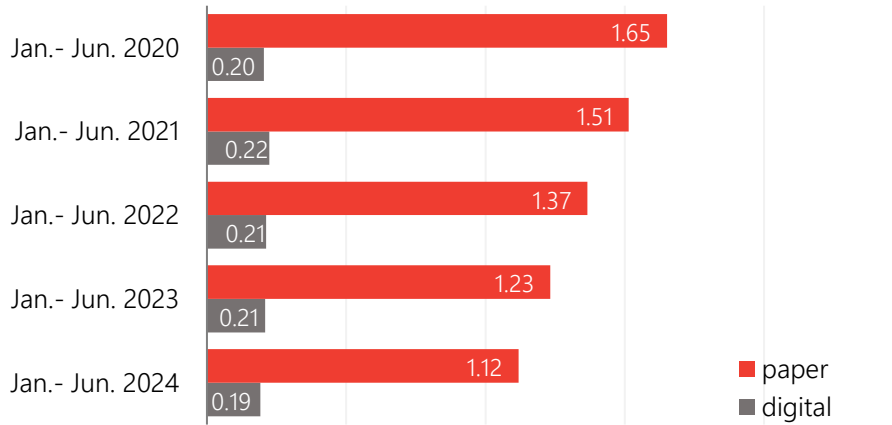
CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)



Change in %
Period: January – June

	(2023 – 2024)	(2020 – 2024)
Total copies:	-9.2 ↓	-29.4 ↓
Paper copies:	-9.2 ↓	-32.3 ↓
Digital copies:	-8.7 ↓	-6.4 ↓
National newspapers copies:	-8.9 ↓	-28.2 ↓
Local newspapers copies:	-9.5 ↓	-31.0 ↓

PAPER vs. DIGITAL COPIES



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. – Jun.	2020	2021	2022	2023	2024
National newspapers	General press - Top 5		540	484	433	381	351
	Other general press		132	124	110	102	92
	Business		73	62	55	49	40
	Sport		146	141	148	138	127
Local newspapers	Top 10		357	337	302	274	253
	Others		404	365	317	289	255

	Change in %	Jan. – Jun.	('20 – '24)	('23 – '24)
National newspapers	General press Top 5		-35.0 ↓	-8.0 ↓
	Other general press		-29.9 ↓	-9.7 ↓
	Business		-45.8 ↓	-18.7 ↓
	Sports		-12.6 ↓	-7.4 ↓
Local newspapers	Top 10		-29.2 ↓	-7.6 ↓
	Others		-36.8 ↓	-11.6 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in thousands)

		Jan. – Jun.	2020	2021	2022	2023	2024
National newspapers	General press - Top 5		81	94	88	92	92
	Other general press		26	32	31	27	16
	Business		38	30	28	28	27
	Sport		7	7	6	5	4
Local newspapers	Top 10		22	27	25	24	23
	Others		29	35	33	33	30

	Change in %	Jan. – Jun.	('20 – '24)	('23 – '24)
National newspapers	General press Top 5		+12.6 ↑	-0.1 ↑
	Other general press		-40.0 ↓	-42.6 ↓
	Business		-28.7 ↓	-3.3 ↓
	Sports		-41.4 ↓	-21.4 ↓
Local newspapers	Top 10		+2.9 ↑	-3.5 ↓
	Others		+1.1 ↑	-10.9 ↓

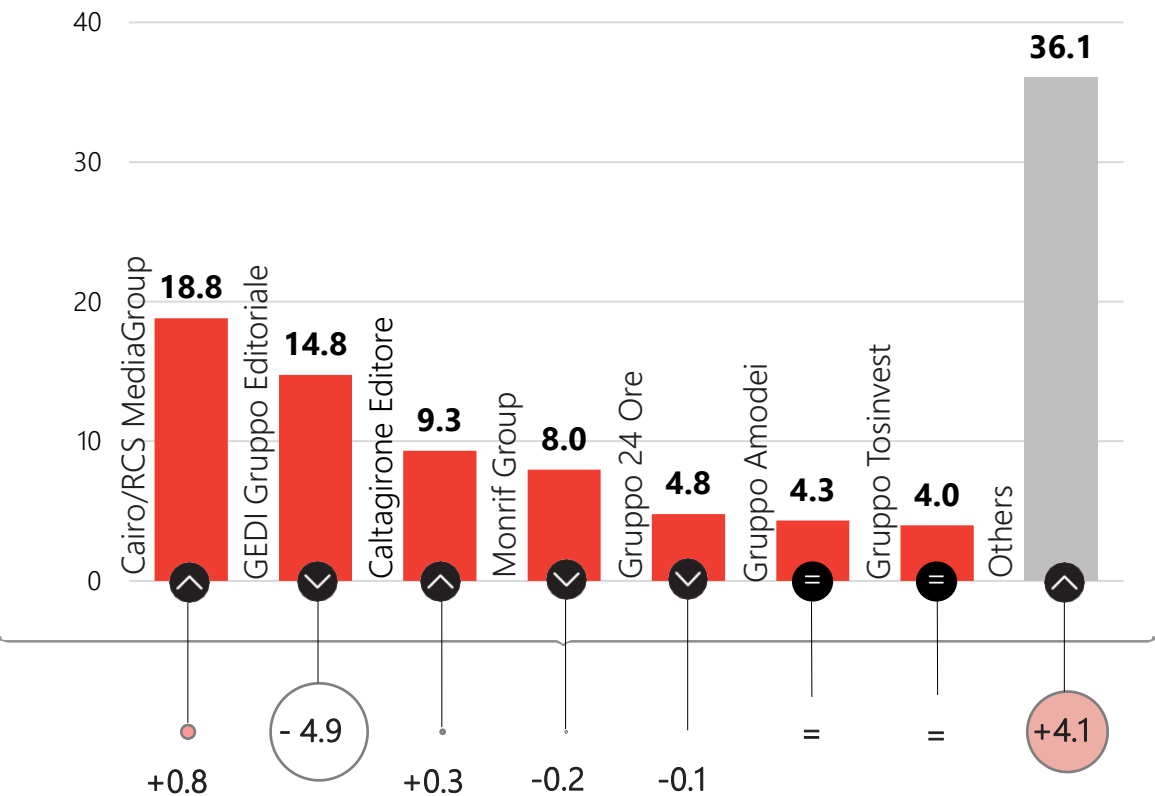
Newspapers categories

- **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

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 (%)

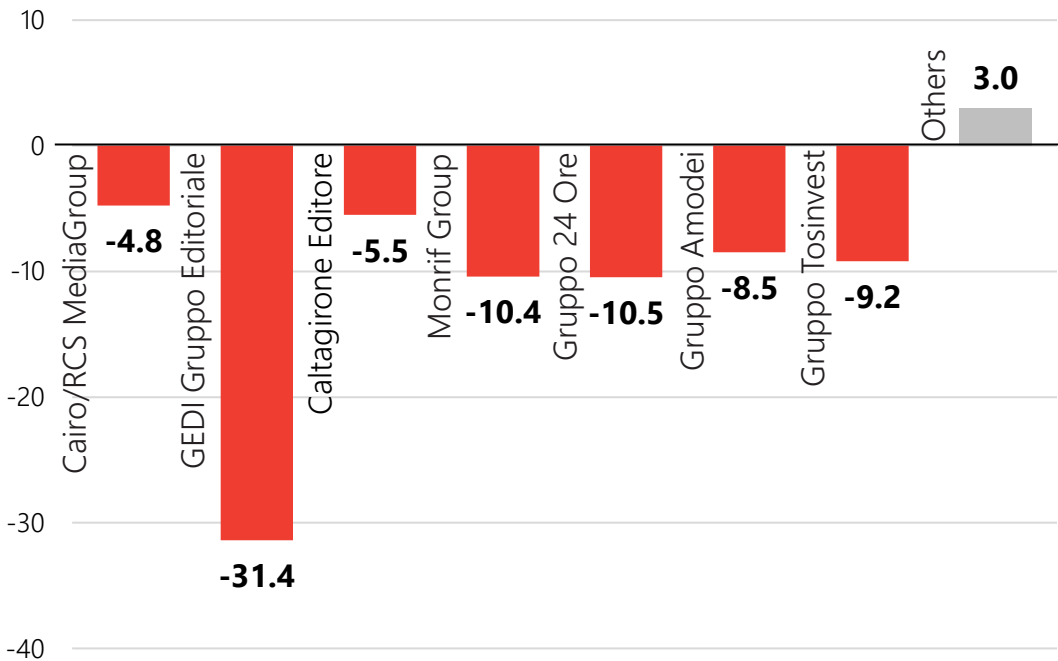
JANUARY – JUNE 2024



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

CHANGE IN TOTAL COPIES SOLD (%)

Difference vs. Jan. – Jun. 2023



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 July 2023 – June 2024)

Major Newspapers	TOTAL COPIES (paper + digital)							PAPER COPIES			DIGITAL COPIES		
	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	11.16	11.25	11.84	12.34	12.93	+0.59	+1.76	11.01	-0.06	+0.45	24.00	+3.93	+7.31
Repubblica (La)	8.61	8.80	8.12	7.35	7.16	-0.18	-1.45	6.20	-0.11	-1.53	12.70	-0.91	-3.91
Gazzetta dello sport (La) (*)	5.76	4.88	5.79	5.74	5.82	+0.08	+0.06	6.60	+0.17	+0.52	1.31	-0.22	-1.56
Stampa (La)	5.49	5.42	5.39	5.22	5.01	-0.21	-0.48	5.10	-0.20	-0.54	4.51	-0.26	+0.37
Sole 24 Ore (Il)	5.06	4.76	4.67	4.75	4.69	-0.06	-0.37	3.23	-0.16	-0.23	13.14	+0.11	-6.53
Avvenire	4.01	4.19	4.09	3.98	4.47	+0.49	+0.45	4.98	+0.55	+0.57	1.52	+0.27	+1.06
QN - Il Resto del Carlino	4.07	4.21	4.18	4.10	4.01	-0.09	-0.06	4.62	-0.03	+0.23	0.48	-0.28	-0.62
Messaggero (Il)	3.77	3.53	3.80	3.84	3.90	+0.05	+0.13	4.00	+0.04	+0.08	3.30	+0.19	+0.86
Corriere dello sport (*)	2.79	2.41	2.70	2.83	2.85	+0.02	+0.06	3.26	+0.06	+0.22	0.48	-0.09	-0.01
Gazzettino (Il)	2.29	2.46	2.49	2.55	2.66	+0.11	+0.36	2.57	+0.10	+0.31	3.16	+0.11	+0.55
QN - La Nazione	2.88	2.90	2.78	2.70	2.64	-0.07	-0.24	3.04	-0.03	-0.08	0.31	-0.18	-0.38
Fatto quotidiano (Il)	1.90	2.50	2.52	2.51	2.18	-0.33	+0.28	1.59	+0.04	+0.26	5.60	-2.81	-1.57
Giornale (Il)	2.21	2.48	2.06	2.00	2.04	+0.04	-0.17	2.27	+0.05	-0.08	0.68	+0.04	-0.17

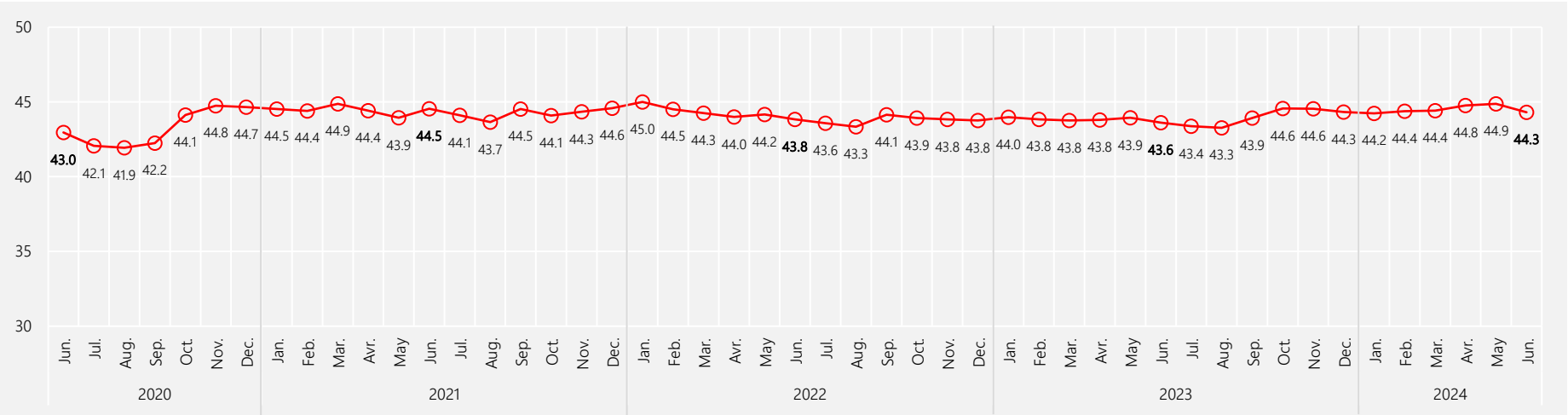
(*) – includes the Monday edition

Source: Agcom elaboration on data from ADS

2.11 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS



UNIQUE USERS IN MILLIONS (June 2020 – June 2024)

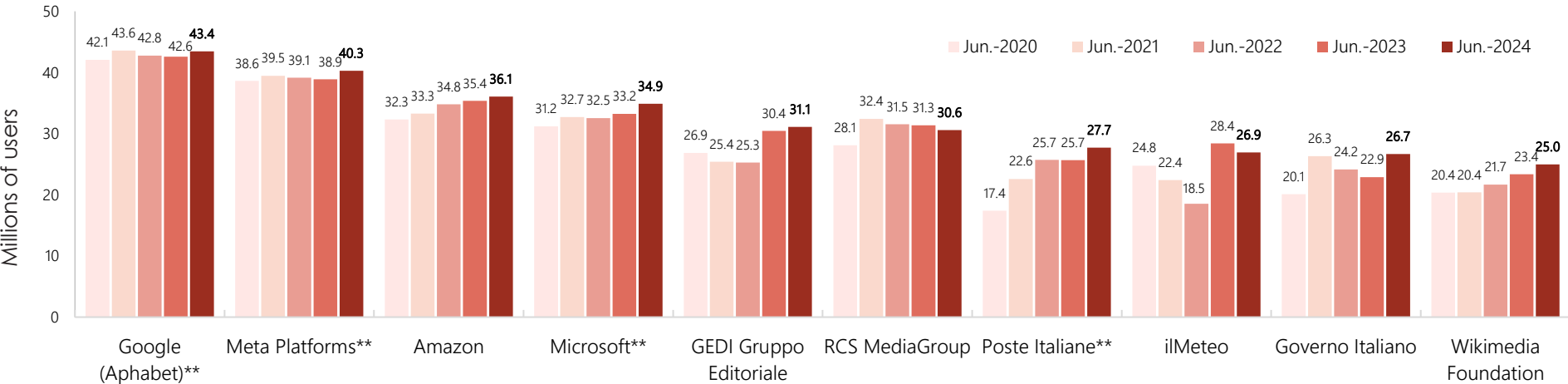


44 million and 316 thousand unique users logged on to the internet in June 2024 (+700 thousand compared to June 2023)

Approximately 72 hours spent, on average, by each user surfing the Internet in June 2024

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

UNIQUE USERS OF THE MAIN OPERATORS (Parent*)



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

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

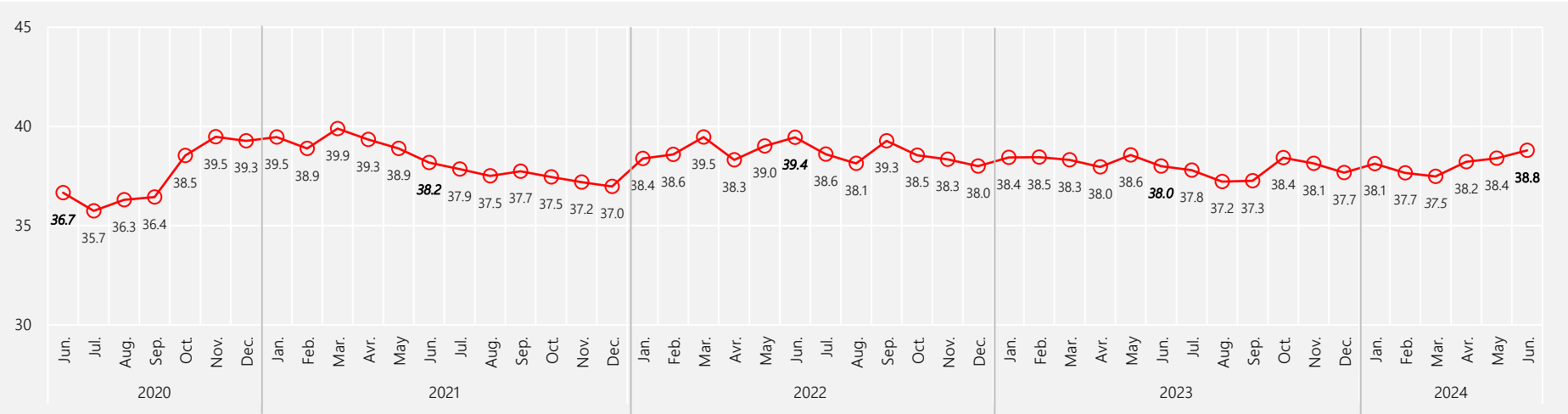
Note**: Google, Meta Platforms, Amazon, Microsoft and Poste Italiane are tracked only through Audiweb Panel.

Source: Agcom elaboration on data from Audicom – sistema Audiweb

2.12 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

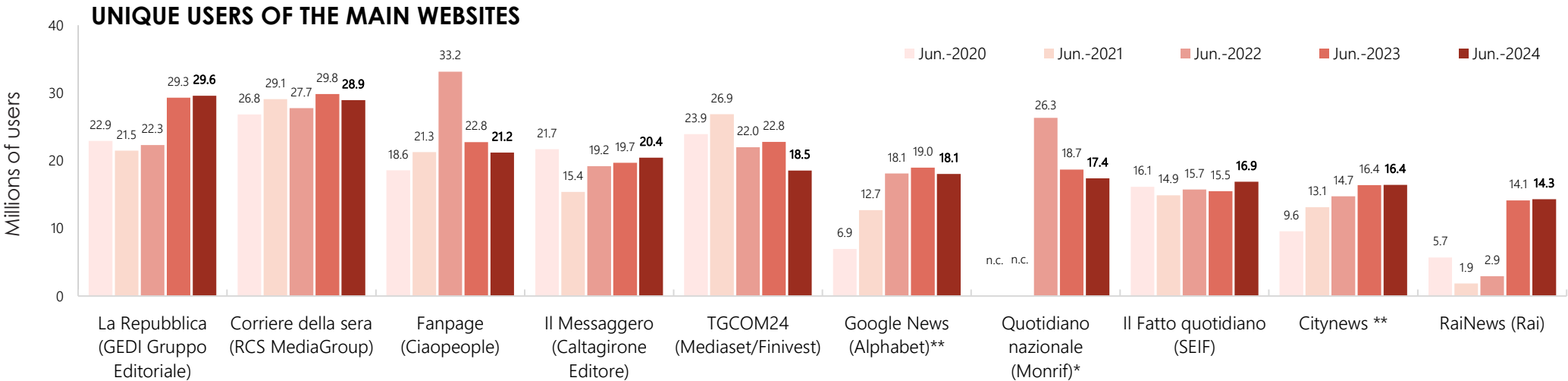


UNIQUE USERS IN MILLIONS (June 2020 – June 2024)



38 million and 788 thousand unique users logged on to the generalist news sites/APPs in June 2024 (over 780 thousand users compared to June 2023)

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



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

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

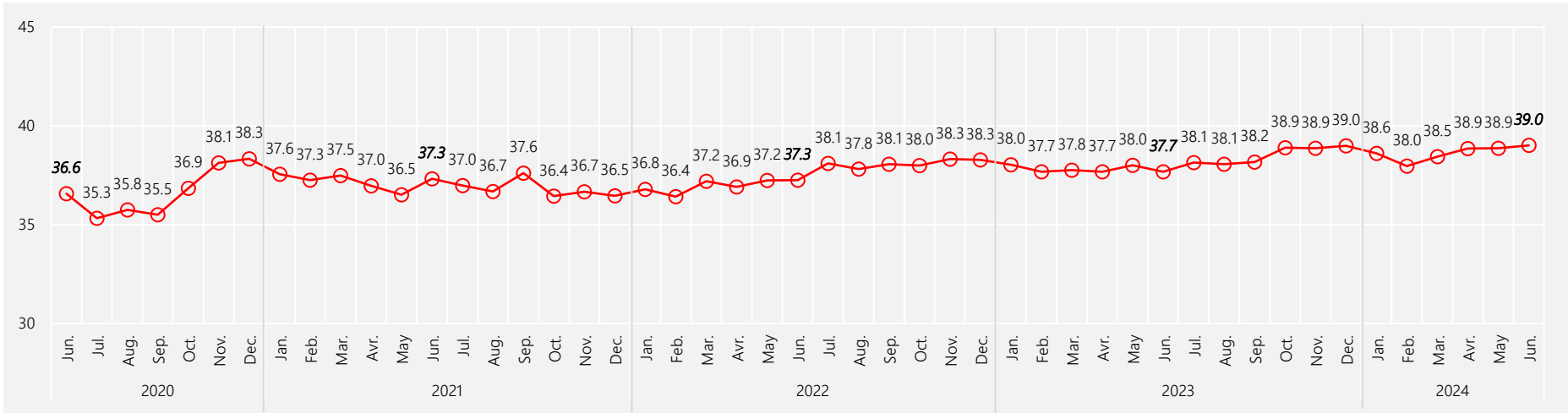
** Google News and Citynews are detected only through the Audiweb Panel.

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



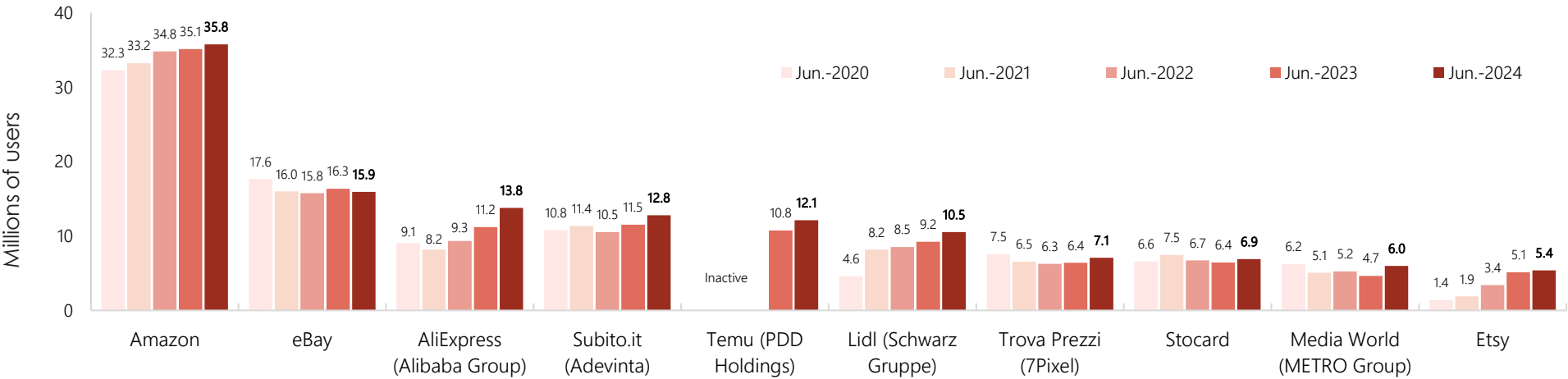
UNIQUE USERS IN MILLIONS (June 2020 – June 2024)



Over **39** million unique users logged on to e-commerce sites/APPs in June 2024 (+**1.336** thousand users compared to June 2023)

2 hour and 28 minute spent, on average, by each user browsing e-commerce websites/APPs in June 2024

UNIQUE USERS OF THE MAIN WEBSITES*



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

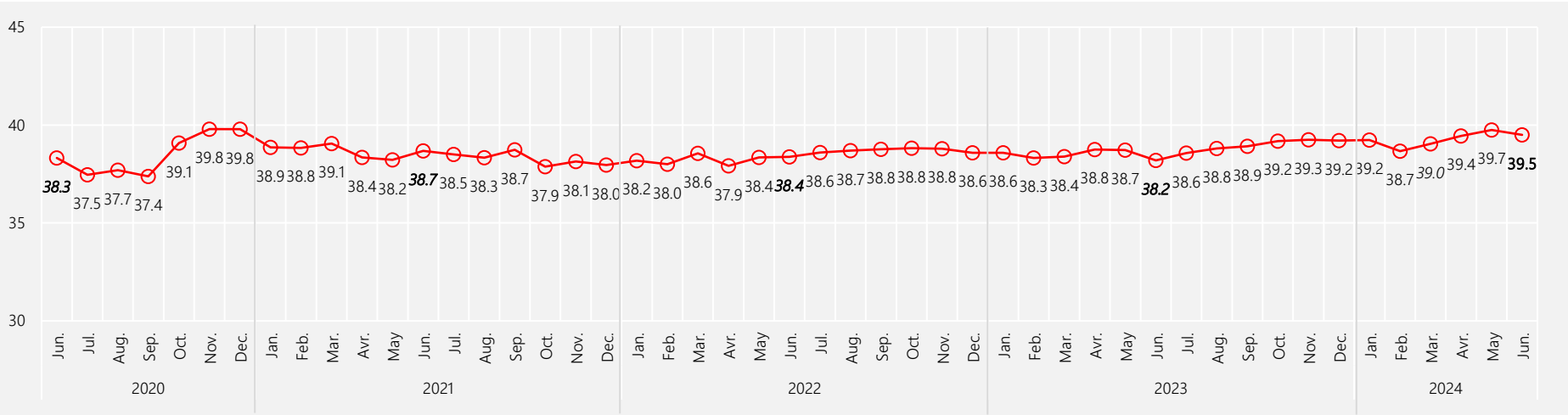
Source: Agcom elaboration on data from Audicom – sistema Audiweb (Values referring to the category: «Multi-category Commerce»)

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

2.14 PLATFORMS: SOCIAL NETWORK WEBSITES/APP UNIQUE USERS



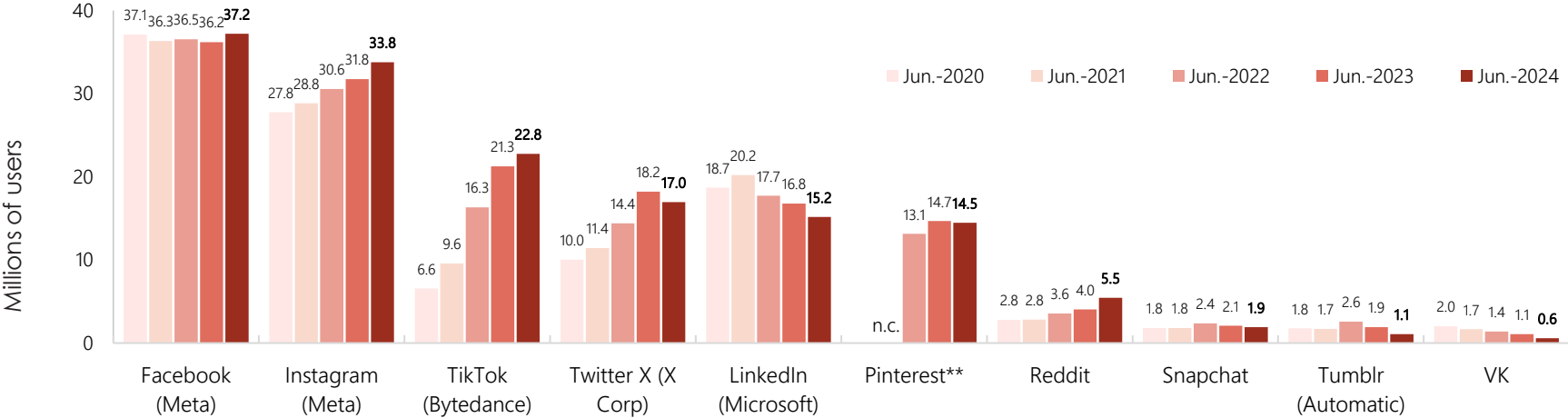
UNIQUE USERS IN MILLIONS (June 2020 – June 2024)



39 million and 496 thousand unique users logged on to social networking sites/APPs in June 2024 (+1.295 thousand users compared to June 2023)

24 hour and 53 minute spent, on average, by each user browsing social networking websites/APPs in June 2024

UNIQUE USERS OF THE MAIN WEBSITES*



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

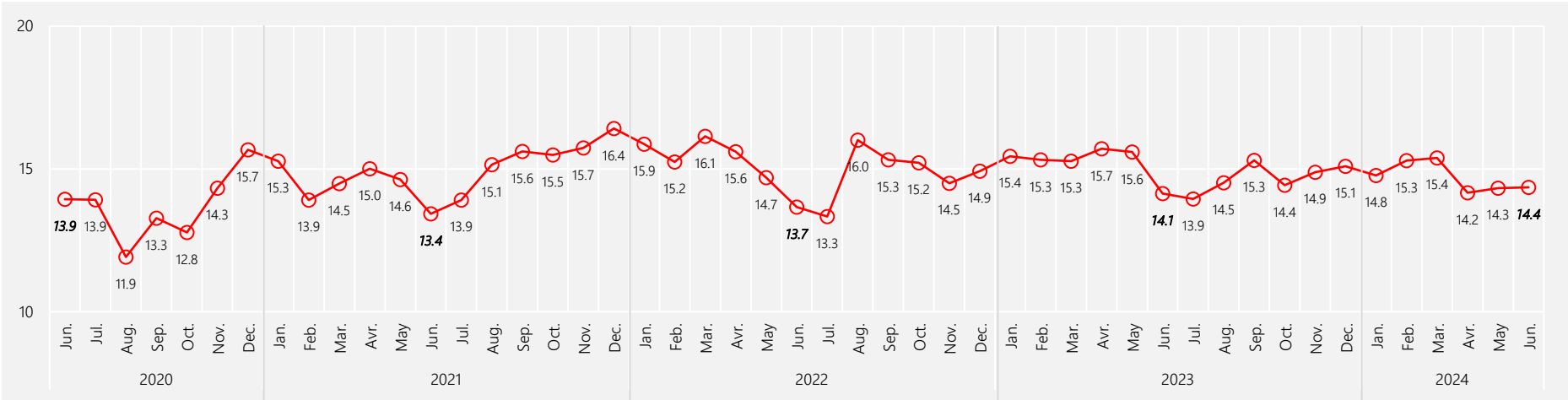
Source: Agcom elaboration on data from Audicom – sistema Audiweb (Values referring to the category: «Member Communities»)

* The chart shows the unique users of the top 10 Brands that belong to the sub-category "Member Communities" and offer Social Networking services in Italy.
** Note: as a result of activities to improve the accuracy of the survey, data from January 2022 onward are not comparable (n.c.) with those of previous years; the outcomes of this activity cannot be isolated from any seasonal effects.

2.15 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS



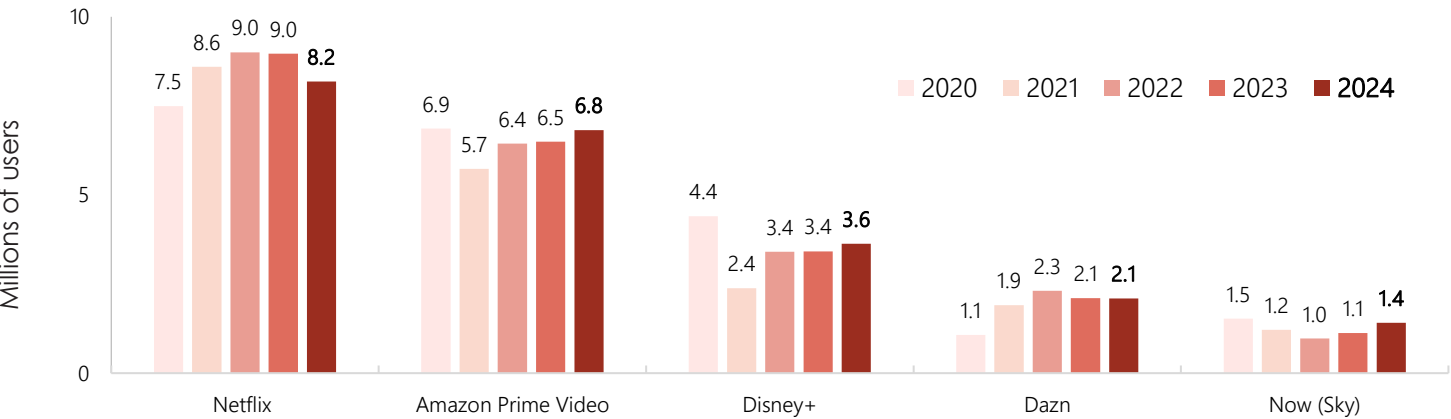
UNIQUE USERS IN MILLIONS (June 2020 – June 2024)



Over **14** million unique users logged on to video-on-demand sites/APPs in June 2024 (+**218** thousand compared to June 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)



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

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

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

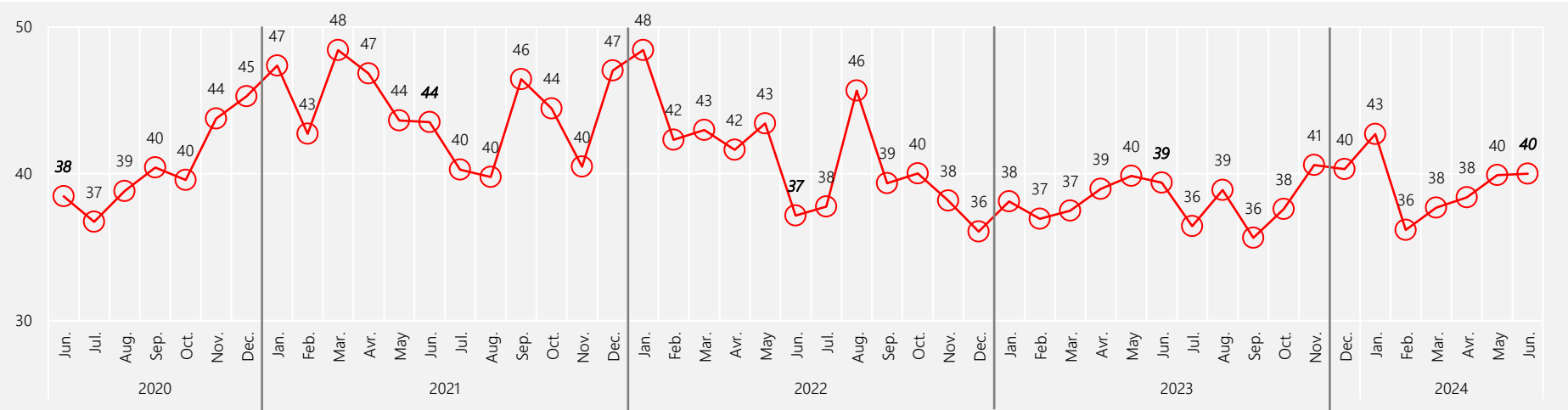
Dazn data will be collected by Auditel starting from August 2022, according to AGCOM resolution no. 18/22/CONS

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

2.16 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

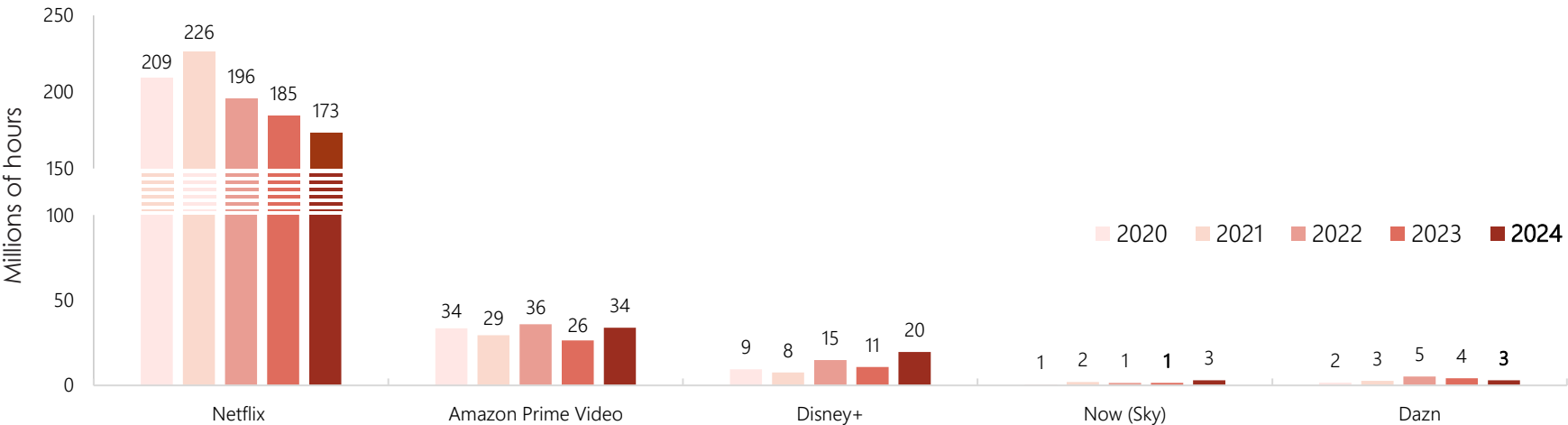


TOTAL HOURS SPENT (in millions of hours) (June 2020 – June 2024)



The average time spent per month by each visitor on pay video on demand platforms is more then **2 hour** in June 2024

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



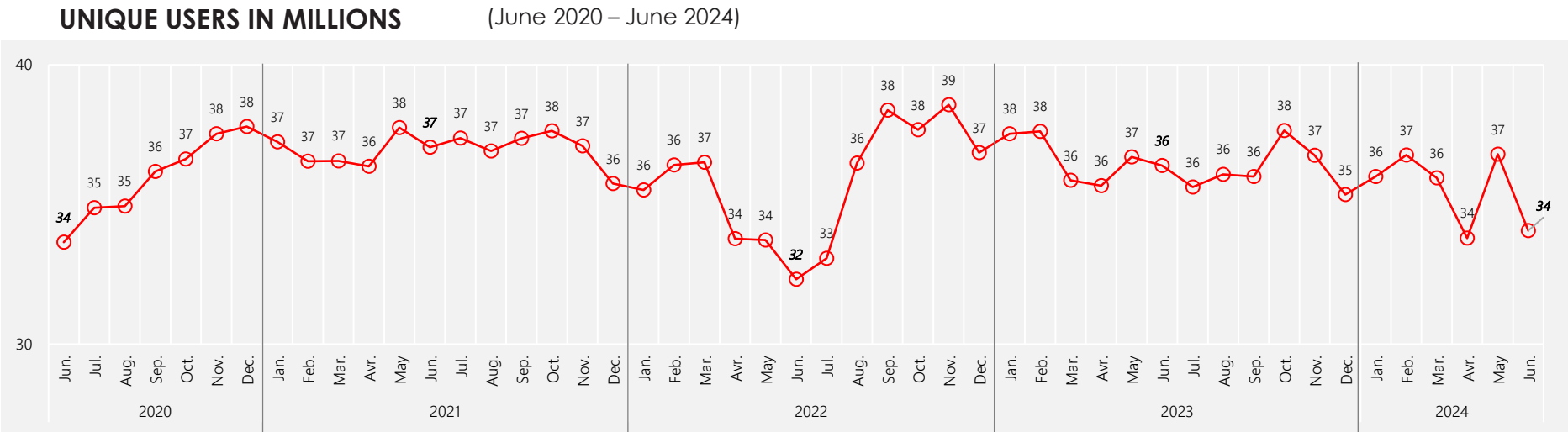
Source: Agcom elaboration on data from ComScore
The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy: Netflix; Primevideo.com (Amazon); Nowtv.it (Sky); Timvision.it (TIM); Disney digital (Disney); Dazn.com (Dazn); Chili.com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

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

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

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

2.17 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS



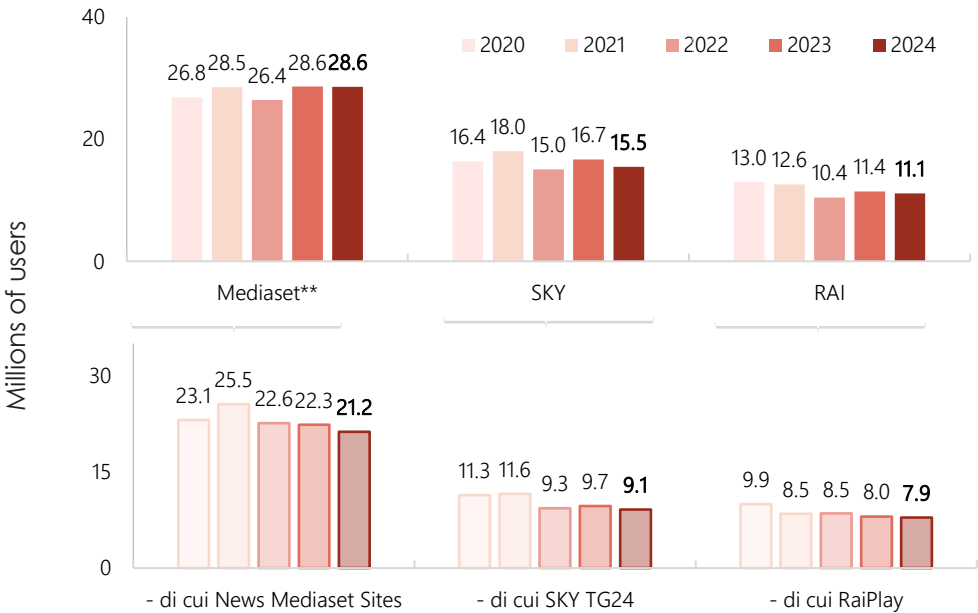
Over **34** million unique users logged on to free video-on-demand sites/APPs in June 2024 (slightly down than in June 2023)

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

The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: Mediaset (Mediaset Infinity Sites and TGC24 Sites Jan.19 - Spr.22; Mediaset.it Sites since May 22). Rai (RaiPlay; Rai News. Rai Sport). Discovery (Discovery Inc). Sky (Cielotv.it. TV8 Sites. Sky.it Sprt HD. Sky.it TG24 HD. Sky.it Uno HD gen.19-apr.19; Sky Free ToAir; Sky sport; Sky TG24. Sky Entertainment mag.19 - giu.22). Cairo/La 7 (La7). Paramount/Viacom (Nickelodeon Kids and Family; MTV Italy). Rakuten (VIKI.COM). Warner (TBS Entertainment Digital). De Agostini (DEABYDAY.TV; DEAKIDS.IT). VVVVID.IT; A+E Networks Digital; SPORTITALIA.COM; TV2000.IT; POPCORNTV.IT; WITTYTV.IT.

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

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



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

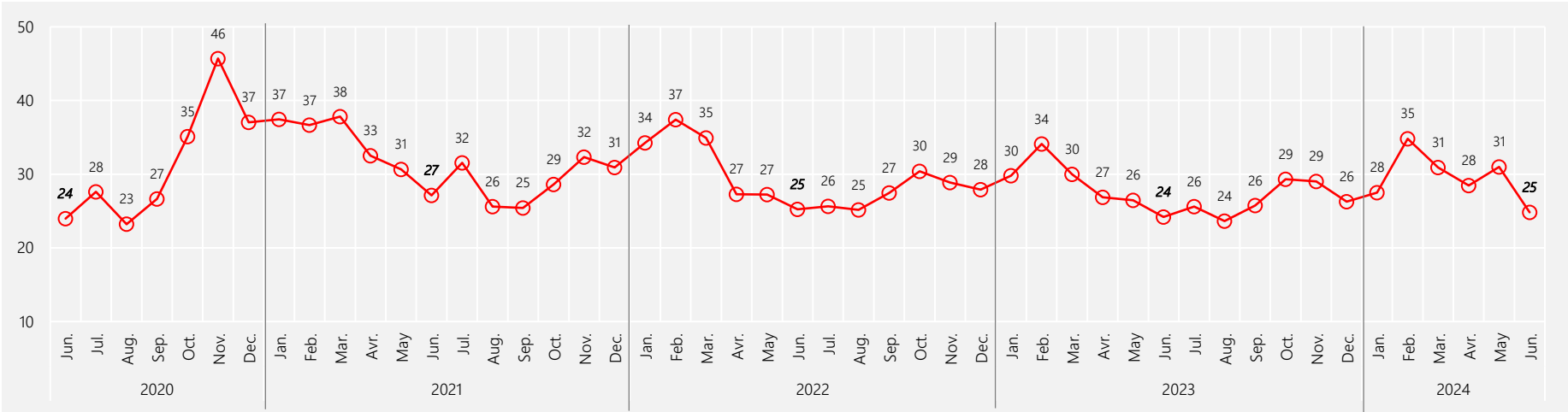
** MFE/Mediaset unique users are those relating to the Mediaset.it Sites/App component due to editorial choices by the operator that do not allow the traffic of paid VOD services included in Mediaset Infinity Sites to be unbundled. Since the beginning of the year, this component has amounted to an average of approximately 21 million 247 thousand unique users.

Source: Agcom elaboration on data from ComScore

2.18 PLATFORMS: TIME SPENT ON FREE VIDEO ON DEMAND PLATFORMS



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

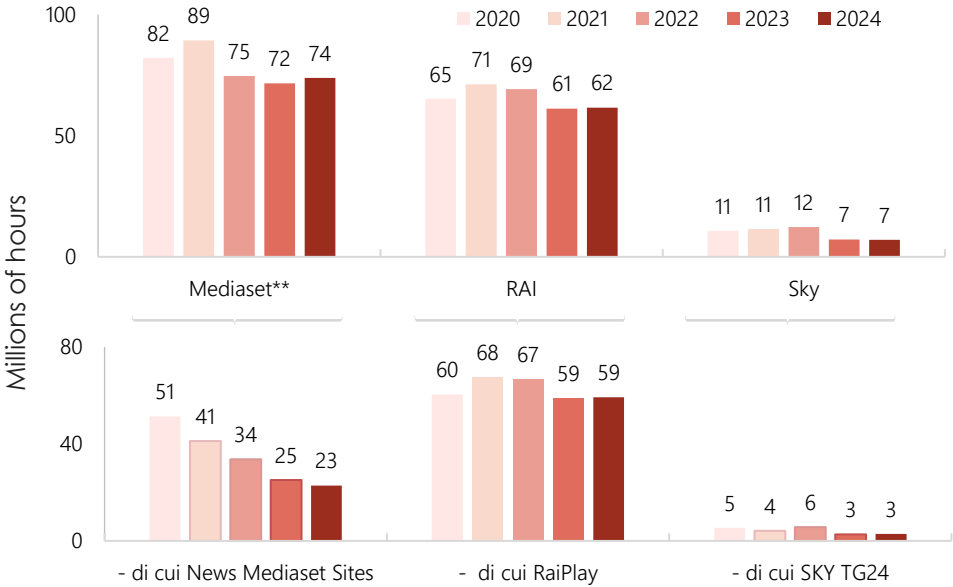


The average time spent per month by each visitor on free video on demand platforms is **43 minute** in June 2024

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

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

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



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

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

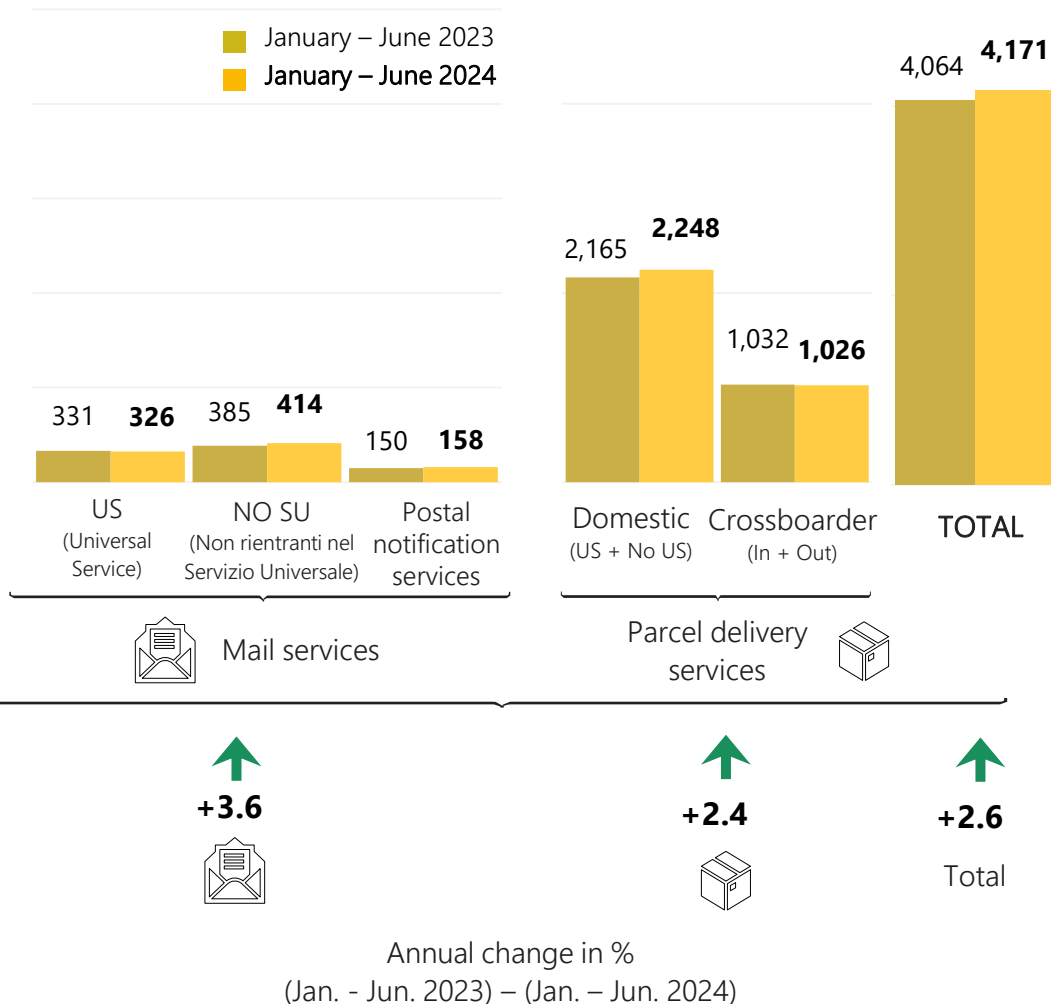
Source: Agcom elaboration on data from ComScore

3.1 POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €

■ January – June 2023
■ January – June 2024



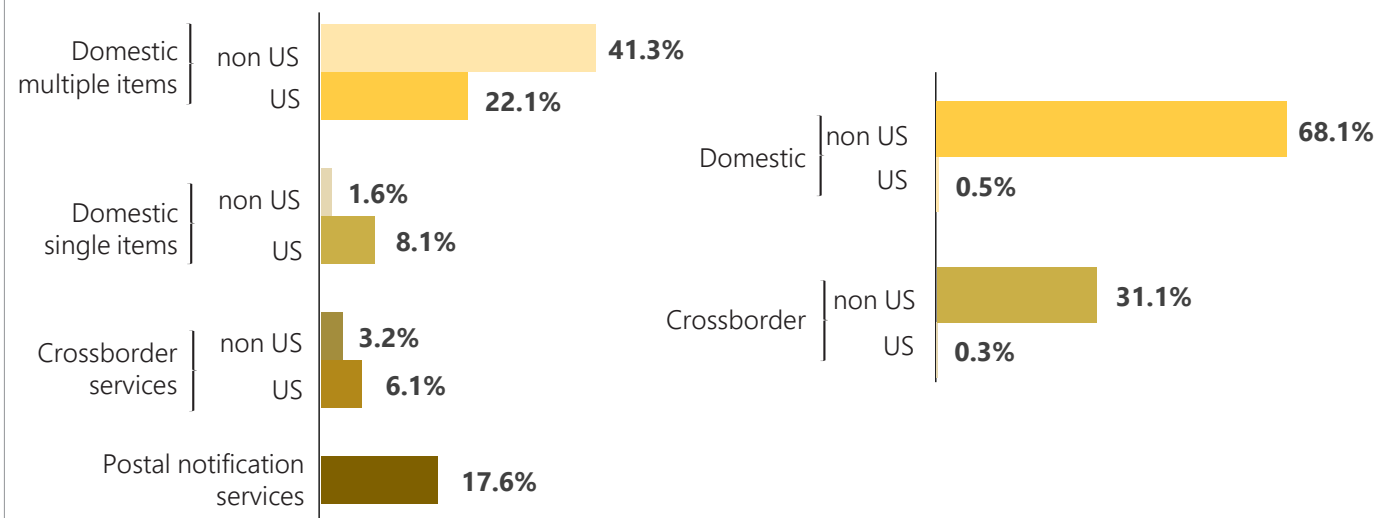
REVENUES BY SOURCE TYPE SINCE THE BEGINNING OF THE YEAR (%)

(January - June 2024)

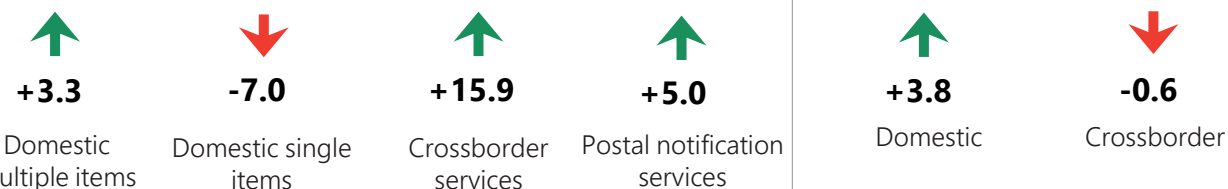
Mail services



Parcel delivery services



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

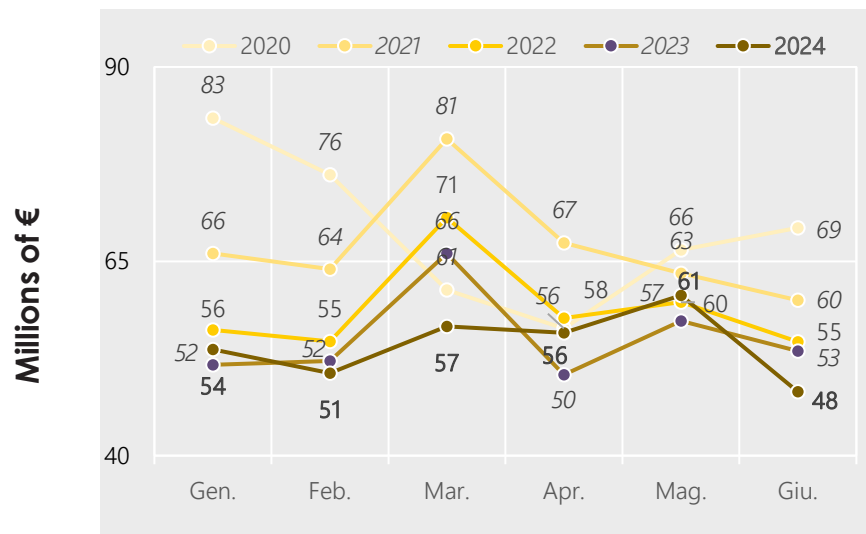


Note: Due to changes in firms' accounting data are not directly comparable with previous versions

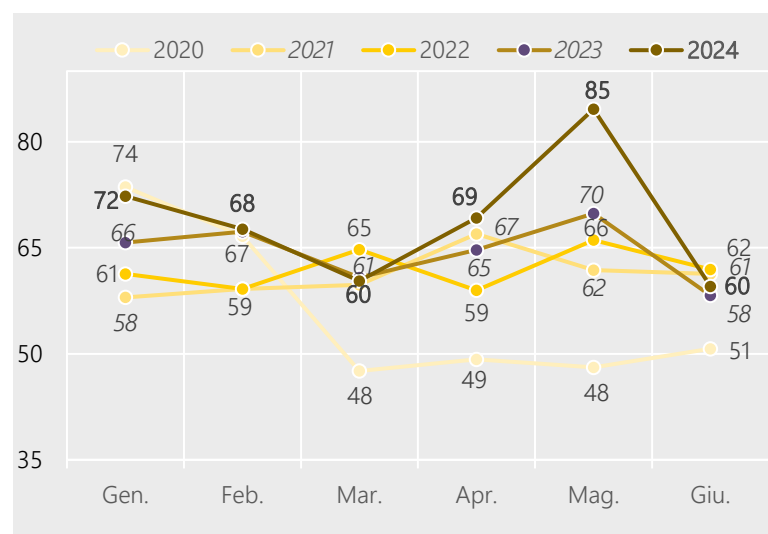
Data refers to the following postal operators: Amazon Italia Transport S.r.l., BRT S.p.A., DHL Express Italy S.r.l., FedEx Express Italy S.r.l., Fulmine Group S.r.l., GLS Italy S.p.A., Locker Inpost Italia S.r.l., Nexive Group S.r.l., Poste Italiane S.p.A., Sailpost S.p.A., SDA Express Courier S.p.A.,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

3.2 POSTAL SERVICES: MONTHLY MAIL SERVICES REVENUES

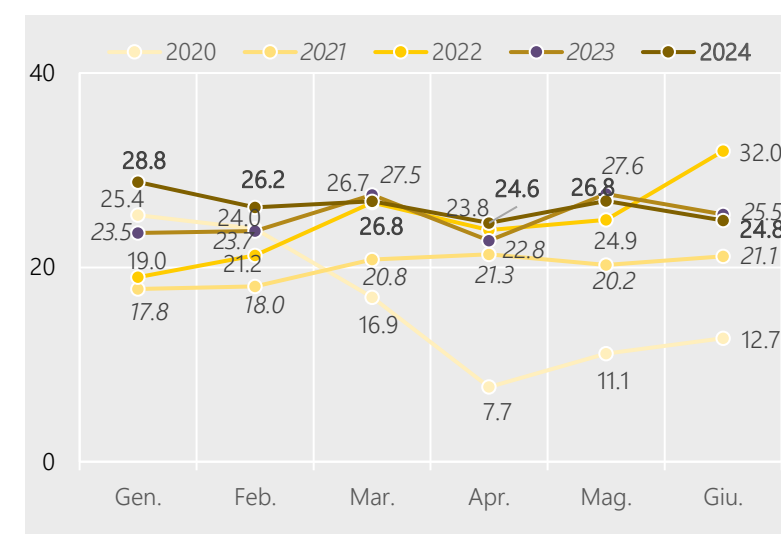
UNIVERSAL SERVICE (US)



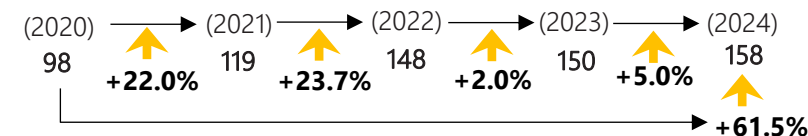
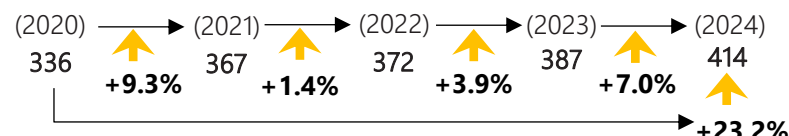
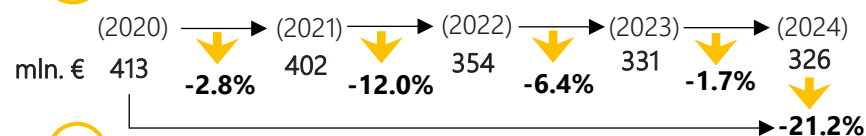
OTHER SERVICES (NON US)



POSTAL NOTIFICATION SERVICES



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



2 Monthly comparison (change in %)

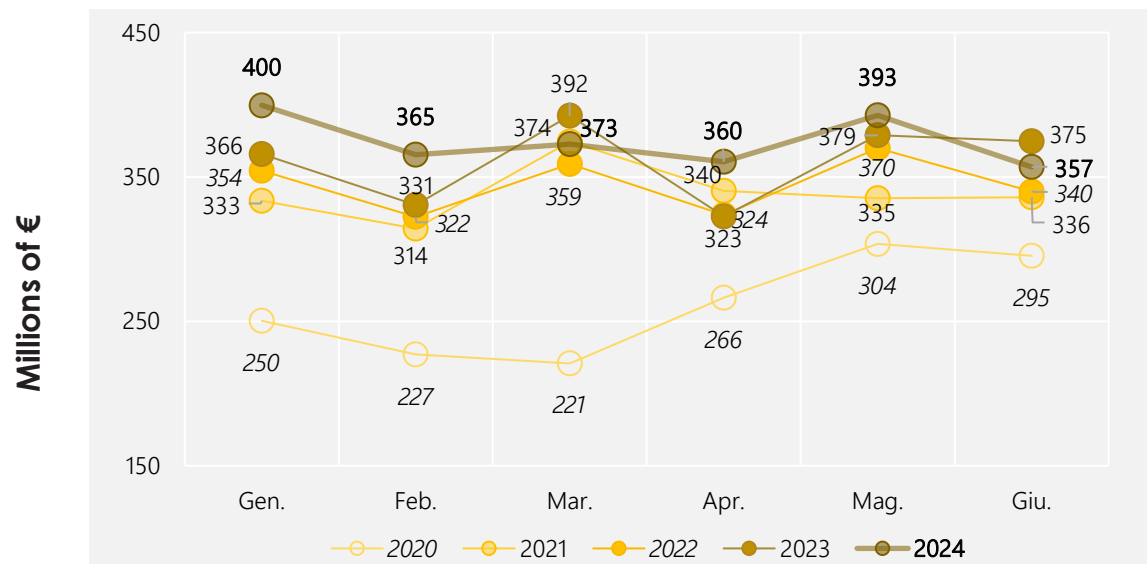
	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	-20.9	-14.9	-8.0	+3.8	-35.7
February	-16.0	-14.6	-4.5	-3.0	-33.5
March	+31.7	-12.6	-6.5	-14.2	-7.7
Avril	+19.5	-14.3	-12.7	+10.7	-1.0
May	-4.5	-5.9	-4.0	+5.7	-8.8
June	-13.4	-8.9	-2.2	-9.8	-30.4

	Annuale				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	-21.2	+5.7	+7.3	+10.0	-1.8
February	-11.2	=	+13.7	+0.5	+1.5
March	+25.7	+8.4	-6.1	-0.8	+26.8
Avril	+36.1	-11.9	+9.7	+7.0	+40.7
May	+28.6	+6.9	+5.7	+21.1	+76.0
June	+21.0	+1.0	-5.9	+2.2	+17.5

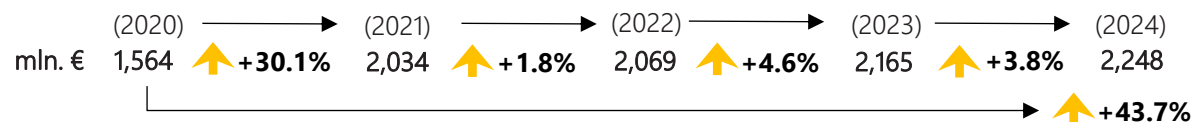
	Annuale				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	-29.9	+6.9	+23.9	+22.3	+13.4
February	-24.7	+17.7	+11.7	+10.3	+9.2
March	+22.8	+28.2	+3.1	-2.4	+58.4
Avril	+177.7	+11.7	-4.6	+8.0	+219.8
May	+81.7	+22.9	+10.7	-2.6	+141.0
June	+66.1	+51.4	-20.4	-2.5	+95.2

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

DOMESTIC



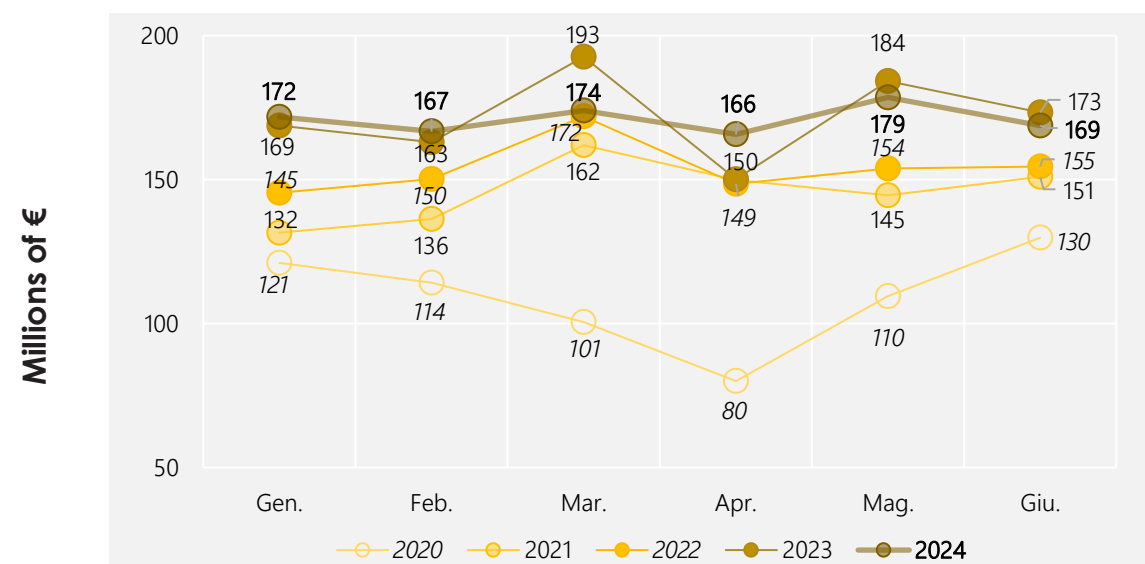
1 Cumulative values since the beginning of the year (Jan. – Jun.)



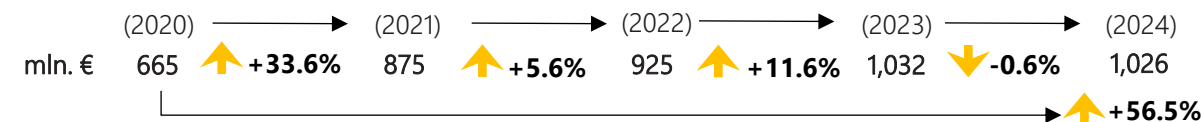
2 Monthly comparison (change in %)

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	+33.2	+6.2	+3.3	+9.2	+59.6
February	+38.4	+2.6	+2.6	+10.5	+60.9
March	+69.6	-4.1	+9.3	-5.0	+68.8
Avril	+27.8	-4.9	-0.3	+11.7	+35.3
May	+10.4	+10.4	+2.4	+3.6	+29.3
June	+13.7	+1.2	+10.2	-4.8	+20.9

CROSSBORDER



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



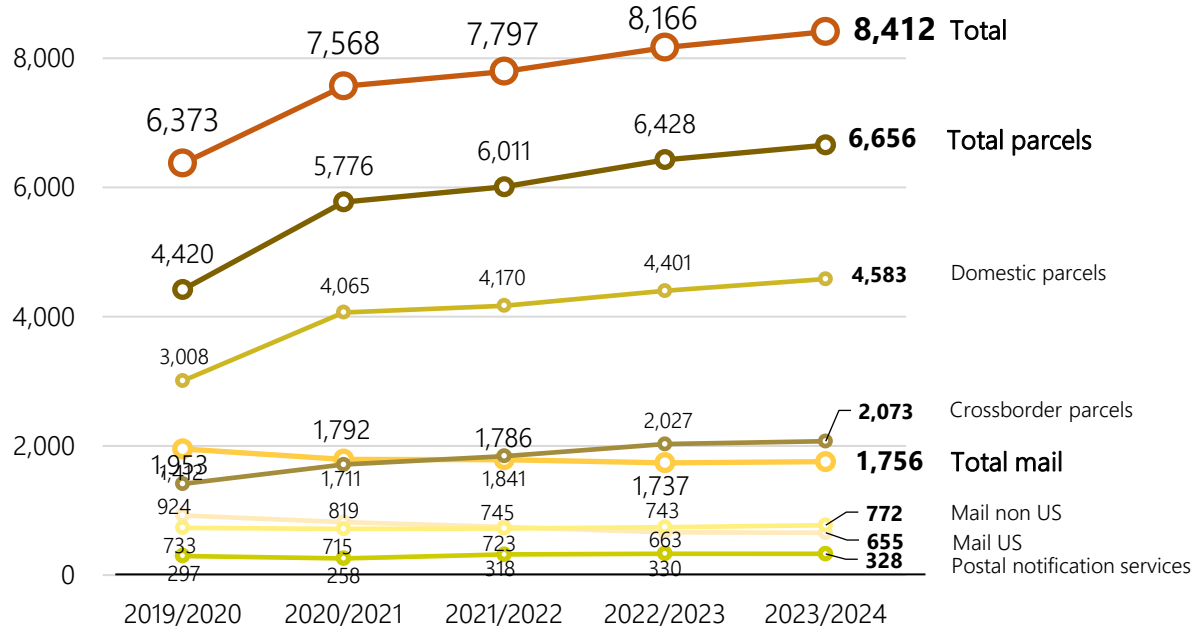
2 Quarterly comparison (change in %)

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	+8.7	+10.5	+16.1	+1.7	+41.8
February	+19.4	+10.2	+8.5	+2.3	+46.0
March	+61.1	+6.2	+12.0	-9.7	+73.1
Avril	+87.2	-0.9	+1.1	+10.4	+107.0
May	+31.9	+6.5	+19.7	-3.0	+63.0
June	+16.3	+2.3	+12.2	-2.6	+30.0

3.4 POSTAL SERVICES: REVENUES HISTORICAL TRENDS

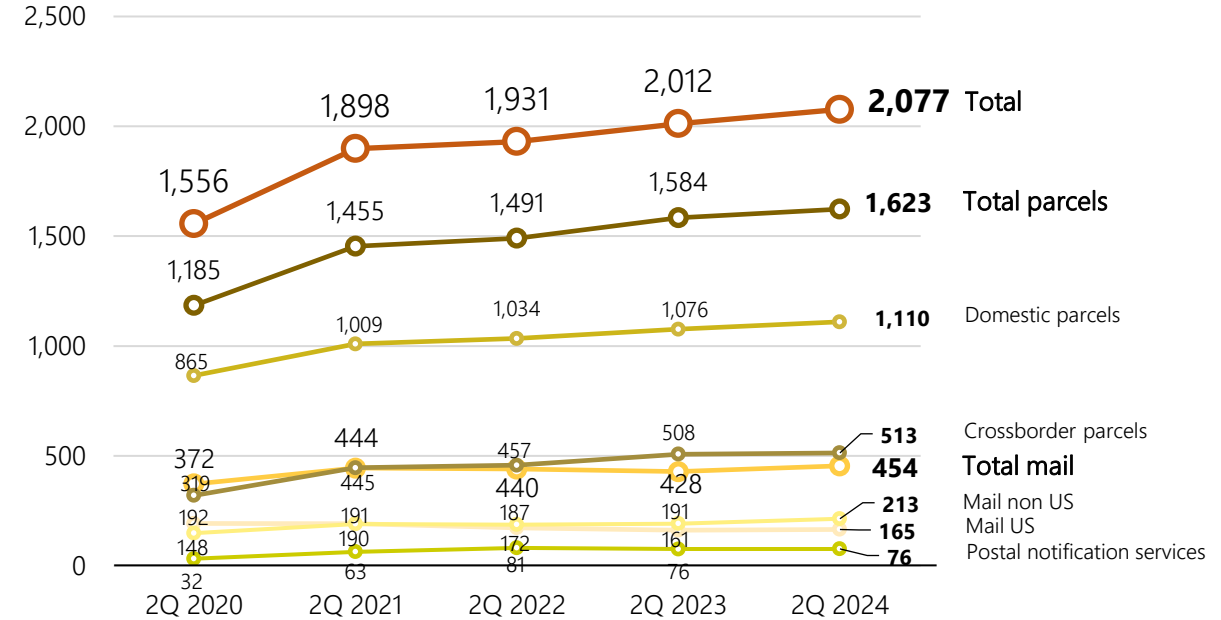
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €

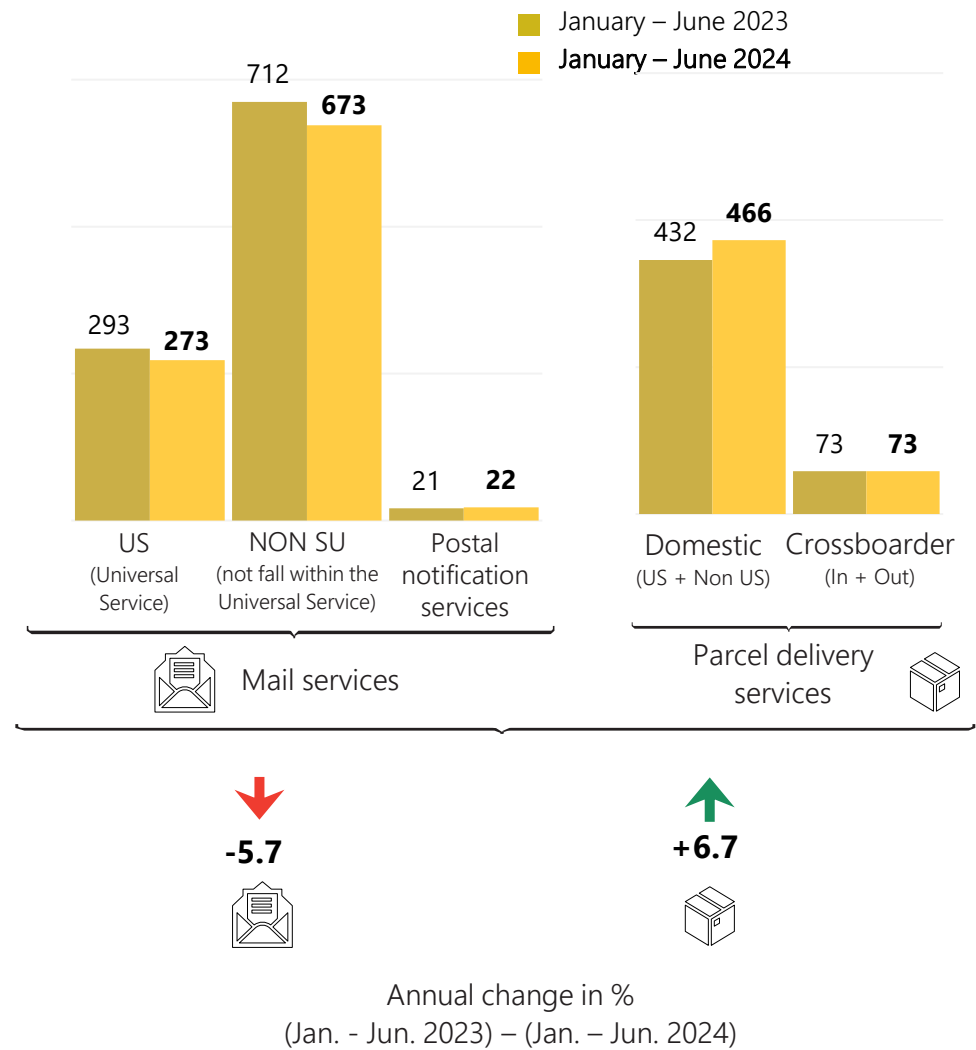


	Change in % (2019/20 – 2023/24)		Change in % (2022/23 – 2023/24)	
Total:	+32.0	↑	+3.0	↑
Mail services:	-10.1	↓	+1.1	↑
- Universal Service:	-29.0	↓	-1.2	↓
- No Universal Service:	+5.4	↑	+3.9	↑
- Postal notification services:	+10.7	↑	-0.7	↓
Parcel delivery services:	+50.6	↑	+3.5	↑
- Domestic:	+52.4	↑	+4.1	↑
- Crossborder:	+46.8	↑	+2.2	↑

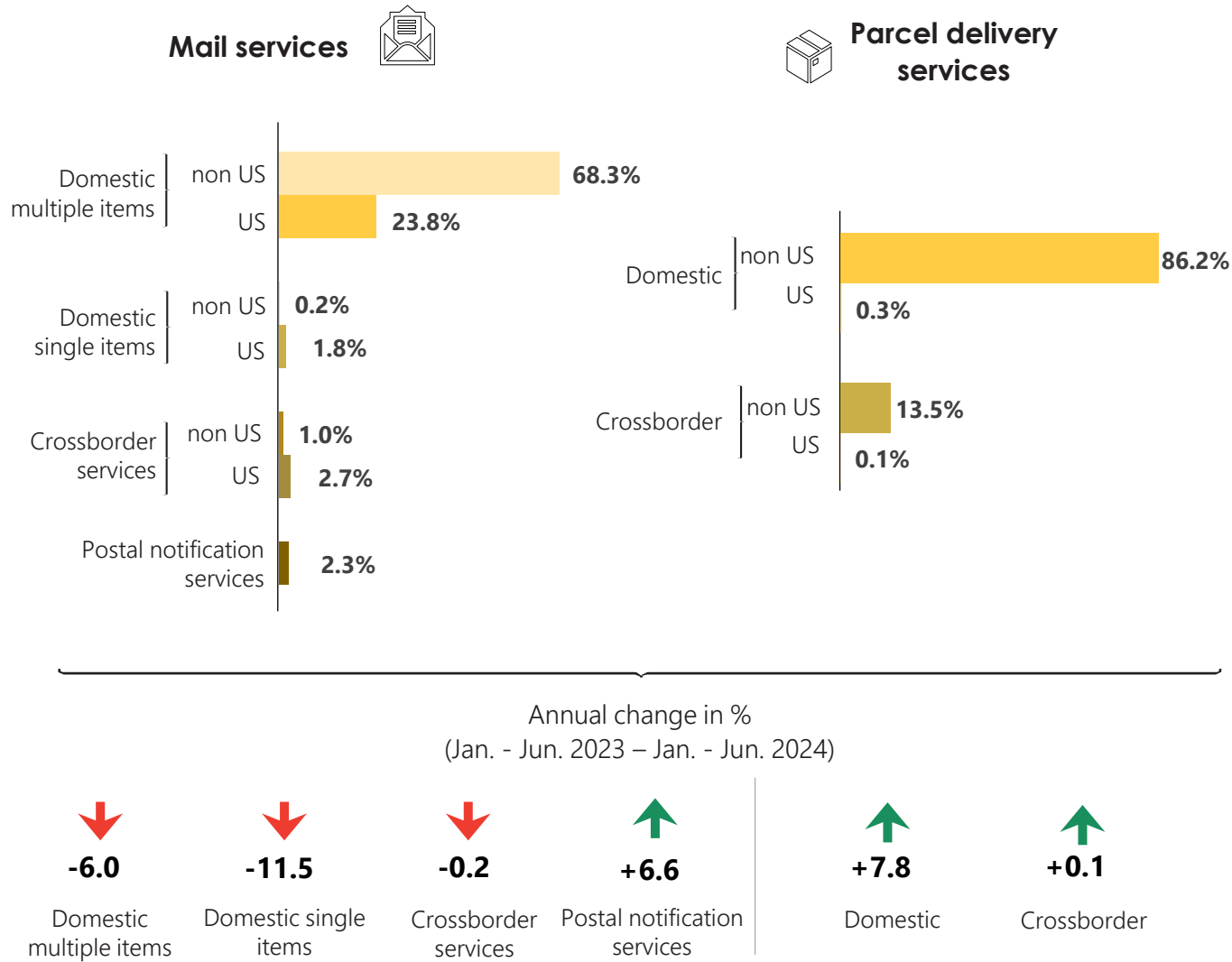
	Change in % (Q2 2020 – Q2 2024)		Change in % (Q2 2023 – Q2 2024)	
Total:	+33.5	↑	+3.3	↑
Mail services:	+22.3	↑	+6.2	↑
- Universal Service:	-14.3	↓	+2.1	↑
- No Universal Service:	+44.3	↑	+11.8	↑
- Postal notification services:	+141.7	↑	+0.6	↑
Parcel delivery services:	+37.0	↑	+2.5	↑
- Domestic:	+28.3	↑	+3.1	↑
- Crossborder:	+60.6	↑	+1.1	↑

3.5 POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR
MILLIONS OF UNITS

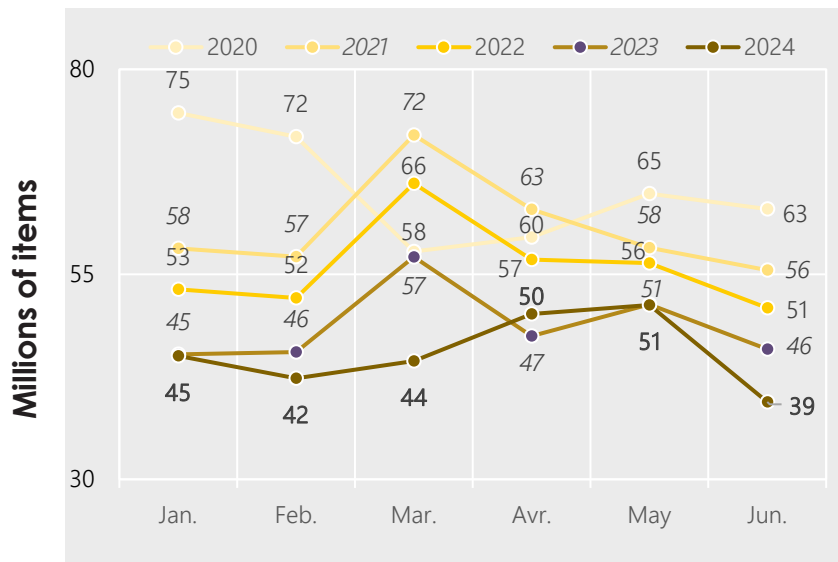


VOLUMES BY SOURCE TYPE (%)
(January – June 2024)

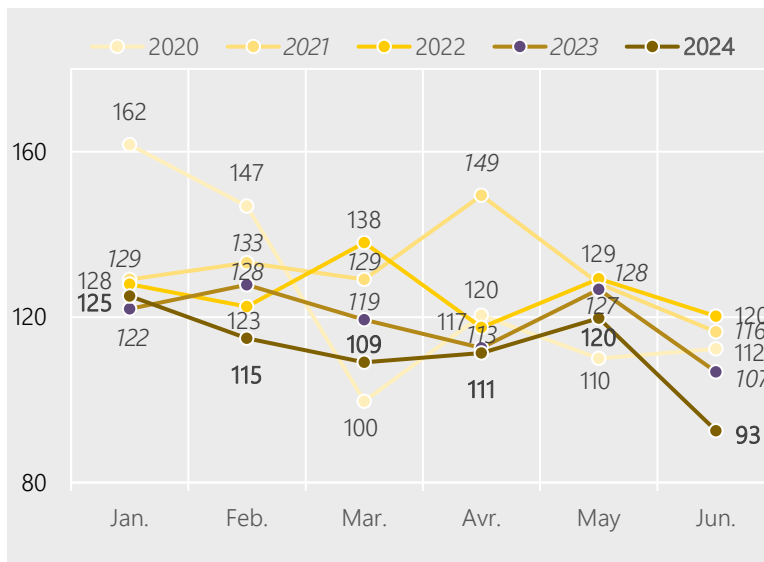


3.6 POSTAL SERVICES: MONTHLY MAIL SERVICES VOLUMES (US/NO US)

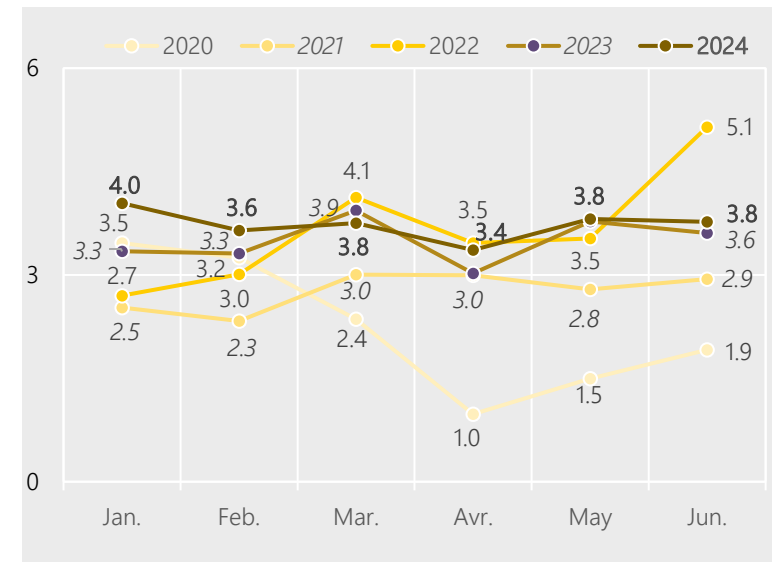
UNIVERSAL SERVICE (US)



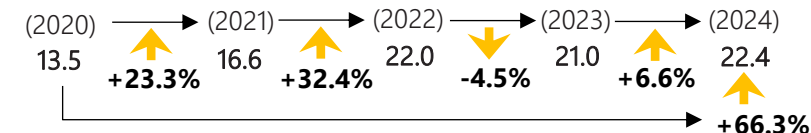
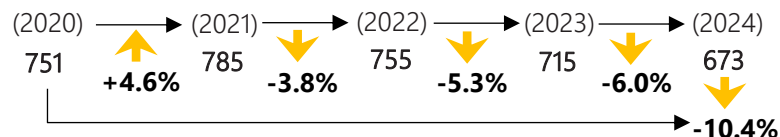
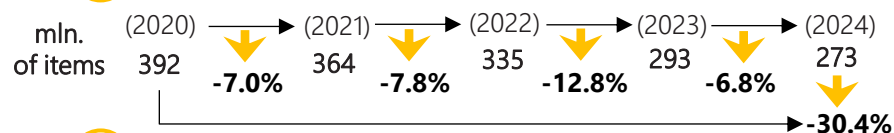
OTHER SERVICES (NON US)



POSTAL NOTIFICATION SERVICES



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



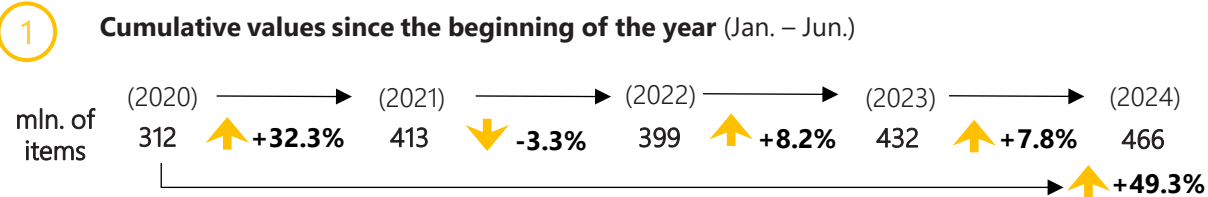
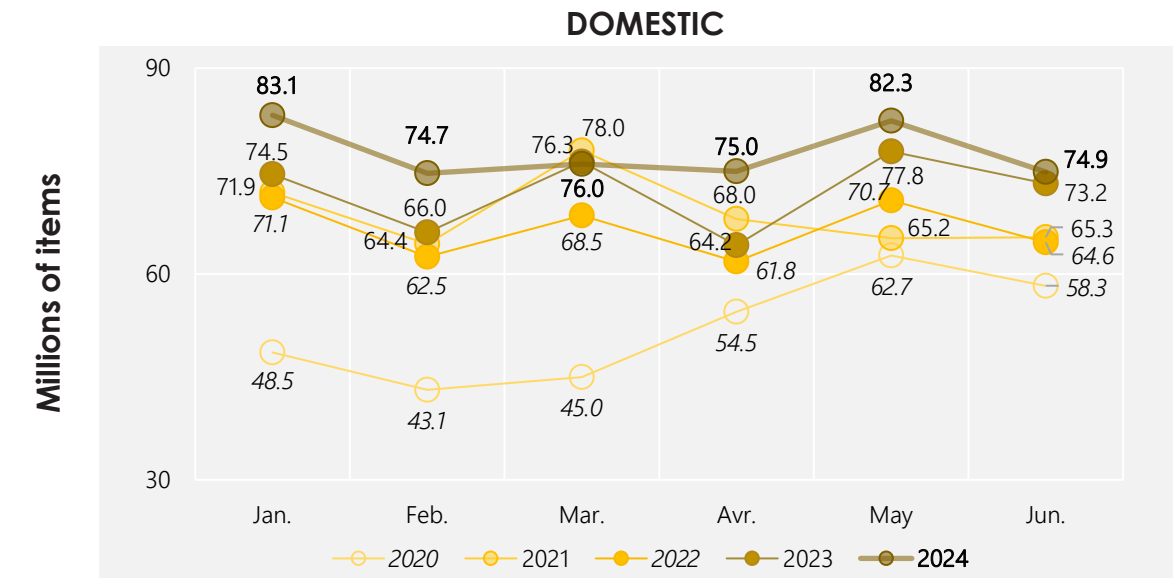
2 Monthly comparison (change in %)

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	-22.1	-8.6	-14.9	-0.5	-39.7
February	-20.4	-8.8	-12.7	-7.0	-41.0
March	+24.6	-8.2	-13.5	-22.2	-23.1
Avril	+5.7	-9.7	-16.5	+5.7	-15.7
May	-10.2	-3.3	-8.9	-0.2	-20.9
June	-11.8	-8.3	-9.9	-14.0	-37.4

	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	-20.2	-0.9	-4.6	+2.5	-22.6
February	-9.3	-8.0	+4.3	-10.1	-21.8
March	+29.5	+6.9	-13.5	-8.6	+9.4
Avril	+24.1	-21.4	-4.2	-1.1	-7.6
May	+16.5	+0.9	-2.0	-5.5	+8.9
June	+3.7	+3.2	-11.2	-13.3	-17.6

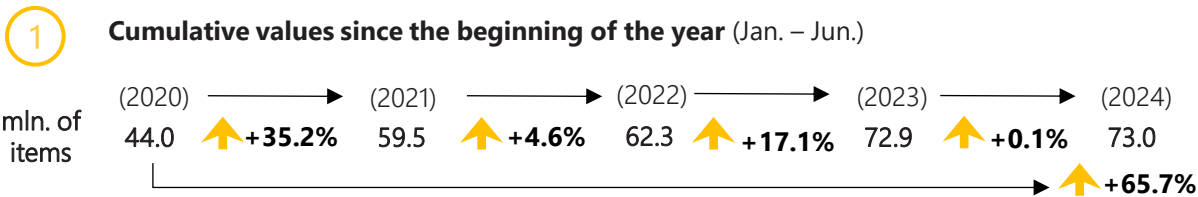
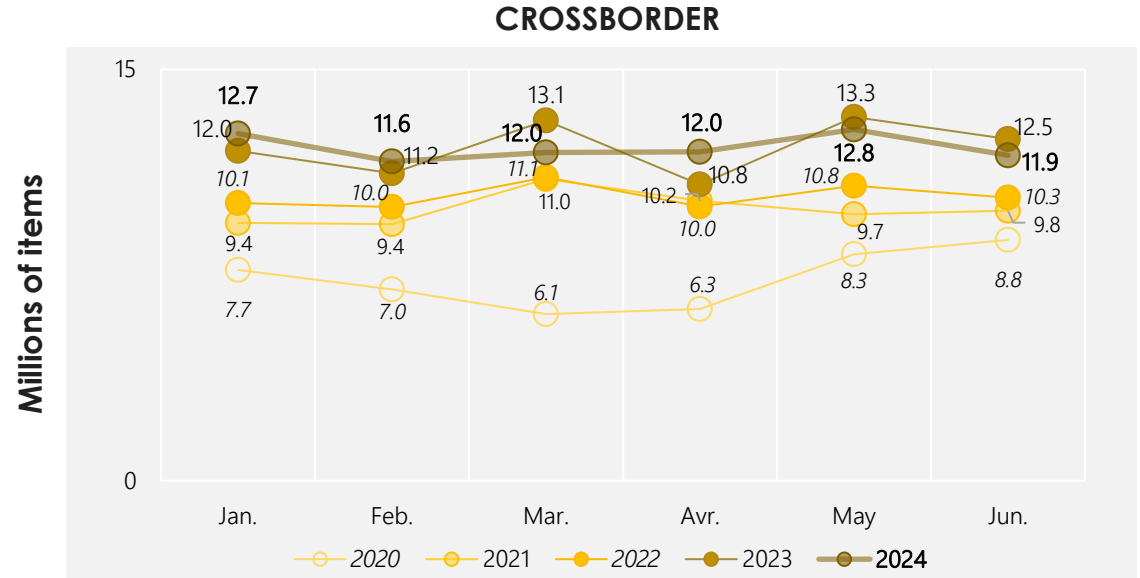
	YoY				Whole period 2020/2024
	2020/2021	2021/2022	2022/2023	2023/2024	
January	-27.0	+6.9	+23.7	+20.9	+16.7
February	-28.2	+29.0	+10.0	+10.1	+12.1
March	+27.3	+37.2	-4.6	-4.7	+58.9
Avril	+205.6	+15.6	-12.7	+11.2	+242.7
May	+86.7	+26.4	+7.0	+1.0	+155.0
June	+53.8	+75.0	-29.9	+4.5	+97.2

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



2 Quarterly comparison (change in %)

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
January	+48.1	-1.0	+4.8	+11.5	+71.3
February	+49.3	-2.9	+5.7	+13.1	+73.2
March	+73.4	-12.1	+11.4	-0.4	+69.1
Avril	+24.8	-9.1	+3.9	+16.8	+37.6
May	+4.0	+8.5	+10.1	+5.7	+31.3
June	+12.1	-1.1	+13.3	+2.3	+28.4



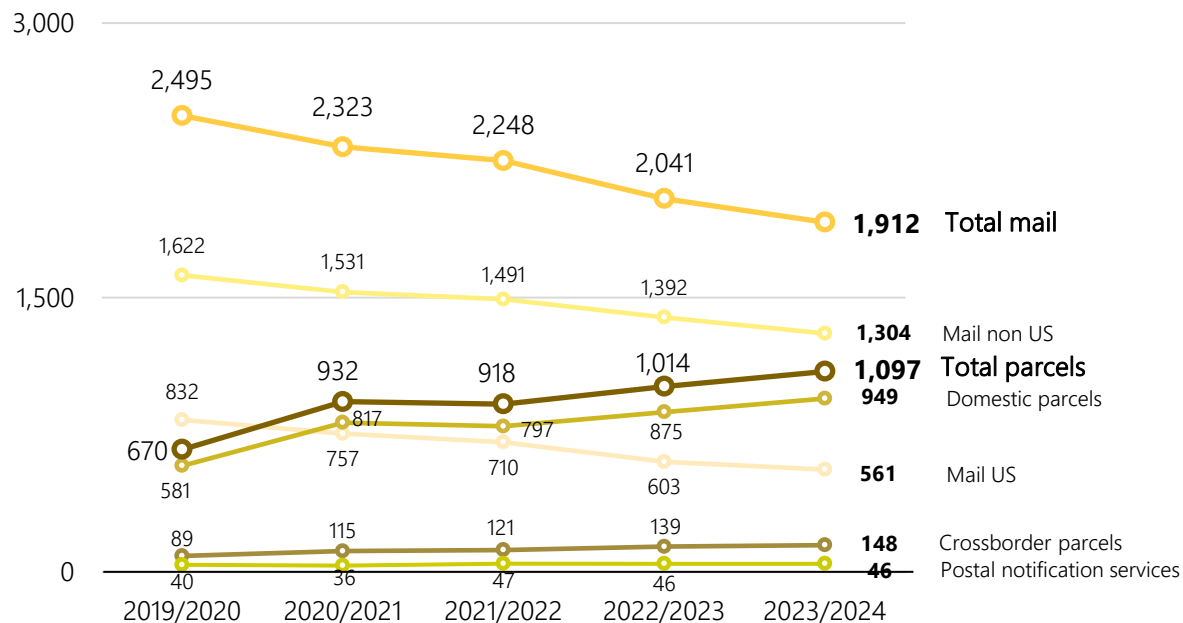
2 Quarterly comparison (change in %)

	YoY				Whole period
	2020/2021	2021/2022	2022/2023	2023/2024	2020/2024
Gennaio	+22.4	+7.6	+18.9	+5.2	+64.7
Febbraio	+34.2	+6.7	+12.3	+3.8	+67.0
Marzo	+81.1	+0.6	+18.7	-8.9	+97.1
Aprile	+63.0	-2.0	+7.9	+11.1	+91.6
Maggio	+17.7	+10.7	+23.3	-3.4	+55.2
Giugno	+12.1	+4.8	+20.7	-4.8	+35.2

3.8 POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

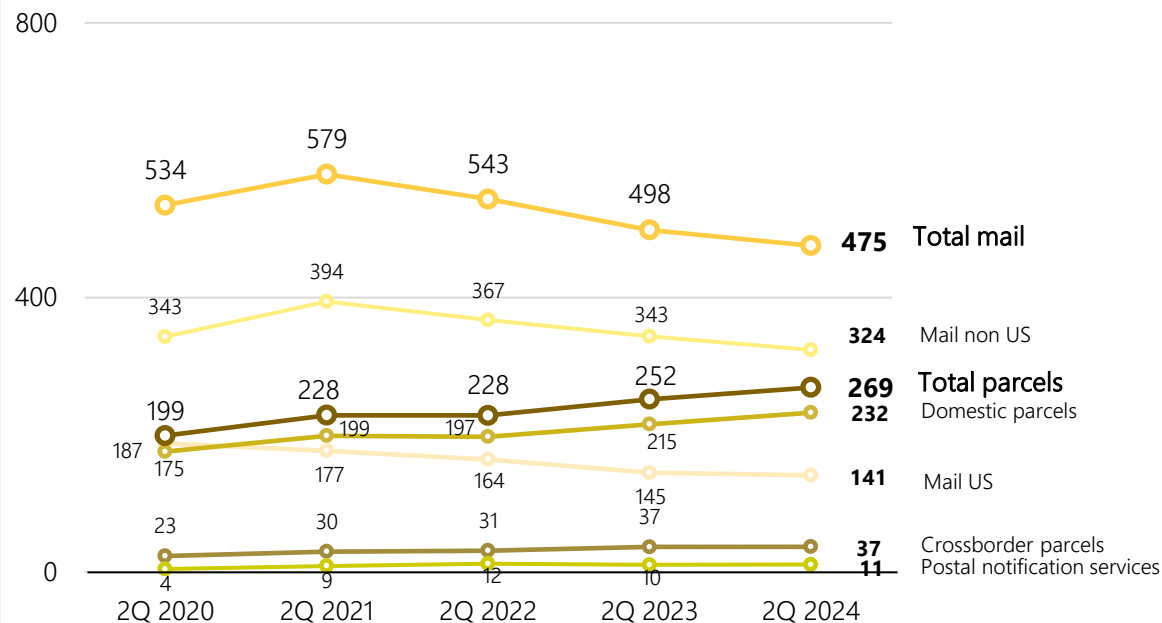
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



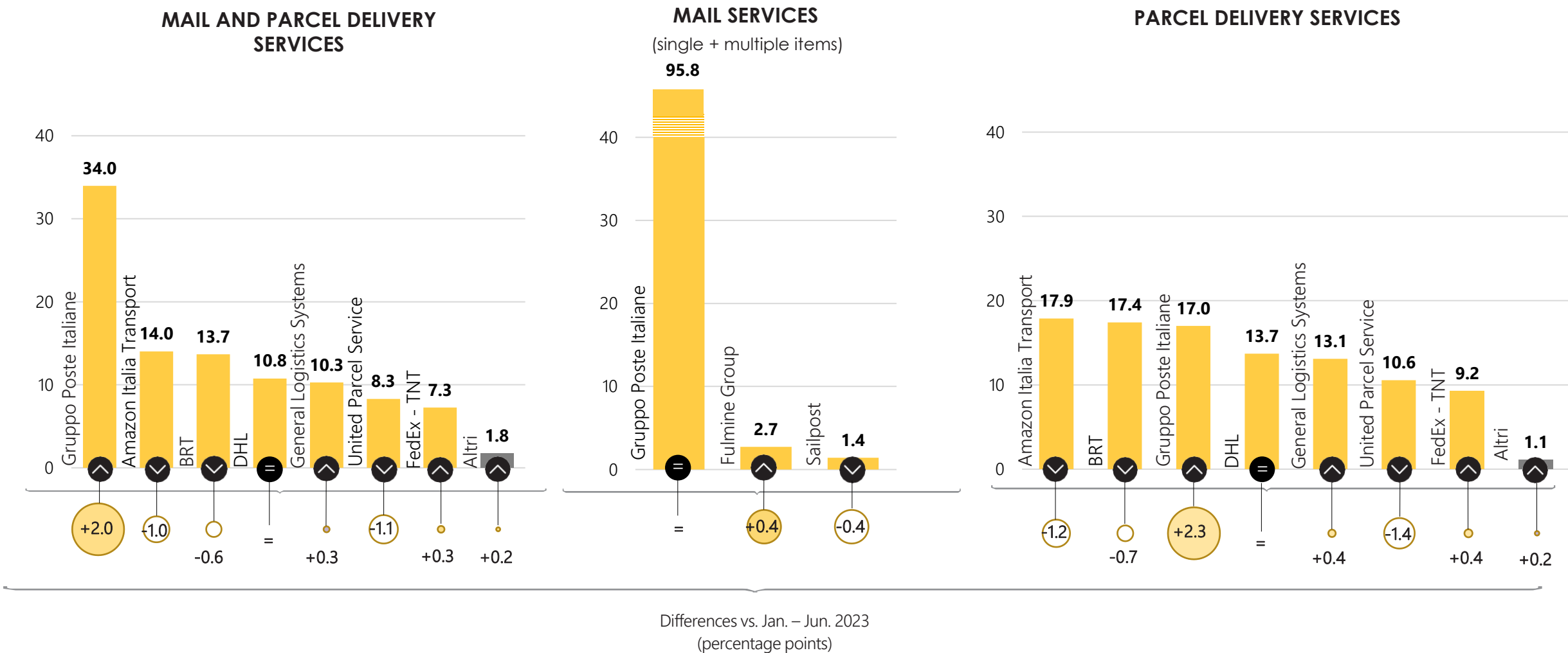
	Change in % (2019/20 – 2023/24)		Change in % (2022/23 – 2023/24)	
Mail services:	-23.4	↓	-6.3	↓
- Universal Service:	-32.6	↓	-6.9	↓
- Non Universal Service:	-19.6	↓	-6.3	↓
- Postal notification services:	+14.6	↑	-0.1	↓
Parcel delivery services:	+63.7	↑	+8.1	↑
- Domestic:	+63.2	↑	+8.4	↑
- Crossborder:	+66.3	↑	+6.0	↑

	Change in % (2Q 2020 – 2Q 2024)		Change in % (2Q 2023 – 2Q 2024)	
Mail services:	-11.1	↓	-4.6	↓
- Universal Service:	-24.8	↓	-2.6	↓
- Non Universal Service:	-5.6	↓	-5.7	↓
- Postal notification services:	+149.4	↑	+5.2	↑
Parcel delivery services:	+35.3	↑	+6.8	↑
- Domestic:	+32.3	↑	+7.9	↑
- Crossborder:	+57.4	↑	+0.4	↑

3.9 POSTAL SERVICES: COMPETITIVE LANDSCAPE



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

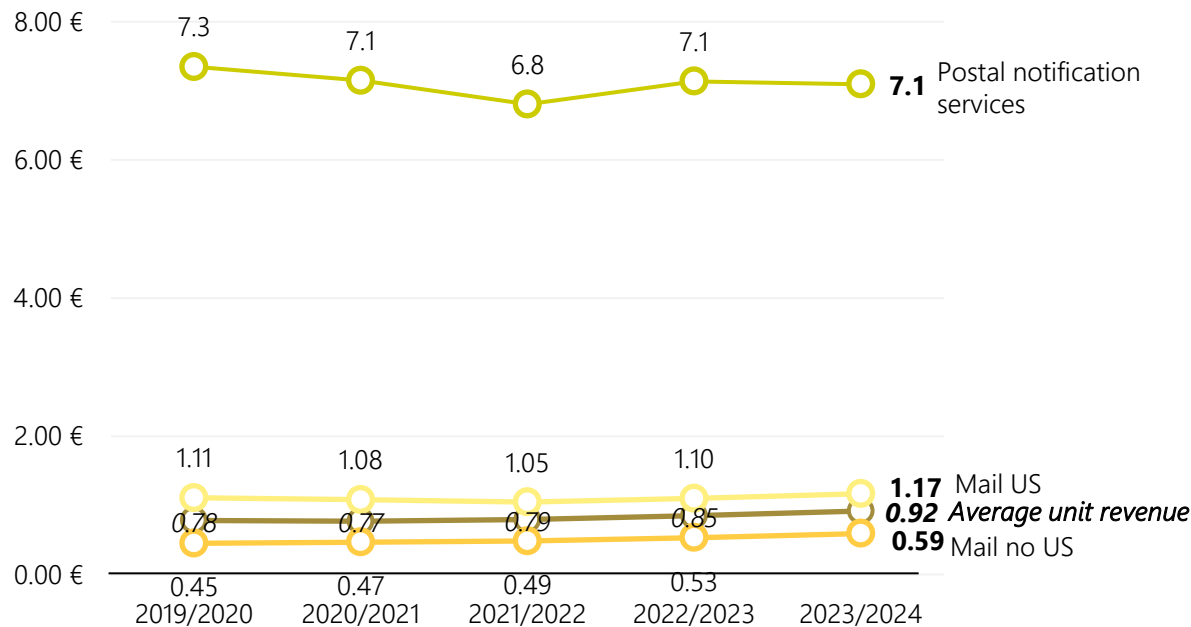


Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group. Nexive Group S.r.l. and SDA Express Courier S.p.A.

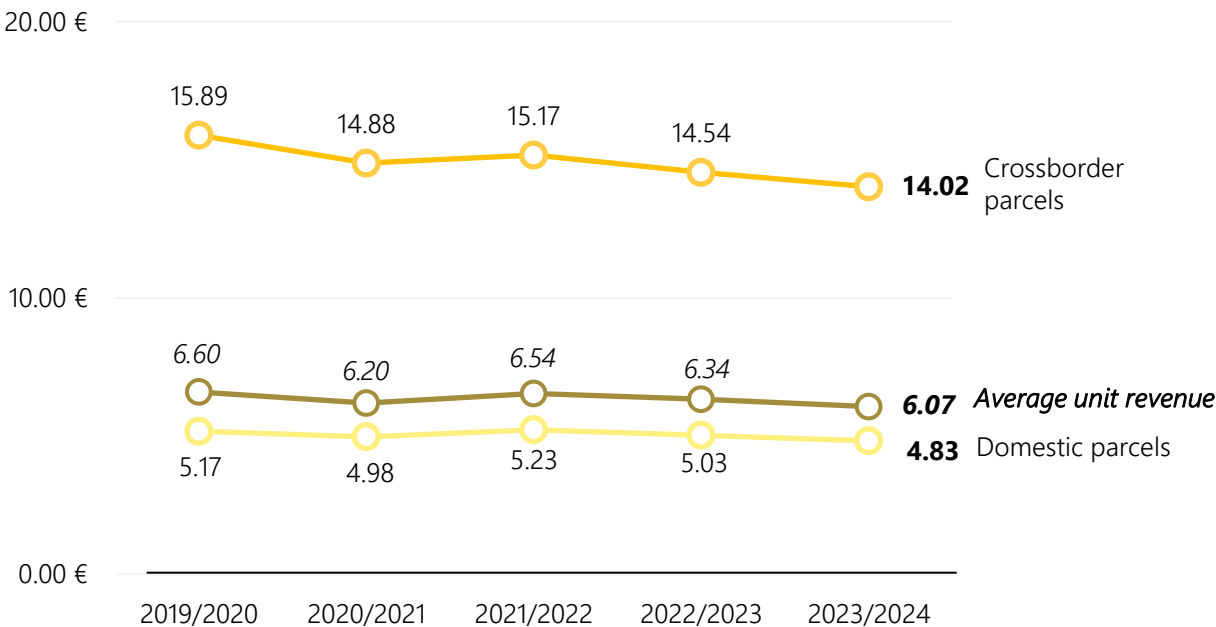
3.10 POSTAL SERVICES: PER-UNIT REVENUES HISTORICAL TRENDS IN € (average last 12 month)



MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

(2019/20 – 2023/24) (2022/23 – 2023/24)

Average unit revenue:	+17.3	▲	+7.9	▲
- Mail US:	+5.3	▲	+6.2	▲
- Mail non US:	+31.1	▲	+10.9	▲
- Postal notification services:	-3.4	▼	-0.6	▼

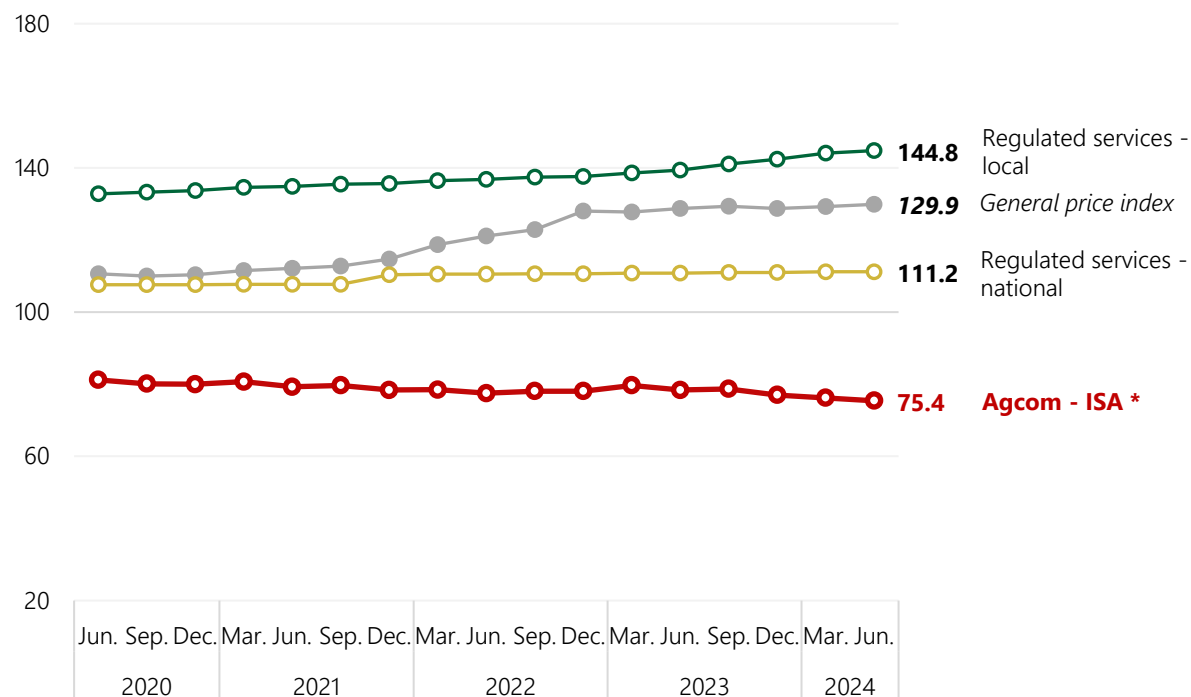
Change in %

(2019/20 – 2023/24) (2022/23 – 2023/24)

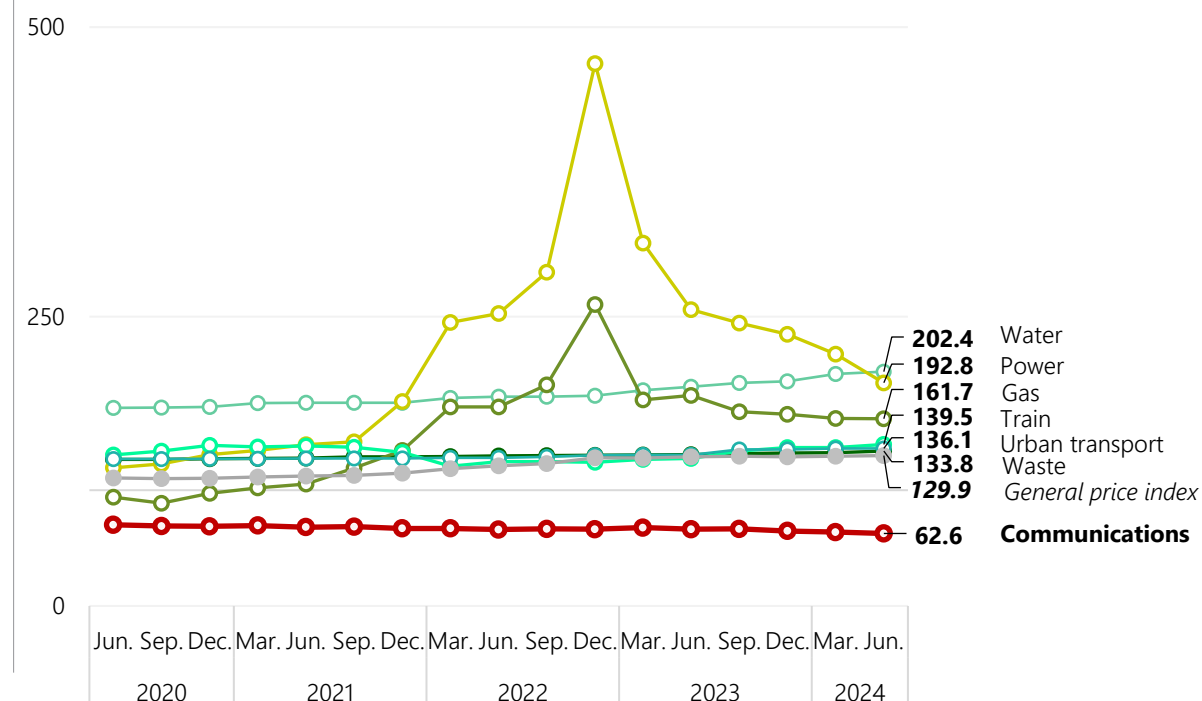
Average unit revenue:	-8.0	▼	-4.2	▼
Crossborder parcels:	-11.7	▼	-3.6	▼
- US:	+8.8	▲	-1.2	▼
- Non US:	-11.7	▼	-3.6	▼
Domestic parcels:	-6.7	▼	-4.0	▼
- US:	+17.5	▲	+6.0	▲
- Non US:	-6.7	▼	-4.0	▼

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

GENERAL PRICE INDEX



UTILITIES PRICE INDEX



Source: Agcom elaboration on data from Istat

ISA (Agcom summary price index):

General price index:

Regulated services - local:

Regulated services - national:

Change in %			
5-Year	YoY	5-Year	YoY
-7.1	▼	-3.8	▼
+17.5	▲	+0.9	▲
+9.0	▲	+3.9	▲
+3.3	▲	+0.4	▲

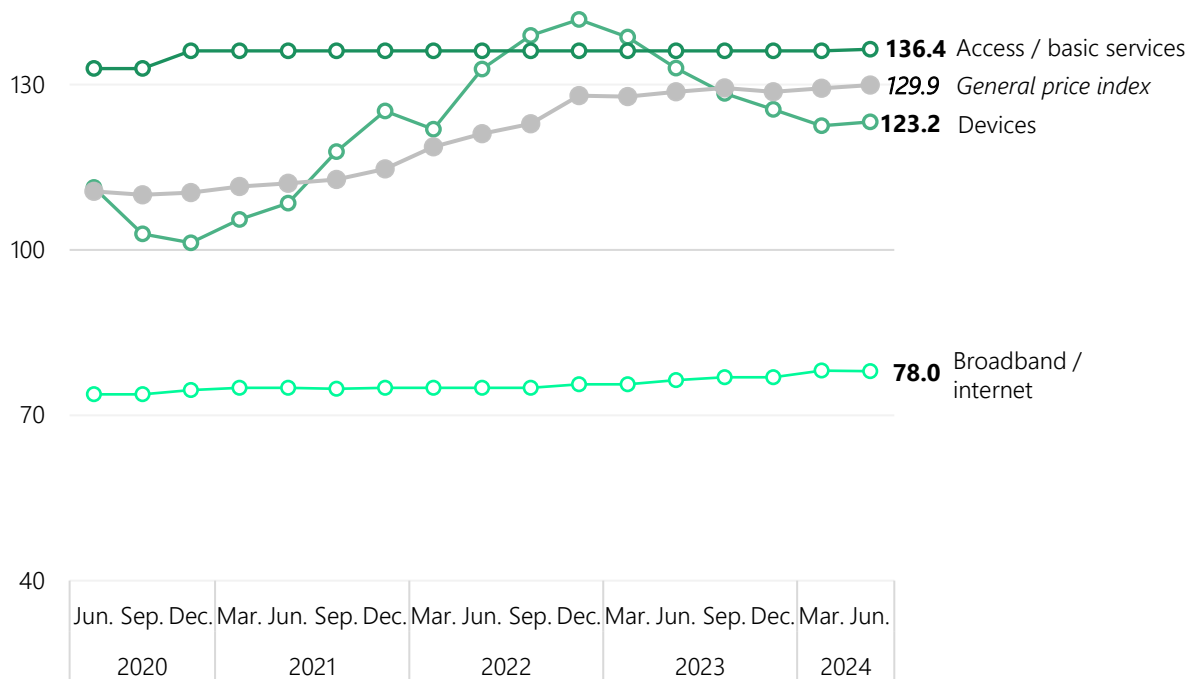
(*) **Note:** The ISA («Indice Sintetico Agcom») price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (for a total of 10 items).

Change in %				Change in %			
		5-Year	YoY			5-Year	YoY
Water (04.4.1):	+18.3	▲	+6.9	▲	Train (07.3.1):	+6.9	▲
Waste (04.4.2):	+5.7	▲	+2.3	▲	Urban transport (07.3.2.1.1):	+7.2	▲
Power (04.5.1):	+61.6	▲	-24.7	▼	Communications (08):	-10.7	▼
Gas (04.5.2):	+72.0	▲	-11.2	▼			

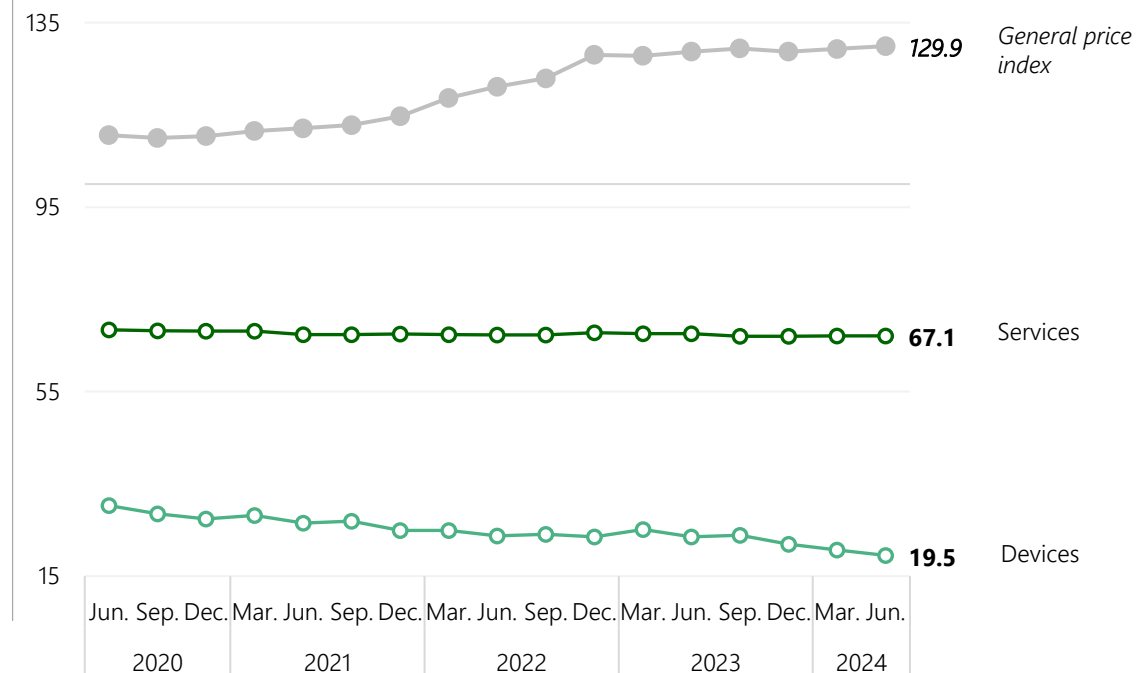
(COICOP - Classification of Individual Consumption by Purpose)

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

FIXED TELEPHONY PRICE INDICES



MOBILE TELEPHONY PRICE INDICES



Source: Agcom elaboration on data from Istat

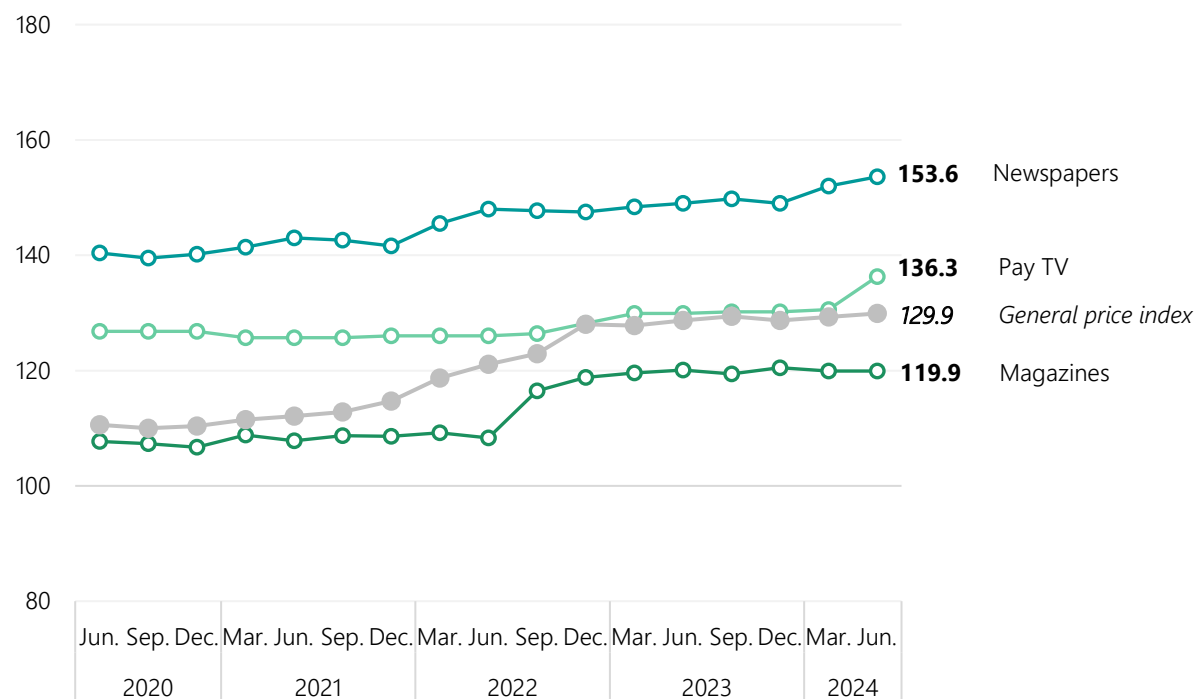
	Change in %	
	4-Year	YoY
Access / basic services (08.3.0.1):	+2.6 ▲	+0.2 ▲
Devices (08.2.0.1):	+10.7 ▲	-7.4 ▼
Broadband / internet (08.3.0.3.0.07):	+5.7 ▲	+2.1 ▲

	Change in %	
	4-Year	YoY
Servces (08.3.0.2):	-1.9 ▼	-0.7 ▼
Devices (08.2.0.2):	-35.6 ▼	-17.0 ▼

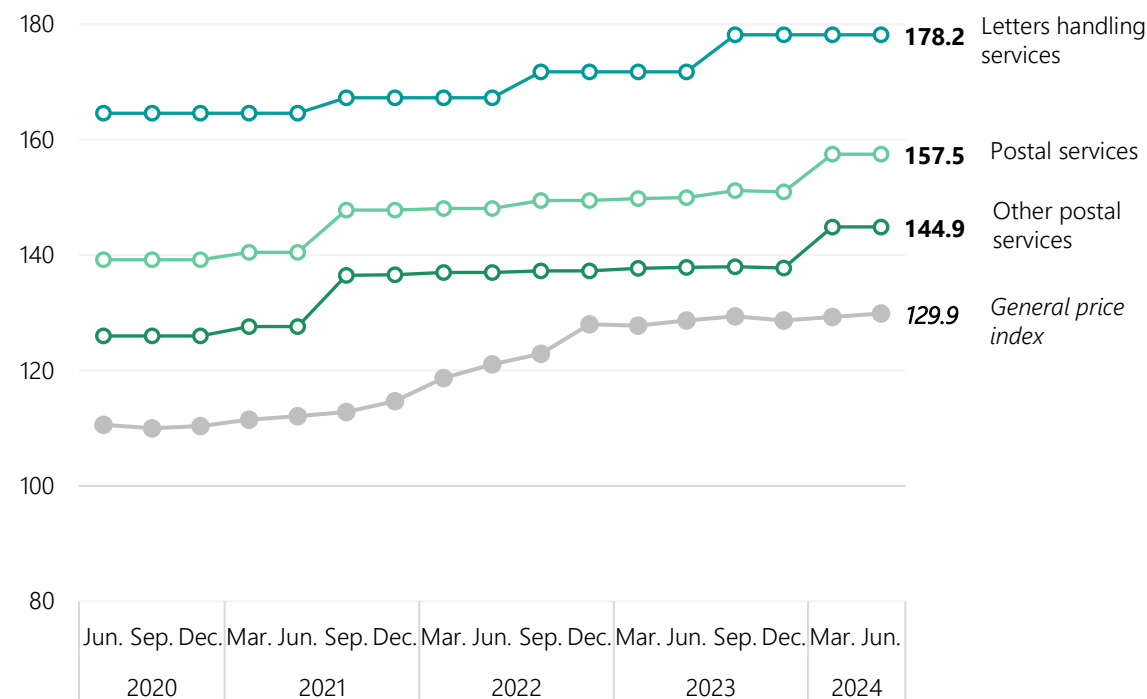
(COICOP - Classification of Individual Consumption by Purpose)

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

NEWSPAPERS. MAGAZINES. TV PRICE INDICES



POSTAL SERVICES PRICE INDEX



Source: Agcom elaboration on data from Istat

	Change in %	
	4-Year	YoY
Newspapers (09.5.2.1.0):	+9.4 ▲	+3.1 ▲
Pay TV (09.4.2.3.0.02):	+7.5 ▲	+4.9 ▼
Magazines (09.5.2.2.0):	+ 11.3 ▲	-0.2 ▲

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

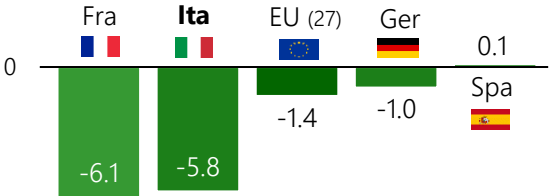
(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

1-Year
change %

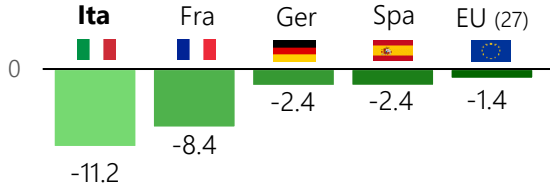
Jun. 2023
-
Jun. 2024

TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)



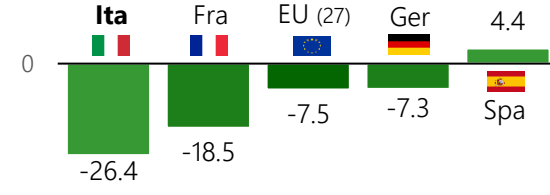
5-Year
change %

Jun. 2020
-
Jun. 2024

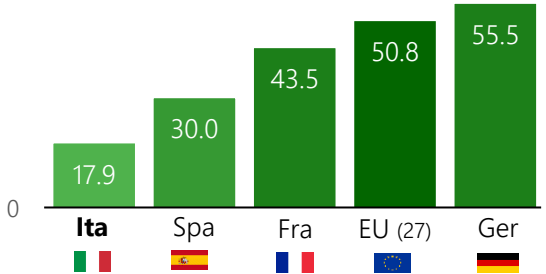
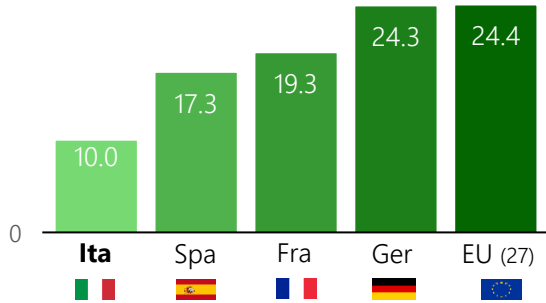
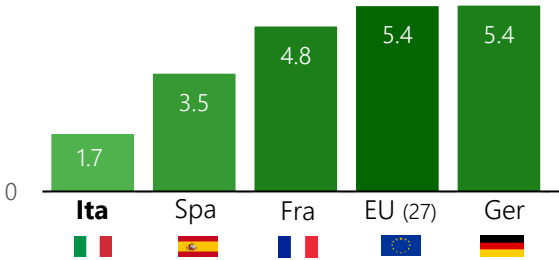


10-Year
change %

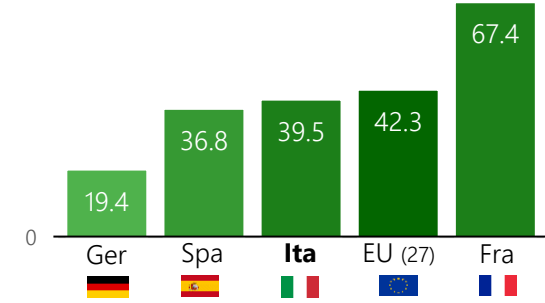
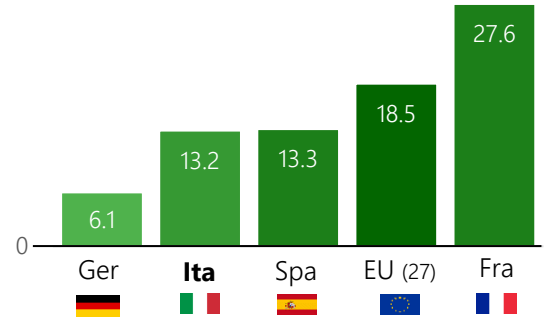
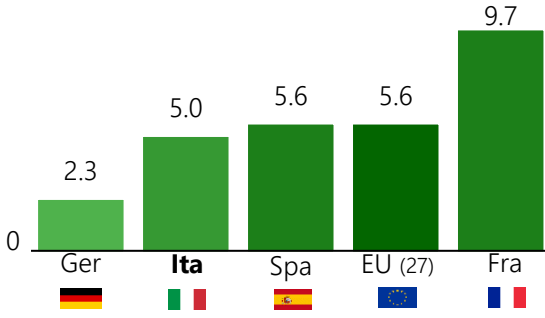
Jun. 2015
-
Jun. 2024



NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)



POSTAL SERVICES
(COICOP 08.1)





AUTORITÀ PER LE
GARANZIE NELLE
AGCOM COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 3/2024

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