



AUTORITÀ PER LE  
GARANZIE NELLE  
COMUNICAZIONI

# COMMUNICATION MARKETS MONITORING SYSTEM

No. 1/2025



# 01 ELECTRONIC COMMUNICATIONS

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- 1.1 Total lines
- 1.2 Broadband and ultrabroadband lines
- 1.3 Broadband and ultrabroadband lines by technology and operators
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- 3.8 Volumes historical trends

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

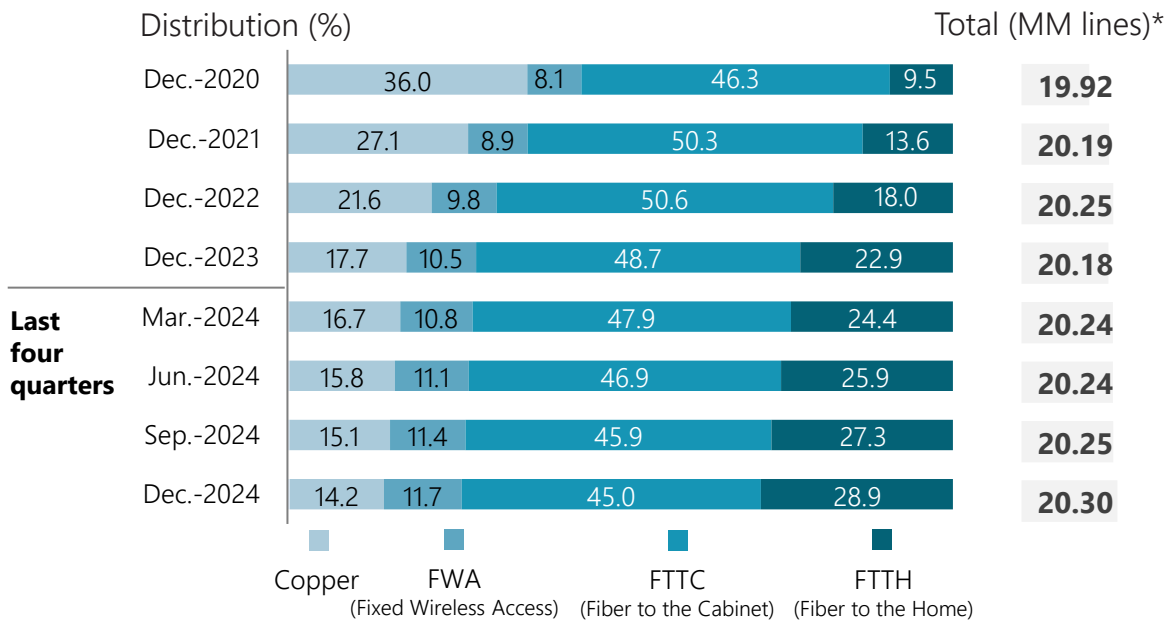
The values indicated in sections 1 and 3 are based on information provided by the main companies present in the electronic communications and mail and parcel delivery services markets. Regarding the section dedicated to media and internet platforms (section 2), the data refer to elaborations on information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

The data collected for this edition are updated to December 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

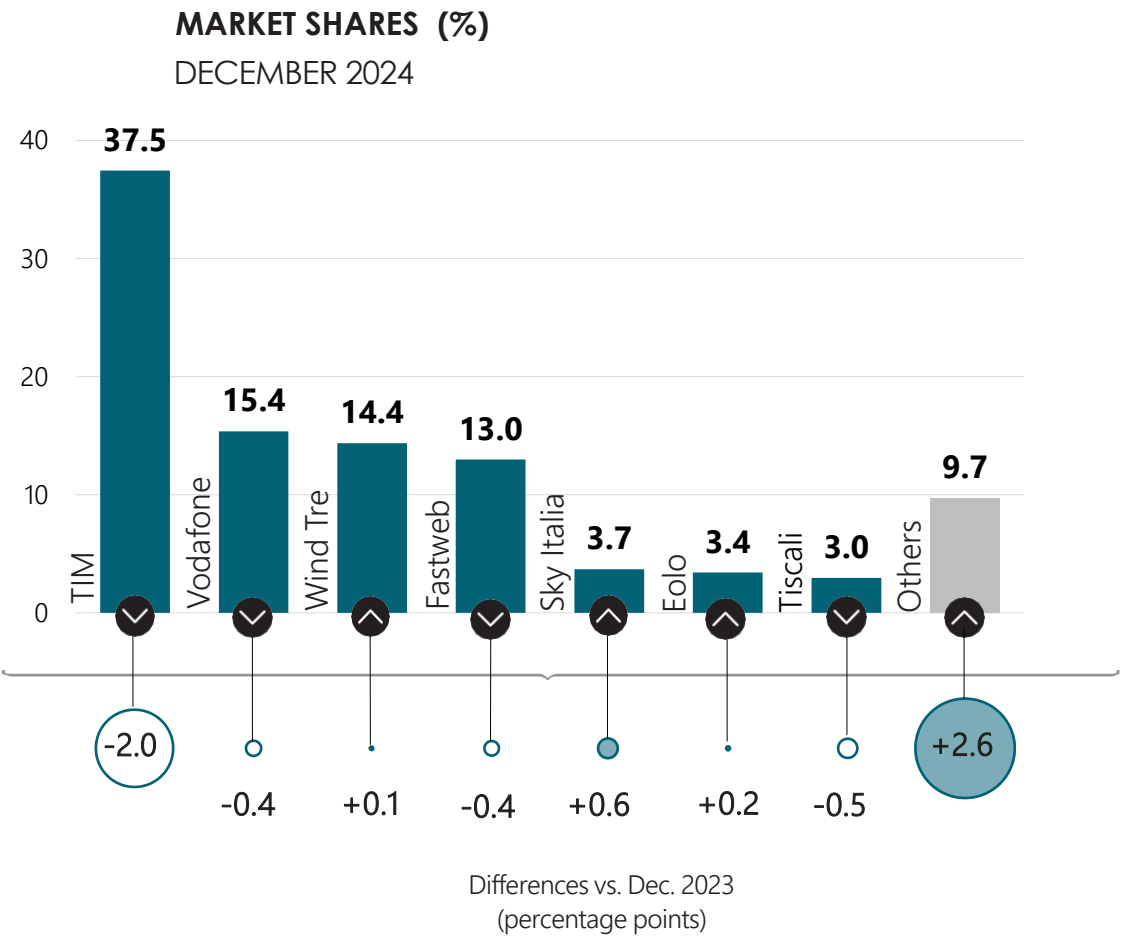
1.1 FIXED NETWORK: TOTAL LINES



\*Total lines, coherently with European reporting, also includes lines indicated in the "other NGA," "other not NGA," and "Satellite" categories. Overall, as of December 2023, these lines are estimated to be about 0.3 percent of the total lines (about 70,000 line), mostly satellite.

| Total lines                                | (no. of lines)  | (Δ %)   | Distribution<br>(Δ 2023-2024)<br>percentage points |
|--------------------------------------------|-----------------|---------|----------------------------------------------------|
| Quarterly change<br>(Sep. 2024 – Dec 2024) | +55 k accesses  | +0.27 ↑ | Copper: -3.5 ↓                                     |
| Annual change<br>(Dec. 2023 – Dec. 2024)   | +118 k accesses | +0.58 ↑ | FWA: +1.2 ↑                                        |
| 4-Year change<br>(Dec. 2020 – Dec. 2025)   | +382 k accesses | +1.92 ↑ | FTTC: -3.8 ↓                                       |
|                                            |                 |         | FTTH: +5.9 ↑                                       |

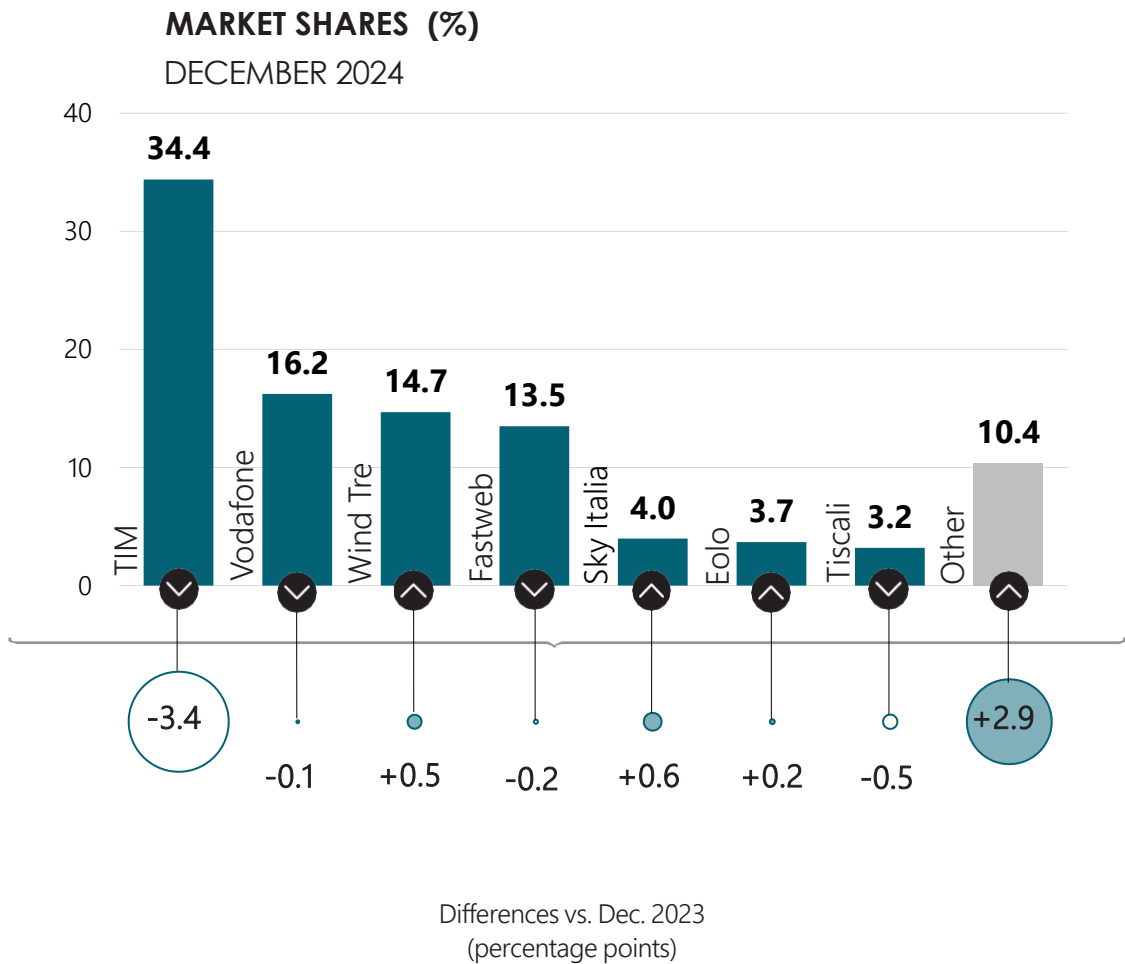
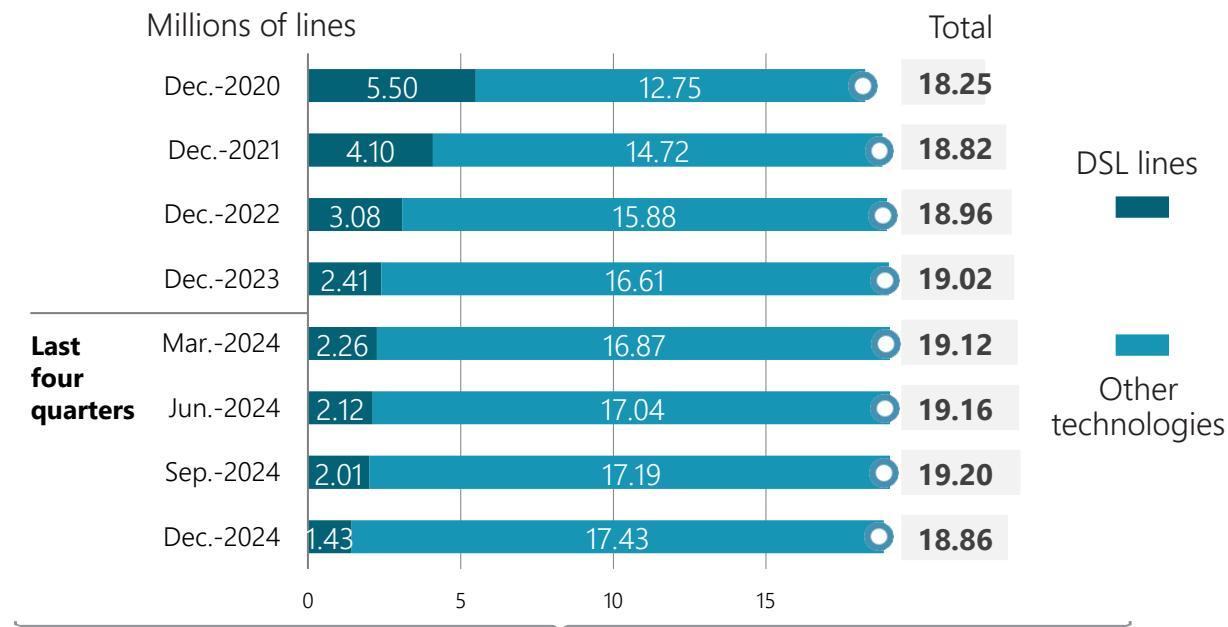
k = thousand



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

The data reported in Electronic communications section also include an estimate of the "other firms" operating in the market.

1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES



| Quarterly change<br>(Sep. 2024 – Dec. 2024) |  | Annual change<br>(Dec. 2023 – Dec. 2024) |                       |                      |
|---------------------------------------------|--|------------------------------------------|-----------------------|----------------------|
| Total lines                                 |  | Total lines                              | DSL lines             | Other technologies   |
| ↓                                           |  | ↓                                        | ↓                     | ↑                    |
| -340 k lines (-1.8%)                        |  | -163 k lines (-0.09%)                    | -975 k lines (-40.5%) | +812 k lines (+4.9%) |

k = thousand

Note: The decrease in broadband and ultrabroadband lines in the last quarter is due to both i) the natural reduction in broadband lines and ii) the remodeling of DSL offers by the operator TIM.

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

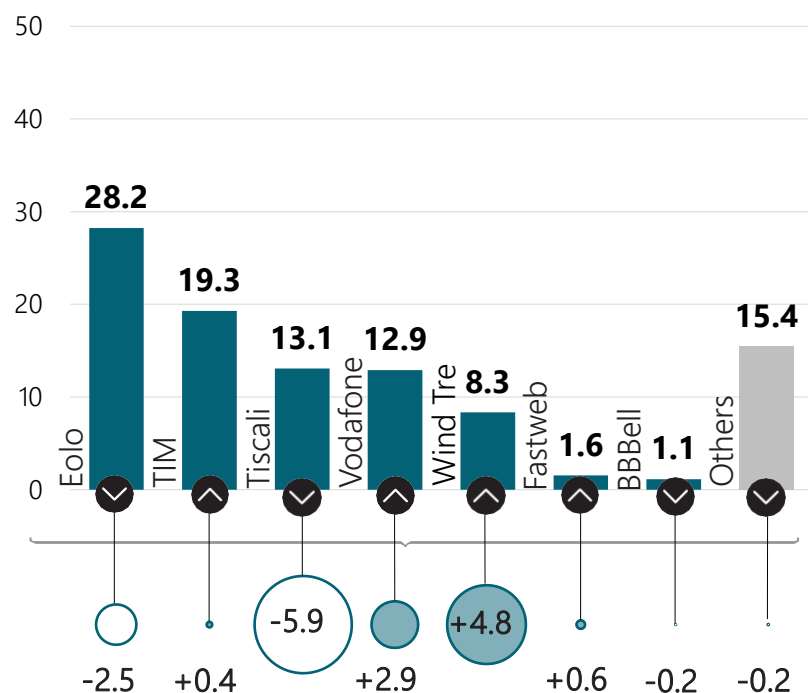
DECEMBER 2024

FWA

Total lines: **2.37** million access

Annual change  
(Dec. 2023 – Dec. 2024)

**+11.9%** ↑

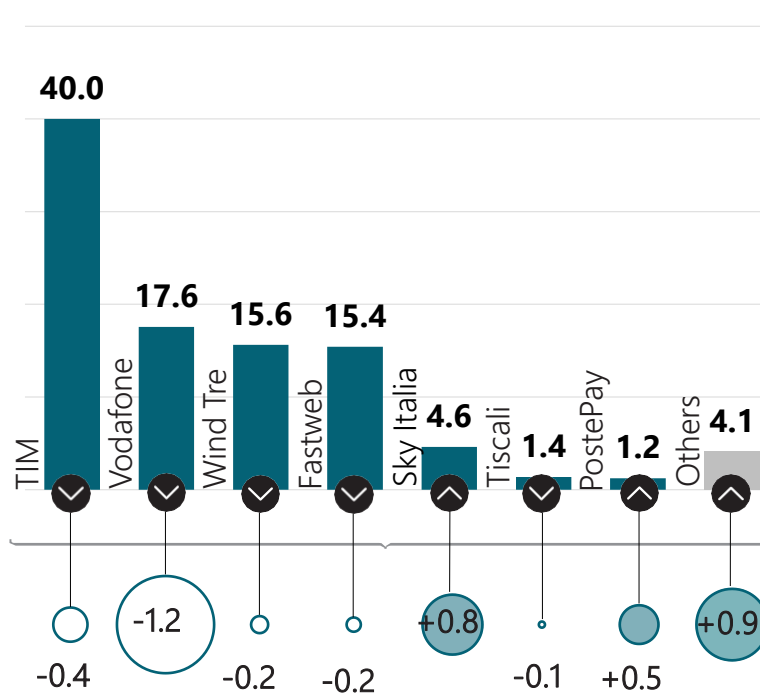


FTTC

Total lines: **9.13** million access

Annual change  
(Dec. 2023 – Dec. 2024)

**-7.2%** ↓

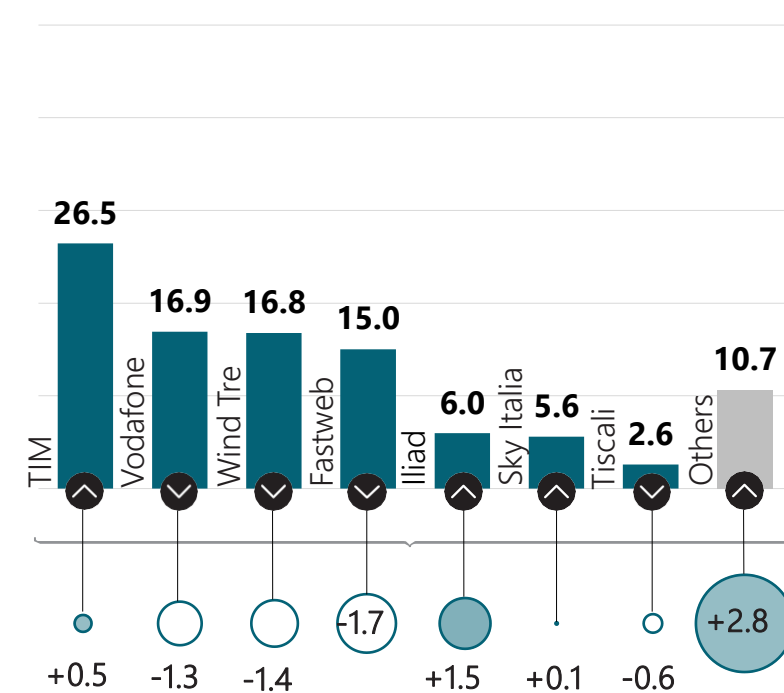


FTTH

Total lines: **5.86** million access

Annual change  
(Dec. 2023 – Dec. 2024)

**+26.6%** ↑



Differences vs. Dec. 2023  
(percentage points)

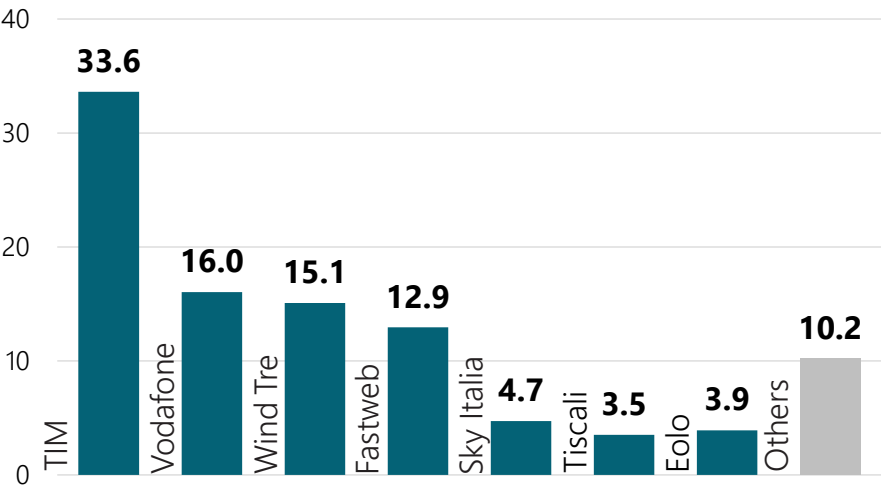
1.4: FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES BY TYPE OF CUSTOMER AND OPERATORS



DECEMBER 2024

RESIDENTIAL CUSTOMERS

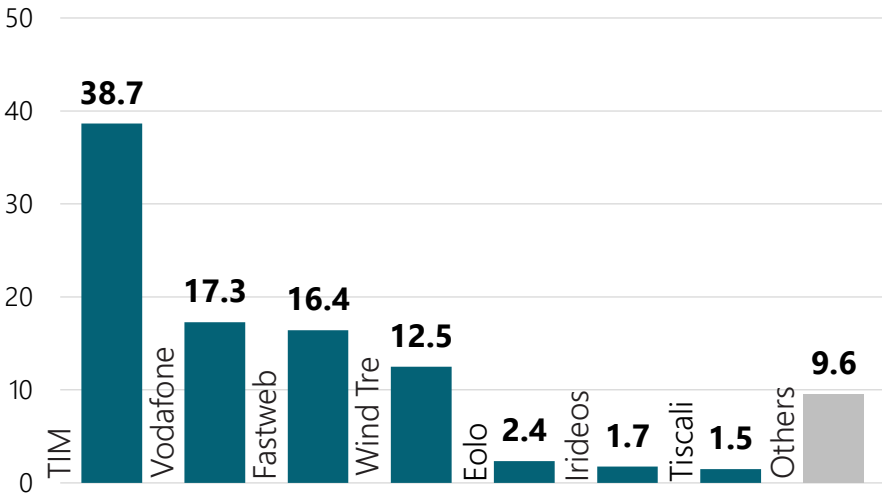
Total lines: 15.913 million lines



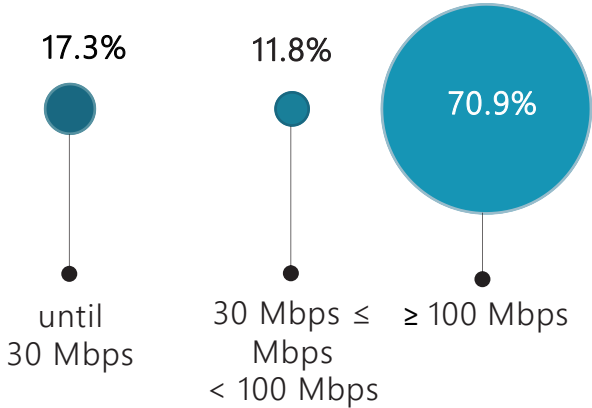
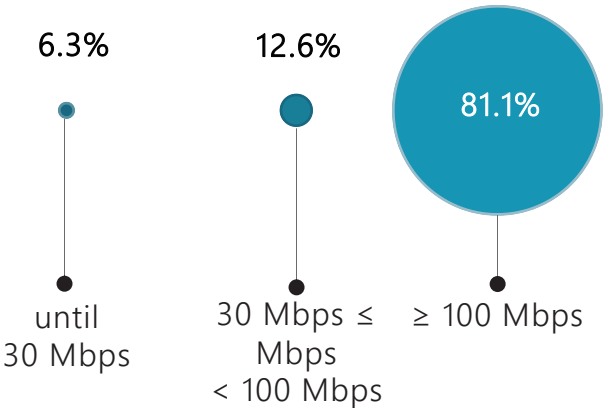
by operator (%)

BUSINESS CUSTOMERS

Total lines: 2.946 million lines



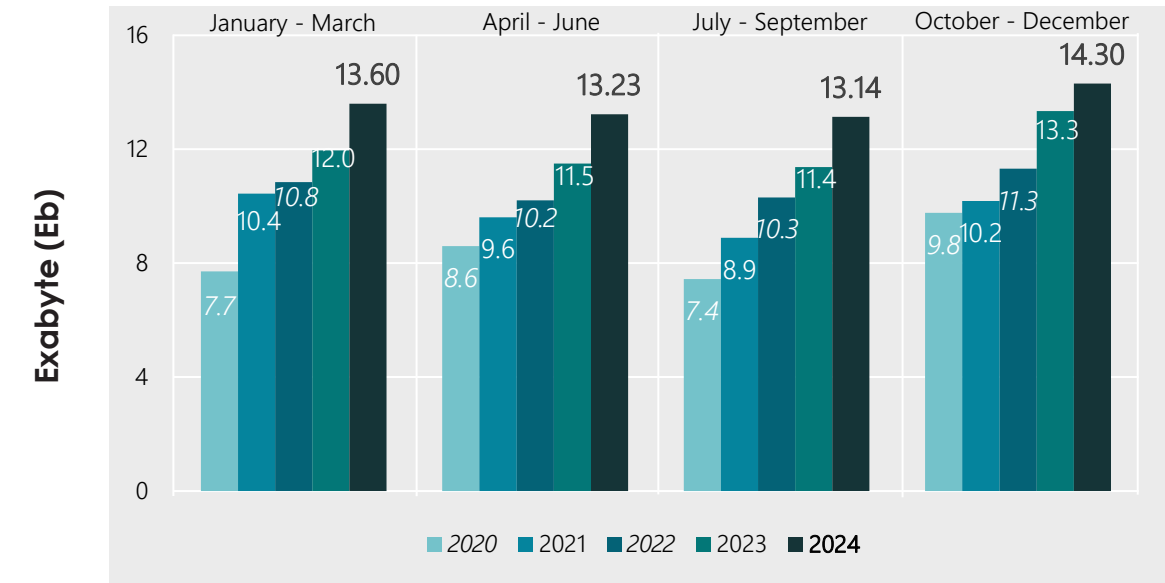
by marketed speed classes (%)



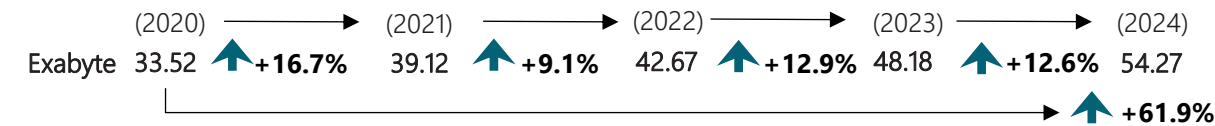
1.5 FIXED NETWORK: DATA TRAFFIC (DOWNLOAD / UPLOAD)



DOWNLOAD (cumulative quarterly data)



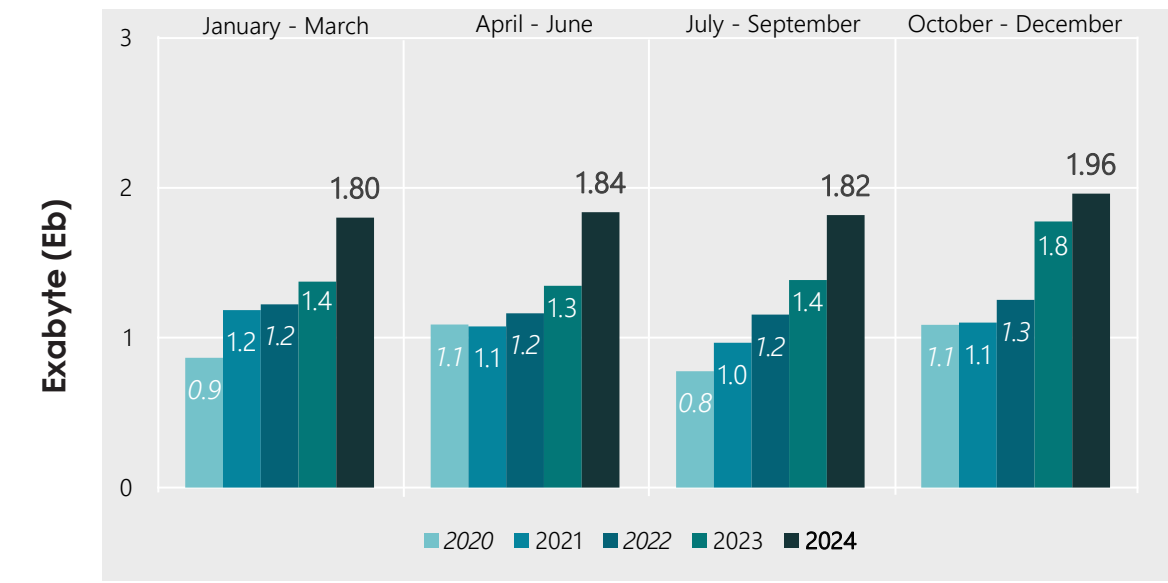
1 Cumulative data since the beginning of the year (Jan. – Dec.)



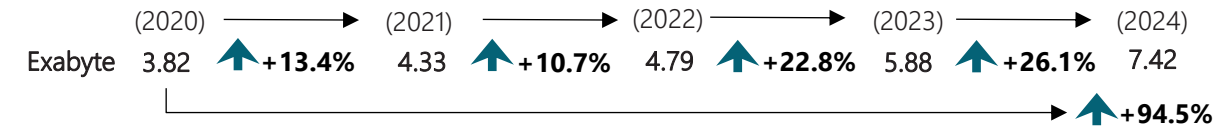
2 Quarterly comparison (change in %)

|                   | YoY       |           |           |           | Whole period<br>2020/2024 |
|-------------------|-----------|-----------|-----------|-----------|---------------------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |                           |
| Q 1 (Jan. - Mar.) | +35.2     | +4.0      | +10.2     | +13.7     | +76.3                     |
| Q 2 (Avr. - Jun.) | +11.7     | +6.1      | +12.8     | +15.1     | +53.9                     |
| Q 3 (Jul. - Sep.) | +19.5     | +15.9     | +10.4     | +15.4     | +76.6                     |
| Q 4 (Oct. - Dec.) | +4.3      | +11.2     | +17.8     | +7.2      | +46.4                     |

UPLOAD (cumulative quarterly data)



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



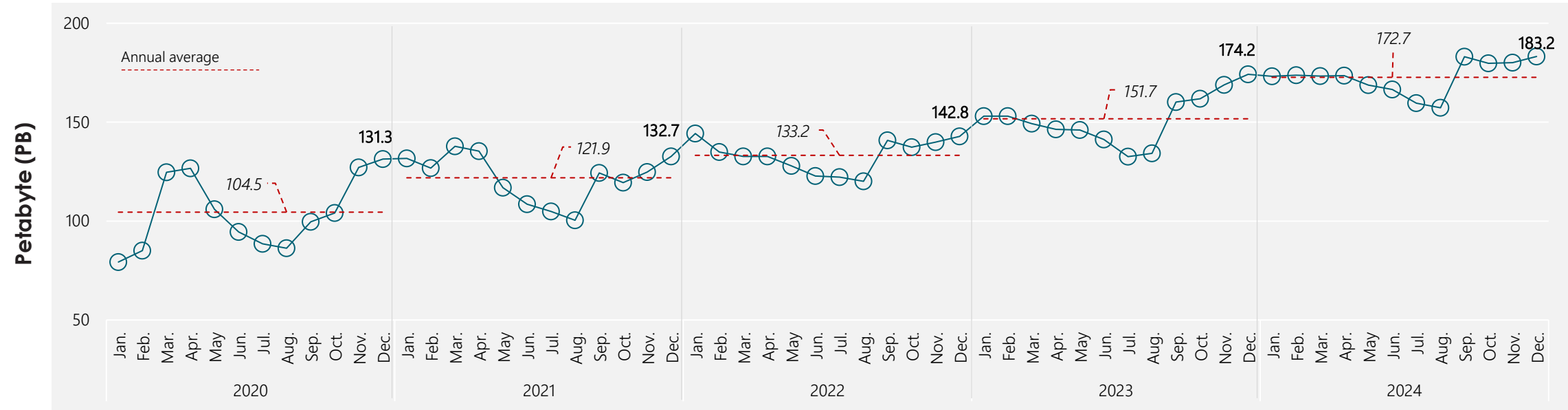
2 Quarterly comparison (change in %)

|                   | YoY       |           |           |           | Whole period<br>2020/2024 |
|-------------------|-----------|-----------|-----------|-----------|---------------------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |                           |
| Q 1 (Jan. - Mar.) | +36.8     | +3.2      | +12.5     | 31.1      | +108.1                    |
| Q 2 (Avr. - Jun.) | -1.2      | +8.1      | +15.9     | +36.5     | +69.0                     |
| Q 3 (Jul. - Sep.) | 24.7      | +19.4     | +20.0     | +31.3     | +134.5                    |
| Q 4 (Oct. - Dec.) | +1.5      | +13.8     | +41.6     | +10.5     | +80.7                     |

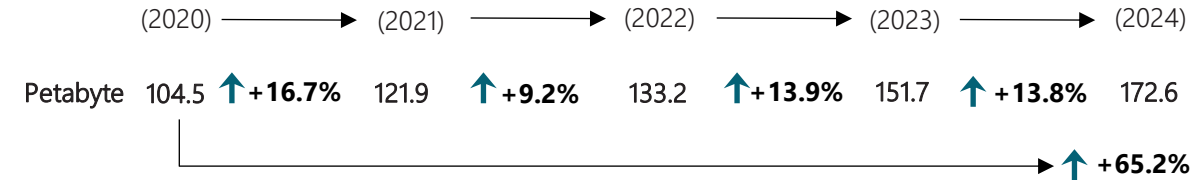
1.6 FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)



TOTAL TRAFFIC



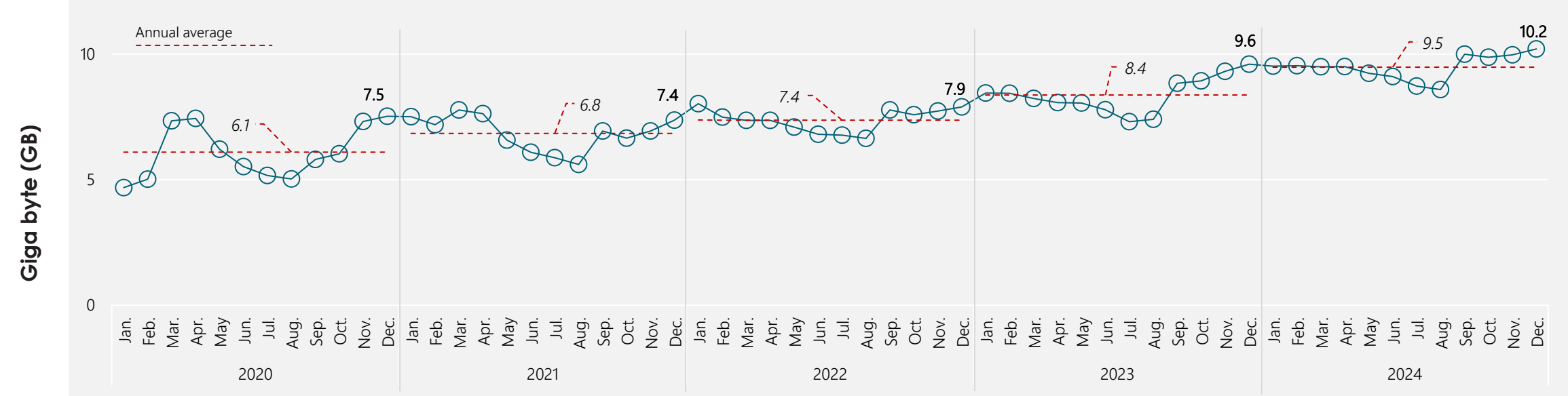
1 Average monthly comparison since the beginning of the year (Jan. – Dec.)



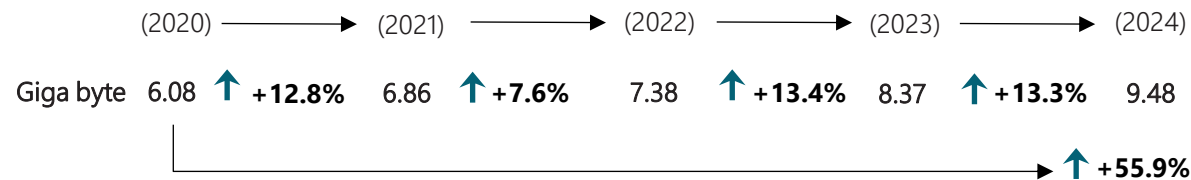
2 Quarterly comparison (change in %)

|                   | YoY       |           |           |           | Whole period<br>2020/2024 |
|-------------------|-----------|-----------|-----------|-----------|---------------------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |                           |
| Q 1 (Jan. - Mar.) | +36.9     | +3.9      | +10.5     | +14.3     | +79.5                     |
| Q 2 (Avr. - Jun.) | +10.3     | +6.3      | +13.1     | +17.3     | +55.6                     |
| Q 3 (Jul. - Sep.) | +20.0     | +16.3     | +11.4     | +17.2     | +82.1                     |
| Q 4 (Oct. - Dec.) | +4.0      | +11.4     | +20.2     | +7.6      | +49.9                     |

1.7 FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC PER BROADBAND LINE (download + upload)  
PER BROADBAND LINE



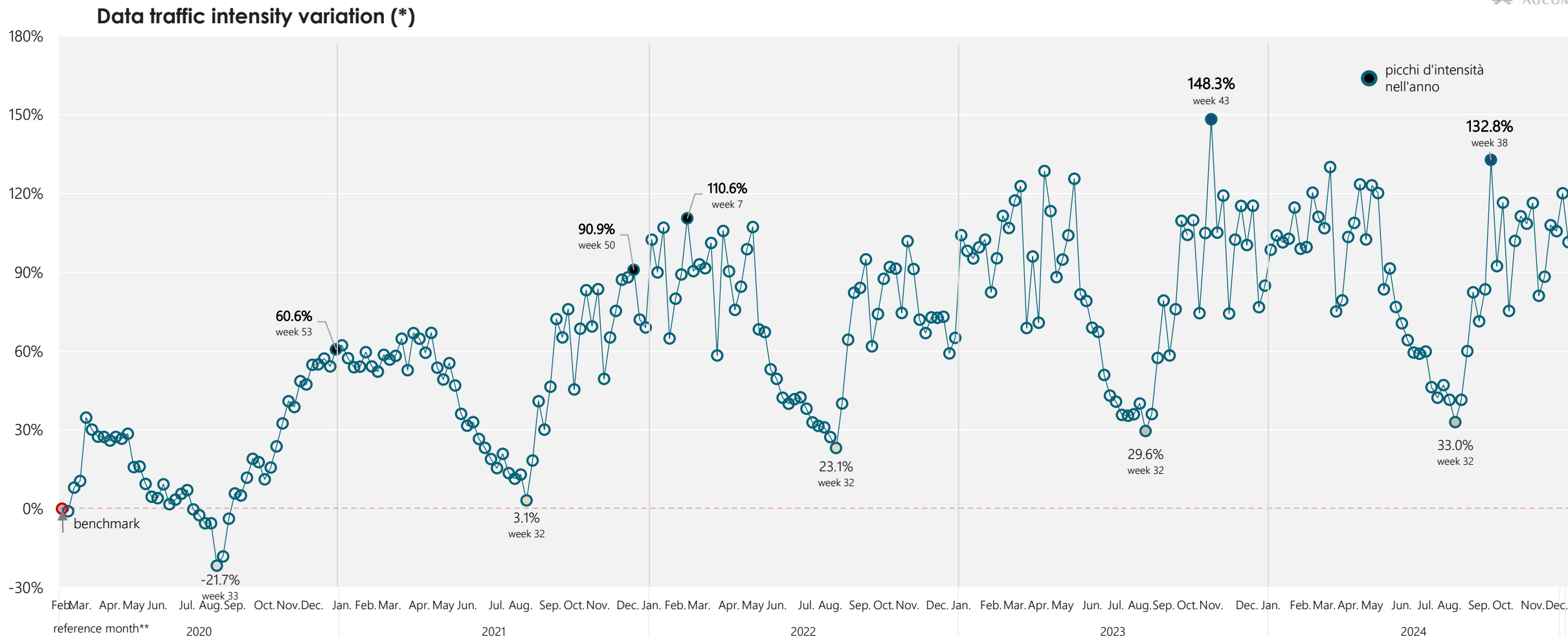
1 Average monthly comparison since the beginning of the year (Jan. – Dec.)



2 Quarterly comparison (change in %)

|                   | Annuale   |           |           |           | Di periodo<br>2020/2024 |
|-------------------|-----------|-----------|-----------|-----------|-------------------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |                         |
| Q 1 (Jan. - Mar.) | +32.2     | +1.5      | +9.7      | +13.7     | +67.3                   |
| Q 2 (Avr. - Jun.) | +6.5      | +4.6      | +12.5     | +16.5     | +45.9                   |
| Q 3 (Jul. - Sep.) | +16.1     | +14.8     | +11.1     | +16.0     | +71.7                   |
| Q 4 (Oct. - Dec.) | +0.8      | +10.4     | +20.0     | +7.9      | +44.1                   |

## 1.8 FIXED NETWORK: WEEKLY DATA TRAFFIC INTENSITY



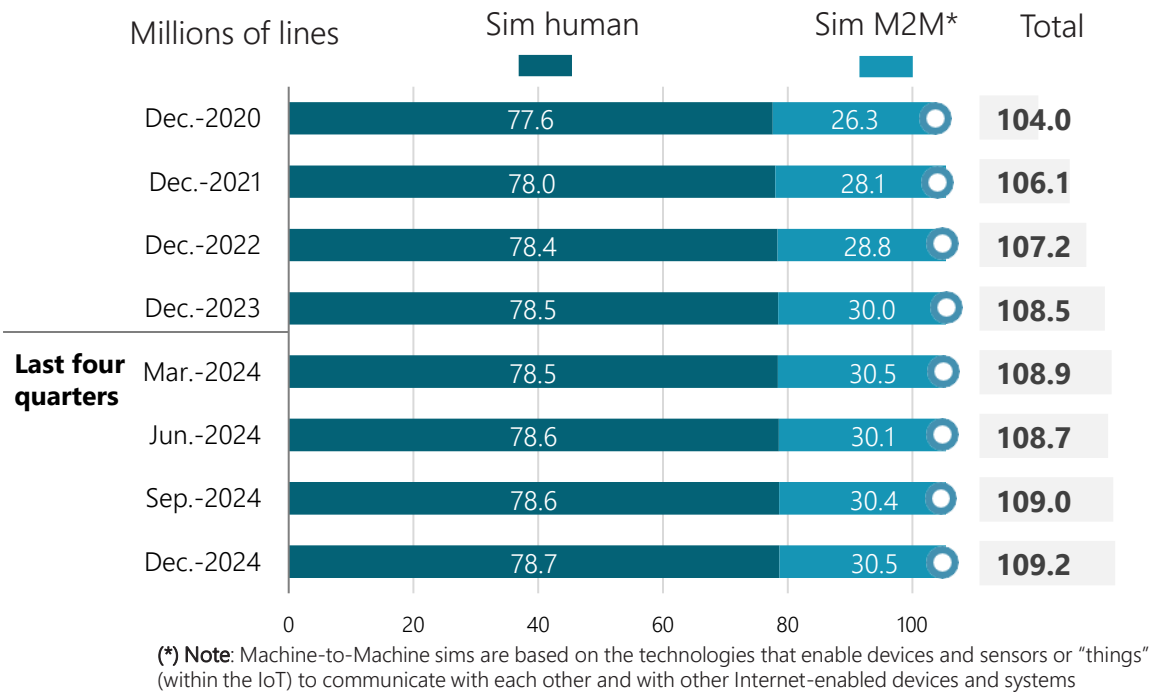
**Definition:** data traffic intensity (Gbps) represents the peak inbound traffic volume registered in a timespan of 5 to 60 minutes.

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

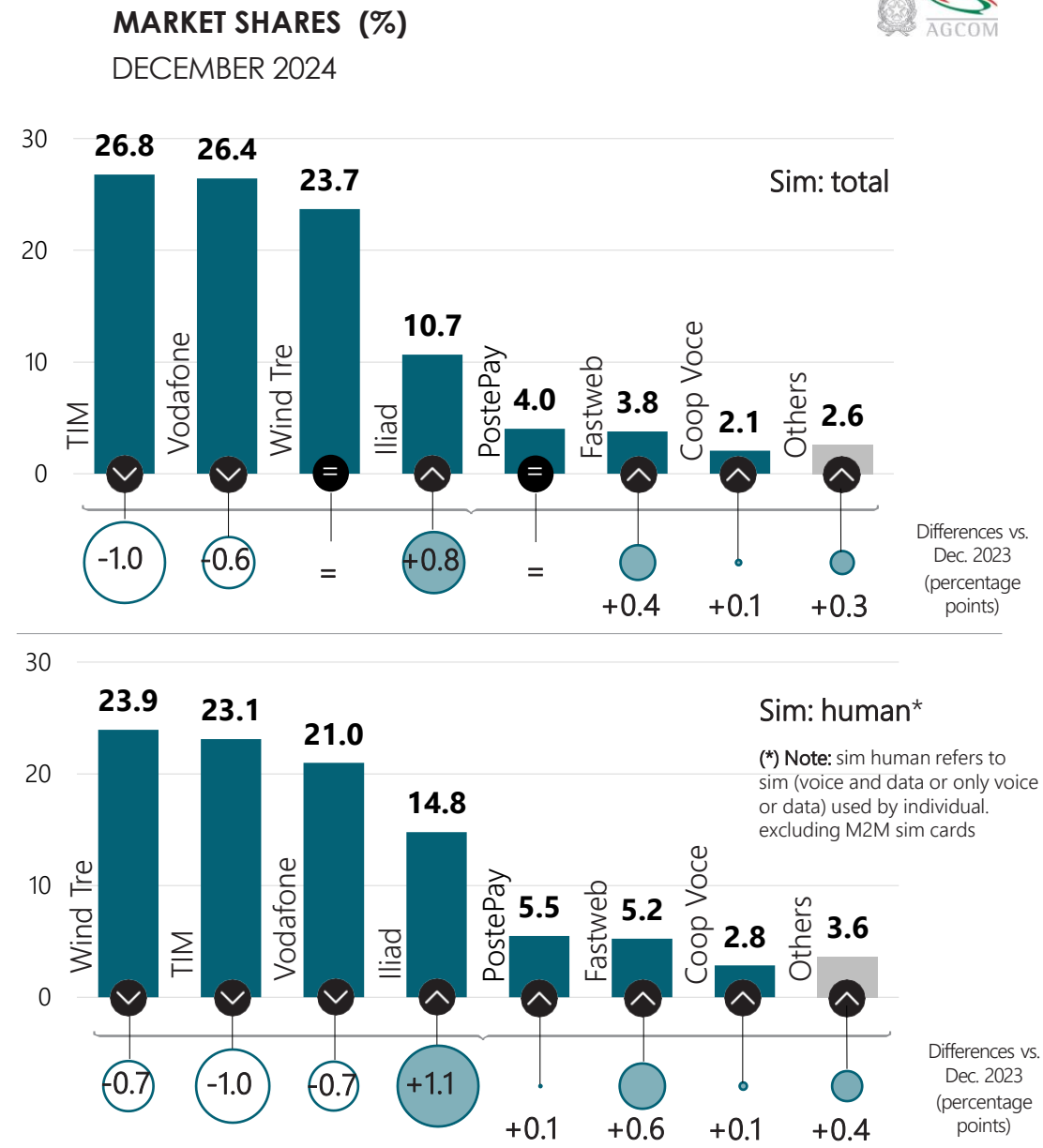
\*\* In some cases, a week straddles two months.

1.9 MOBILE NETWORK: TOTAL SUBSCRIBERS

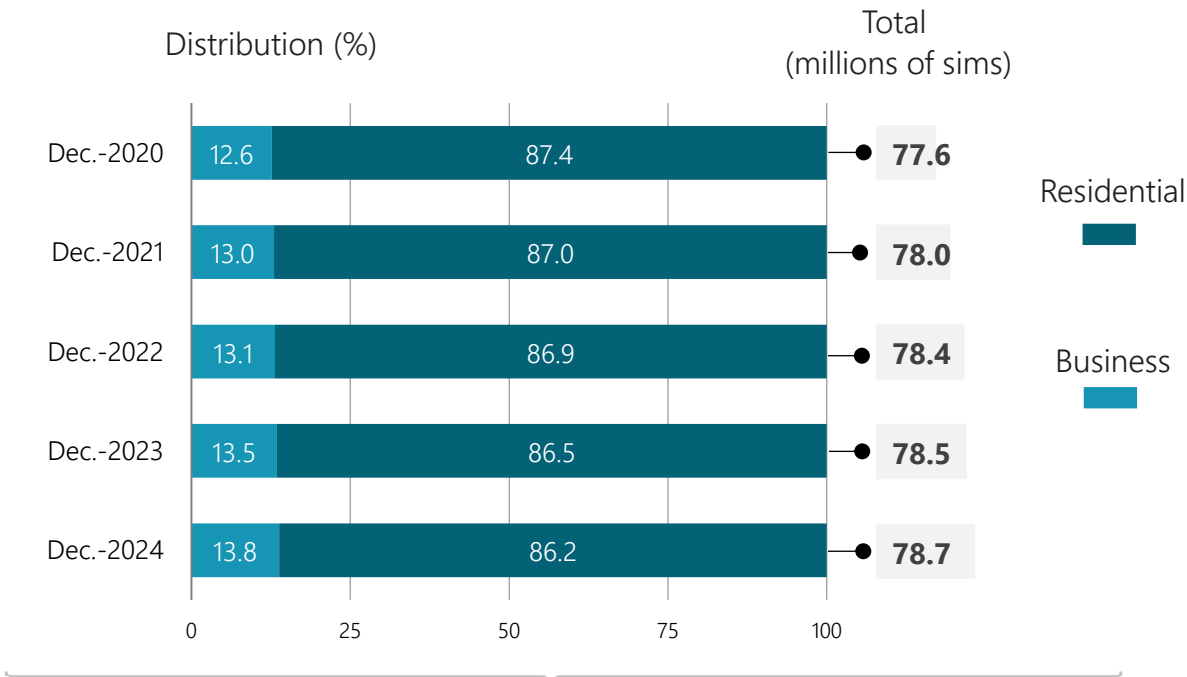


|                  | Quarterly change        |        | Annual change           |        |
|------------------|-------------------------|--------|-------------------------|--------|
|                  | (Sep. 2024 – Dec. 2024) |        | (Dec. 2023 – Dec. 2024) |        |
|                  | (no of sim in thousand) | (Δ %)  | (no of sim in thousand) | (Δ %)  |
| Total sim cards: | +114                    | ↑ +0.1 | +673                    | ↑ +0.6 |
| Sim human:       | +40                     | ↑ +0.1 | +211                    | ↑ +0.3 |
| Sim M2M:         | +75                     | ↑ +0.2 | +462                    | ↑ +1.5 |

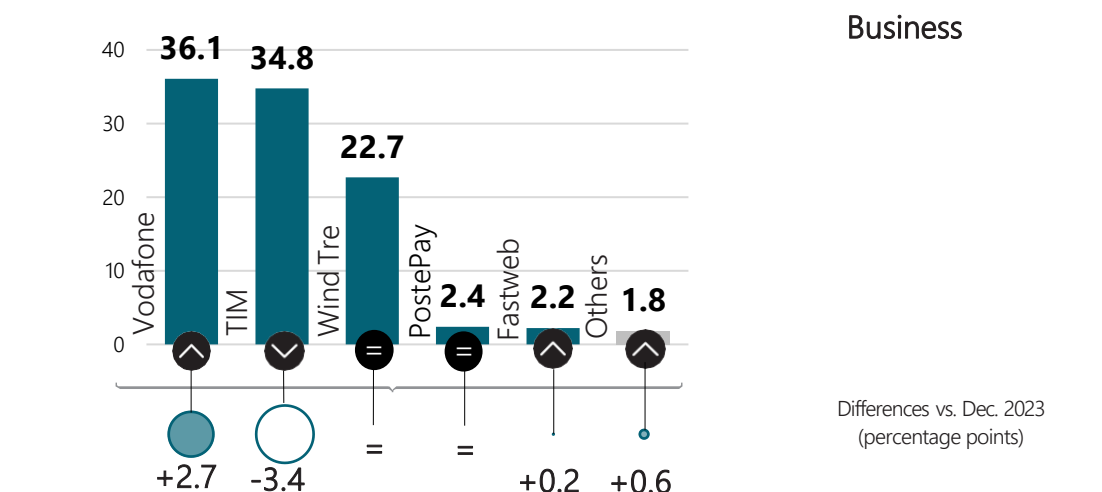
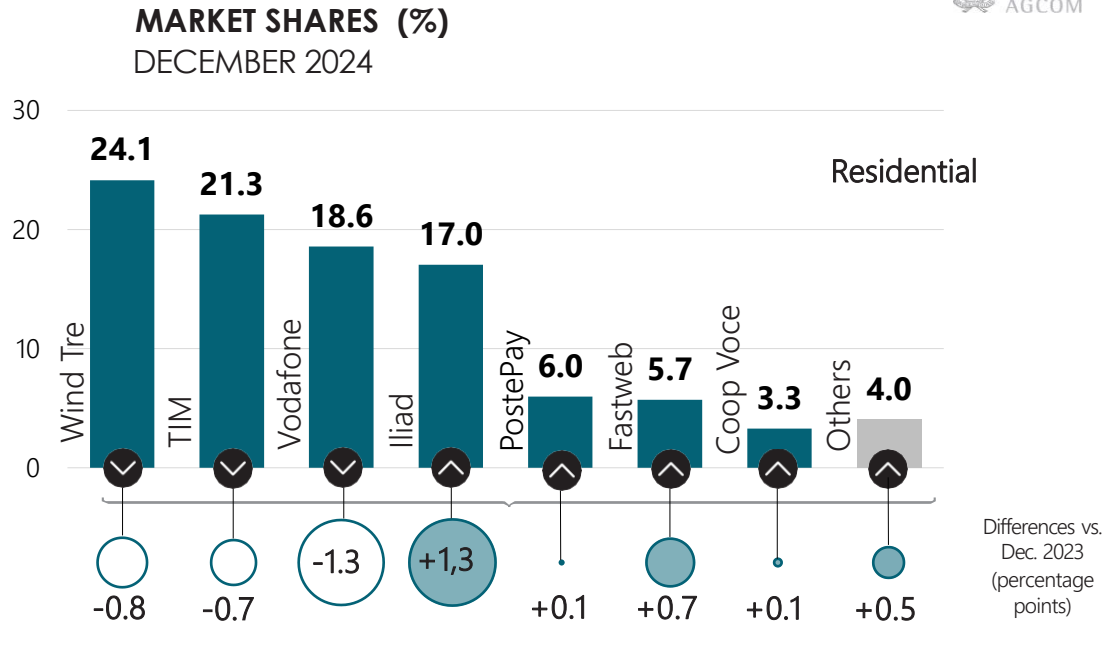
**Note:** the data collected on TIM and Vodafone include the lines of the subsidiaries. respectively Kena mobile and VEI (which offers mobile telephony services called .ho)



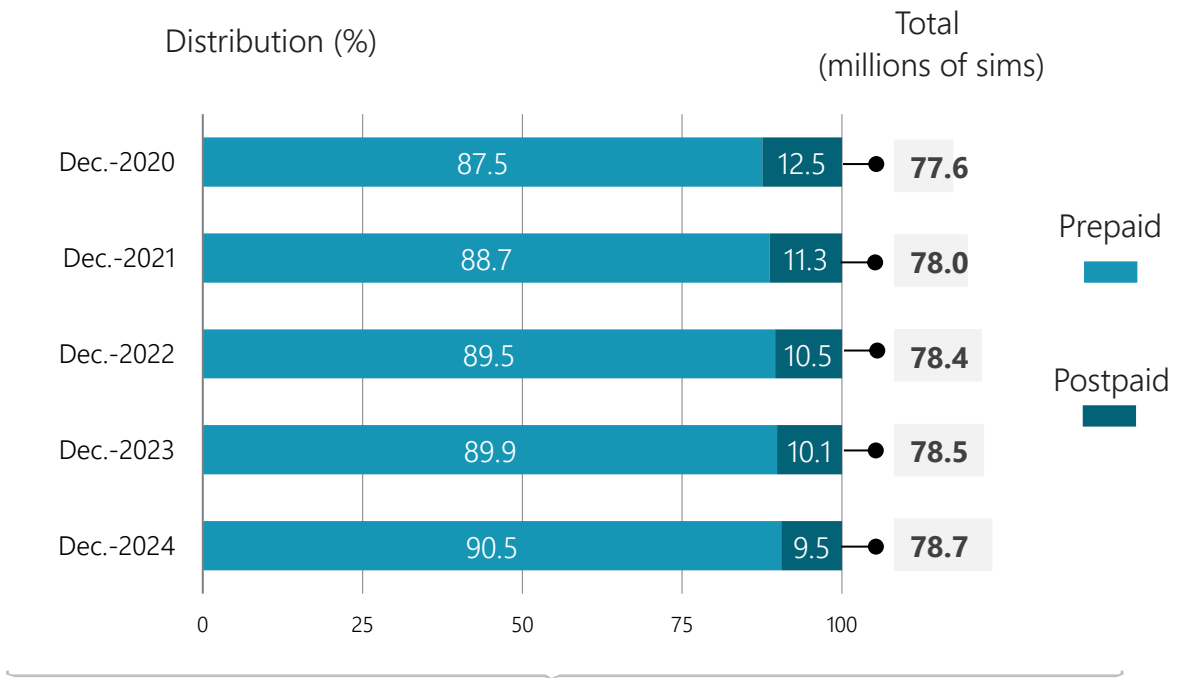
1.10 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



|                        | Annual change<br>(Dec. 2023 – Dec. 2024) |        |  | 4-Year change<br>(Dec. 2020 – Dec. 2024) |         |  |
|------------------------|------------------------------------------|--------|--|------------------------------------------|---------|--|
|                        | (no of sim<br>in thousand)               | (Δ %)  |  | (no of sim<br>in thousand)               | (Δ %)   |  |
| Total human sim cards: | +211                                     | ↑ +0.3 |  | +1,046                                   | ↑ +1.3  |  |
| Residential sim card:  | -74                                      | ↓ -0.1 |  | +11                                      | ↑ +0.02 |  |
| Business sim cards:    | +285                                     | ↑ +2.7 |  | +1,035                                   | ↑ +10.5 |  |

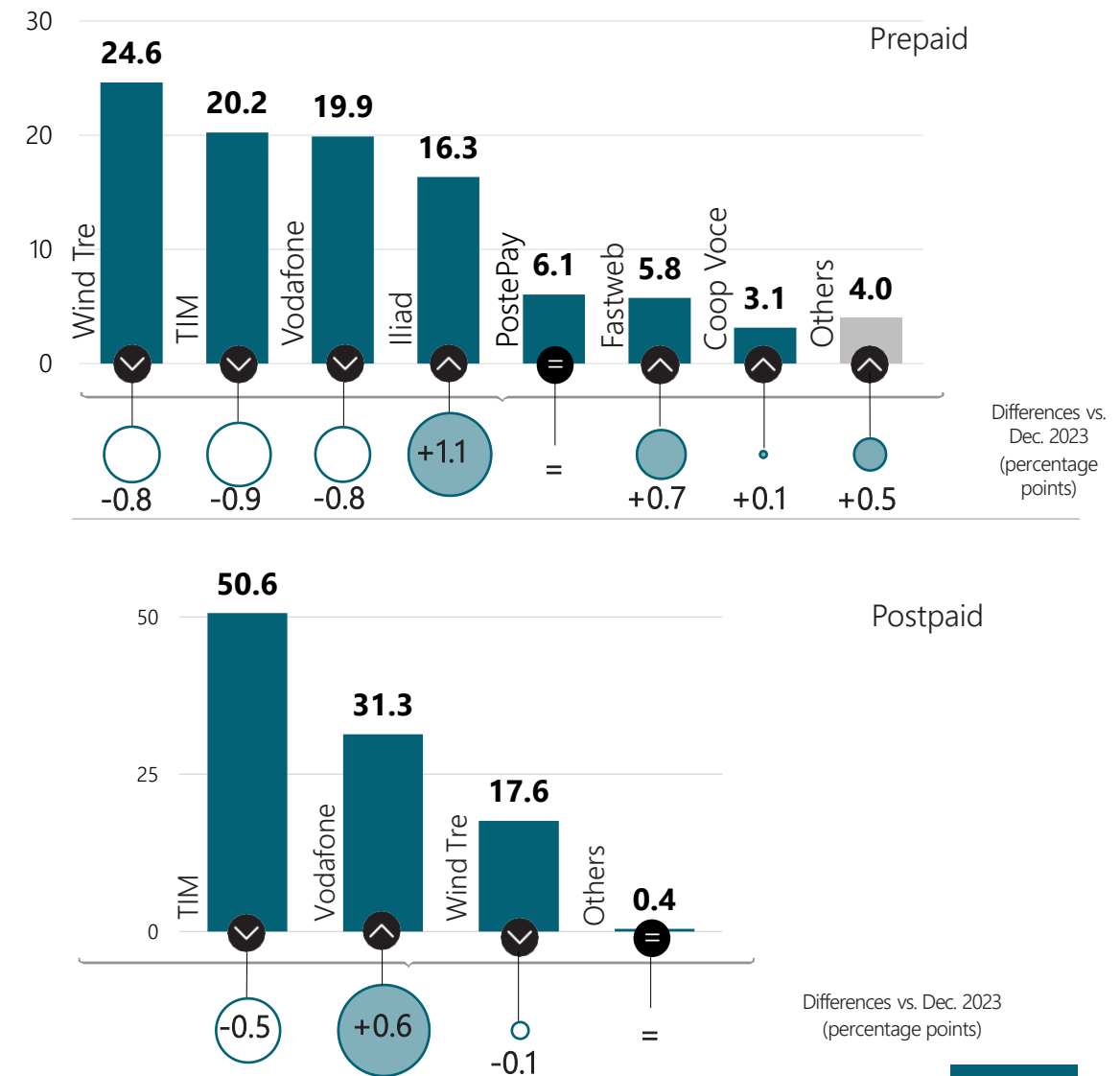


# 1.11 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT



|                        | Annual change<br>(Dec. 2023 – Dec. 2024) |       |      | 4-Year change<br>(Dec. 2020 – Dec. 2024) |       |       |
|------------------------|------------------------------------------|-------|------|------------------------------------------|-------|-------|
|                        | (no of sim<br>in thousand)               | (Δ %) |      | (no of sim<br>in thousand)               | (Δ %) |       |
| Total human sim cards: | +211                                     | ↑     | +0.3 | +1,046                                   | ↓     | +1.4  |
| Prepaid sim cards:     | +663                                     | ↑     | +0.9 | +3,226                                   | ↑     | +4.7  |
| Postpaid sim cards:    | -452                                     | ↓     | -5.7 | -2,180                                   | ↓     | -22.5 |

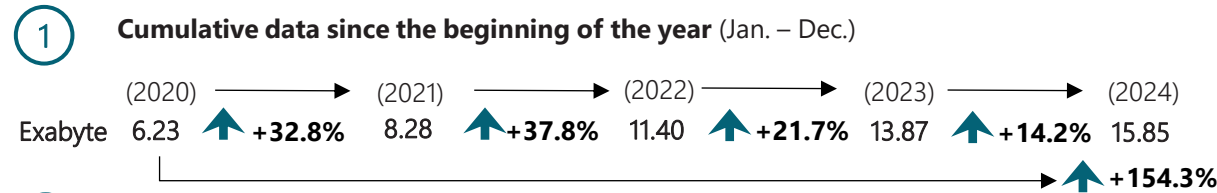
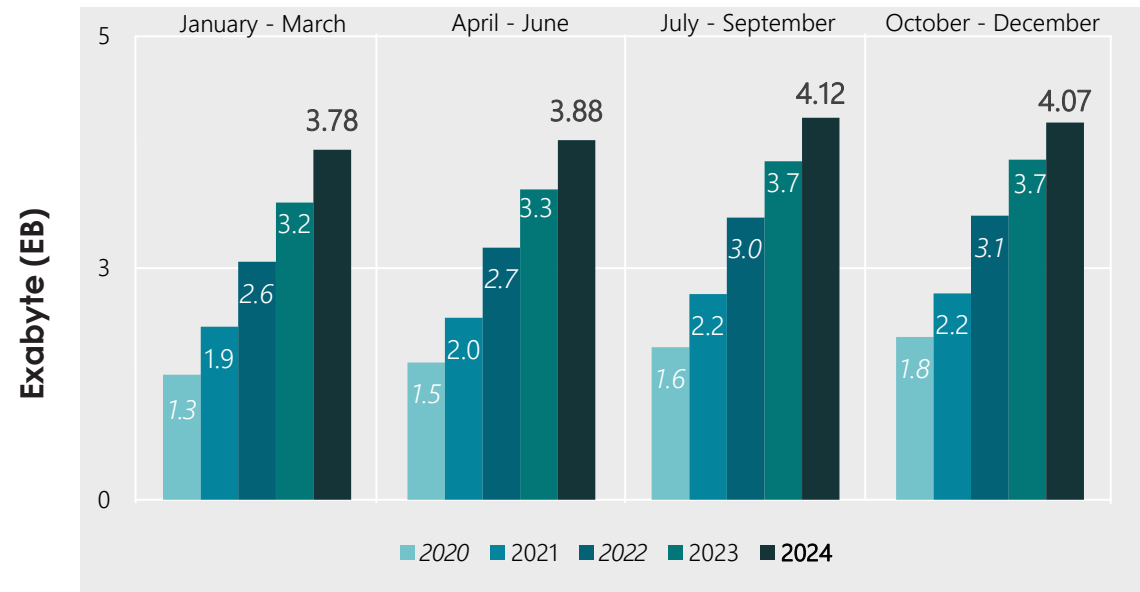
MARKET SHARES (%)  
DECEMBER 2024



1.12 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD



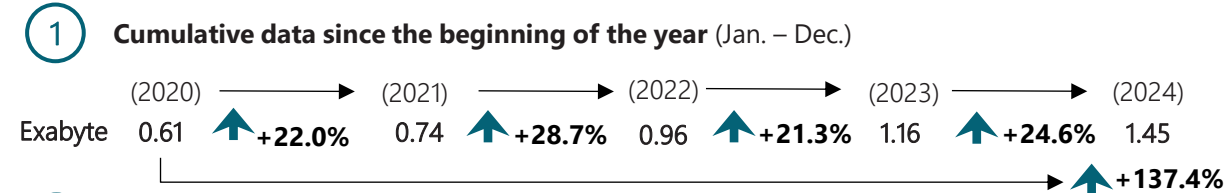
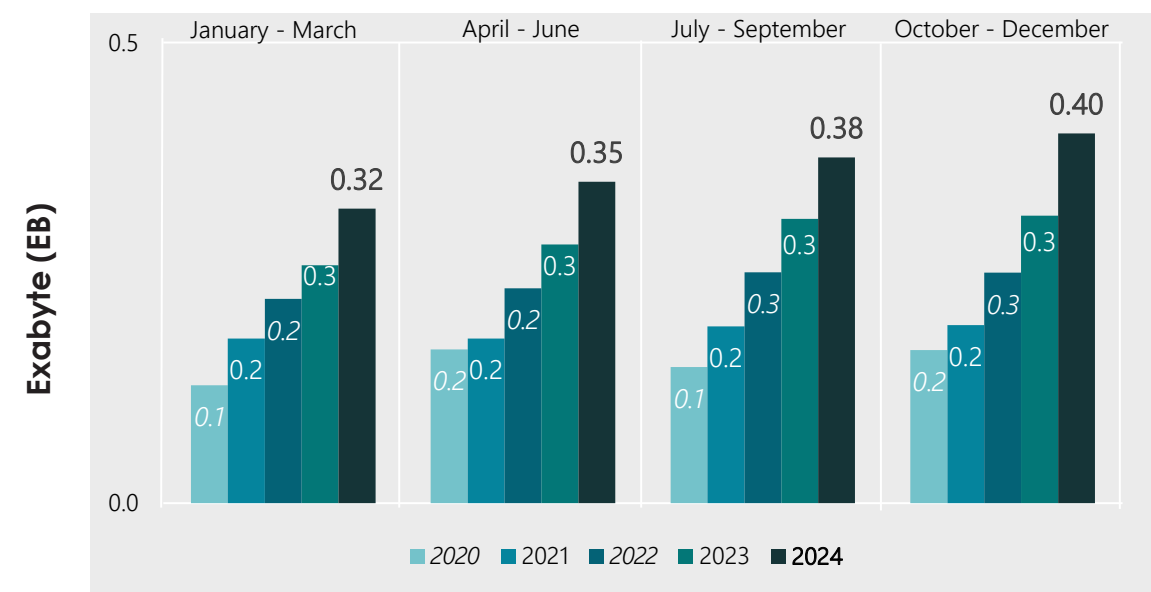
DOWNLOAD (cumulative quarterly data)



2 Quarterly comparison (change in %)

|                   | YoY       |           |           |           | Whole period<br>2020/2024 |
|-------------------|-----------|-----------|-----------|-----------|---------------------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |                           |
| 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. - Sep.) | +35.0     | +37.2     | +19.7     | +13.1     | +150.7                    |
| Q 4 (Oct. - Dec.) | +26.7     | +37.7     | +19.7     | +10.9     | +131.5                    |

UPLOAD (cumulative quarterly data)



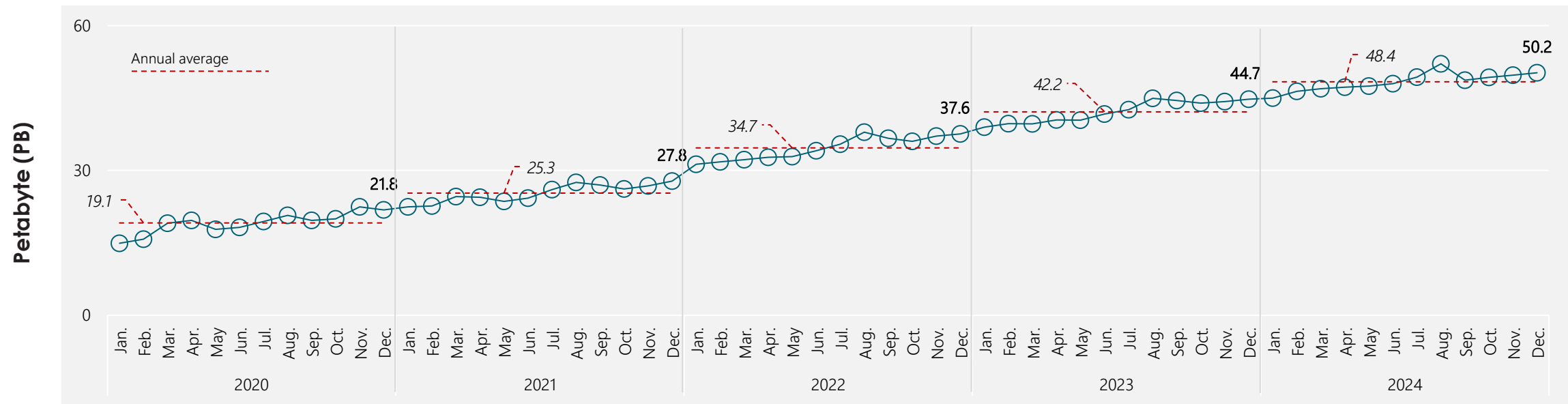
2 Quarterly comparison (change in %)

|                   | YoY       |           |           |           | Whole period<br>2020/2024 |
|-------------------|-----------|-----------|-----------|-----------|---------------------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |                           |
| Q 1 (Jan. - Mar.) | +39.9     | +24.0     | +16.5     | +23.7     | +149.9                    |
| Q 2 (Avr. - Jun.) | +7.1      | +30.5     | +20.5     | +24.1     | +108.9                    |
| Q 3 (Jul. - Sep.) | +30.0     | +30.6     | +23.1     | +21.6     | +154.2                    |
| Q 4 (Oct. - Dec.) | +16.3     | +29.4     | +24.6     | +28.7     | +141.4                    |

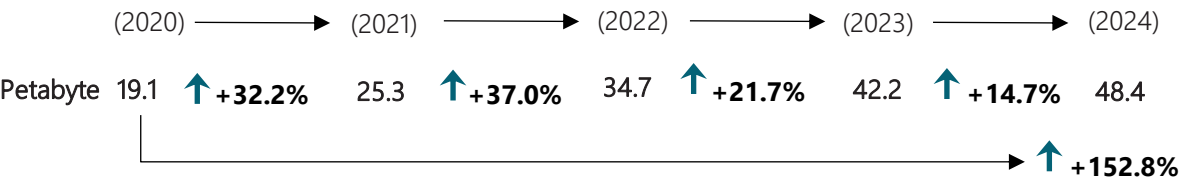
1.13 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)



TOTAL TRAFFIC



1 Average monthly comparison since the beginning of the year (Jan. – Dec.)



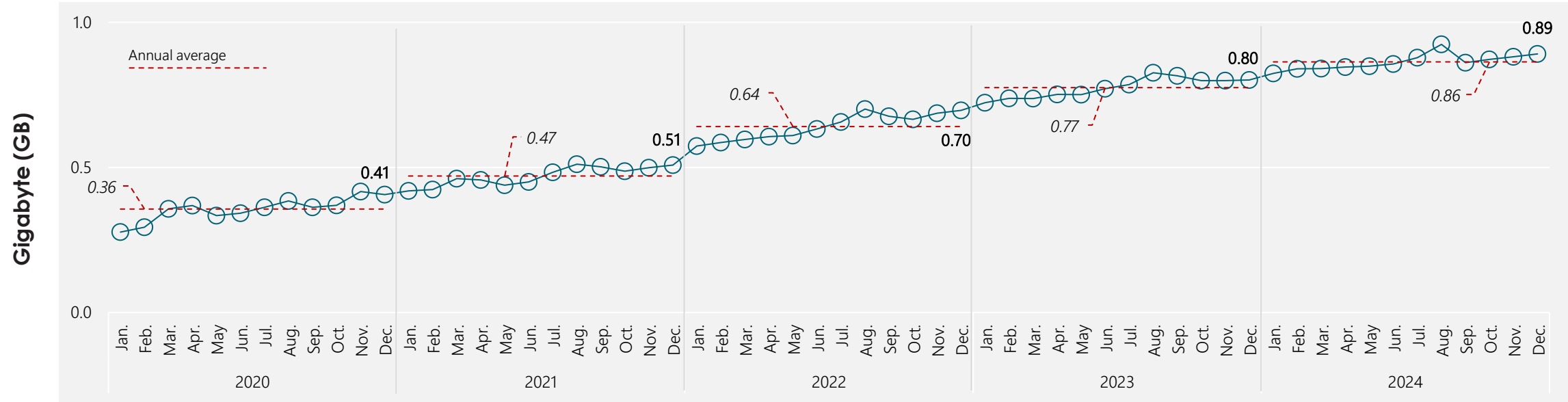
2 Quarterly comparison (change in %)

|                   | YoY       |           |           |           | Whole period |
|-------------------|-----------|-----------|-----------|-----------|--------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |              |
| Q 1 (Jan. - Mar.) | +40.0     | +36.5     | +24.2     | +16.9     | +177.5       |
| Q 2 (Avr. - Jun.) | +29.9     | +37.9     | +22.9     | +16.4     | +156.4       |
| Q 3 (Jul. - Sep.) | +34.6     | +36.6     | +20.0     | +13.7     | +151.0       |
| Q 4 (Oct. - Dec.) | +25.8     | +37.0     | +20.1     | +12.3     | +132.3       |

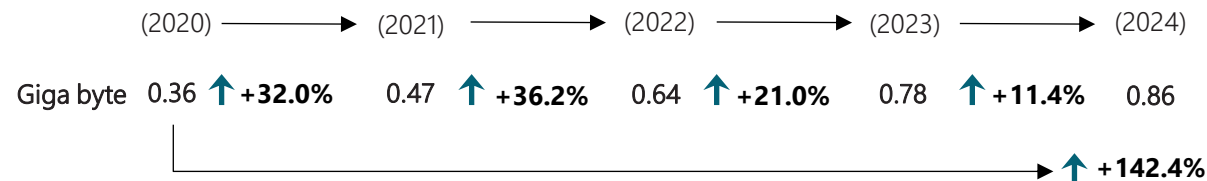
1.14 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC PER SIM CARDS



PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



1 Average monthly comparison since the beginning of the year\* (Jan. – Dec.)



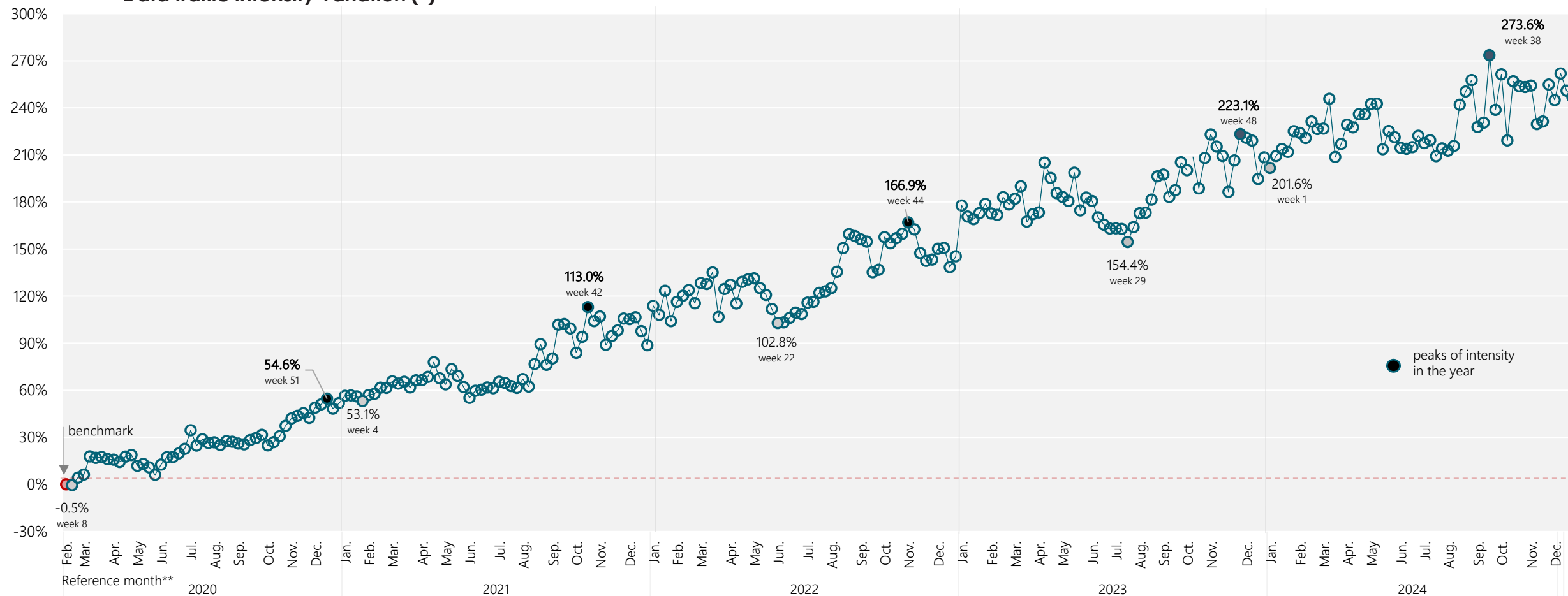
2 Quarterly comparison (change in %)

|                   | YoY       |           |           |           | Whole period |
|-------------------|-----------|-----------|-----------|-----------|--------------|
|                   | 2020/2021 | 2021/2022 | 2022/2023 | 2023/2024 |              |
| Q 1 (Jan. - Mar.) | +40.5     | +34.5     | +25.3     | +14.0     | +169.7       |
| Q 2 (Apr. - Jun.) | +28.8     | +37.4     | +23.0     | +12.2     | +144.2       |
| Q 3 (Jul. - Sep.) | +34.8     | +35.9     | +19.4     | +9.7      | +140.0       |
| Q 4 (Oct. - Dec.) | +25.3     | +37.1     | +17.2     | +10.2     | +121.9       |

\*The average daily data traffic is based on the annual average number of SIMs generating data traffic.

## 1.15 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.

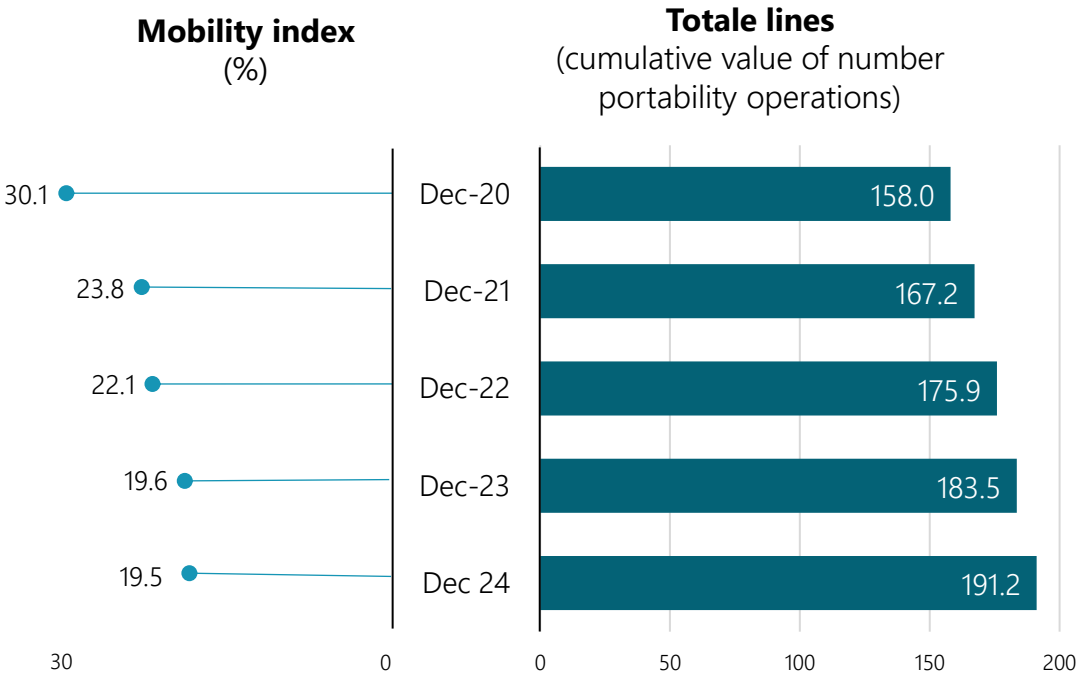
\*For each week, the intensity indicator is represented by the percentage change, compared to the 7th week of 2020 (10 to 16 February - red dot in the graph), of the weighted average of the traffic data calculated on the operators' data using, as weighting coefficient, the percentual market share of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

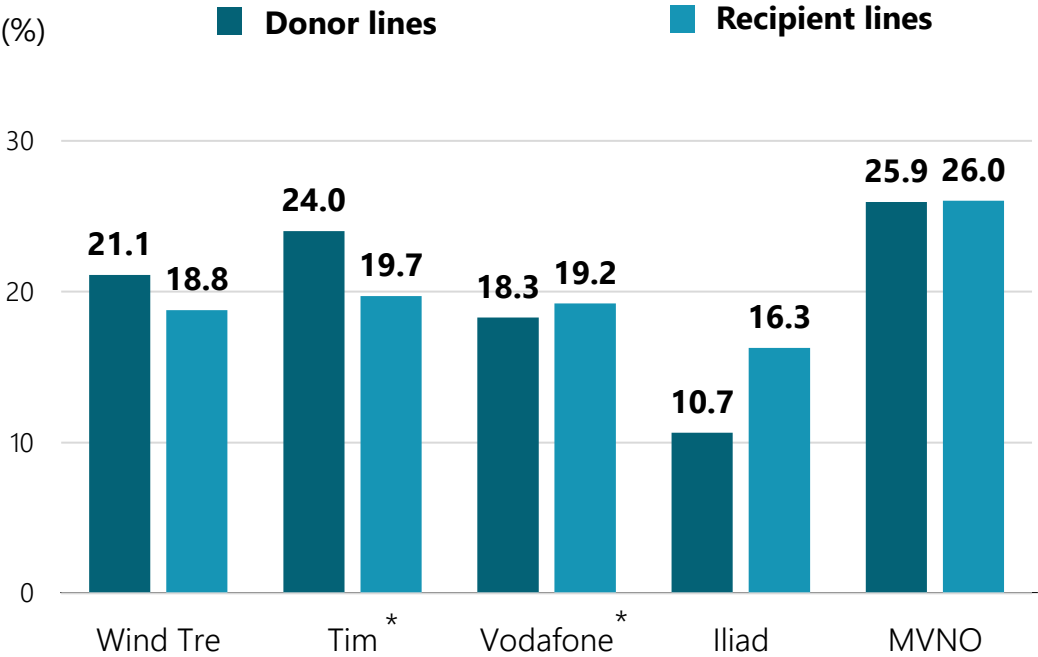
1.16 MOBILE NETWORK: NUMBER PORTABILITY

In one year (Dec. 2023 – Dec. 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)**  
DECEMBER 2024

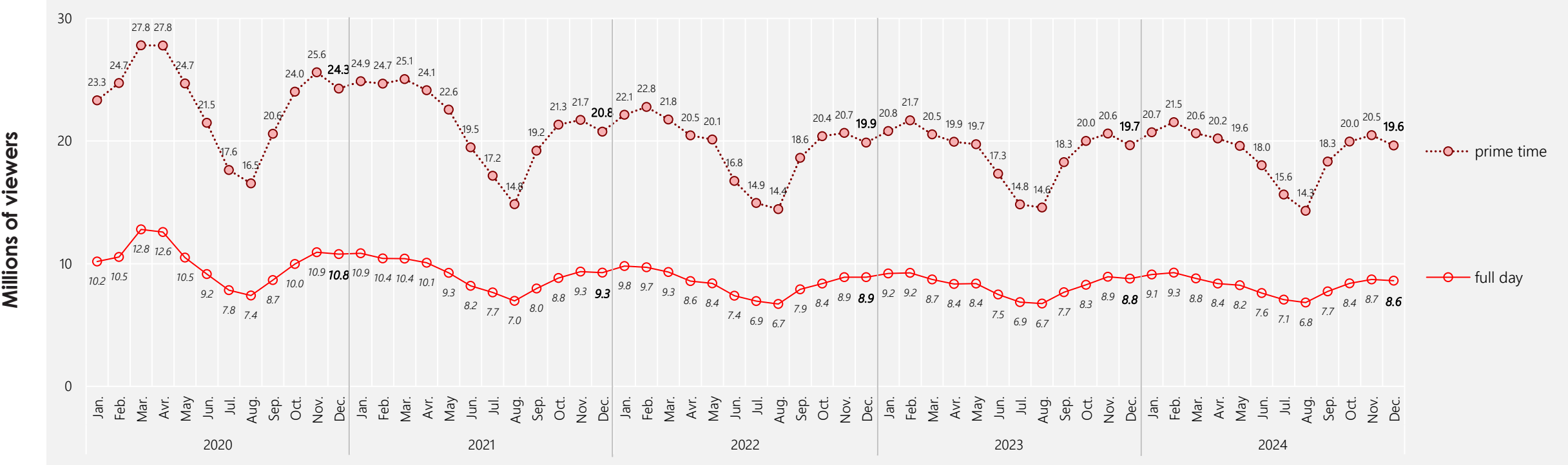


(\*) **Note:** the data collected on TIM and Vodafone include the lines of the subsidiaries, respectively Kena mobile and VEI (which offers mobile telephony services called .ho)

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



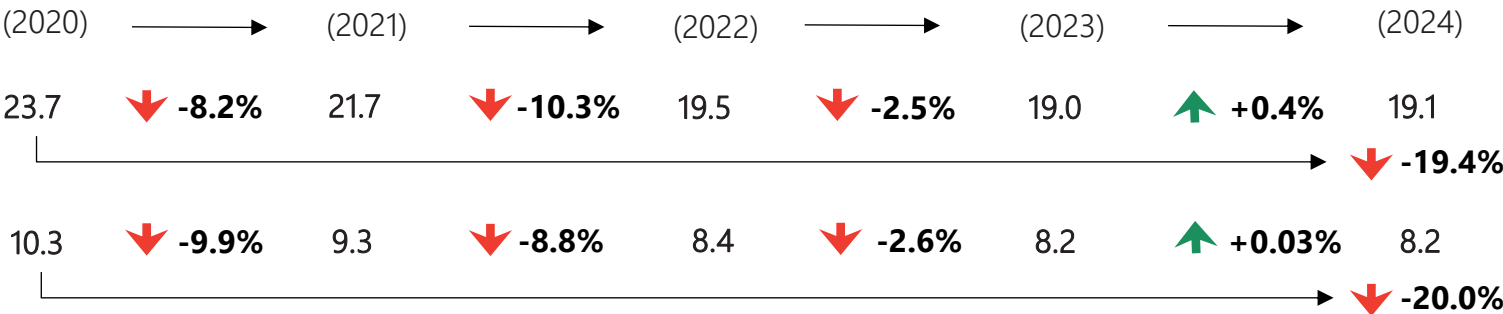
Janury 2020 – December 2024 (average daily audince)



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

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

Average daily audience  
(Time slot: 02:00 – 25:59)

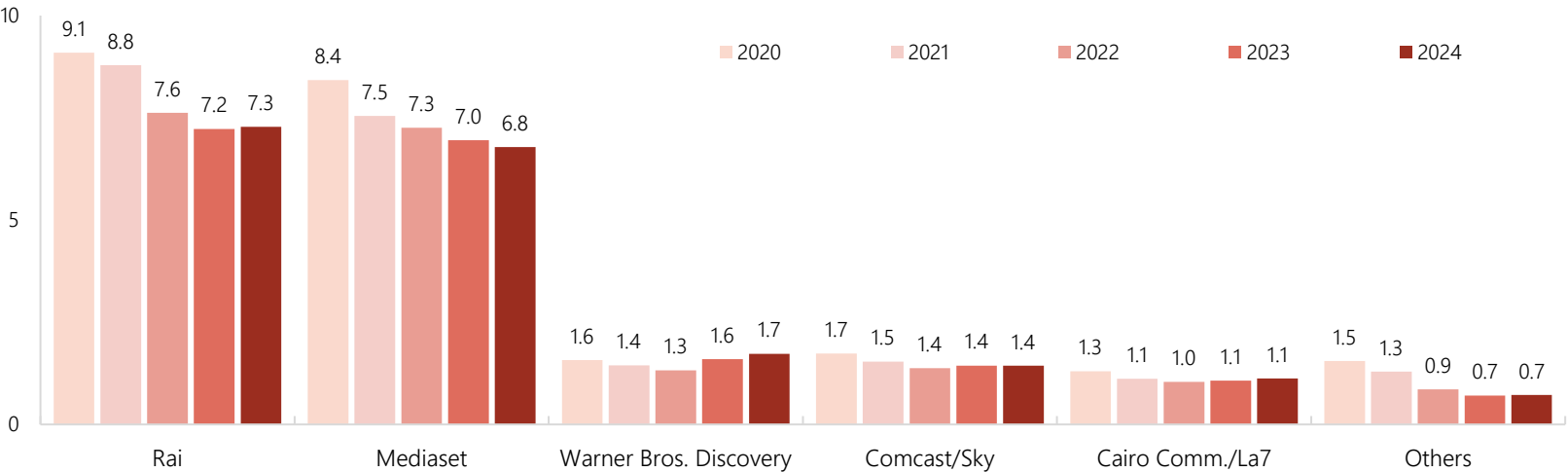


2.2 TELEVISION (DVB-T AND SAT): LEADING TV BROADCASTER BY AUDIENCE PRIME TIME (FY)



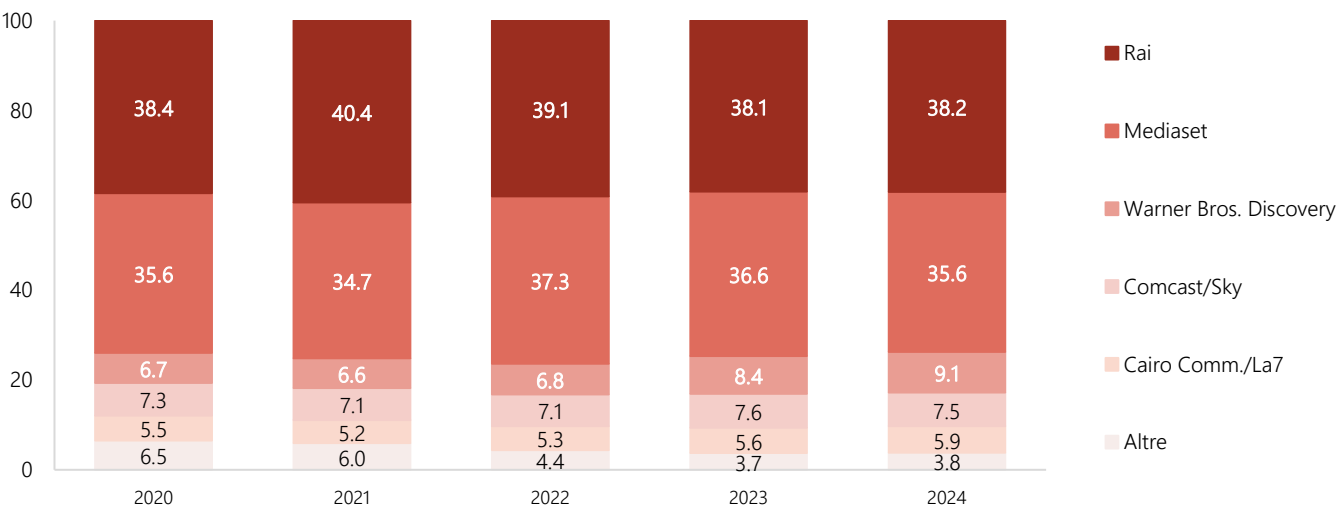
PRIME TIME AUDIENCE

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



|                        | Change % |         |
|------------------------|----------|---------|
|                        | '20-'24  | '23-'24 |
| Rai                    | -2.0     | +0.7    |
| Mediaset               | -19.4    | -2.4    |
| Warner Bros. Discovery | 9.5      | +8.3    |
| Comcast/Sky            | -17.0    | -0.3    |
| Cairo Comm./La7        | -13.4    | +5.3    |
| Others                 | -53.4    | +2.2    |

Average share in %



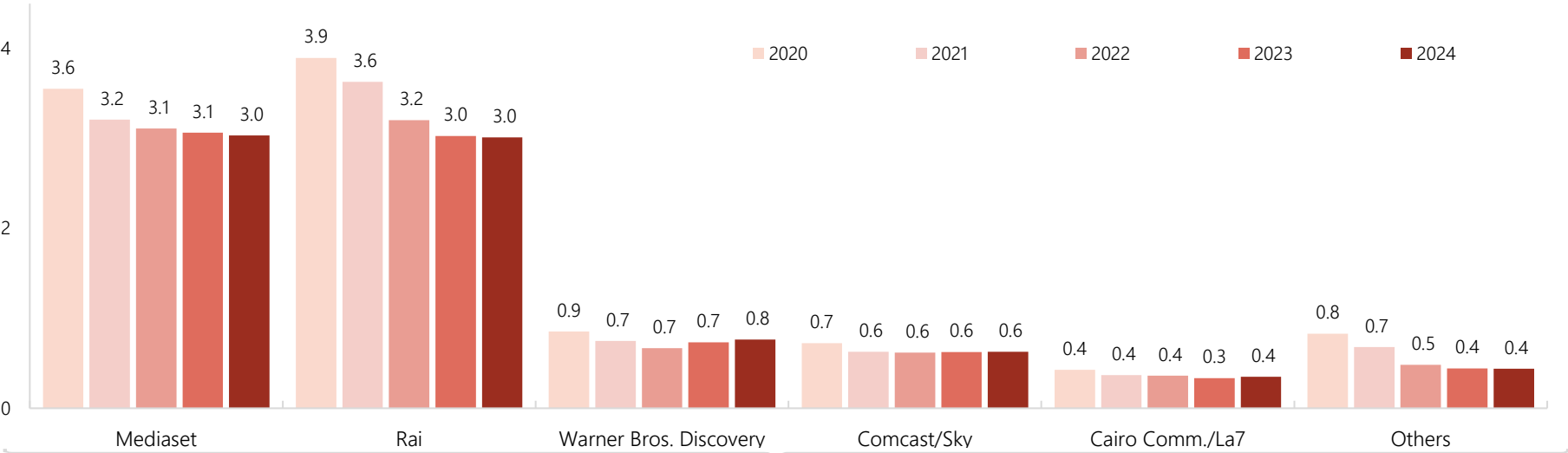
|                        | Change percentage points |         |
|------------------------|--------------------------|---------|
|                        | '20-'24                  | '23-'24 |
| Rai                    | -0.3                     | +0.1    |
| Mediaset               | =                        | -1.0    |
| Warner Bros. Discovery | +2.4                     | +0.7    |
| Comcast/Sky            | +0.2                     | -0.1    |
| Cairo Comm./La7        | +0.4                     | +0.3    |
| Others                 | -2.8                     | +0.1    |

2.3 TELEVISION (DVB-T AND SAT): LEADING TV BROADCASTER BY AUDIENCE WHOLE DAY (FY)



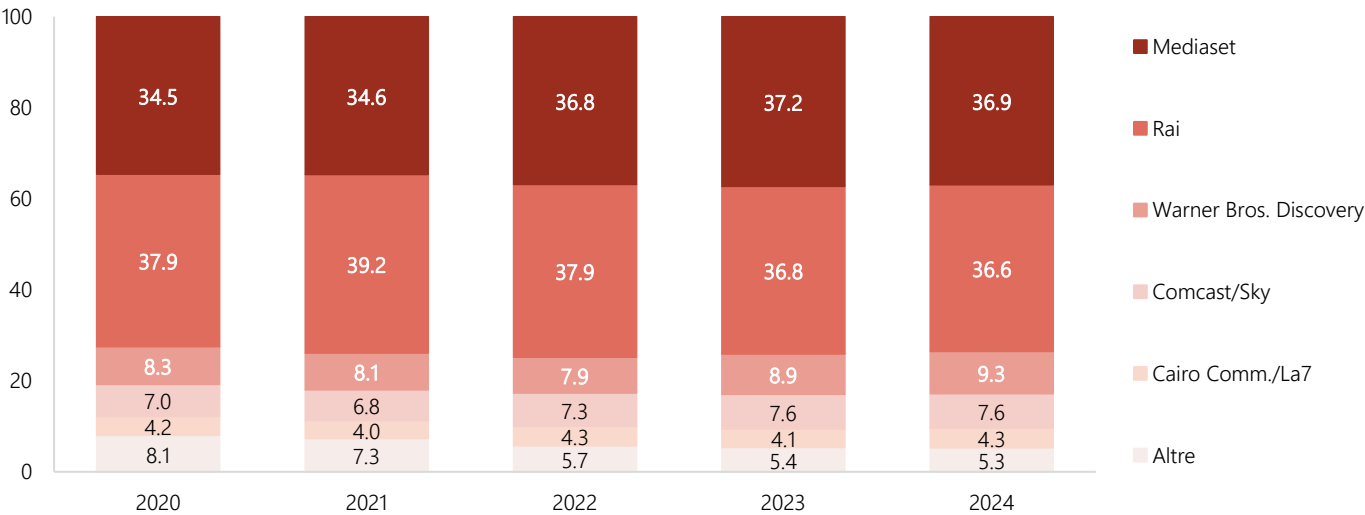
AVERAGE DAILY AUDIENCE – WHOLE DAY

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



|                        | Change % |         |
|------------------------|----------|---------|
|                        | '20-'24  | '23-'24 |
| Mediaset               | -14.6    | -1.0    |
| Rai                    | -22.7    | -0.5    |
| Warner Bros. Discovery | -10.5    | +4.2    |
| Comcast/Sky            | -13.1    | +0.4    |
| Cairo Comm./La7        | -17.7    | +4.8    |
| Others                 | -47.1    | -0.7    |

Average share in %



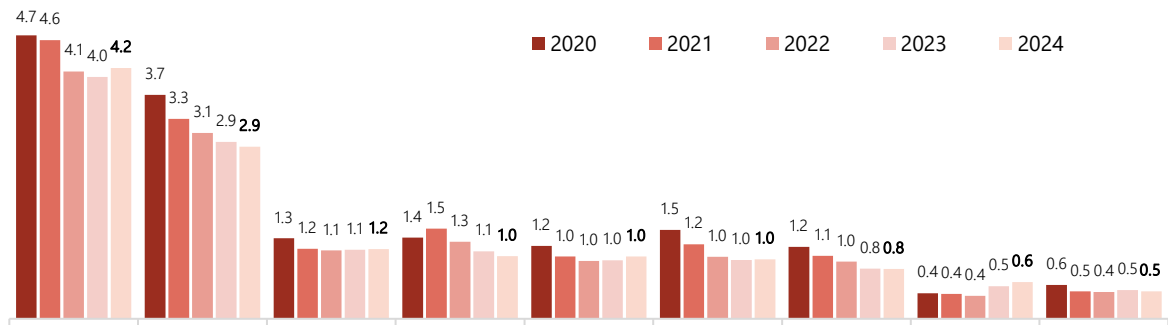
|                        | Change percentage points |         |
|------------------------|--------------------------|---------|
|                        | '20-'24                  | '23-'24 |
| Mediaset               | +2.3                     | -0.4    |
| Rai                    | -1.3                     | -0.2    |
| Warner Bros. Discovery | +1.0                     | +0.4    |
| Comcast/Sky            | +0.6                     | =       |
| Cairo Comm./La7        | +0.1                     | +0.2    |
| Others                 | -2.7                     | =       |

2.4 TELEVISION (DVB-T AND SAT): LEADING TV CHANNELS BY AUDIENCE (FY)



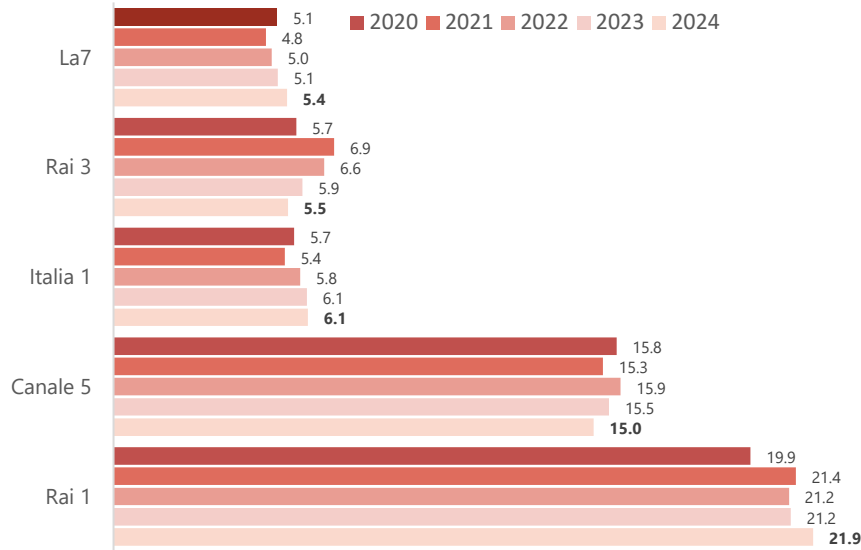
AVERAGE DAY- PRIME TIME

Average daily audience (Jan. – Dec. in million)



| Change % | Rai 1 | Canale 5 | Italia 1 | Rai 3 | La7   | Rai 2 | Rete 4 | Nove  | TV8   |
|----------|-------|----------|----------|-------|-------|-------|--------|-------|-------|
| '20-'24  | -11.5 | -23.1    | -13.3    | -23.1 | -14.6 | -32.9 | -30.7  | +44.3 | -18.8 |
| '23-'24  | +3.8  | -2.7     | +1.1     | -7.4  | +6.1  | +1.4  | -0.9   | +13.2 | -3.6  |

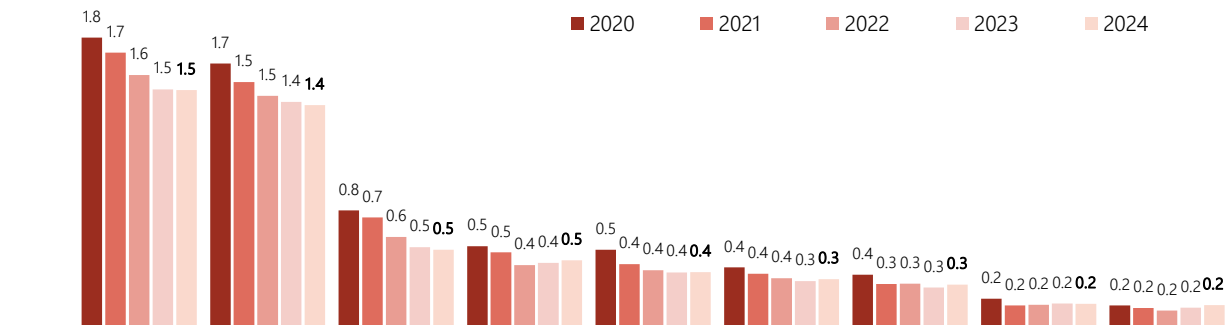
Share in %



| Channel  | Change percentage points '23-'24 |
|----------|----------------------------------|
| Rai 1    | +0.7                             |
| Canale 5 | -0.5                             |
| Italia 1 | =                                |
| Rai 3    | -0.5                             |
| La7      | +0.3                             |
| Rai 2    | +0.1                             |
| Rete 4   | -0.1                             |
| Nove     | +0.4                             |
| TV8      | -0.1                             |

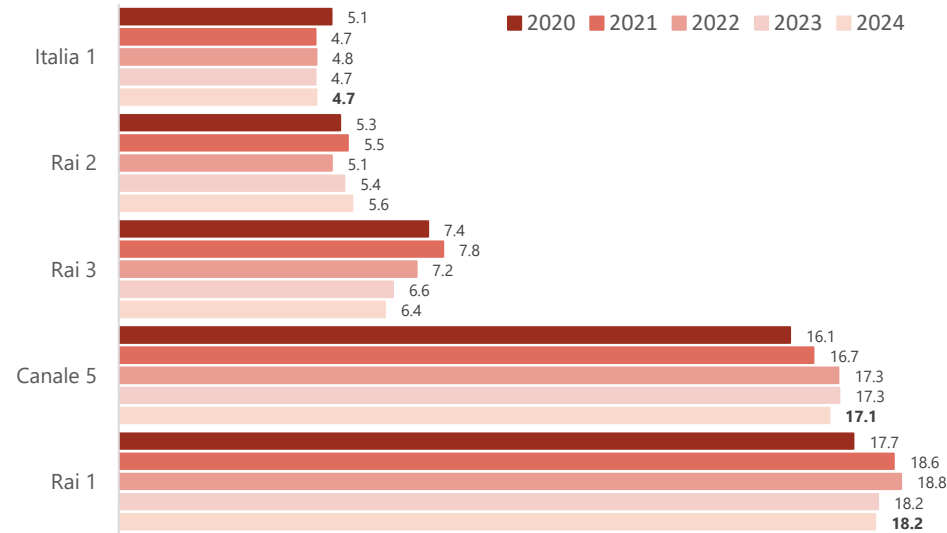
AVERAGE DAY - WHOLE DAY

Average daily audience (Jan. – Dec. in million)



| Change % | Rai 1 | Canale 5 | Rai 3 | Rai 2 | Italia 1 | Rete 4 | La7   | TV8   | Nove |
|----------|-------|----------|-------|-------|----------|--------|-------|-------|------|
| '20-'24  | -17.6 | -15.3    | -31.1 | -15.5 | -25.7    | -16.9  | -15.9 | -13.9 | +1.0 |
| '23-'24  | -0.3  | -1.4     | -2.9  | +3.6  | +0.5     | 3.4    | 6.2   | -1.0  | +8.3 |

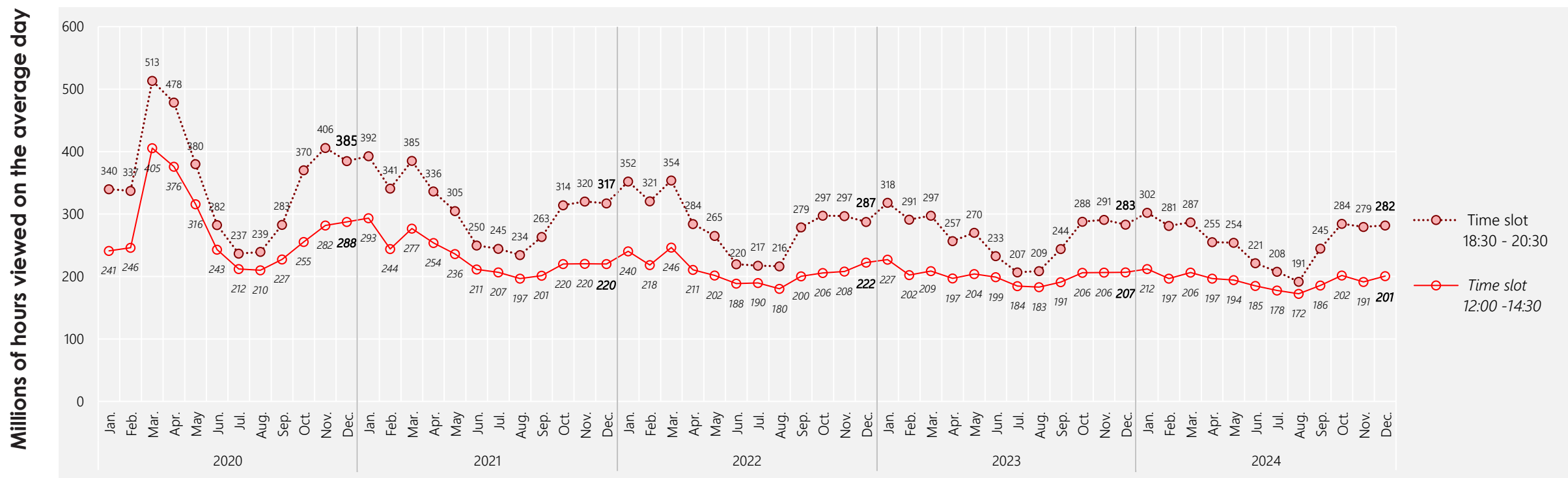
Share in %



| Channel  | Change percentage points '23-'24 |
|----------|----------------------------------|
| Rai 1    | -0.1                             |
| Canale 5 | -0.2                             |
| Rai 3    | -0.2                             |
| Rai 2    | +0.2                             |
| Italia 1 | =                                |
| Rete 4   | +0.1                             |
| La7      | +0.2                             |
| TV8      | =                                |
| Nove     | 0.2                              |

## 2.5 TELEVISION (DVB-T AND SAT): TOTAL TIME SPENT OF THE MAIN NATIONAL NEWS PROGRAMS\*

January 2020 – December 2024



Trend in time spent by audiences  
(Jan. – Dec. Time in millions of hours)

|                          | (2020)   | →        | (2021) | →       | (2022) | →       | (2023) | →       | (2024) |
|--------------------------|----------|----------|--------|---------|--------|---------|--------|---------|--------|
| Time slot: 18:30 – 21:00 | 354.3    | ↓ -12.9% | 308.5  | ↓ -8,5% | 282.4  | ↓ -6.0% | 265.6  | ↓ -3.1% | 257,5  |
|                          | ↓ -27,3% |          |        |         |        |         |        |         |        |
| Time slot: 12:00 – 14:30 | 275.1    | ↓ -15.8% | 231.7  | ↓ -9,7% | 209.3  | ↓ -3.9% | 201.2  | ↓ -3.9% | 193.4  |
|                          | ↓ -29.7% |          |        |         |        |         |        |         |        |

\* Total time spent:  
is the sum of the  
time spent by  
each viewer, on  
the average day  
of the reference  
period, watching  
the editions of the  
TG in the time  
slots considered.

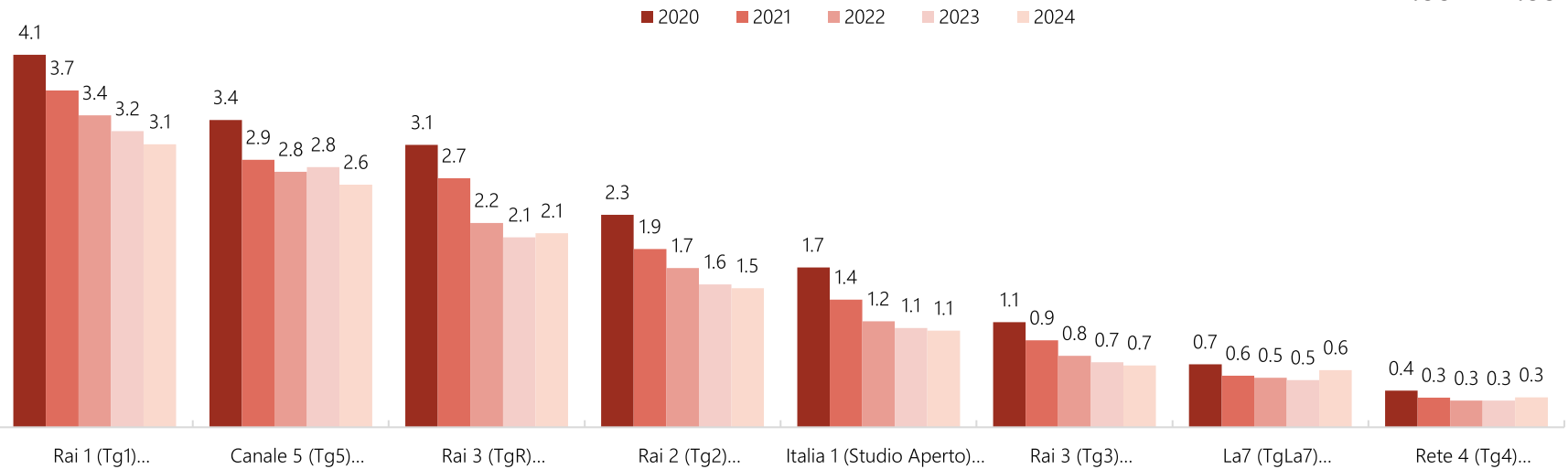
2.6 TELEVISION (DVB-T AND SAT): AVERAGE DAILY AUDIENCE OF MAIN NATIONAL NEWS PROGRAMS (FY)



Average audience since the beginning of the year (Jan. – Dec. in milioni)

TIME SLOT:

12:00 – 14:30

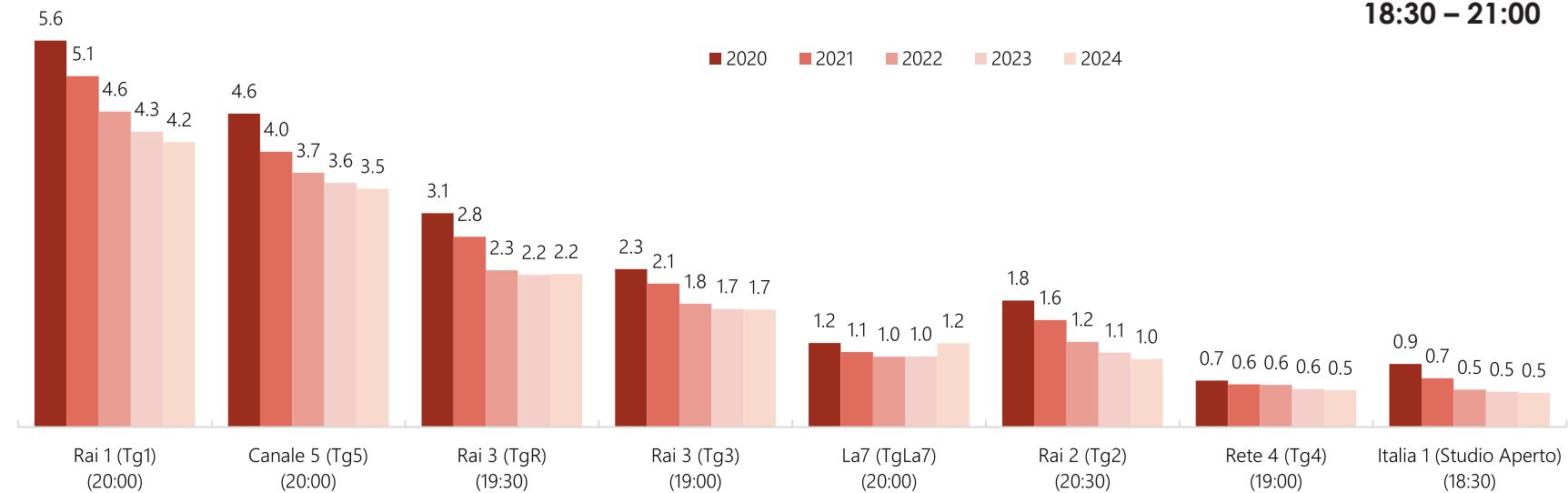


|             |                                  | Change % |         |
|-------------|----------------------------------|----------|---------|
| Channel/TG  |                                  | '20-'24  | '23-'24 |
| Rai         | Rai 1 (Tg1 - 13:30)              | -2..0    | -4.4    |
|             | Rai 2 (Tg2 - 13:00)              | -34.5    | -2.7    |
|             | Rai 3 (Tg3 - 12:00)              | -41.0    | -4.6    |
|             | Rai 3 (TgR - 14:00)              | -31.3    | +2.2    |
| Mediaset    | Canale 5 (Tg5 - 13:00)           | -21.1    | -6.8    |
|             | Italia 1 (Studio Aperto - 12:25) | -39.6    | -2.8    |
|             | Rete 4 (Tg4 - 12:00)             | -17.8    | +13.0   |
| Cairo Comm. | La7 (TgLa7 - 13:30)              | -9.0     | +21.3   |

Average audience since the beginning of the year (Jan. – Dec. in milioni)

TIME SLOT:

18:30 – 21:00



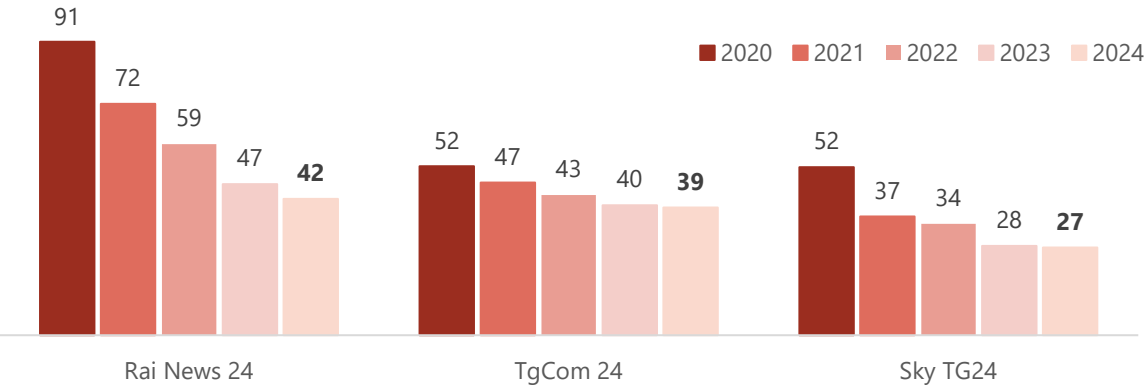
|             |                                  | Change % |         |
|-------------|----------------------------------|----------|---------|
| Channel/TG  |                                  | '20-'24  | '23-'24 |
| Rai         | Rai 1 (Tg1 - 20:00)              | -26.3    | -3.6    |
|             | Rai 2 (Tg2 - 20:30)              | -46.3    | -8.4    |
|             | Rai 3 (Tg3 - 19:00)              | -25.6    | -0.7    |
|             | Rai 3 (TgR - 19:30)              | -28.5    | +0.5    |
| Mediaset    | Canale 5 (Tg5 - 20:00)           | -24.0    | -2.4    |
|             | Italia 1 (Studio Aperto - 18:30) | -45.6    | -3.0    |
|             | Rete 4 (Tg4 - 19:00)             | -20.7    | -3.7    |
| Cairo Comm. | La7 (TgLa7 - 20:00)              | -0.3     | +18.5   |

## 2.7 TELEVISION (DVB-T AND SAT): AVERAGE DAILY AUDIENCE OF MAIN NATIONAL «ALL NEWS PROGRAMS»

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

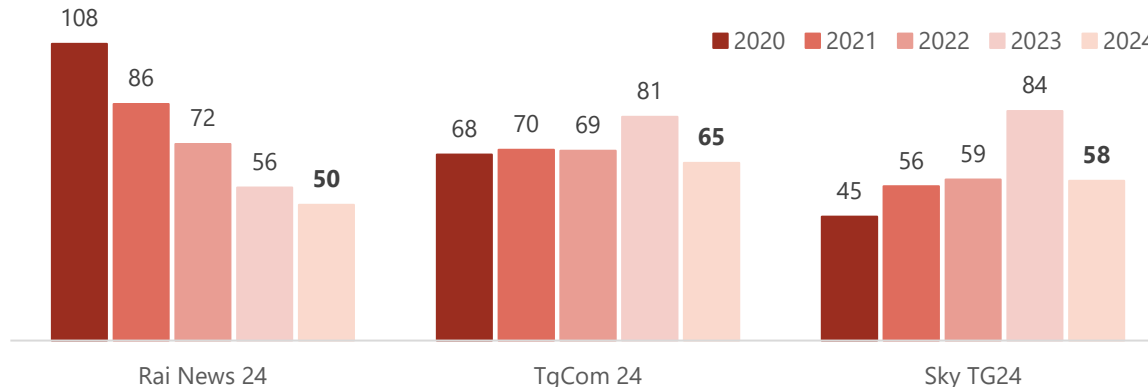
### AVERAGE DAY – PRIME TIME

Average daily audience (Jan. – Dec. in thousand)



### AVERAGE DAY – WHOLE DAY

Average daily audience (Jan. – Dec. in thousand)



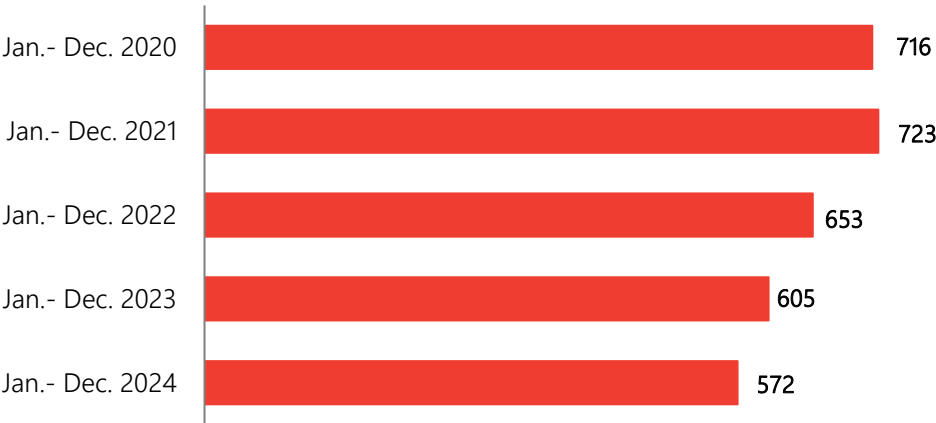
### Average daily audience (Jan. – Dec. in thousand)

|             | Year      | Whole Day | 07:00 09:00 | 12:00 15:00 | 20:30 22:30 |
|-------------|-----------|-----------|-------------|-------------|-------------|
| Rai News 24 | 2024      | 42        | 86          | 50          | 35          |
|             | 2023      | 47        | 92          | 56          | 40          |
|             | 2022      | 59        | 112         | 72          | 48          |
|             | 2021      | 72        | 145         | 86          | 56          |
|             | 2020      | 91        | 163         | 108         | 71          |
| Change %    | 2023-2024 | -9.7      | -6.7        | -11.3       | -10.5       |
|             | 2020-2024 | -53.6     | -47.2       | -54.2       | -50.1       |
| TgCom 24    | 2024      | 39        | 79          | 66          | 34          |
|             | 2023      | 40        | 78          | 68          | 35          |
|             | 2022      | 43        | 78          | 70          | 40          |
|             | 2021      | 47        | 84          | 69          | 35          |
|             | 2020      | 52        | 78          | 81          | 35          |
| Change %    | 2023-2024 | -1.9      | +1.2        | -2.3        | -3.3        |
|             | 2020-2024 | -24.5     | +1.1        | -18.7       | -1.1        |
| Sky Tg24    | 2024      | 27        | 50          | 45          | 27          |
|             | 2023      | 28        | 50          | 45          | 29          |
|             | 2022      | 34        | 52          | 56          | 37          |
|             | 2021      | 37        | 53          | 59          | 39          |
|             | 2020      | 52        | 58          | 84          | 61          |
| Change %    | 2023-2024 | -1.8      | -0.8        | -0.4        | -5.7        |
|             | 2020-2024 | -47.7     | -14.0       | -46.3       | -56.0       |

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



CUMULATIVE SALES  
(copies sold in millions)



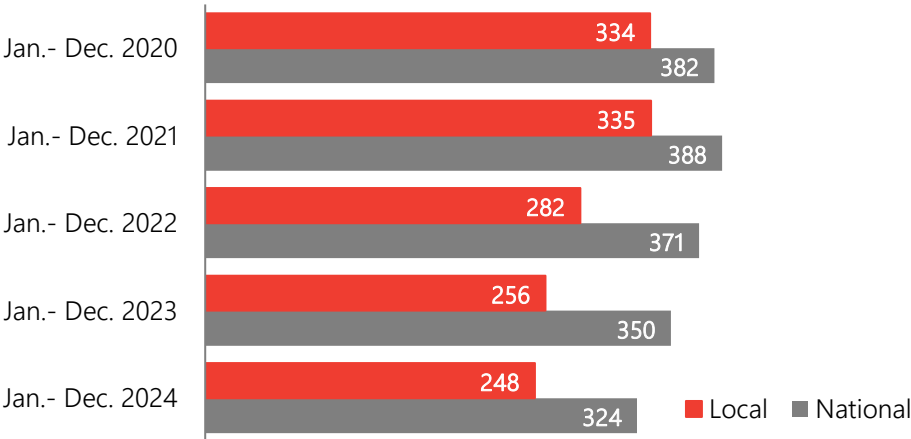
Change in %  
Period Jan. – Dec.

|                             | (2023 – 2024) | (2020 – 2024) |
|-----------------------------|---------------|---------------|
| Total copies:               | -5.5 ↓        | -20.2 ↓       |
| Paper copies:               | -7.6 ↓        | -32.2 ↓       |
| Digital copies:             | +0.8 ↑        | +59.5 ↑       |
| National newspapers copies: | -7.3 ↓        | -15.2 ↓       |
| Local newspapers copies:    | -3.1 ↓        | -25.9 ↓       |

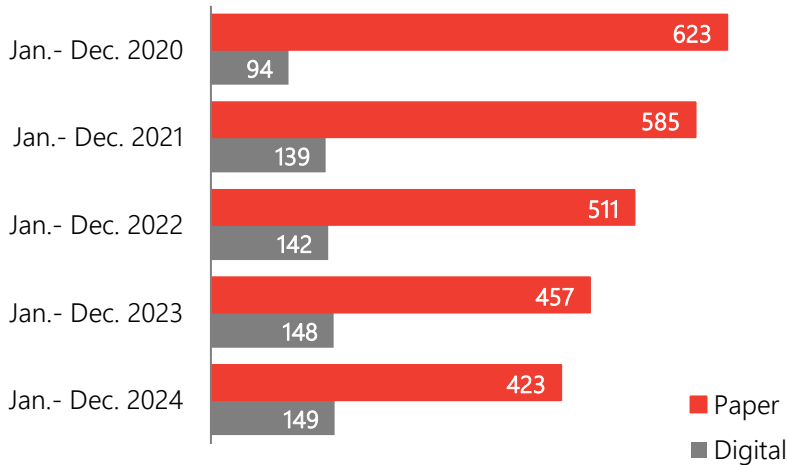
**Note:** for the overall copies for the years 2020-2023, data extracted from the declarations to the Economic System Information (ESI) were used and, where not available, the certified data (average year) from ADS was included. The figure for 2024 is the result of AGCOM elaborations from the estimated monthly data declared to ADS.

CUMULATIVE SALES BY TYPOLOGY  
(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



PAPER vs. DIGITAL COPIES



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

### PAPER COPIES BY NEWSPAPER MACRO-CATEGORY

(copies sold in millions)

|                     |                       | Jan. – Dec. | 2020 | 2021 | 2022 | 2023 | 2024 |
|---------------------|-----------------------|-------------|------|------|------|------|------|
| National newspapers | General press - Top 5 |             | 190  | 169  | 153  | 136  | 125  |
|                     | Other general press   |             | 49   | 45   | 41   | 37   | 33   |
|                     | Business              |             | 58   | 55   | 54   | 50   | 46   |
|                     | Sport                 |             | 24   | 20   | 17   | 16   | 14   |
| Local newspapers    | Top 10                |             | 128  | 117  | 107  | 96   | 89   |
|                     | Others                |             | 174  | 178  | 139  | 122  | 116  |

|                     | Change in %         | Jan. – Dec. | ('23 – '24) | ('20 – '24) |
|---------------------|---------------------|-------------|-------------|-------------|
| National newspapers | General press Top 5 |             | -34.5 ↓     | -8.6 ↓      |
|                     | Other general press |             | -33.0 ↓     | -11.5 ↓     |
|                     | Business            |             | -19.5 ↓     | -7.7 ↓      |
|                     | Sports              |             | -41.9 ↓     | -11.5 ↓     |
| Local newspapers    | Top 10              |             | -30.2 ↓     | -6.9 ↓      |
|                     | Others              |             | -33.6 ↓     | -5.2 ↓      |

### DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in millions)

|                     |                       | Jan. – Dec. | 2020 | 2021 | 2022 | 2023 | 2024 |
|---------------------|-----------------------|-------------|------|------|------|------|------|
| National newspapers | General press - Top 5 |             | 36   | 54   | 56   | 60   | 58   |
|                     | Other general press   |             | 12   | 14   | 15   | 16   | 16   |
|                     | Business              |             | 12   | 26   | 27   | 26   | 25   |
|                     | Sport                 |             | 2    | 5    | 7    | 8    | 7    |
| Local newspapers    | Top 10                |             | 13   | 14   | 15   | 15   | 15   |
|                     | Others                |             | 19   | 25   | 21   | 23   | 28   |

|                     | Change in %         | Jan. – Dec. | ('23 – '24) | ('20 – '24) |
|---------------------|---------------------|-------------|-------------|-------------|
| National newspapers | General press Top 5 |             | 58.9 ↑      | -3.0 ↑      |
|                     | Other general press |             | 40.5 ↑      | -0.2 ↓      |
|                     | Business            |             | 117.9 ↓     | -3.8 ↓      |
|                     | Sports              |             | 270.7 ↓     | -11.5 ↓     |
| Local newspapers    | Top 10              |             | 15.5 ↑      | -1.0 ↓      |
|                     | Others              |             | 44.7 ↑      | 21.9 ↑      |

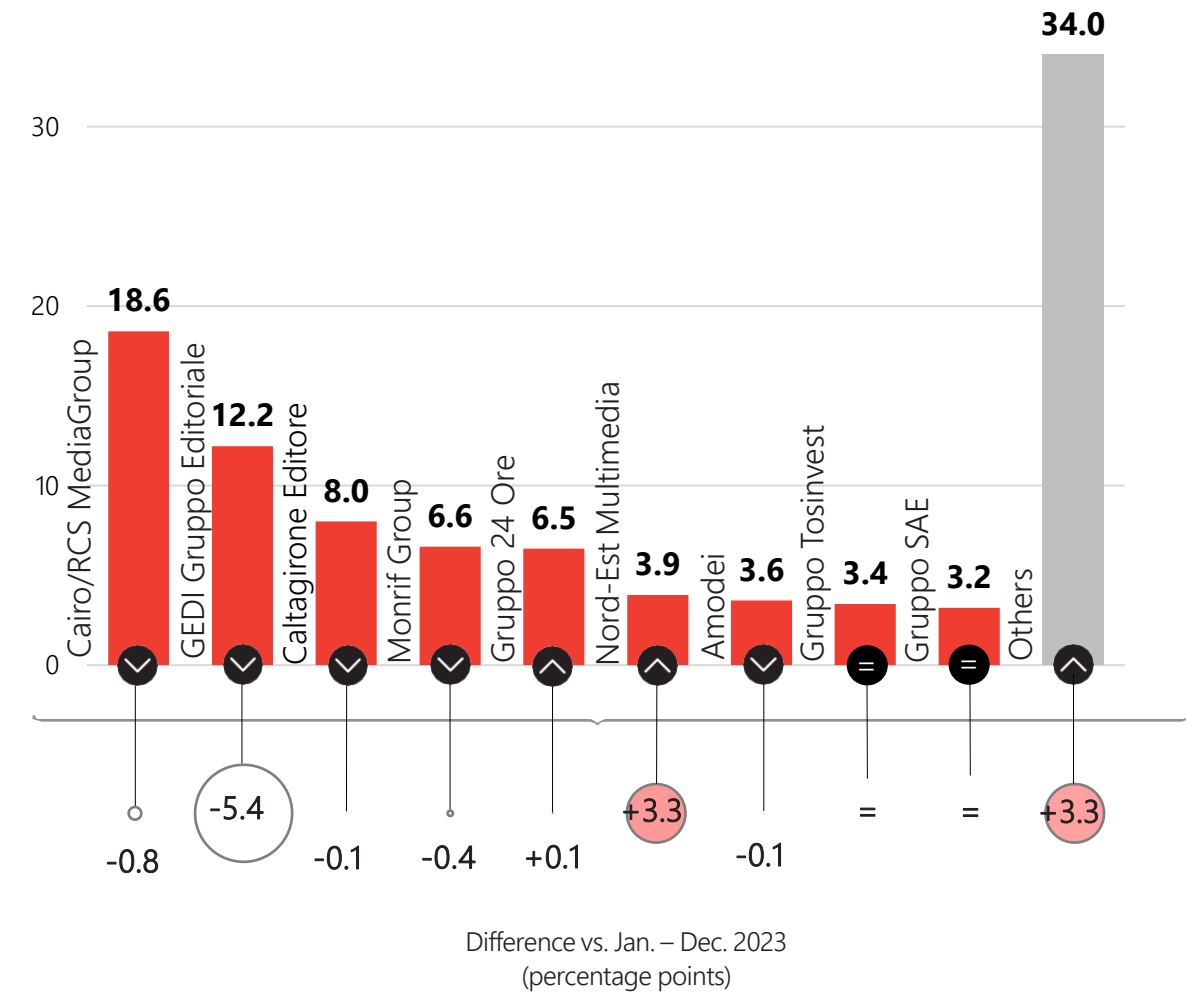
#### Newspapers categories

- **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

2.10 NEWSPAPERS: VOLUME SALES AND SHARES BY MAIN PUBLISHING GROUPS

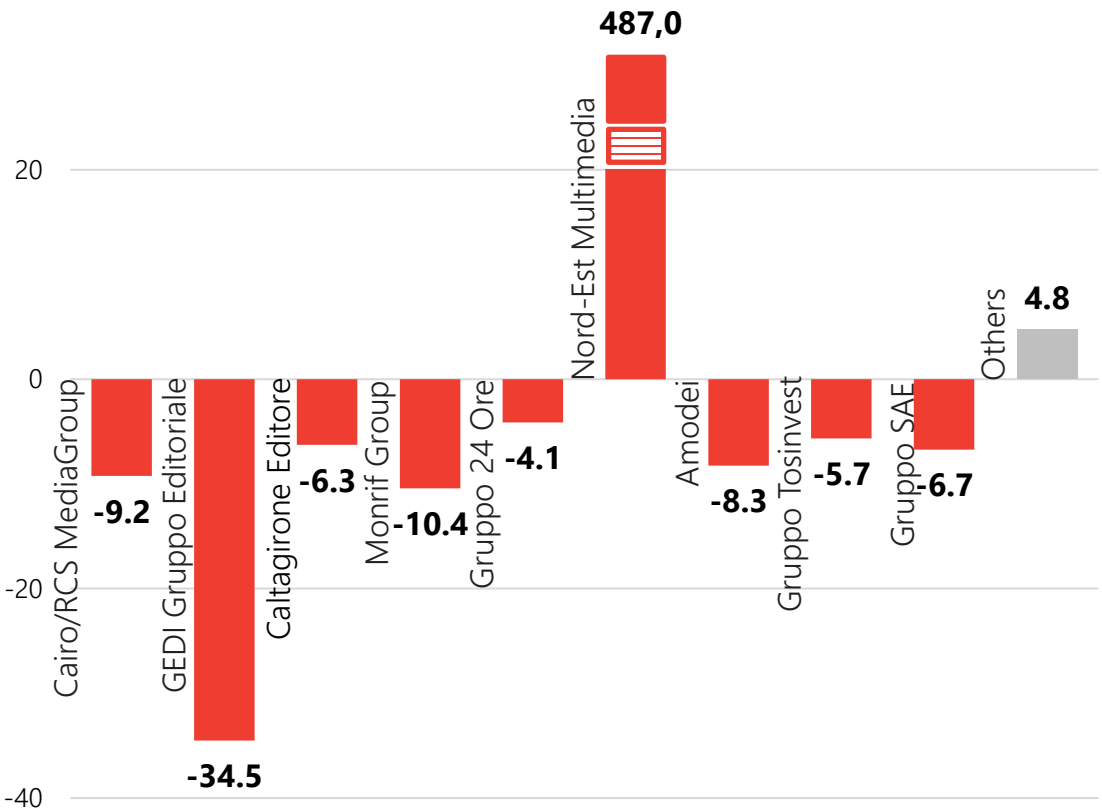
DISTRIBUTION OF TOTAL COPIES SOLD SINCE THE BEGINNING OF THE YEAR BY PUBLISHING GROUPS (%)

JANUARY – DECEMBER 2024



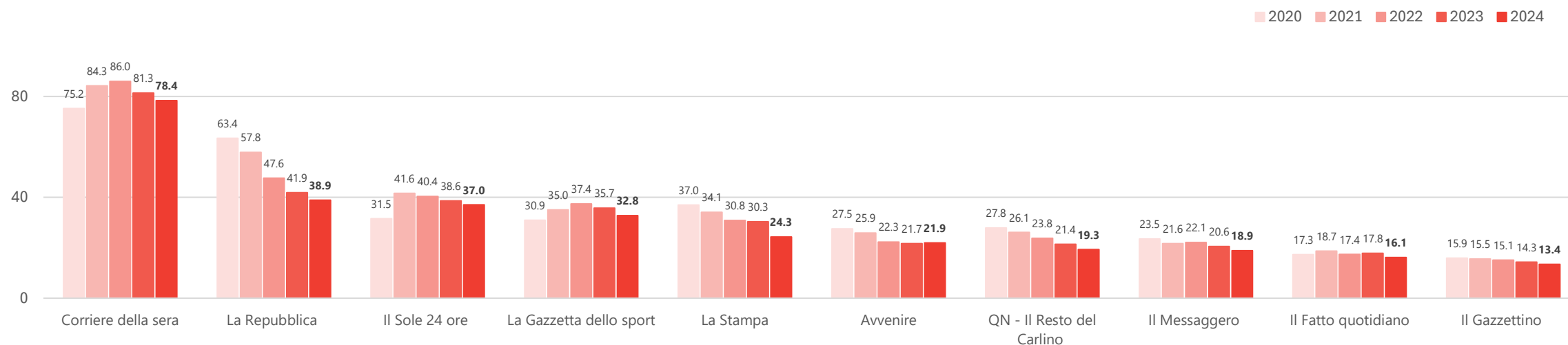
CHANGE IN TOTAL COPIES SOLD (%)

Difference vs. Jan. – Dec. 2023



## 2.11 NEWSPAPERS: DISTRIBUTION OF COPIES SOLD BY MAJOR NEWSPAPERS

Distribution of copies sold since the beginning of the year (Jan. – Dec in million)



| Change.% 24/20      | Corriere della Sera | La Repubblica | Il Sole 24 ore | La Gazzetta dello Sport | La Stampa | Avvenire | QN-II Resto del Carlino | Il Messaggero | Il Fatto Quotidiano | Il Gazzettino |
|---------------------|---------------------|---------------|----------------|-------------------------|-----------|----------|-------------------------|---------------|---------------------|---------------|
| <b>TOTAL COPIES</b> | 3.2                 | -24.5         | 5.5            | 1.9                     | -12.7     | -5.6     | -8.5                    | -4.6          | -1.1                | -2.5          |
| PAPER COPIES        | -19.4               | -20.8         | -7.5           | -3.4                    | -13.5     | -6.3     | -9.0                    | -5.6          | -3.5                | -3.4          |
| DIGITAL COPIES      | 22.6                | -3.7          | 13.0           | 5.3                     | 0.8       | 0.7      | 0.4                     | 1.0           | 2.3                 | 1.0           |

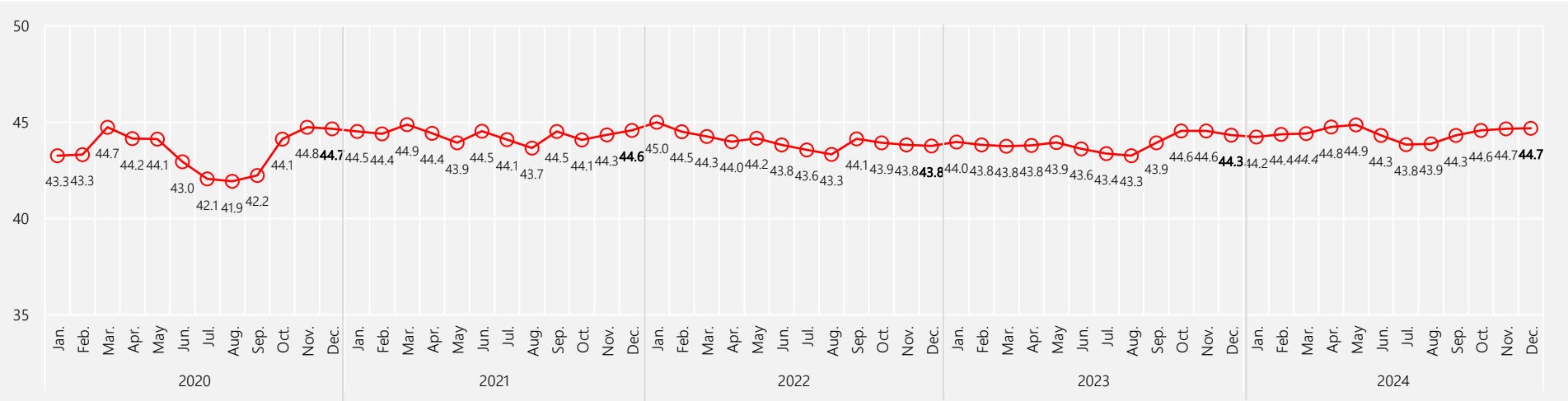
| Change.% 24/23      | Corriere della Sera | La Repubblica | Il Sole 24 ore | La Gazzetta dello Sport | La Stampa | Avvenire | QN-II Resto del Carlino | Il Messaggero | Il Fatto Quotidiano | Il Gazzettino |
|---------------------|---------------------|---------------|----------------|-------------------------|-----------|----------|-------------------------|---------------|---------------------|---------------|
| <b>TOTAL COPIES</b> | -3.0                | -3.0          | -1.6           | -2.9                    | -6.1      | 0.2      | -2.1                    | -1.7          | -1.7                | -0.9          |
| PAPER COPIES        | -4.8                | -2.5          | -0.9           | -1.9                    | -2.9      | 0.1      | -2.3                    | -1.5          | -1.4                | -0.7          |
| DIGITAL COPIES      | 1.9                 | -0.5          | -0.7           | -1.1                    | -3.2      | 0.2      | 0.1                     | -0.2          | -0.2                | -0.2          |

(\*) – includes Monday edition

2.12 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS



UNIQUE USERS IN MILLIONS (January 2020 – December 2024)

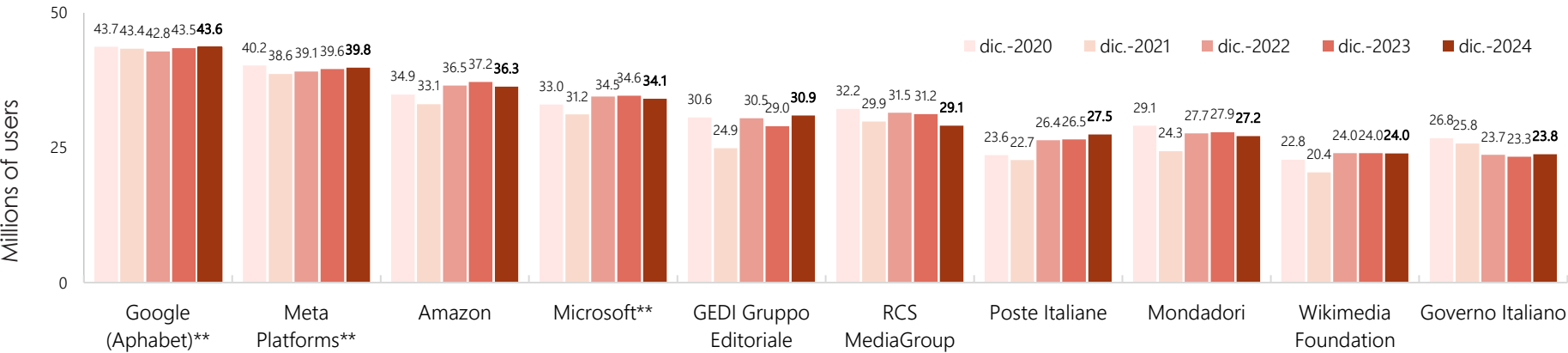


44 million and 695 thousand unique users logged on to the internet in December 2024 (+364 thousand compared to December 2023)

Approximately 70 hours and 10 minute spent, on average, by each user surfing the Internet in December 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.

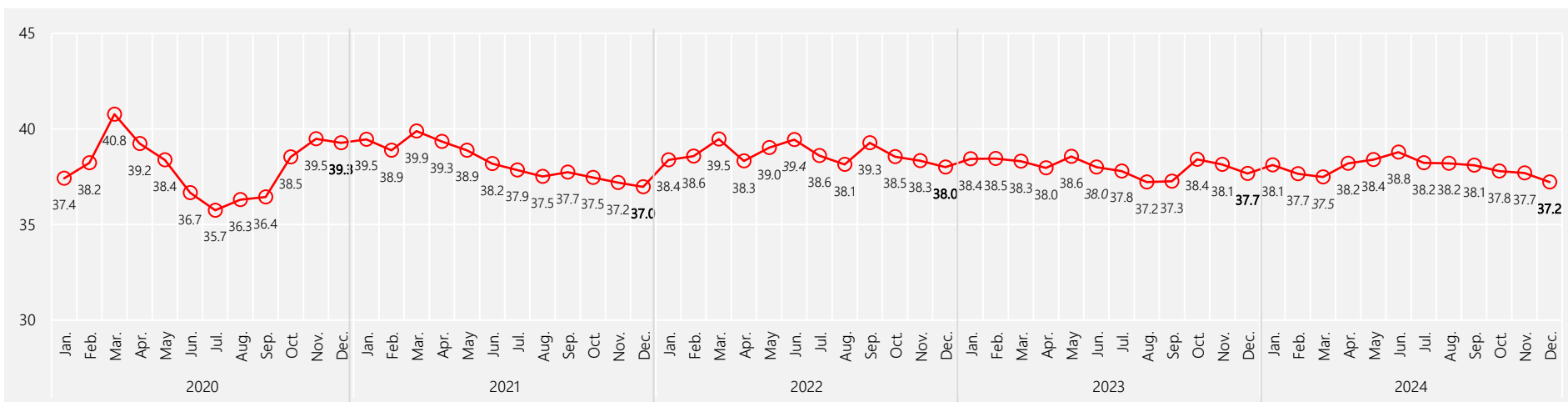
Source: Agcom elaboration on data from Audicom – sistema Audiweb

\*\* Google, Meta Facebook, Amazon, Microsoft and Poste Italiane are detected only through the Audiweb Panel.

## 2.13 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

### UNIQUE USERS IN MILLIONS

(January 2020 – December 2024)

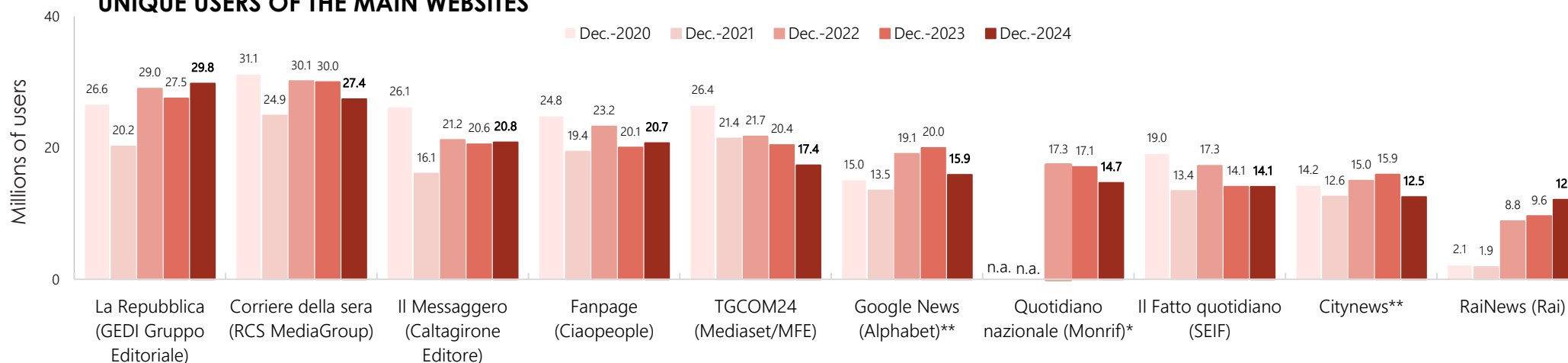


**37 million and 221 thousand** unique users logged on to the generalist news sites/APPs in December 2024 (**-454 thousand** users compared to December 2023)

About **56 minute** spent, on average, by each user browsing general news websites/APPs in December 2024

### UNIQUE USERS OF THE MAIN WEBSITES

Dec.-2020 Dec.-2021 Dec.-2022 Dec.-2023 Dec.-2024



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

\* n.a.: 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 Sep. 2022 and Sep. 2023 are not directly comparable with those of previous years.

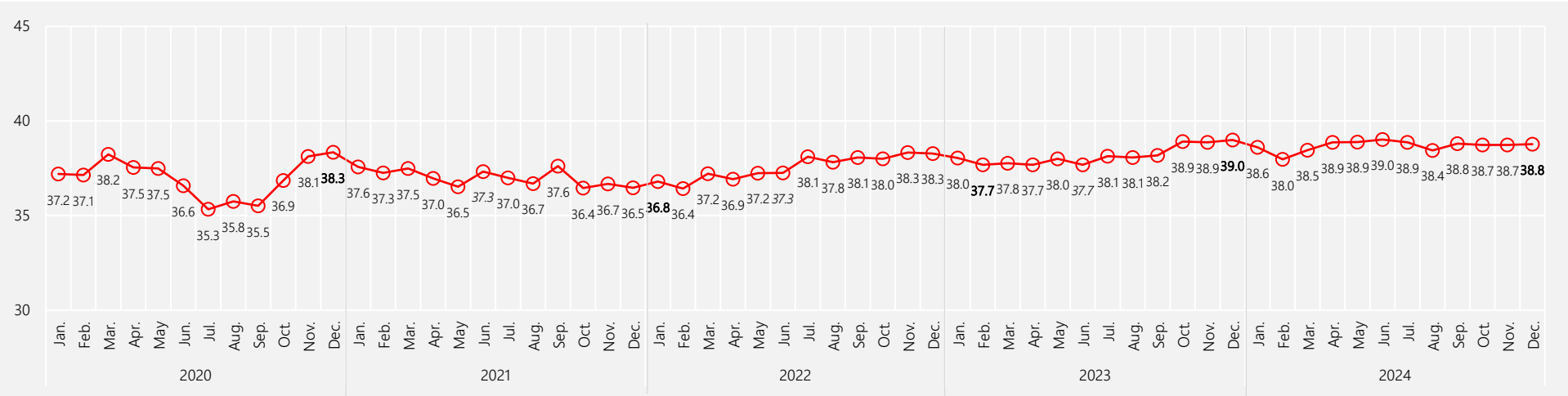
\*\* Google News and Citynews are detected only through the Audiweb Panel.

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

2.14 PLATFORMS: E-COMMERCE WEBSITES/APP UNIQUE USERS



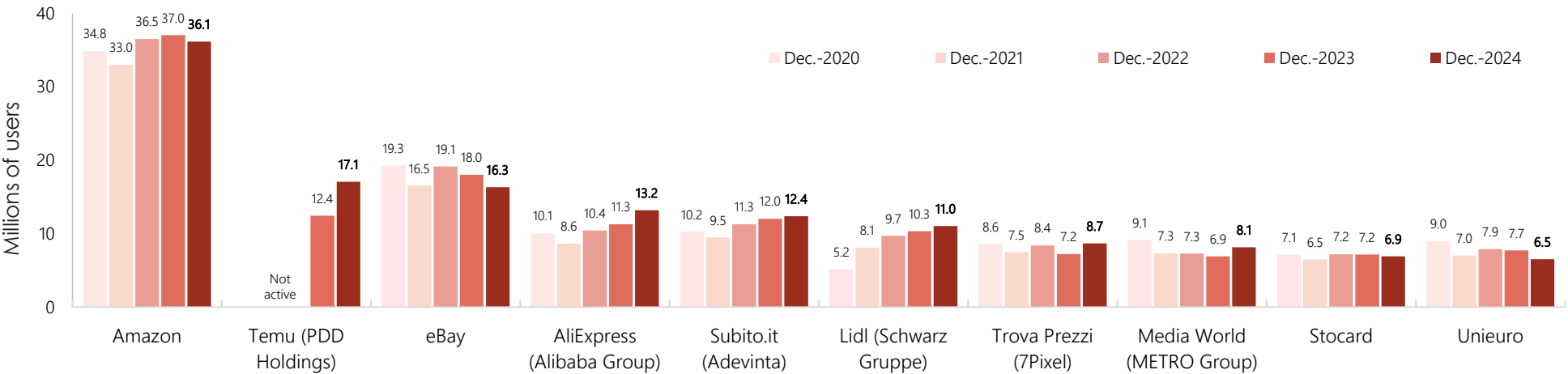
UNIQUE USERS IN MILLIONS (January 2020 – December 2024)



38 million and 774 thousand unique users logged on to e-commerce sites/APPs in December 2024 (-215 thousand users compared to December 2023)

3 hour and 2 minute spent, on average, by each user browsing e-commerce websites/APPs in December 2023

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.

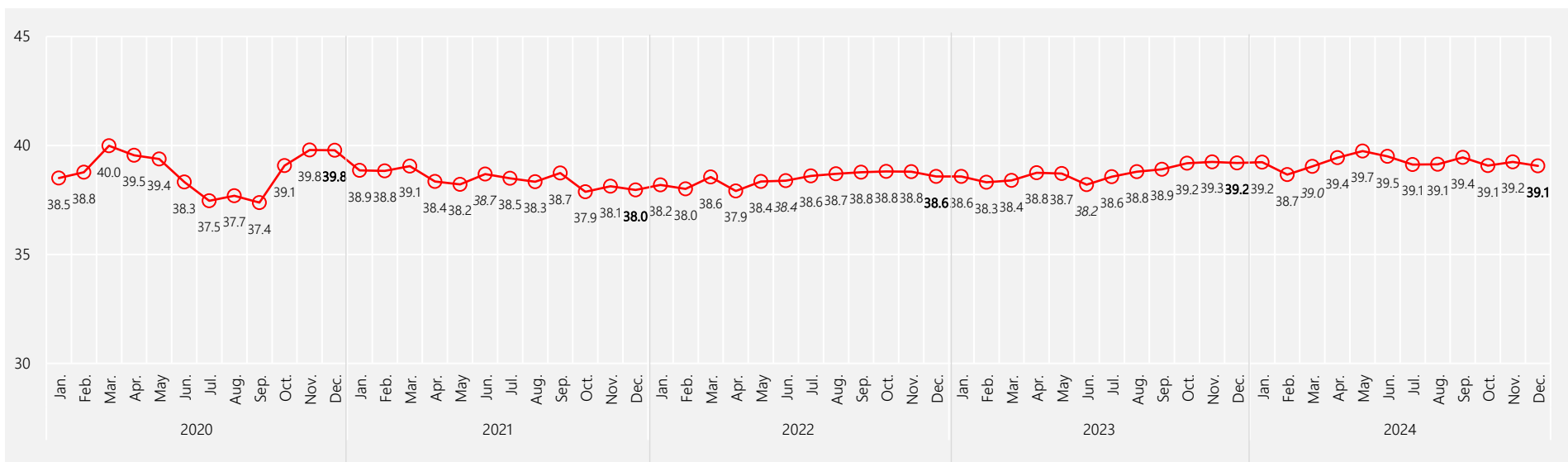
Source: Agcom elaboration on data from Audicom – sistema Audiweb (Values referring to the category: «Multi-category Commerce»)

\* The brands represented are detected only through the Audiweb Panel.

## 2.15 PLATFORMS: SOCIAL NETWORK WEBSITES/APP UNIQUE USERS

### UNIQUE USERS IN MILLIONS

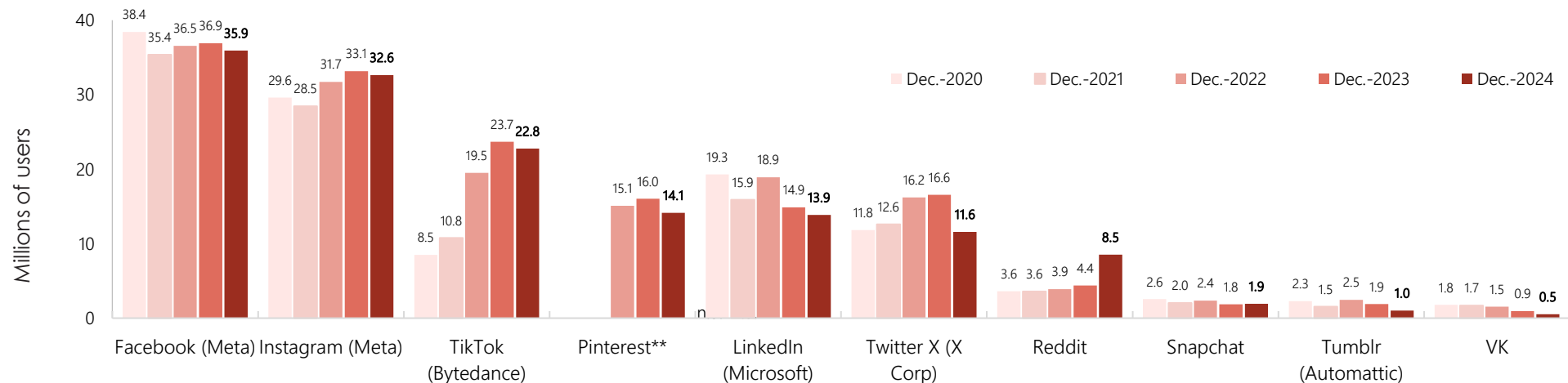
(January 2020 – December 2024)



**39** million unique users logged on to social networking sites/APPs in December 2024 (**-141** thousand users compared to December 2023)

**22 hour and 38 minute** spent, on average, by each user browsing social networking websites/APPs in December 2023

### 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»)

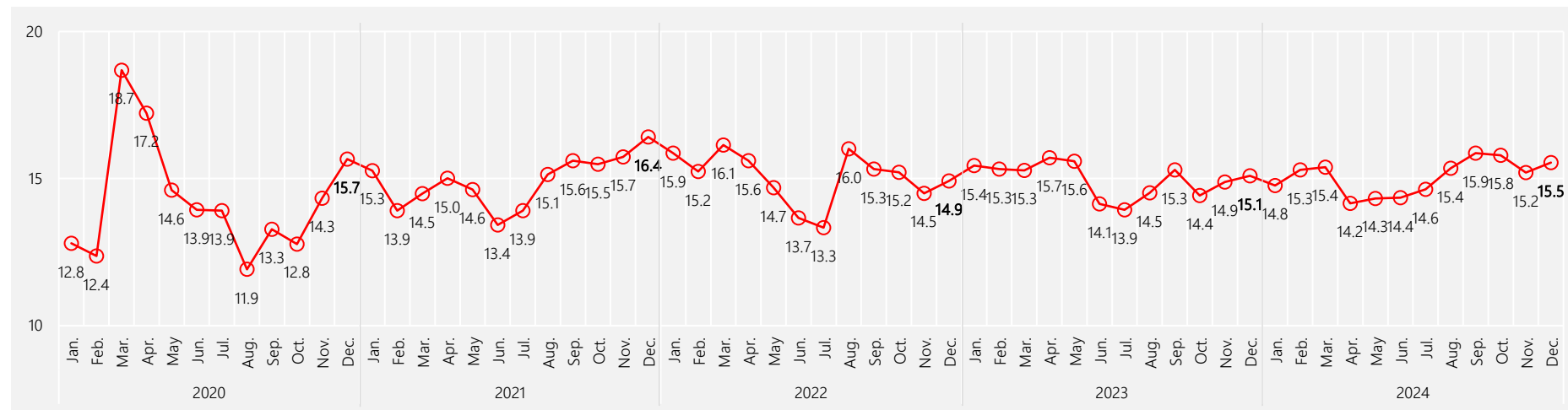
\* The chart shows the unique users of the top 10 Brands that belong to the sub-category "Member Communities" and offer Social Networking services in Italy.

\*\* 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.

## 2.16 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

### UNIQUE USERS IN MILLIONS

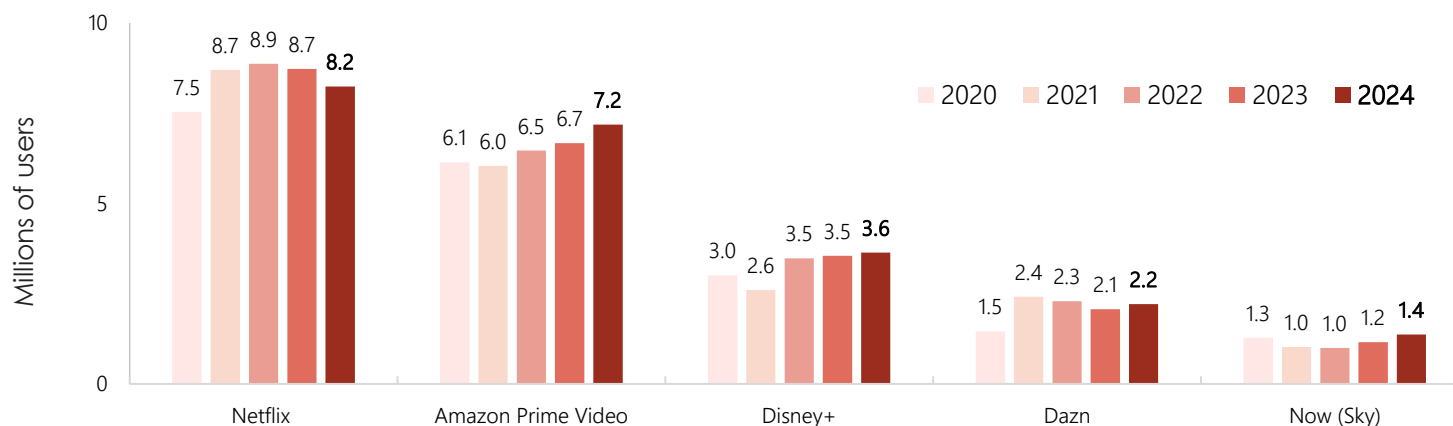
(January 2020 – December 2024)



**15 million and 546 thousand** unique users logged on to video-on-demand sites/APPs in December 2024 (+**453 thousand** compared to December 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. – Dec..)



\* Note: platforms with an average time spent per user in the past nine months not exceeding 2 million 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.

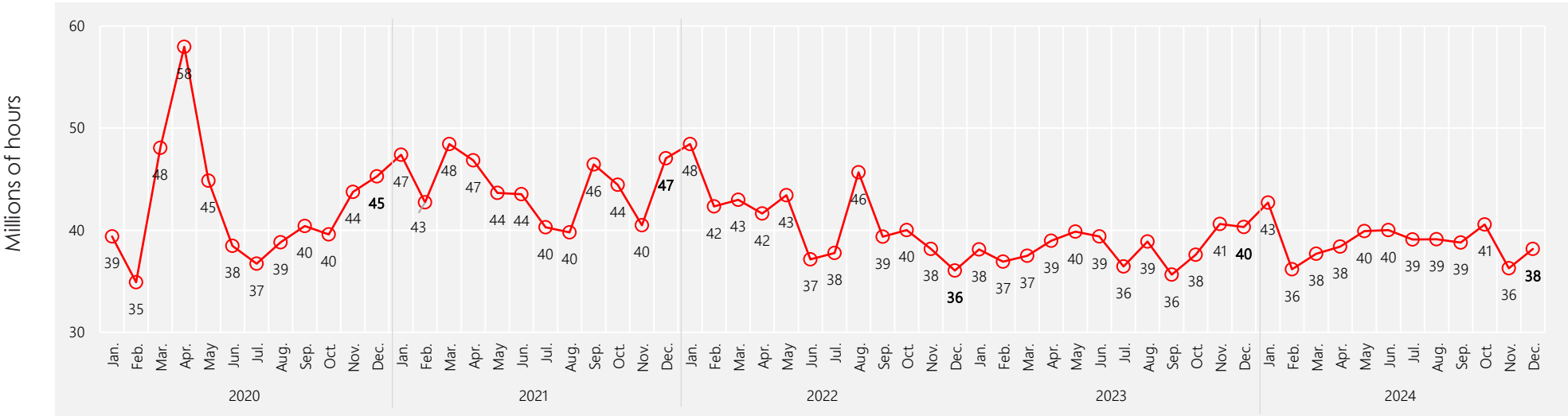
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

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

2.17 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

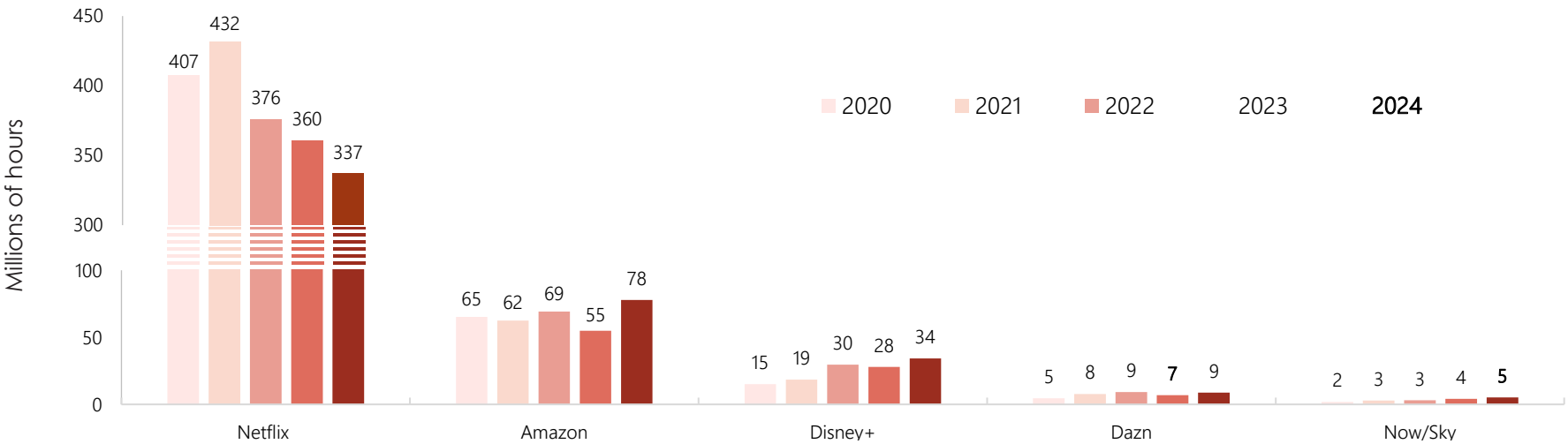


TOTAL HOURS SPENT (January 2020 – December 2024)



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 27 minute** in December 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: 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.

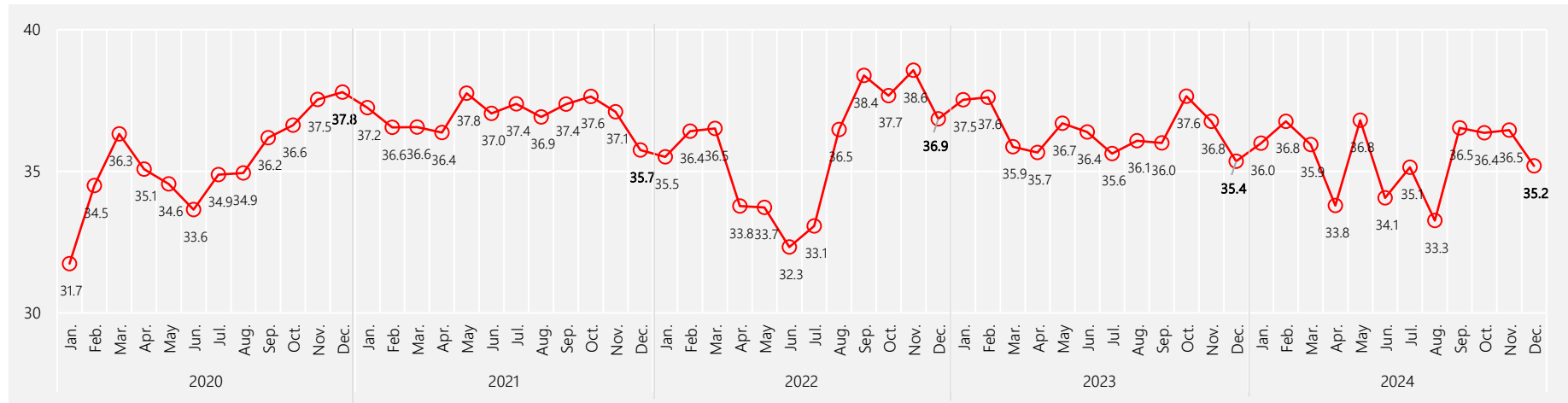
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

\* Note: the total hours of the first 5 operators for unique users (slide 2.16) are represented. For Netflix, the figure for December 2024 was estimated.

2.18 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS



UNIQUE USERS IN MILLIONS (January 2020 – December 2024)

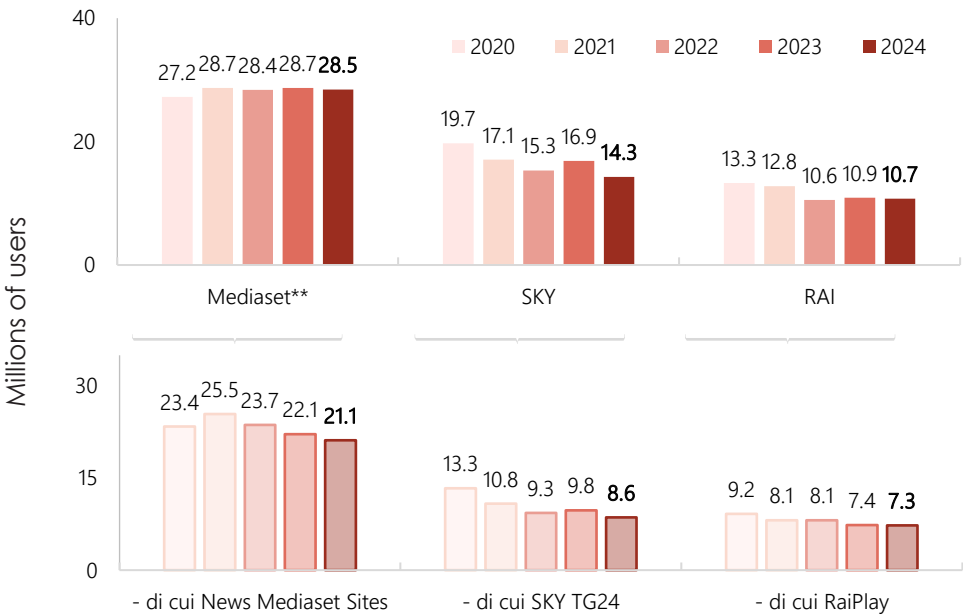


**35,2** million unique users logged on to free video-on-demand sites/APPs in December 2024 (slightly down from December 2023)

**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).

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. The latter component has amounted to an average of about 15.507 million unique users since the beginning of the year.

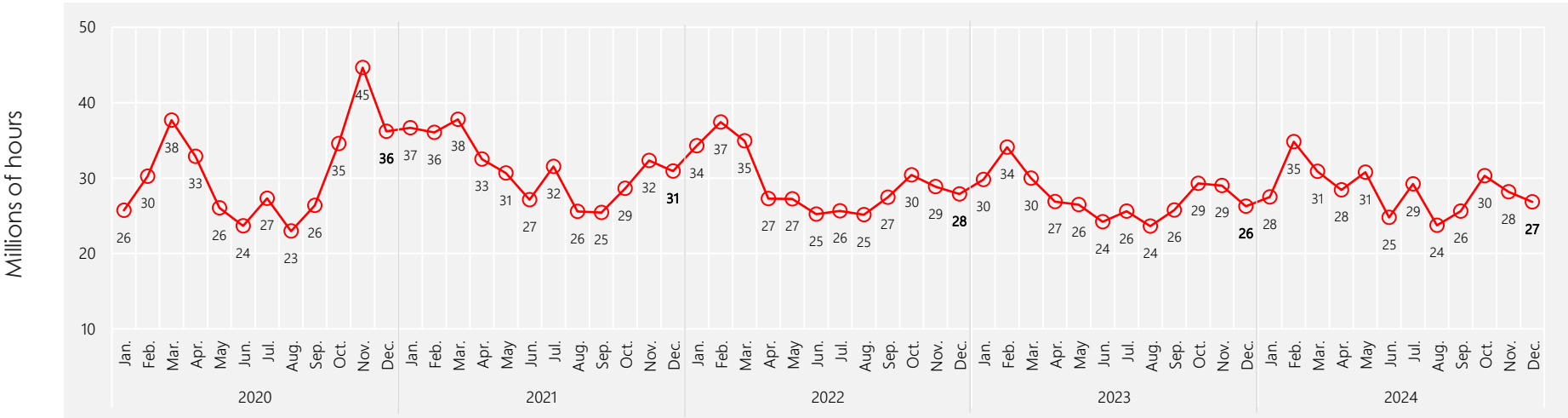
Please note that due to editorial choices for some sites and applications (Mediaset Infinity Sites; Warner Bros. Discovery) it is not possible to unbundle the paid VOD portion.

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

2.19 PLATFORMS: TIME SPENT ON FREE VIDEO ON DEMAND PLATFORMS



TOTAL HOURS SPENT (January 2020 – December 2024)

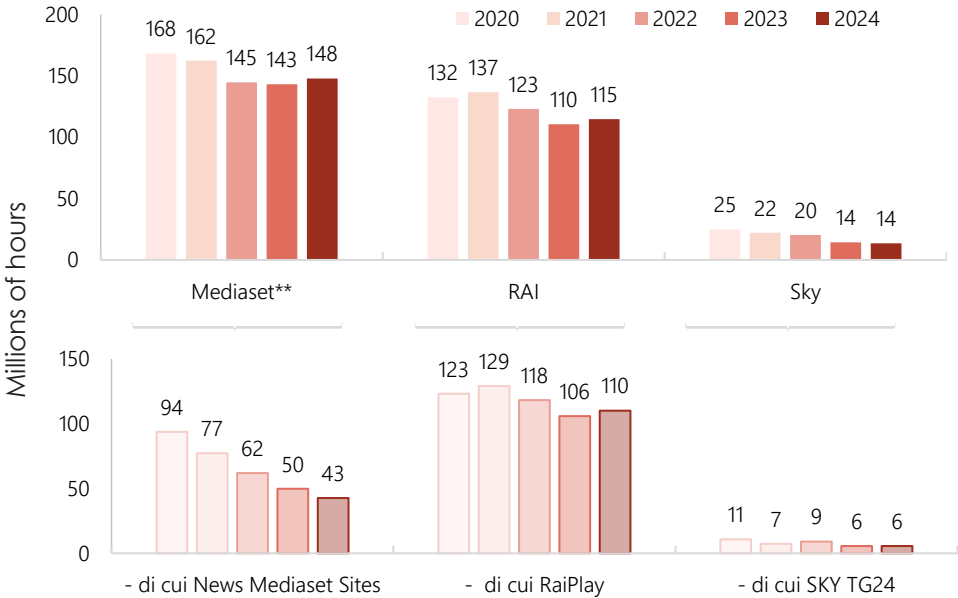


The average time spent per month by each visitor on free video on demand platforms is **45 minute** in December 2024

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 TGCOM 24 Sites Jan.19 - Spr.22; Mediaset.it Sites since May 22). Rai (RaiPlay; Rai News. Rai Sport). Discovery (Discovery Inc). Sky (Cielotv.it. TV8 Sites. Sky.it Sprt HD. Sky.it TG24 HD. Sky.it Uno HD gen.19-apr.19; Sky Free ToAir; Sky sport; Sky TG24. Sky Entertainment mag.19 - giu.22). Cairo/La 7 (La7). Paramount/Viacom (Nickelodeon Kids and Family; MTV Italy). Rakuten (VIKI.COM). Warner (TBS Entertainment Digital). De Agostini (DEABYDAY.TV; DEAKIDS.IT). VVVVID.IT; A+E Networks Digital; SPORTITALIA.COM; TV2000.IT; POPCORNTV.IT; WITTYTV.IT.

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

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

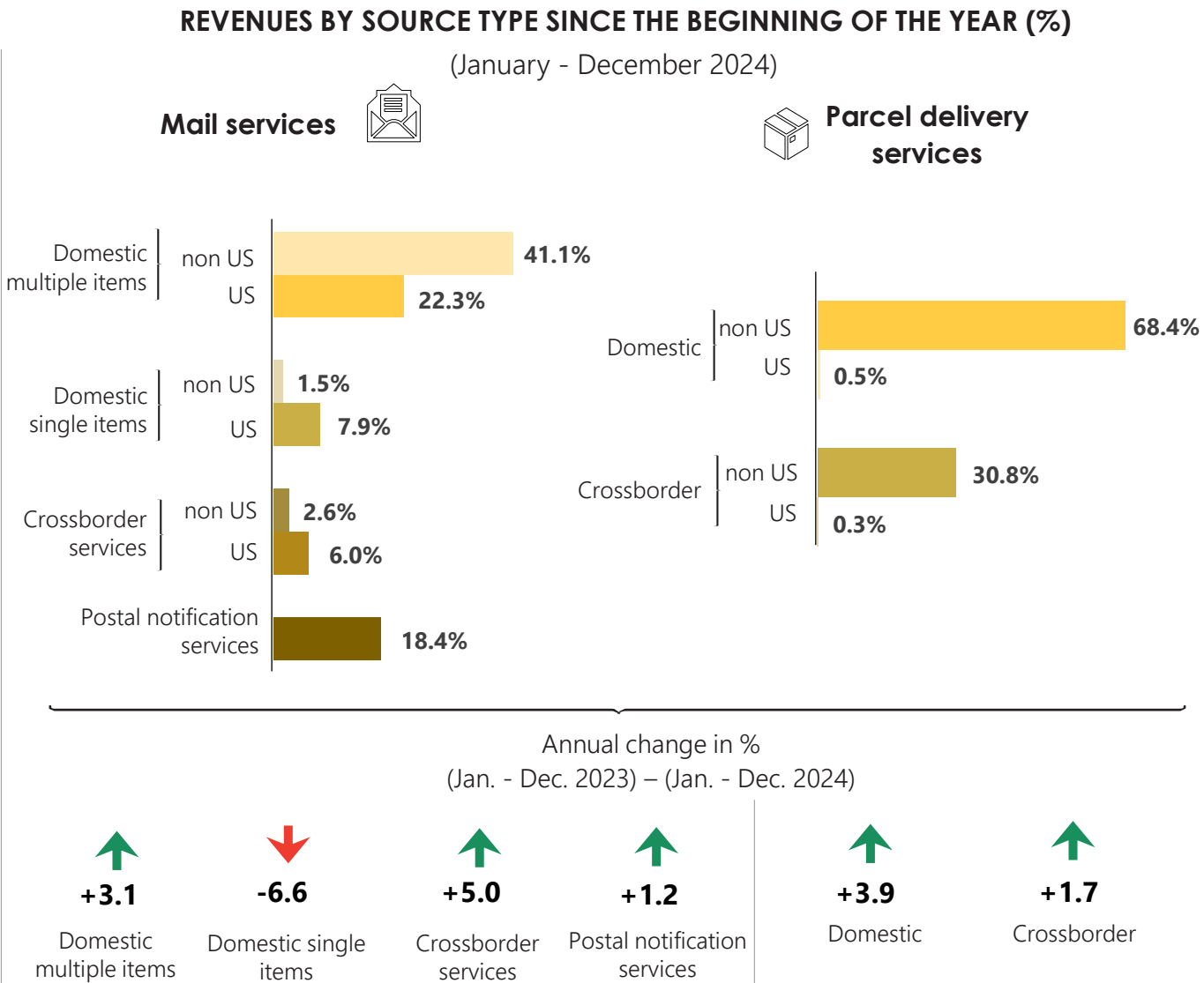
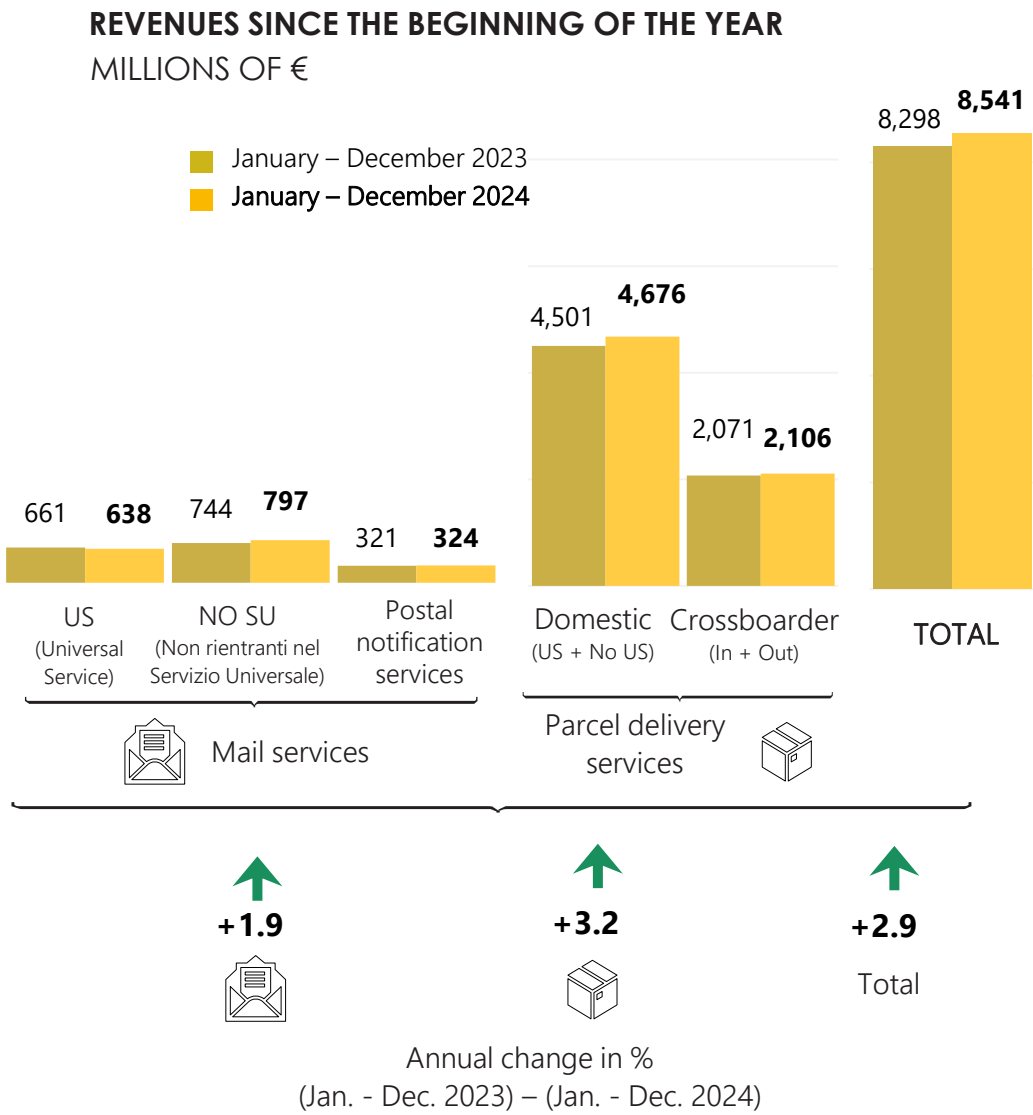


\* For each publishers (slide 2.19) it is displayed separately the component, of those considered (News, Sport and Entertainment), that is most relevant in terms of unique audience.

\*\* MEF/Mediaset total hours are those relating to the component *News Mediaset Sites* due to an editorial choice that do not allow to separate the part of the paid services related to *Mediaset Infinity*. The latter component has amounted to an average of just under 87 million hours since the beginning of the year.

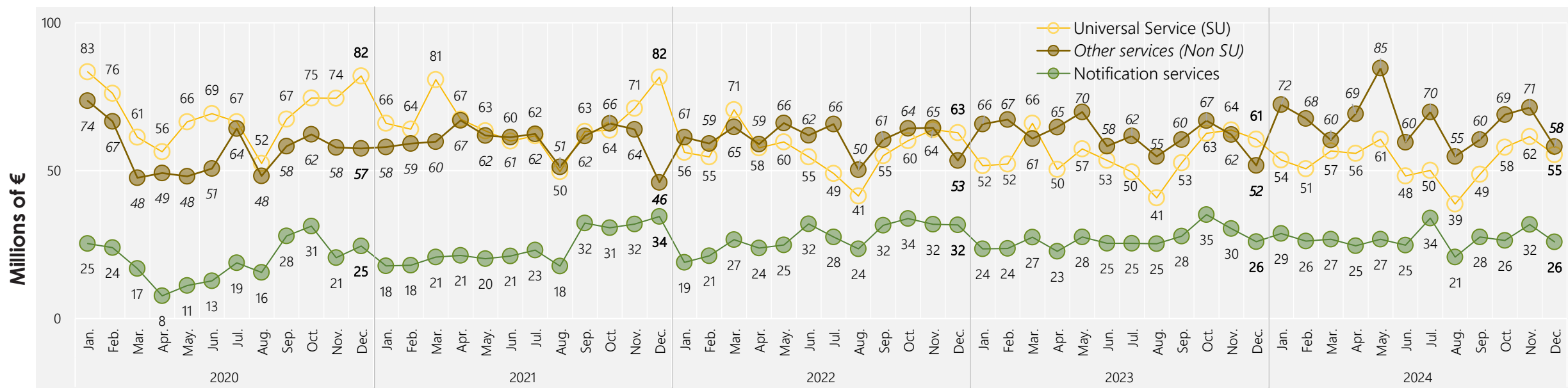
Source: Agcom elaboration on data from ComScore

3.1: POSTAL SERVICES: REVENUES

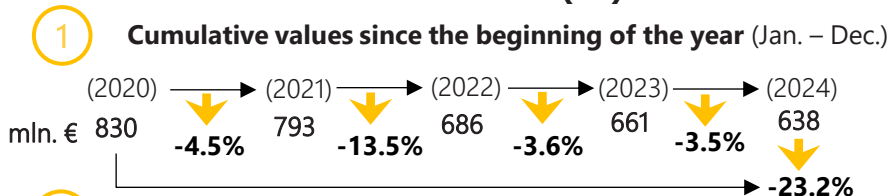


**Note:** Due to changes in firms' accounting data are not directly comparable with previous versions  
Data refers to the following postal operators: Amazon Italia Transport S.r.l., BRT S.p.A., DHL Express Italy S.r.l., FedEx Express Italy S.r.l., Fulmine Group S.p.A., GLS Italy S.p.A., Locker Inpost 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.

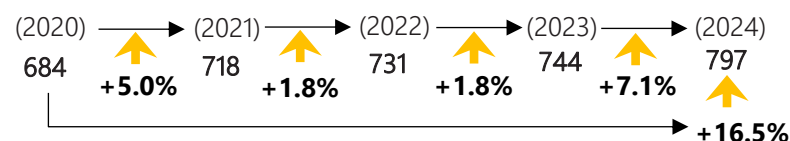
## 3.2 POSTAL SERVICES: MONTHLY MAIL SERVICES REVENUES



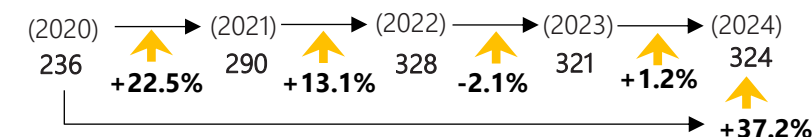
### UNIVERSAL SERVICE (US)



### OTHER SERVICES (NON US)



### POSTAL NOTIFICATION SERVICES



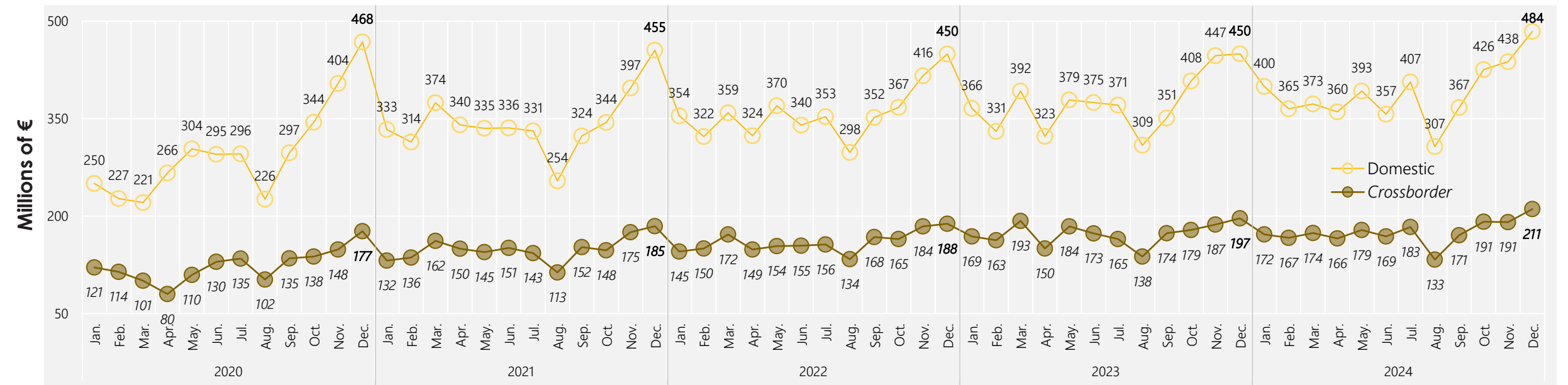
### 2 Monthly comparison (change in %)

|                   | 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 (Apr. - Jun.) | -0.7  | -9.8  | -6.3  | +2.1  | -14.3        |
| Q 3 (Jul. - Sep.) | -6.3  | -16.7 | -1.8  | -3.8  | -26.2        |
| Q 4 (Oct. - Dec.) | -6.3  | -13.6 | +0.1  | -6.5  | -24.3        |

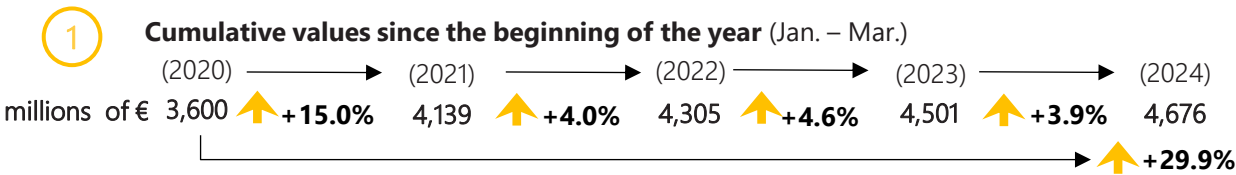
|                   | YoY   |       |       |       | Whole period |
|-------------------|-------|-------|-------|-------|--------------|
|                   | 20/21 | 21/22 | 22/23 | 23/24 | 2020/2024    |
| Q 1 (Jan. - Mar.) | -5.8  | +4.7  | +4.6  | +3.3  | +6.6         |
| Q 2 (Apr. - Jun.) | +28.5 | -1.6  | +3.1  | +10.7 | +44.2        |
| Q 3 (Jul. - Sep.) | +2.8  | +0.7  | +0.2  | +4.6  | +8.5         |
| Q 4 (Oct. - Dec.) | -0.9  | +3.6  | -0.7  | +9.7  | +11.7        |

|                   | 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 (Apr. - Jun.) | +98.8 | +28.7 | -6.1  | +0.6  | +141.7       |
| Q 3 (Jul. - Sep.) | +17.4 | +12.9 | -4.9  | +4.7  | +32.1        |
| Q 4 (Oct. - Dec.) | +27.2 | +0.2  | -5.9  | -8.2  | +10.1        |

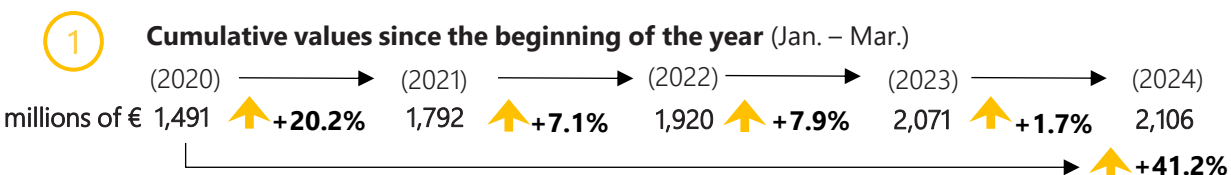
3.3: POSTAL SERVICES: MONTHLY PARCEL SERVICES REVENUES (DOMESTIC/CROSSBORDER)



DOMESTIC



CROSSBORDER



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. - Sep.) | +10.9     | +10.4     | +2.8      | +4.8      | +31.9        |
| Q 4 (Oct. - Dec.) | -1.6      | +3.0      | +5.9      | +3.3      | +10.8        |

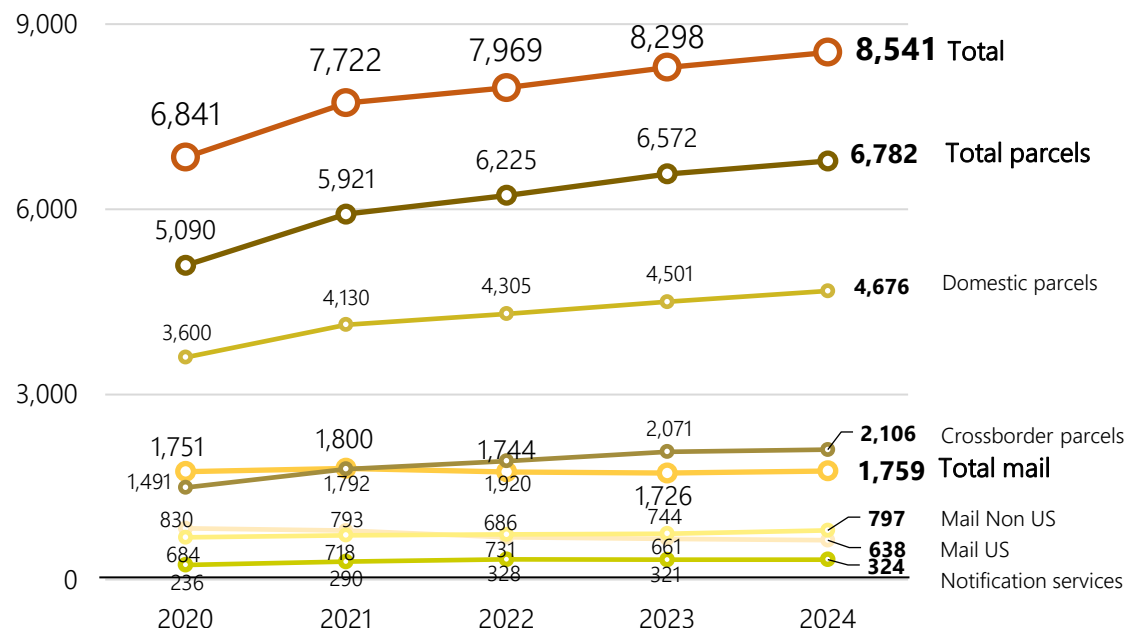
2 Quarterly comparison (change in %)

|                   | 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. - Sep.) | +9.8      | +12.1     | +3.9      | +2.3      | +30.8        |
| Q 4 (Oct. - Dec.) | +9.6      | +5.8      | +4.7      | +5.4      | +28.0        |

### 3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

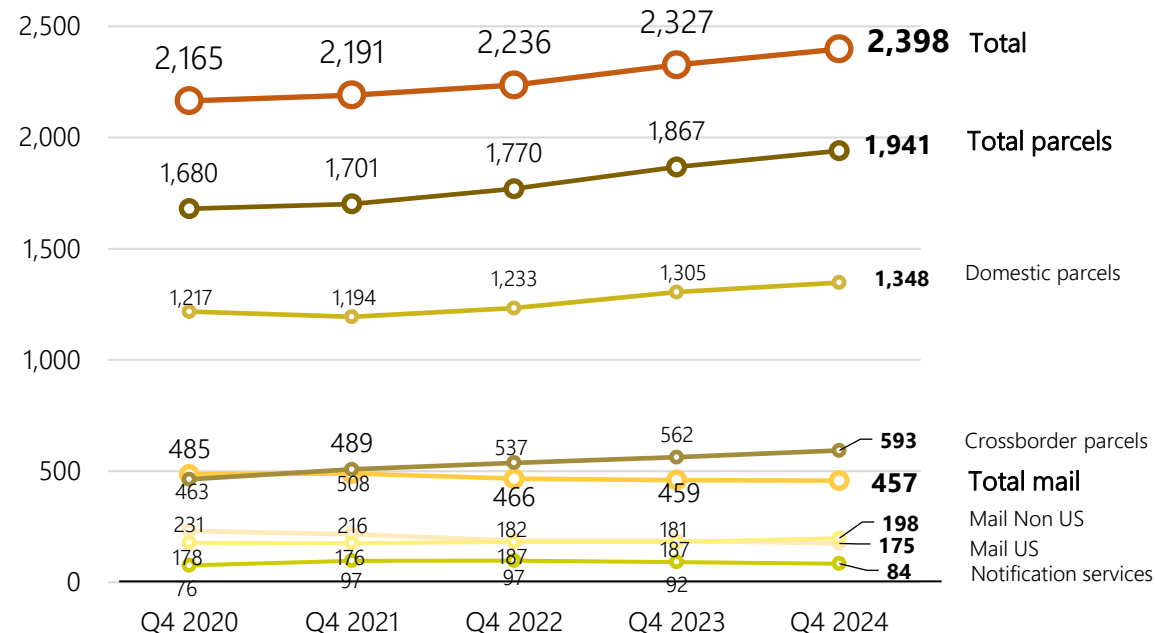
#### ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



#### ON A QUARTERLY BASIS

MILLIONS OF €

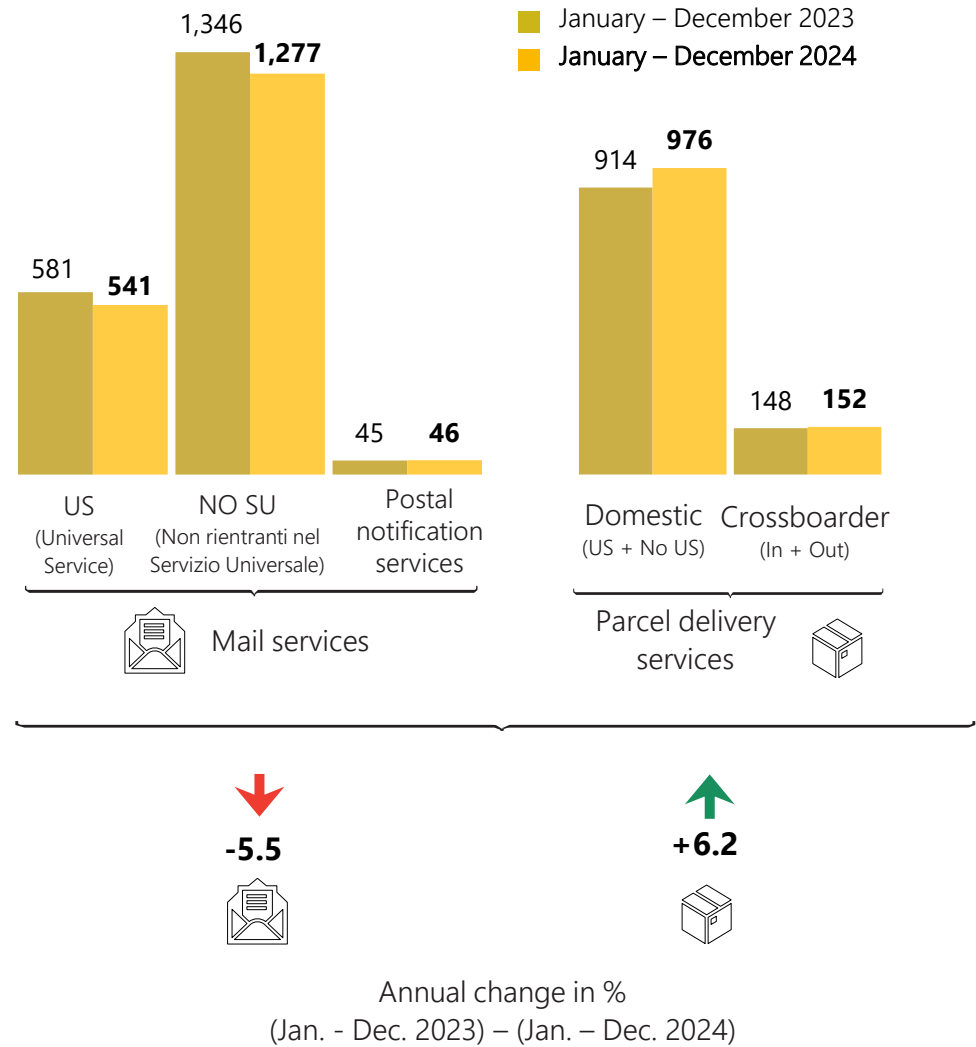


|                                  | Change in %<br>(2020 – 2024) |   | Change in %<br>(2023 – 2024) |   |
|----------------------------------|------------------------------|---|------------------------------|---|
| <b>Total:</b>                    | <b>+24.8</b>                 | ↑ | <b>+2.9</b>                  | ↑ |
| <b>Mail services:</b>            | <b>+0.5</b>                  | ↑ | <b>+1.9</b>                  | ↑ |
| - Universal Service:             | -23.2                        | ↓ | -3.5                         | ↓ |
| - No Universal Service:          | +16.5                        | ↑ | +7.1                         | ↑ |
| - Postal notification services:  | +37.2                        | ↑ | +1.2                         | ↑ |
| <b>Parcel delivery services:</b> | <b>+33.2</b>                 | ↑ | <b>+3.2</b>                  | ↑ |
| - Domestic:                      | +29.9                        | ↑ | +3.9                         | ↑ |
| - Crossborder:                   | +41.2                        | ↑ | +1.7                         | ↑ |

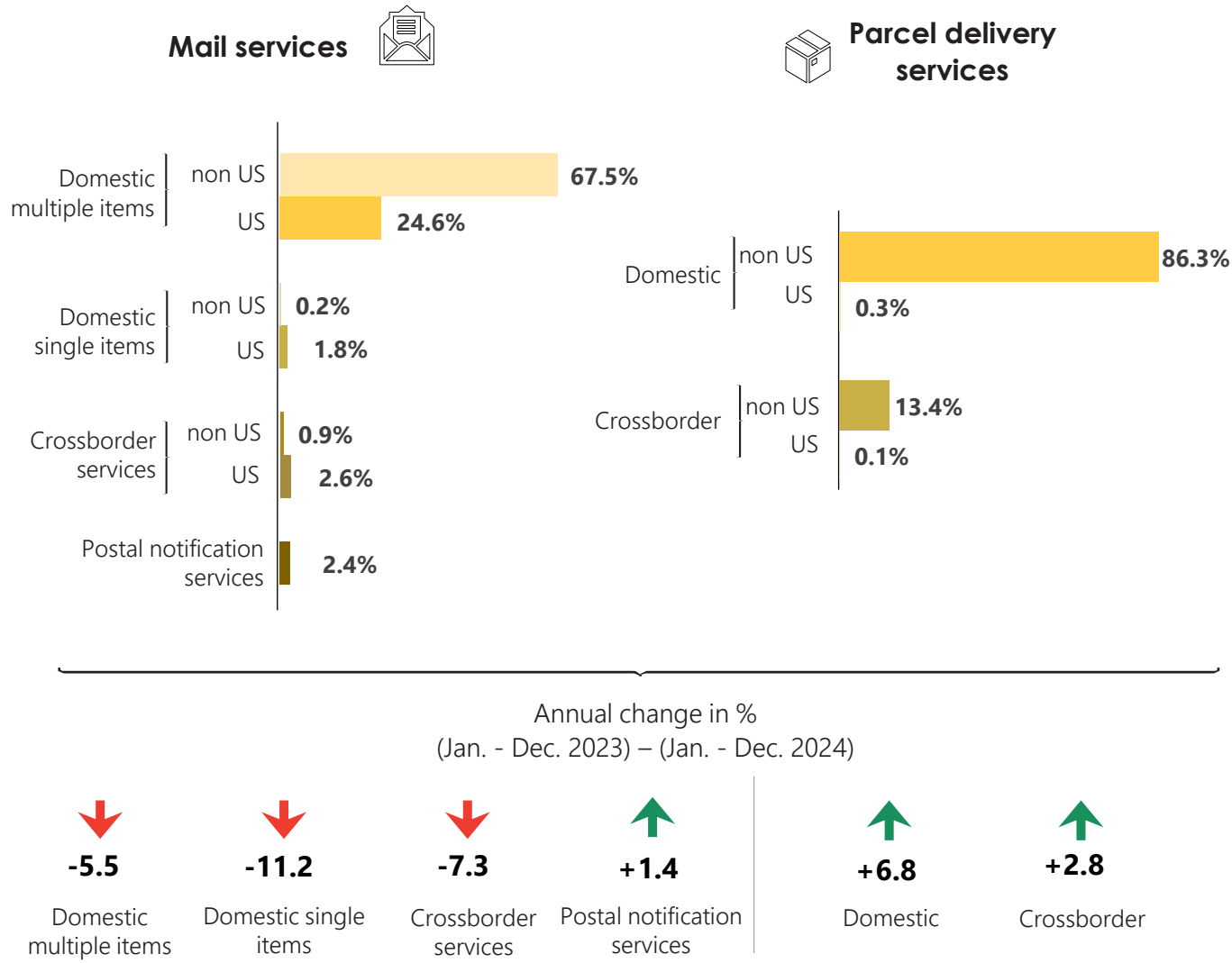
|                                  | Change in %<br>(Q4 2020 – Q4 2024) |   | Change in %<br>(Q4 2023 – Q4 2024) |   |
|----------------------------------|------------------------------------|---|------------------------------------|---|
| <b>Total:</b>                    | <b>+10.8</b>                       | ↑ | <b>+3.1</b>                        | ↑ |
| <b>Mail services:</b>            | <b>-5.7</b>                        | ↓ | <b>-0.5</b>                        | ↓ |
| - Universal Service:             | -24.3                              | ↓ | -6.5                               | ↓ |
| - No Universal Service:          | +11.7                              | ↑ | +9.7                               | ↑ |
| - Postal notification services:  | +10.1                              | ↑ | -8.2                               | ↓ |
| <b>Parcel delivery services:</b> | <b>+15.5</b>                       | ↑ | <b>+3.9</b>                        | ↑ |
| - Domestic:                      | +10.8                              | ↑ | +3.3                               | ↑ |
| - Crossborder:                   | +28.0                              | ↑ | +5.4                               | ↑ |

3.5: POSTAL SERVICES: VOLUMES

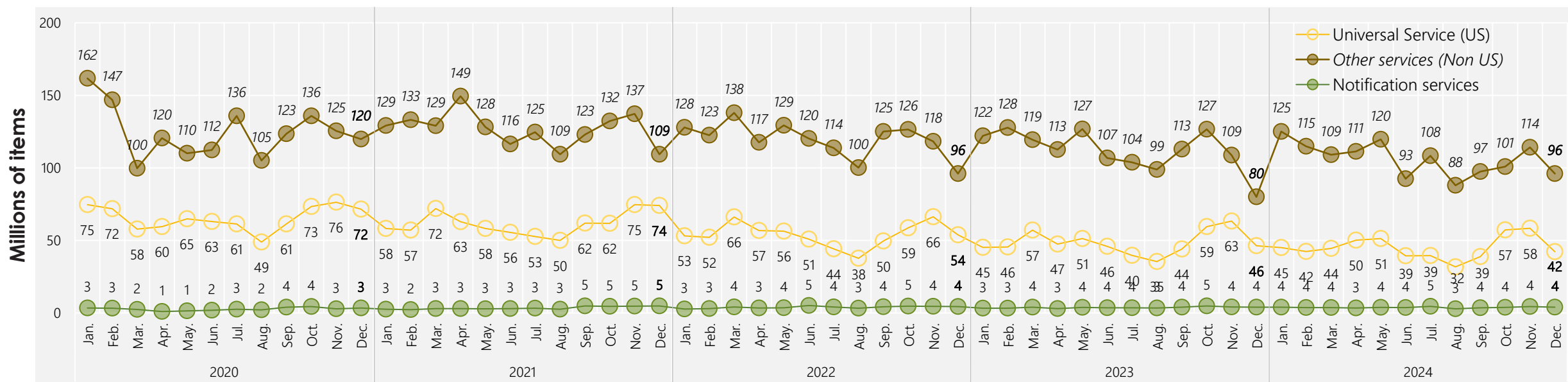
VOLUMES SINCE THE BEGINNING OF THE YEAR  
MILLIONS OF UNITS



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



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

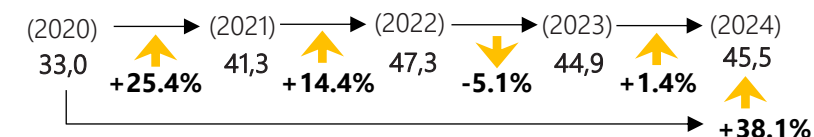
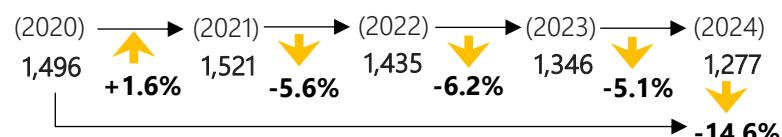
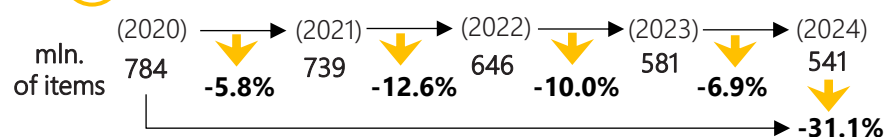


### UNIVERSAL SERVICE (US)

### OTHER SERVICES (NON US)

### POSTAL NOTIFICATION SERVICES

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



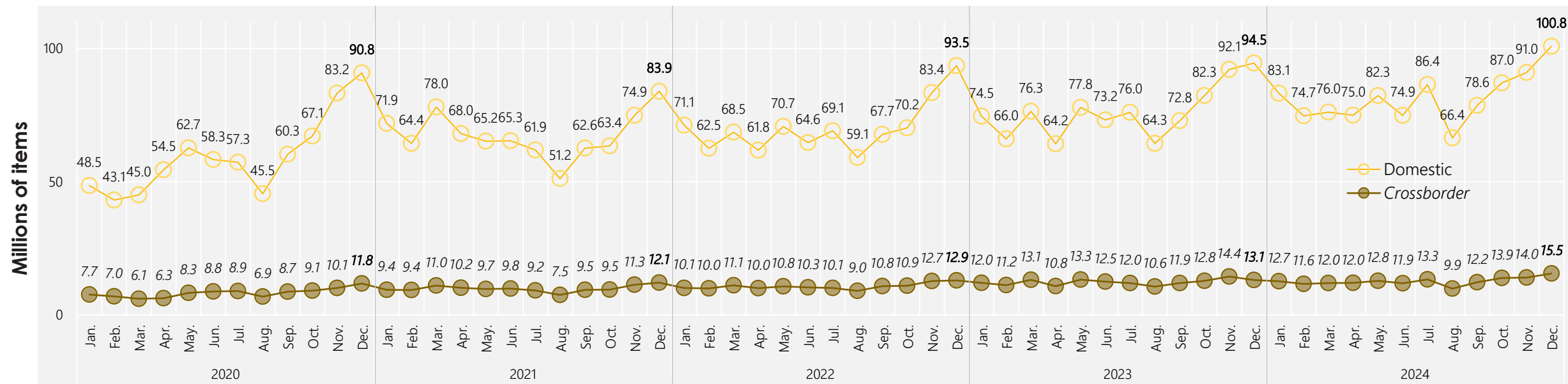
#### 2 Monthly comparison (change in %)

|                   | 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 (Apr. - Jun.) | -5.7  | -7.1  | -11.8 | -2.6  | -24.8        |
| Q 3 (Jul. - Sep.) | -4.1  | -20.1 | -9.3  | -7.7  | -35.8        |
| Q 4 (Oct. - Dec.) | -4.9  | -15.1 | -5.4  | -6.6  | -28.6        |

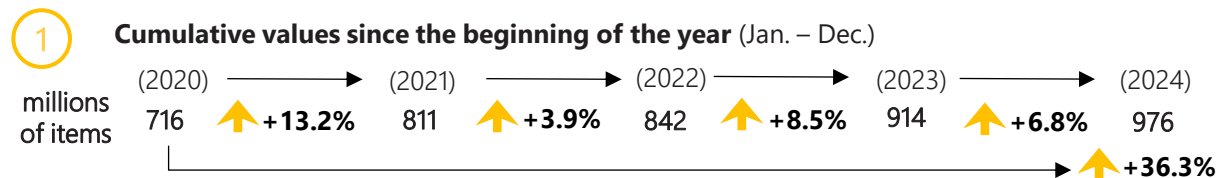
|                   | YoY   |       |       |       | Whole period |
|-------------------|-------|-------|-------|-------|--------------|
|                   | 20/21 | 21/22 | 22/23 | 23/24 | 2020/2024    |
| Q 1 (Jan. - Mar.) | -4.1  | -0.7  | -5.0  | -5.5  | -14.5        |
| Q 2 (Apr. - Jun.) | +14.9 | -6.9  | -5.7  | -6.5  | -5.6         |
| Q 3 (Jul. - Sep.) | -2.0  | -5.0  | -6.9  | -6.9  | -19.4        |
| Q 4 (Oct. - Dec.) | -0.6  | -10.0 | -7.5  | -1.3  | -18.4        |

|                   | 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 (Apr. - Jun.) | +98.9 | +39.1 | -14.3 | +5.2  | +149.4       |
| Q 3 (Jul. - Sep.) | +19.6 | +10.3 | -5.9  | -0.7  | +23.3        |
| Q 4 (Oct. - Dec.) | +32.8 | -3.7  | -5.4  | -5.1  | +14.7        |

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



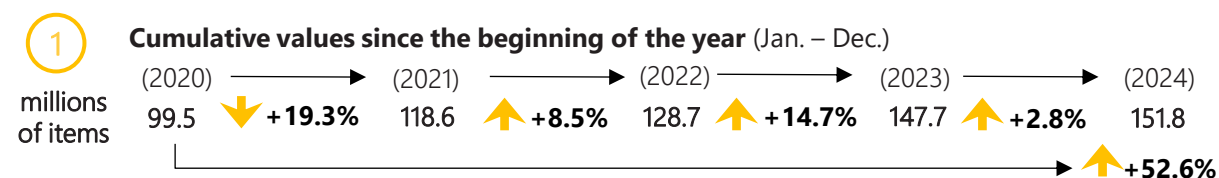
#### DOMESTIC



#### 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 (Apr. - Jun.) | +13.2     | -0.7      | +9.2      | +7.9      | +32.3        |
| Q 3 (Jul. - Sep.) | +7.7      | +11.5     | +8.9      | +8.6      | +41.9        |
| Q 4 (Oct. - Dec.) | -7.9      | +11.2     | +8.8      | +3.7      | +15.6        |

#### CROSSBORDER



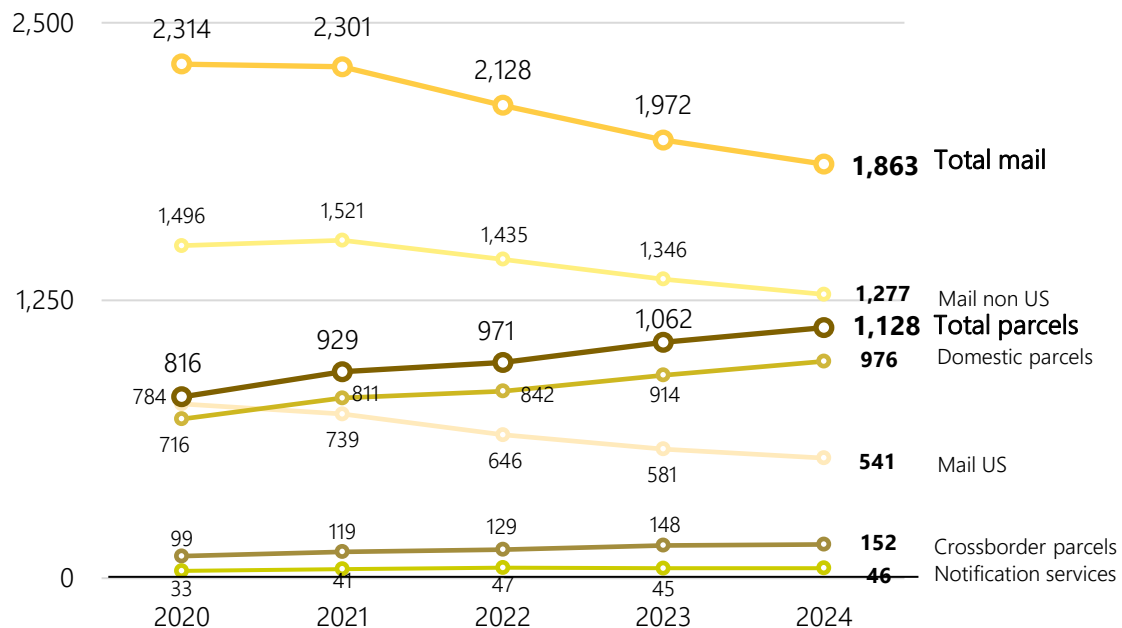
#### 2 Quarterly comparison (change in %)

|                   | 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 (Apr. - Jun.) | +27.8     | +4.4      | +17.5     | +0.4      | +57.4        |
| Q 3 (Jul. - Sep.) | +6.7      | +14.5     | +15.2     | +2.7      | +44.6        |
| Q 4 (Oct. - Dec.) | +6.6      | +10.8     | +10.2     | +7.9      | +40.4        |

### 3.8: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

#### ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



Change in %

(2020 – 2023)

(2023 – 2024)

#### Mail services:

- Universal Service:
- No Universal Service:
- Postal notification services:

-19.5



-5.5



-31.7



-6.9



-14.6



-5.1



+38.1



+1.4



#### Parcel delivery services:

- Domestic:
- Crossborder:

+38.3



+6.2



+36.3



+6.8



+52.6

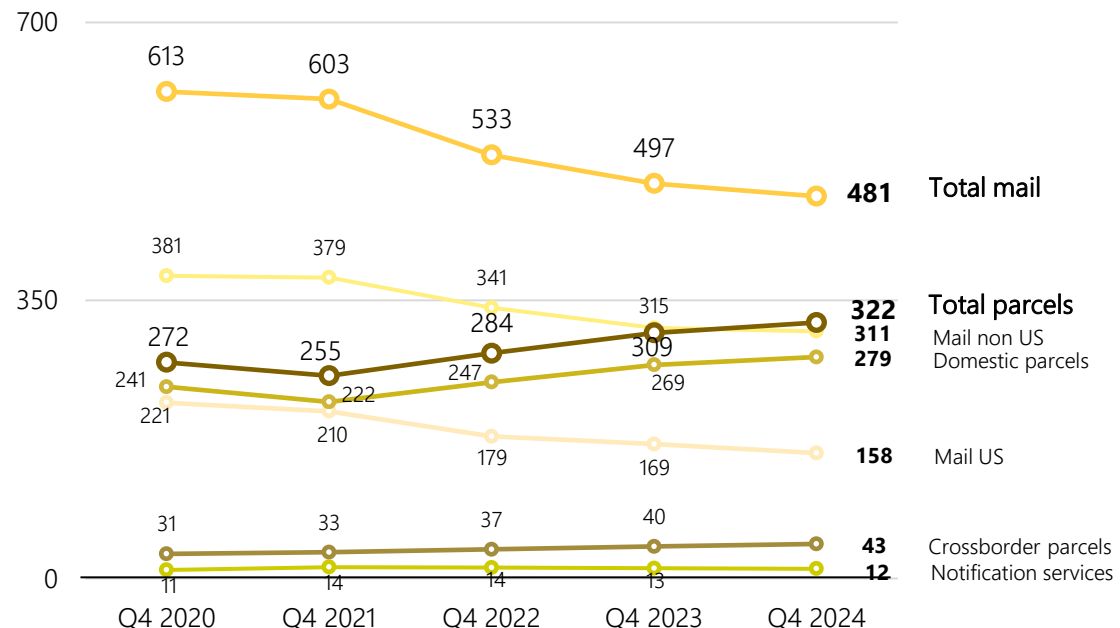


+2.8



#### ON A QUARTERLY BASIS

MILLIONS OF UNITS



Change in %

(Q4 2020 – Q4 2024)

(Q4 2023 – Q4 2024)

#### Mail services:

- Universal Service:
- No Universal Service:
- Postal notification services:

-21.5



-3.2



-28.6



-6.6



-18.4



-1.3



+14.7



-5.1



#### Parcel delivery services:

- Domestic:
- Crossborder:

+18.4



+4.2



+15.6



+3.7



+40.4



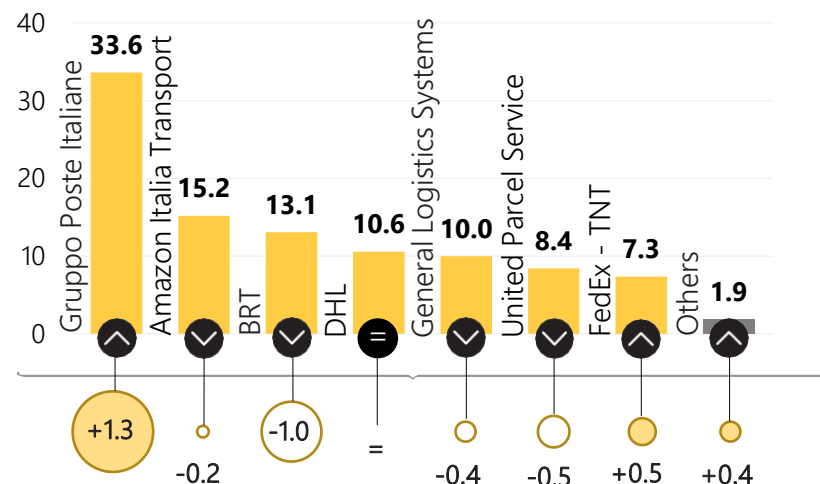
+7.9



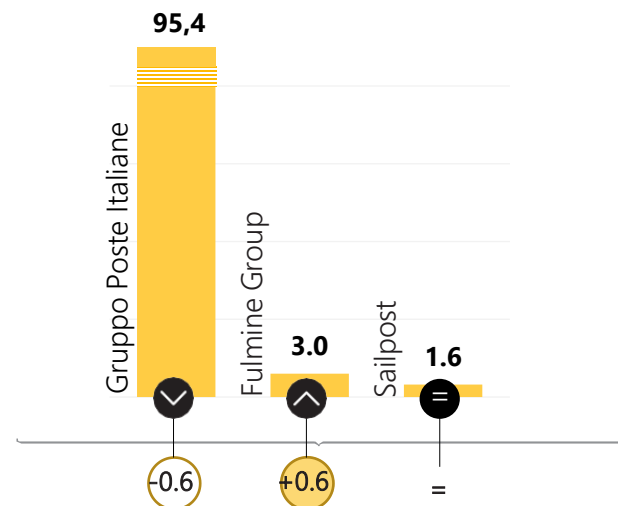
### 3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

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

#### MAIL AND PARCEL DELIVERY SERVICES

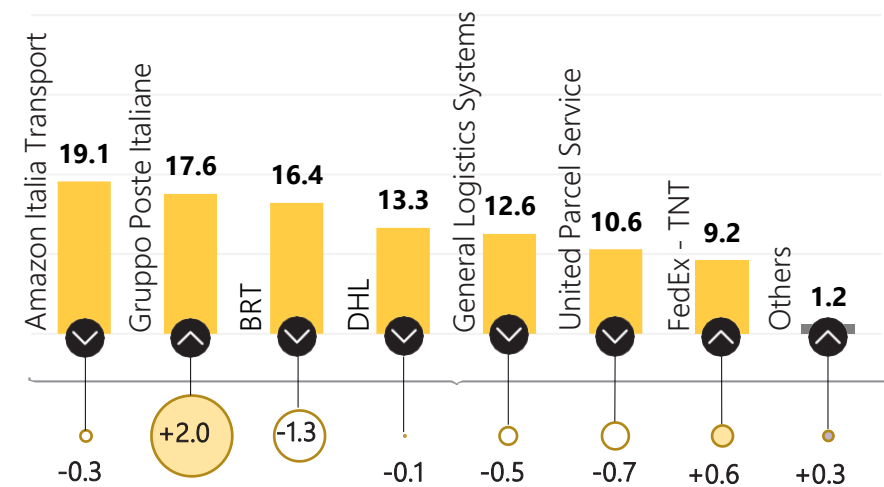


#### MAIL SERVICES (single + multiple items)

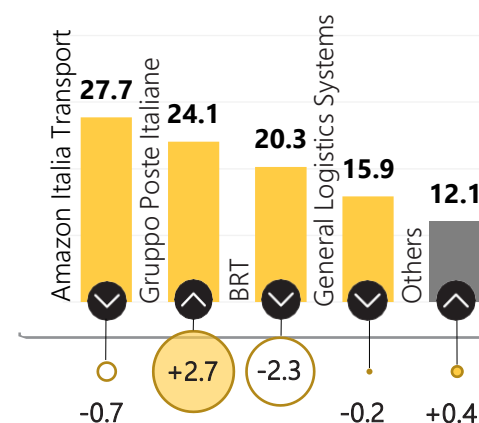


Differences vs. Jan. - Dec. 2023  
(percentage points)

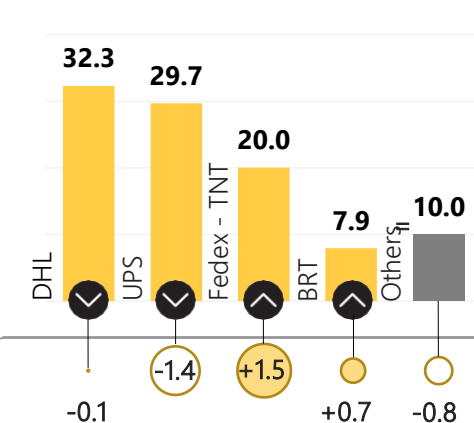
#### PARCEL DELIVERY SERVICES COURIERS



#### -of wich domestic



#### -of wich crossborder



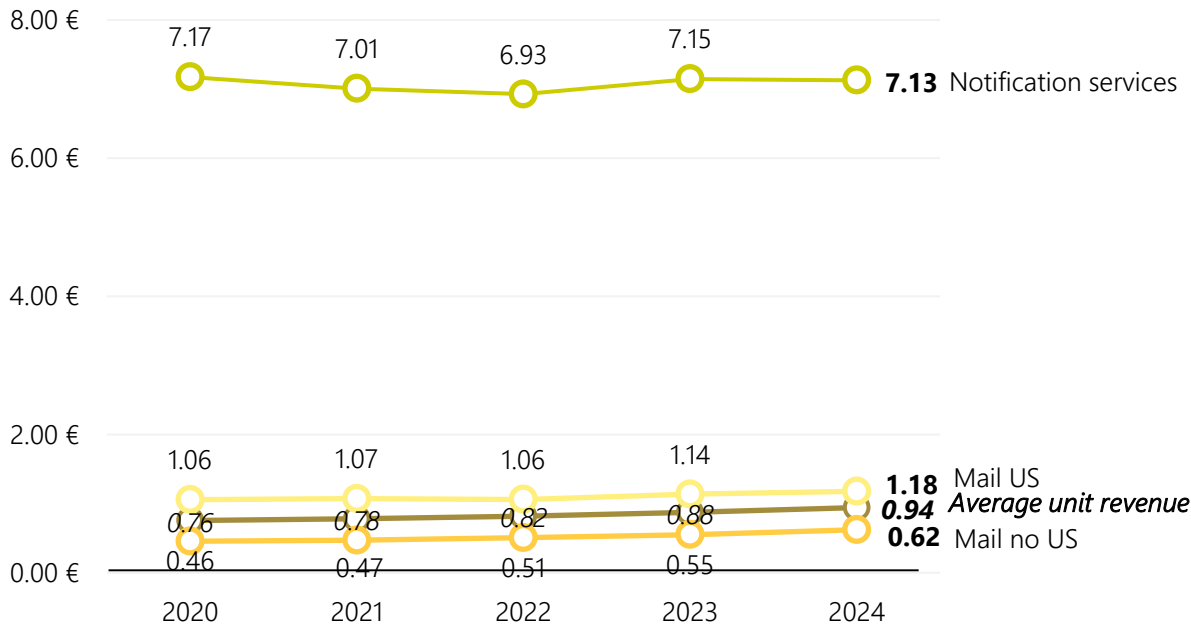
Differences vs. Jan. - Dec. 2023 (percentage points)

**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.

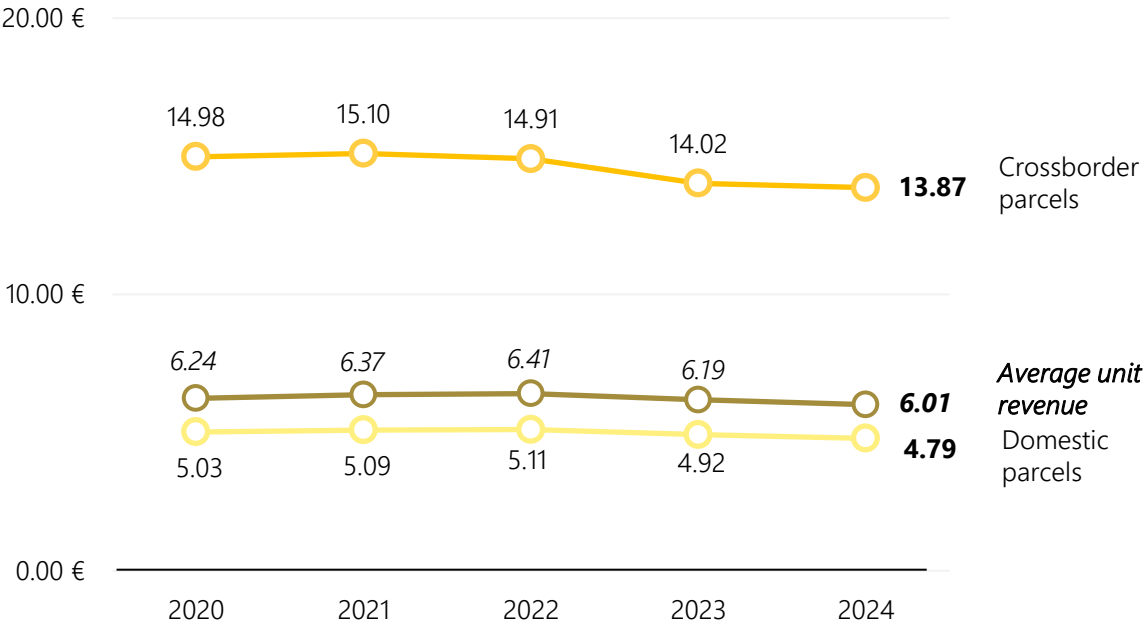
3.10: POSTAL SERVICES: PER-UNIT REVENUES HISTORICAL TRENDS IN € (average last 12 month)



MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

(2020 – 2024) (2023 – 2024)

|                                 |       |   |       |   |
|---------------------------------|-------|---|-------|---|
| Average unit revenue:           | +24.8 | ▲ | +7.9  | ▲ |
| - Mail US:                      | +11.5 | ▲ | +3.7  | ▲ |
| - Mail non US:                  | +36.5 | ▲ | +12.8 | ▲ |
| - Postal notification services: | -0.7  | ▼ | -0.3  | ▼ |

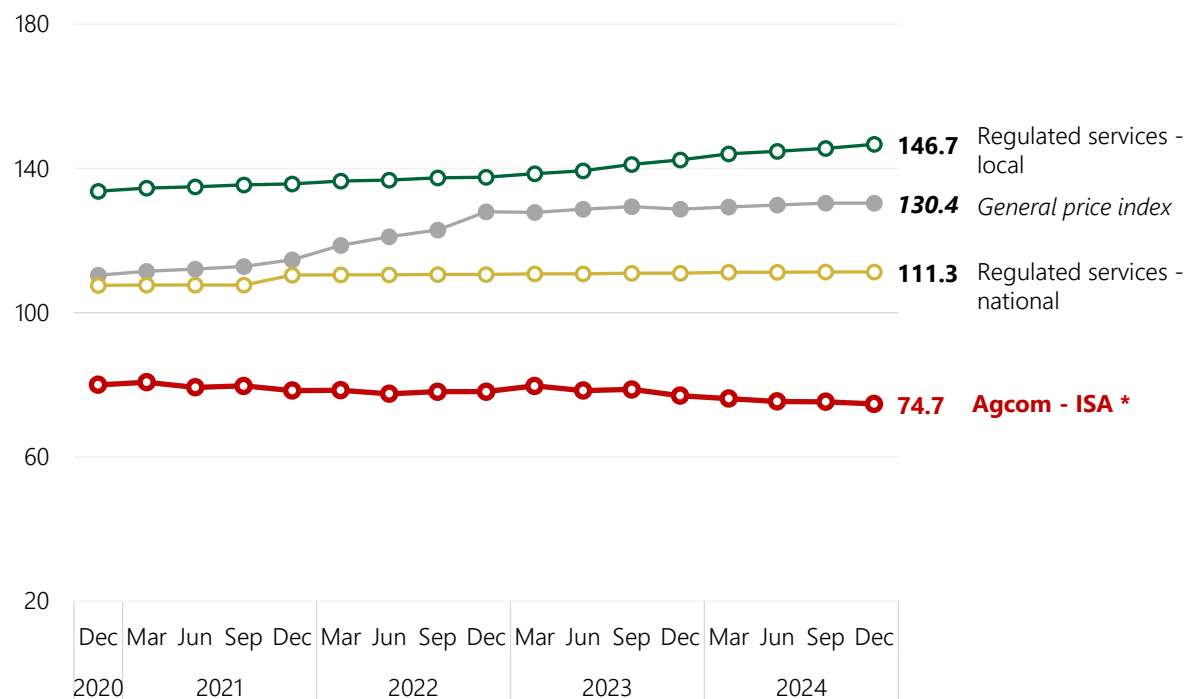
Change in %

(2020 – 2024) (2023 – 2024)

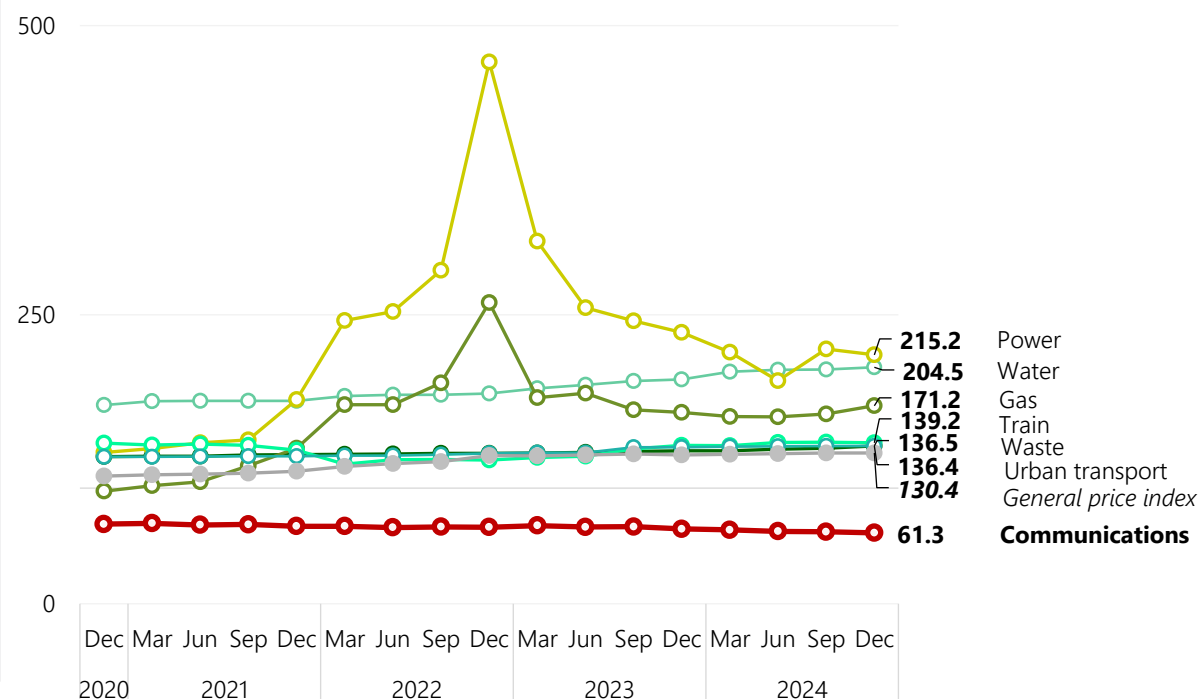
|                       |       |   |      |   |
|-----------------------|-------|---|------|---|
| Average unit revenue: | -3.7  | ▼ | -2.9 | ▼ |
| Crossborder parcels:  | -7.5  | ▼ | -1.1 | ▼ |
| - US:                 | +11.9 | ▲ | +1.5 | ▲ |
| - Non US:             | -7.5  | ▼ | -1.1 | ▼ |
| Domestic parcels:     | -4.7  | ▼ | -2.7 | ▼ |
| - US:                 | +18.8 | ▲ | +3.2 | ▲ |
| - Non US:             | -4.7  | ▼ | -2.7 | ▼ |

## 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 % |     |      |   |
|-------------|-----|------|---|
| 4-Year      | YoY |      |   |
| -6.6        | ▼   | -3.0 | ▼ |
| +18.1       | ▲   | +1.3 | ▲ |
| +9.7        | ▲   | +3.0 | ▲ |
| +3.4        | ▲   | +0.3 | ▲ |

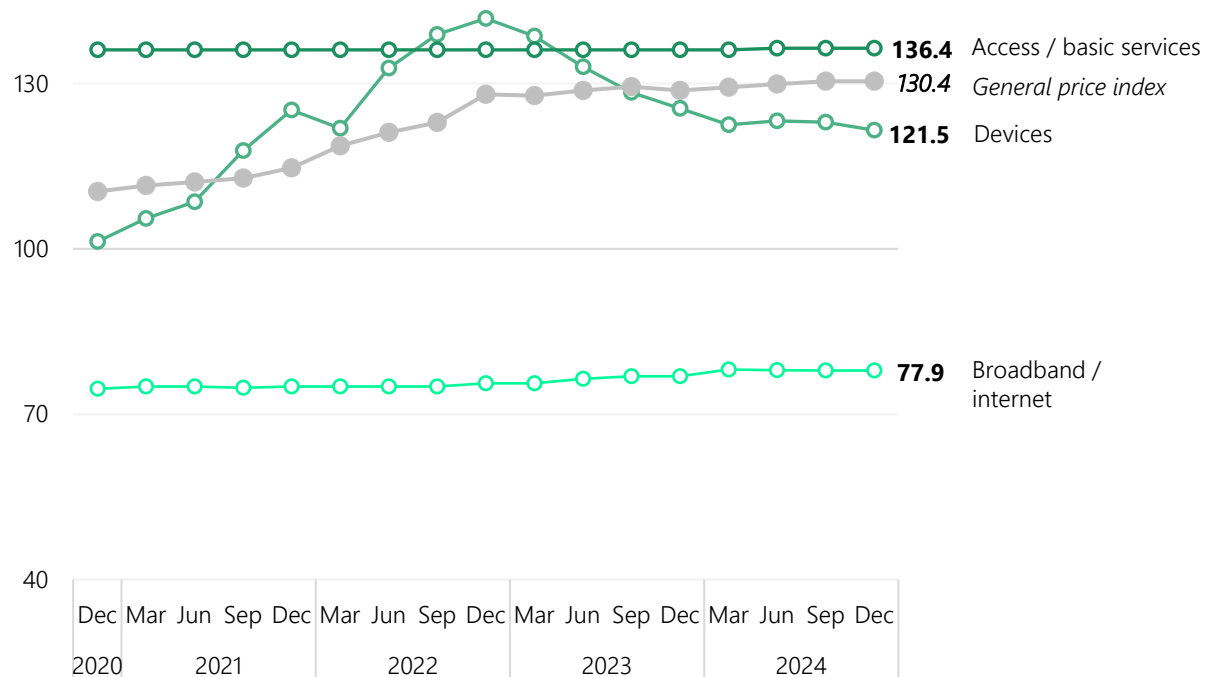
(\*) **Note:** The ISA («Indice Sintetico Agcom») price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (for a total of 10 items).

| Change in %     |       |        |      | Change in % |                               |        |     |      |   |
|-----------------|-------|--------|------|-------------|-------------------------------|--------|-----|------|---|
|                 |       | 4-Year | YoY  |             |                               | 4-Year | YoY |      |   |
| Water (04.4.1): | +19.0 | ▲      | +5.4 | ▲           | Train (07.3.1):               | +0.2   | ▲   | +1.7 | ▲ |
| Waste (04.4.2): | +7.3  | ▲      | +3.3 | ▲           | Urban transport (07.3.2.1.1): | +7.3   | ▲   | +0.8 | ▲ |
| Power (04.5.1): | +64.5 | ▲      | -8.3 | ▼           | Communications (08):          | -10.9  | ▼   | -5.3 | ▼ |
| Gas (04.5.2):   | +76.0 | ▲      | -3.4 | ▼           |                               |        |     |      |   |

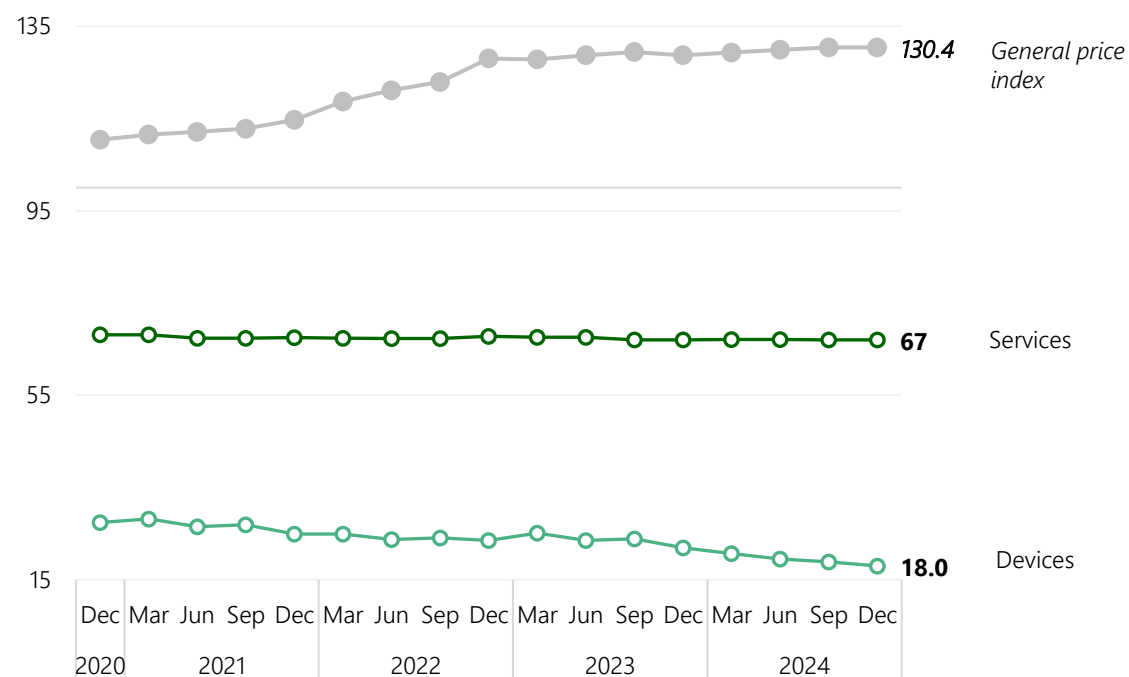
(COICOP - Classification of Individual Consumption by Purpose)

## 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

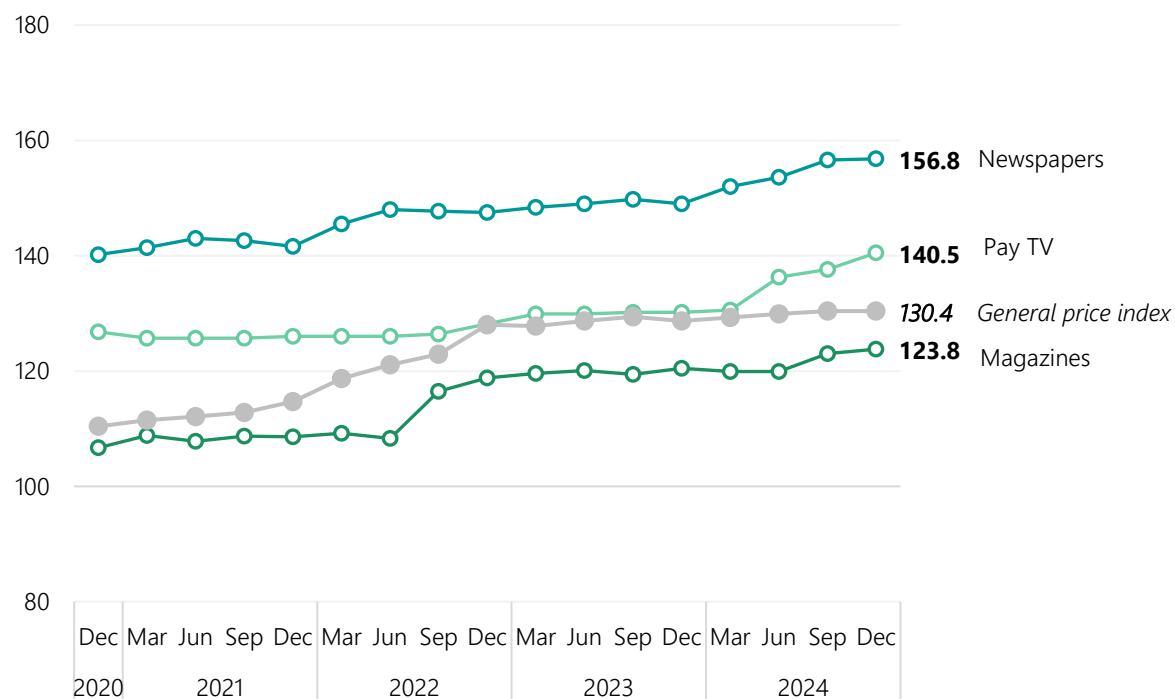
|                                       | Change in %  |   |             |   |
|---------------------------------------|--------------|---|-------------|---|
|                                       | 4-Year       |   | YoY         |   |
| Access / basic services (08.3.0.1):   | <b>+0.2</b>  | ▲ | <b>+0.2</b> | ▲ |
| Devices (08.2.0.1):                   | <b>+19.9</b> | ▲ | <b>-3.2</b> | ▼ |
| Broadband / internet (08.3.0.3.0.07): | <b>+4.4</b>  | ▲ | <b>+1.3</b> | ▲ |

|                     | Change in %  |   |              |   |
|---------------------|--------------|---|--------------|---|
|                     | 4-Year       |   | YoY          |   |
| Servces (08.3.0.2): | <b>-1.6</b>  | ▼ | =            | ↔ |
| Devices (08.2.0.2): | <b>-34.3</b> | ▼ | <b>-17.8</b> | ▼ |

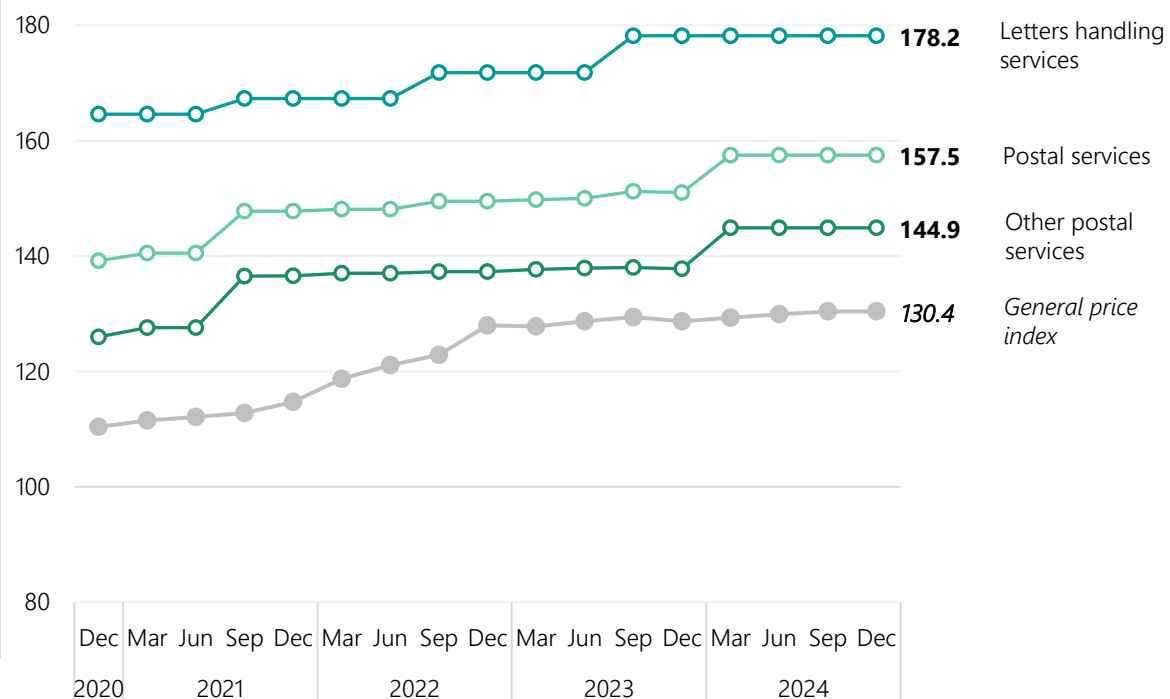
(COICOP - Classification of Individual Consumption by Purpose)

## 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): | <b>+11.8</b> ↑ | <b>+5.2</b> ↑ |
| Pay TV (09.4.2.3.0.02):  | <b>+10.8</b> ↑ | <b>+7.9</b> ↑ |
| Magazines (09.5.2.2.0):  | <b>+16.0</b> ↑ | <b>+2.7</b> ↑ |

|                                            | Change in %    |               |
|--------------------------------------------|----------------|---------------|
|                                            | 4-Year         | YoY           |
| Postal services (08.1):                    | <b>+13.1</b> ↑ | <b>+4.3</b> ↑ |
| Letters handling services (08.1.0.1.0.00): | <b>+8.3</b> ↑  | = ↔           |
| Other postal services (08.1.0.9.0.00):     | <b>+15.0</b> ↑ | <b>+5.2</b> ↑ |

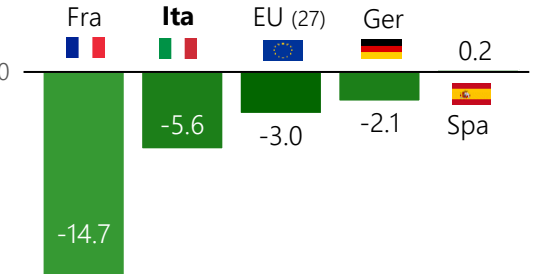
(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

1-Year  
change %

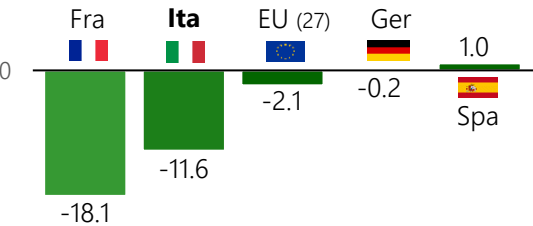
Dec. 2023  
-  
Dec. 2024

TLC – SERVICES AND EQUIPMENTS  
(COICOP 08.2 - 08.3)



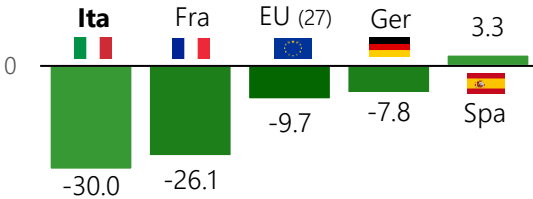
5-Year  
change %

Dec. 2020  
-  
Dec. 2024

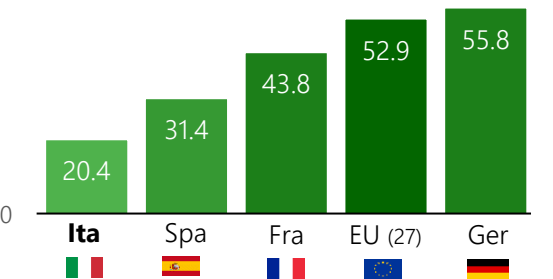
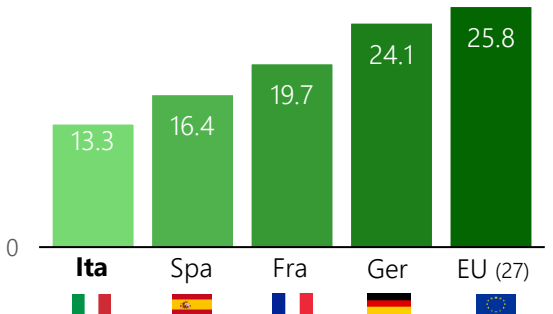
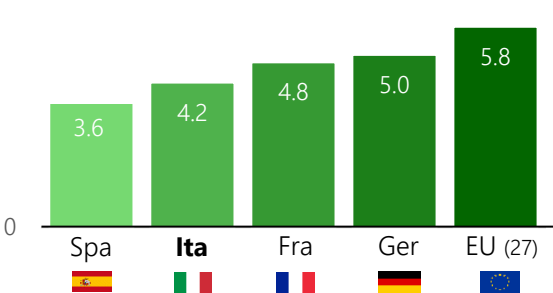


10-Year  
change %

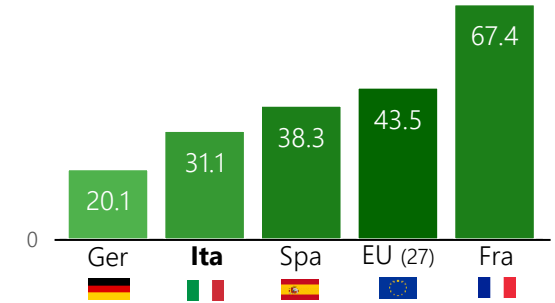
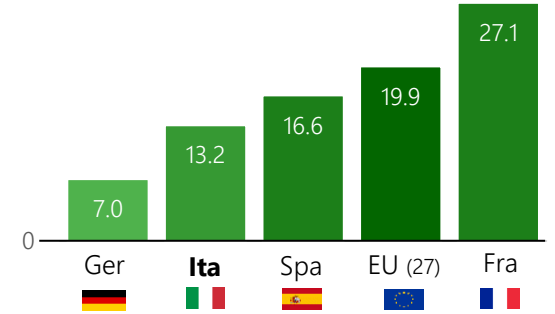
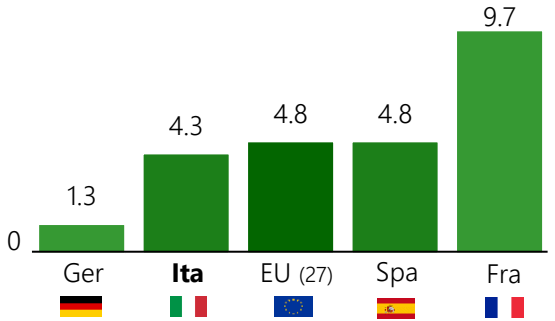
Dec. 2015  
-  
Dec. 2024



NEWSPAPERS AND MAGAZINES  
(COICOP 09.5.2)



POSTAL SERVICES  
(COICOP 08.1)





## COMMUNICATION MARKETS MONITORING SYSTEM

no. 1/2025

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