



AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

No. 3/2023



01 ELECTRONIC COMMUNICATIONS

Fixed and mobile networks

1.1 Main economic results (1H 2023)

Fixed network

1.2 Total lines

1.3 Broadband and ultrabroadband lines

1.4 Broadband lines by type of customer and operators

1.5 Broadband and ultrabroadband lines by technology and operators

1.6 Data traffic in download and upload

1.7 Average daily data traffic

1.8 Weekly data traffic intensity

Mobile network

1.9 Total subscribers

1.10 Subscribers by type of customer

1.11 Subscribers by type of contract

1.12 Data traffic in download and upload

1.13 Average daily data traffic

1.14 Weekly data traffic intensity

1.15 Number portability

02 MEDIA AND PLATFORMS

Television (DVB and SAT)

2.1 Total audience of national broadcaster

2.2 Leading TV broadcasters by audience

2.3 Average monthly audience of the main national TV channels

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2.5 Average monthly audience of main national news programs

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2.8 Volume sales and shares by main publishing groups

2.9 Distribution of copies sold by major newspapers

Platforms

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2.11 General press websites/app unique users

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2.13 Pay video on demand platforms unique users

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2.15 Free video on demand platforms unique users

2.16 Time spent on free video on demand platforms

03 POSTAL SERVICES

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3.2 Monthly mail services revenues (US/no US)

3.3 Monthly parcel services revenues (domestic/cross-border)

3.4 Revenues historical trends

Volumes

3.5 Volumes trend

3.6 Monthly mail services volumes (US/no US)

3.7 Monthly parcel services volumes (domestic/cross-border)

3.8 Volumes historical trends

Market

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 2023. 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

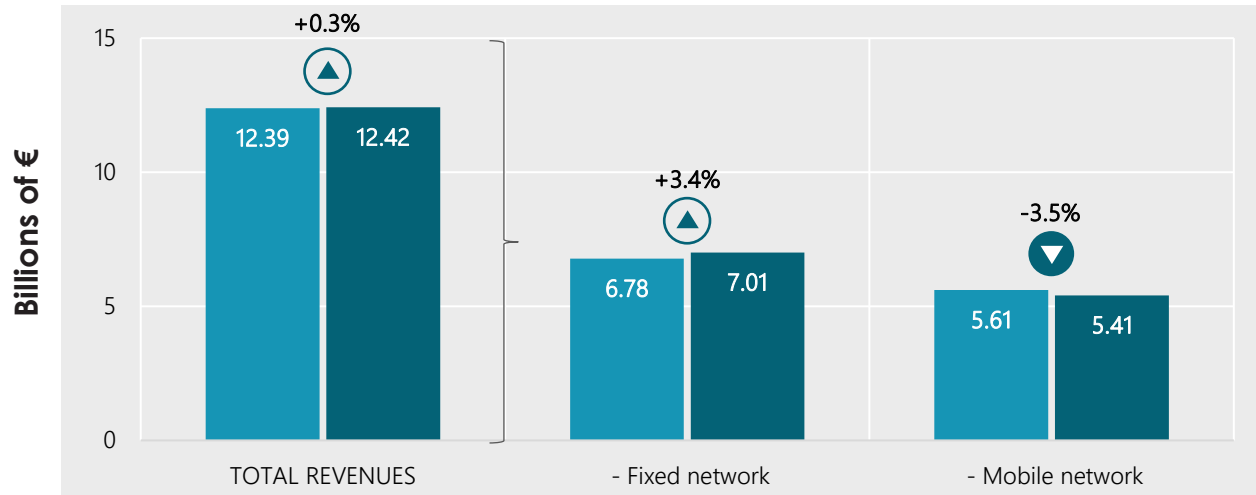
4.3 Daily newspapers, magazines, TV and postal services price indices

4.4 International benchmark

1.1 FIXED AND MOBILE NETWORKS: MAIN ECONOMIC RESULTS



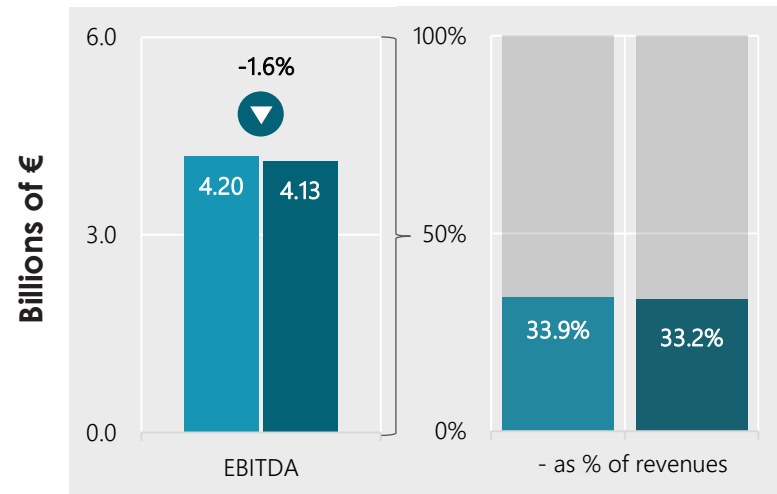
REVENUES



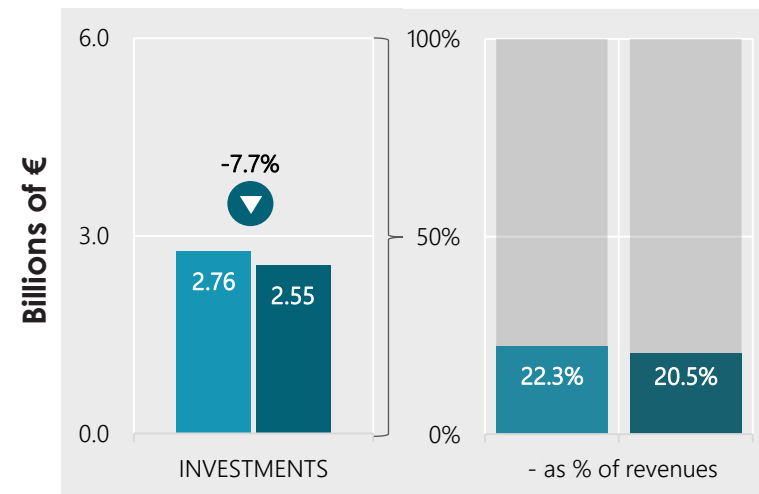
1H COMPARISON



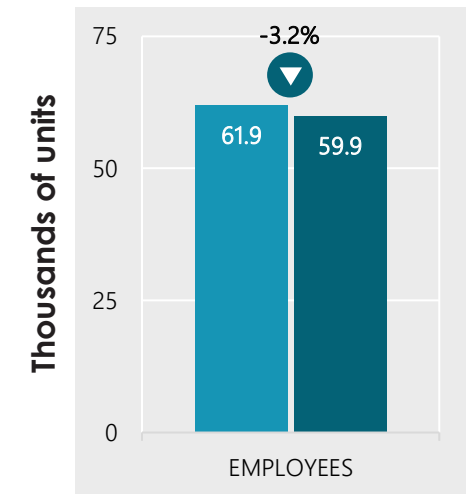
EBITDA



INVESTMENTS

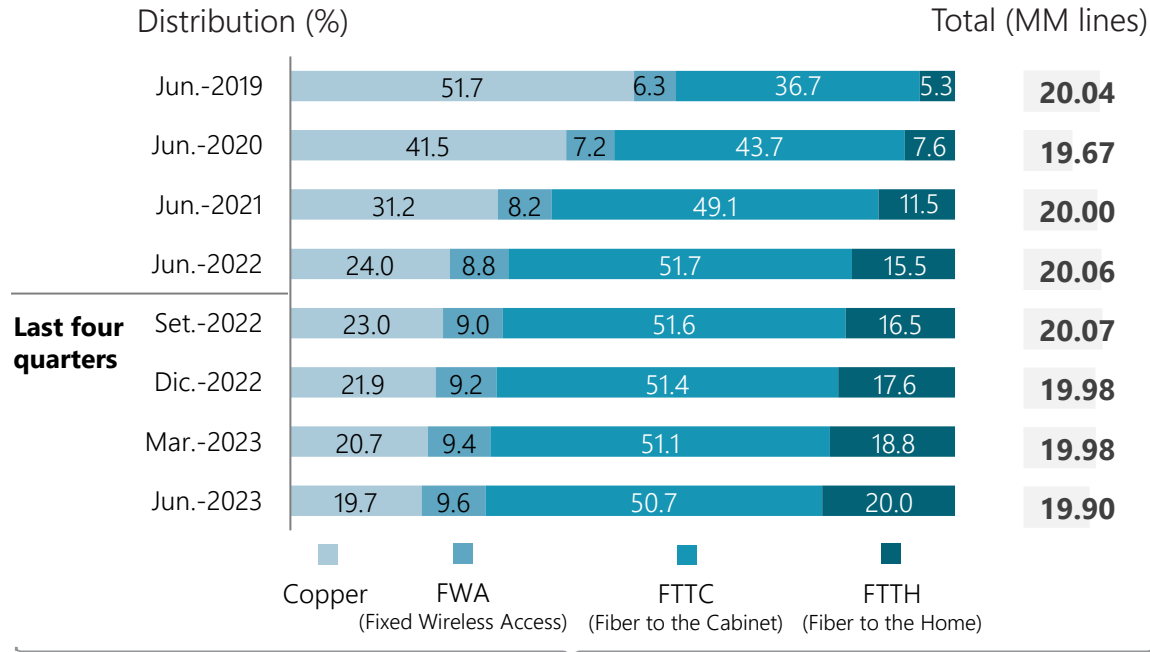


EMPLOYEES



Source: elaborations and estimates on data provided by the following companies: BBell, BT Italia, Eolo, Fastweb, Go Internet, Iliad, Intred, IrIDEOS, Micso, PostePay, TIM, Tessellis (Tiscali), Vodafone, Wind Tre

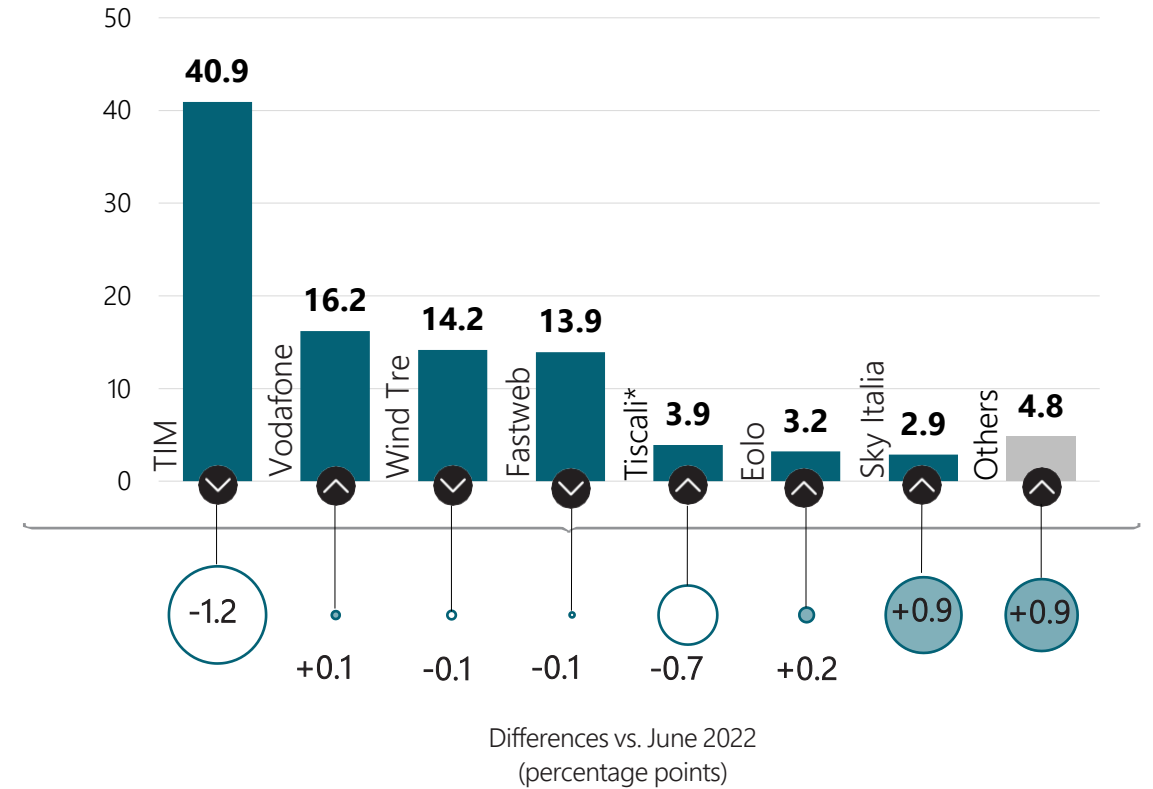
1.2 FIXED NETWORK: TOTAL LINES



Total lines	(no. of lines)	(Δ %)	Distribution (Δ 2022-2023) percentage points
Quarterly change (Mar. 2023 – June 2023)	-81 k accesses	-0.4 ↓	Copper: -4.2 ↓
Annual change (June 2022 – June 2022)	-162 k accesses	-0.8 ↓	FWA: +0.8 ↑
4-Year change (June 2019 – June 2023)	-137 k accesses	-0.7 ↓	FTTC: -1.0 ↓
			FTTH: +4.4 ↑

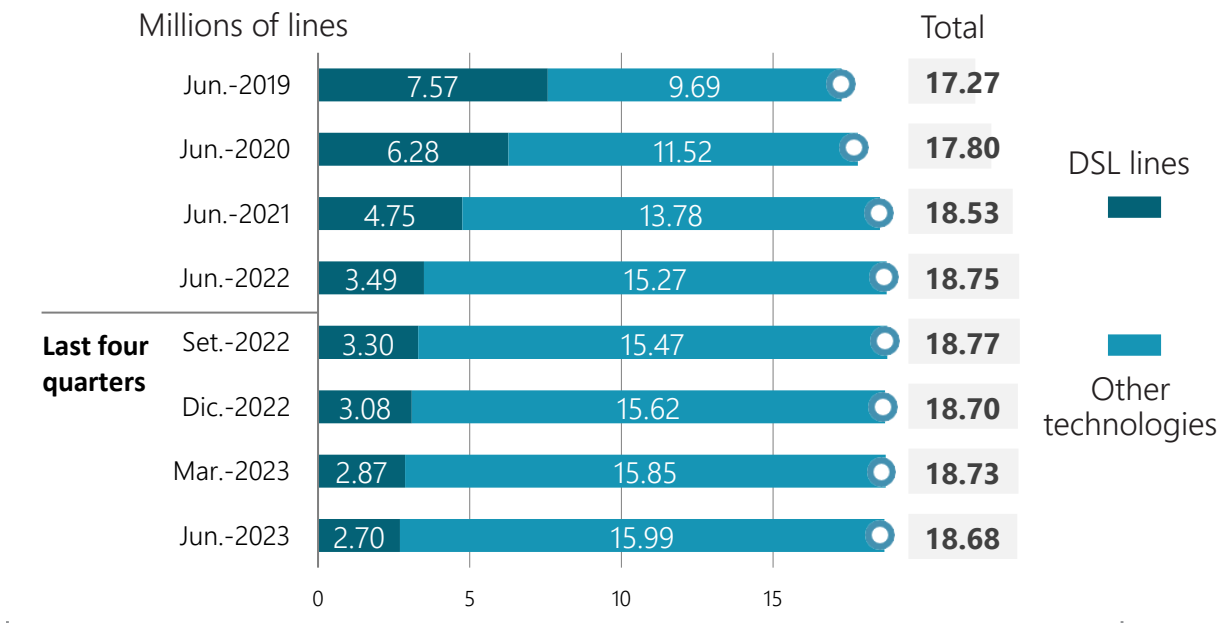
MARKET SHARES (%)

JUNE 2023



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

1.3 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES



Quarterly change
(March 2022 – June 2023)

Total lines



-42 k
lines
(-0.2%)

Annual change
(June 2022 – June 2023)

Total lines



-70 k
lines
(-0.4 %)

DSL lines



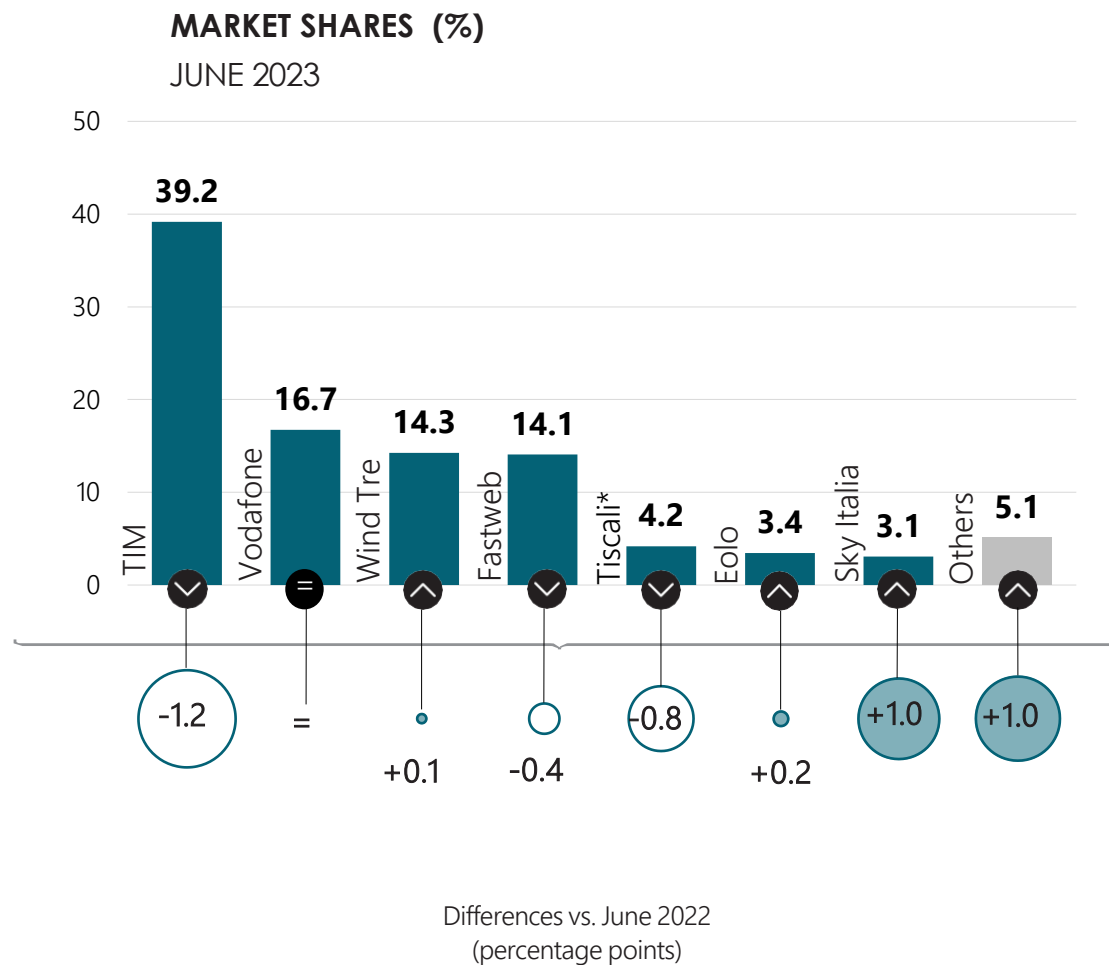
-790 k
lines
(-22.7%)

Other technologies



+720 k
lines
(+4.7%)

k = thousand



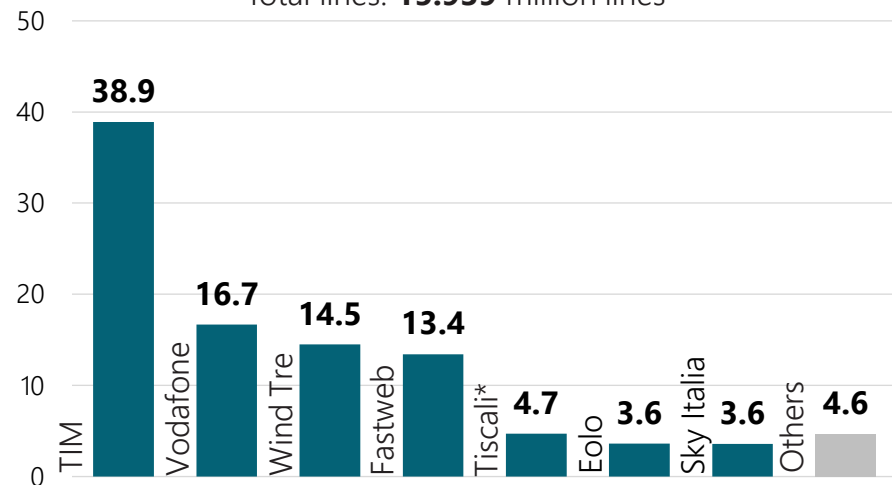
* The value - following the merger that took place on 1st August 2022- include the share previously attributed to Linkem

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

JUNE 2023

RESIDENTIAL CUSTOMERS

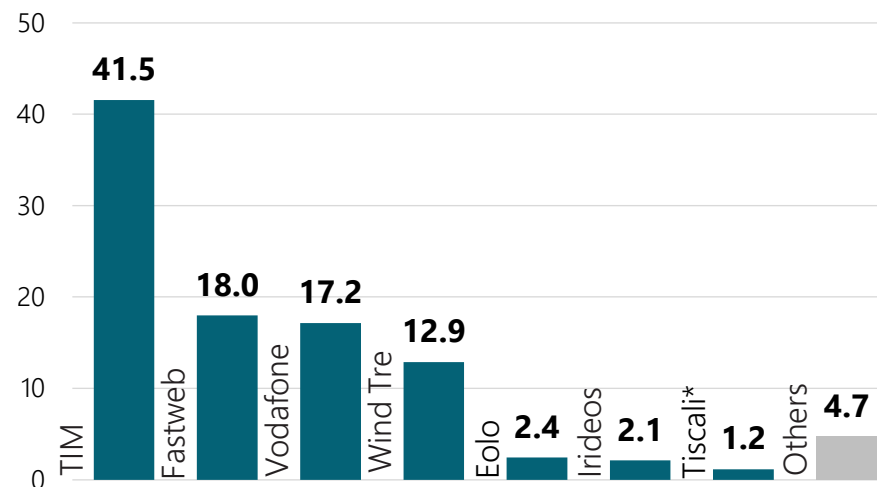
Total lines: **15.939** million lines



by operator (%)

BUSINESS CUSTOMERS

Total lines: **2.744** million lines



16,1%



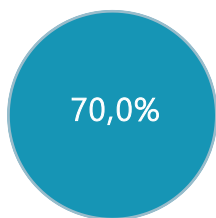
up to
30 Mbps

13,9%



30 Mbps ≤
Mbps
< 100 Mbps

70,0%



≥ 100 Mbps

by marketed speed classes (%)

22,7%



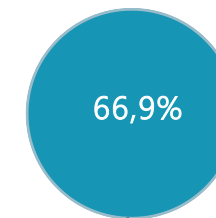
up to
30 Mbps

10,3%



30 Mbps ≤
Mbps
< 100 Mbps

66,9%



≥ 100 Mbps

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

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



JUNE 2023

FWA

FTTC

FTTH

Total lines: **1.91** million access

Total lines: **10.09** million access

Total lines: **3.97** million access

Annual change
(June 2022 – June 2023)

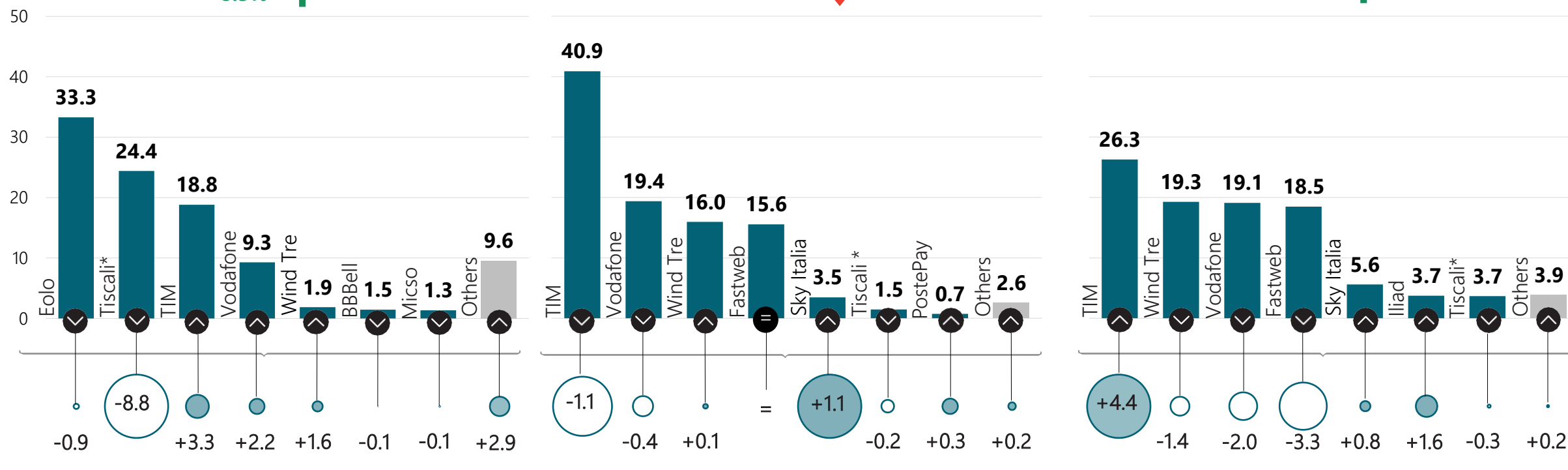
Annual change
(June 2022 – June 2023)

Annual change
(June 2022 – June 2023)

+8.5% ↑

-2.8% ↓

+27.6% ↑



Differences vs. June 2022
(percentage points)

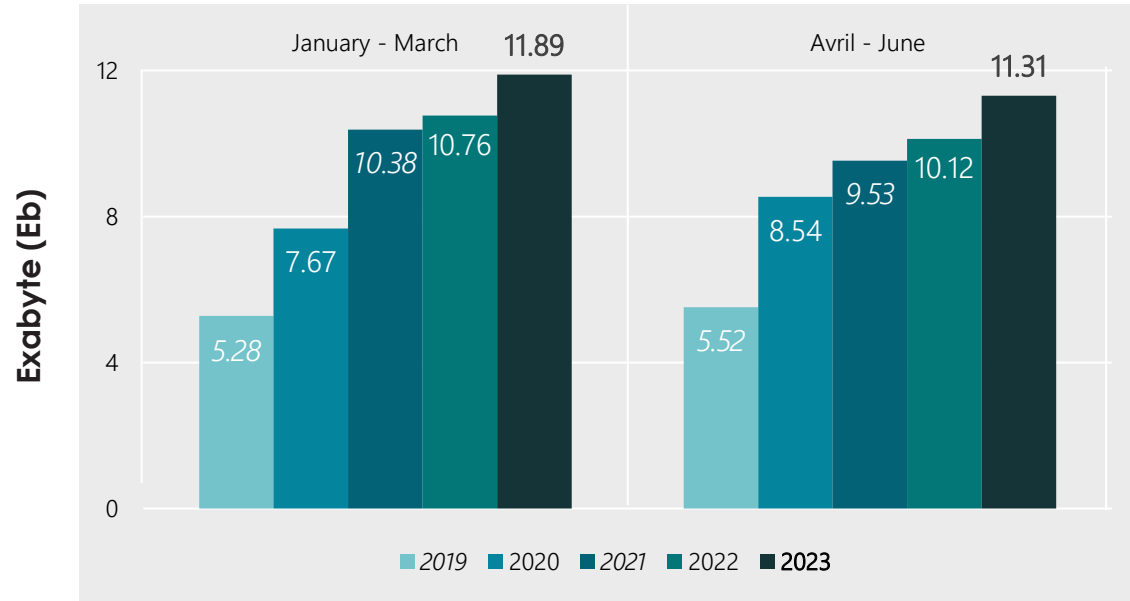
* The value - following the merger that took place on 1st August 2022- include the share previously attributed to Linkem

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

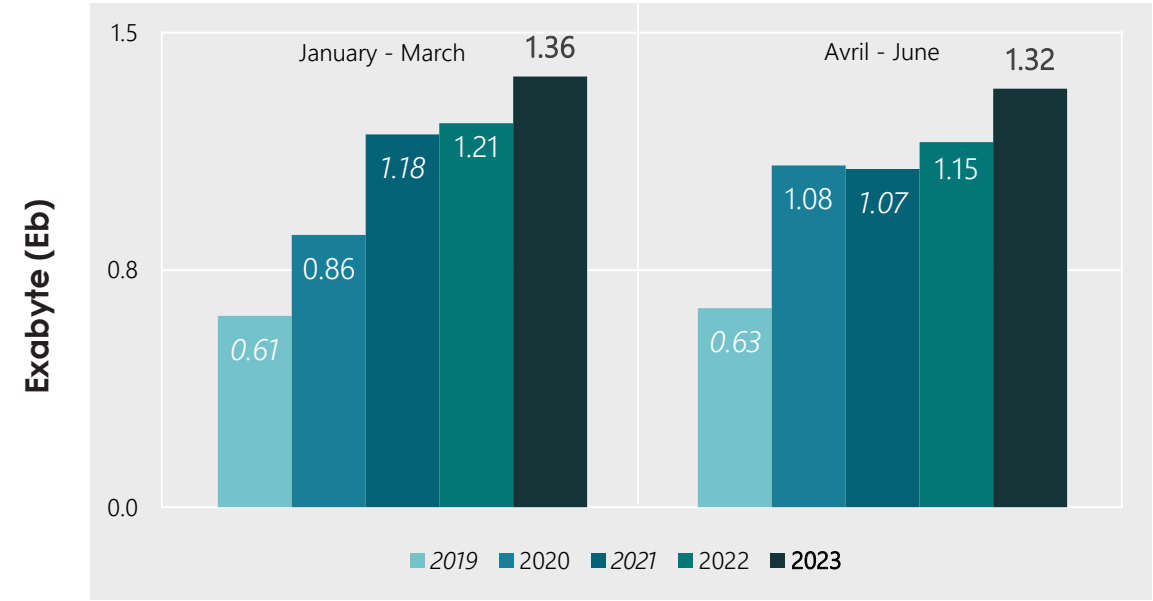
1.6 FIXED NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD



DOWNLOAD (cumulative monthly data)

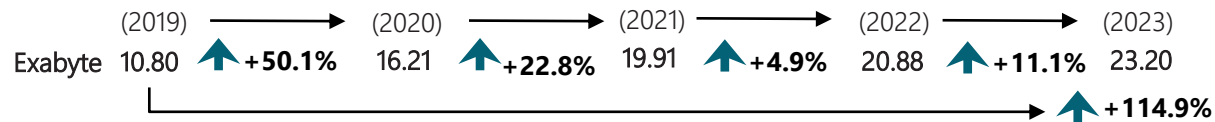


UPLOAD (cumulative monthly data)



1

Cumulative data since the beginning of the year (January – June)



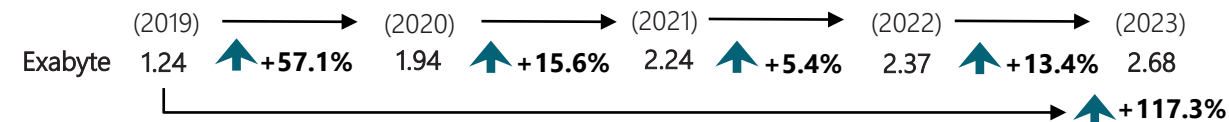
2

Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+18.6	+66.4	+8.8	+6.5	+128.5
February	+27.4	+43.2	+6.3	+12.7	+118.6
March	+89.9	+10.4	-3.5	+12.7	+128.2
Avril	+77.1	+8.6	-1.5	+8.9	+106.3
May	+50.4	+11.3	+9.3	+12.9	+106.6
June	+36.5	+16.0	+12.2	+13.6	+101.9

1

Cumulative data since the beginning of the year (January – June)



2

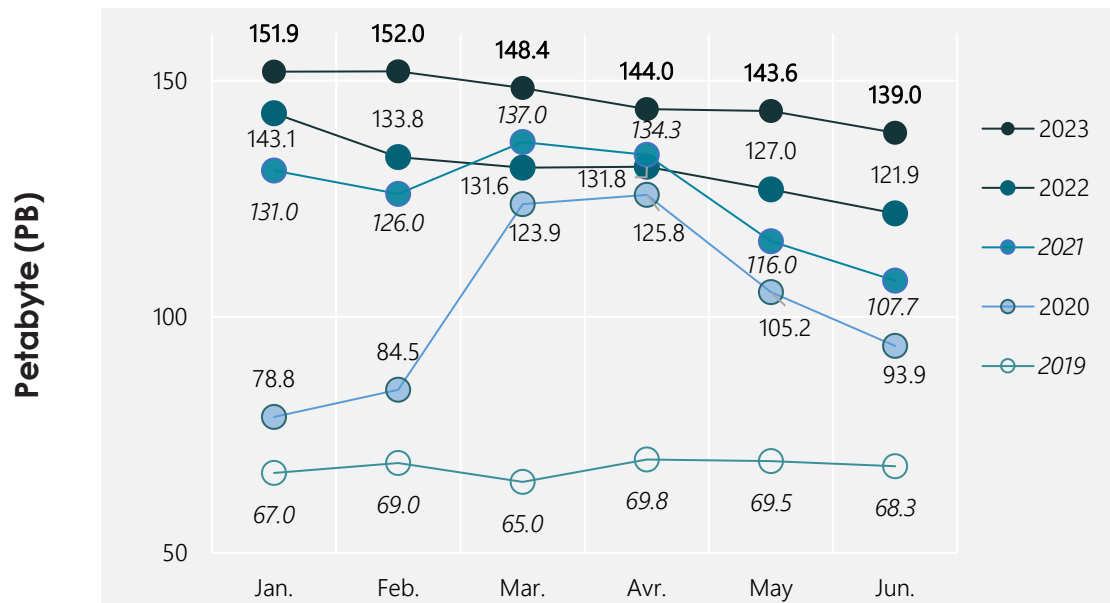
Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+10.2	+64.8	+13.5	+3.7	+113.7
February	+21.3	+50.8	+5.0	+21.4	+133.1
March	+95.6	+12.1	-7.9	+13.4	+129.0
Avril	+108.2	-7.2	-4.7	+12.1	+106.3
May	+61.0	+1.6	+10.5	+14.8	+107.6
June	+44.7	+4.1	+22.9	+17.1	+116.7

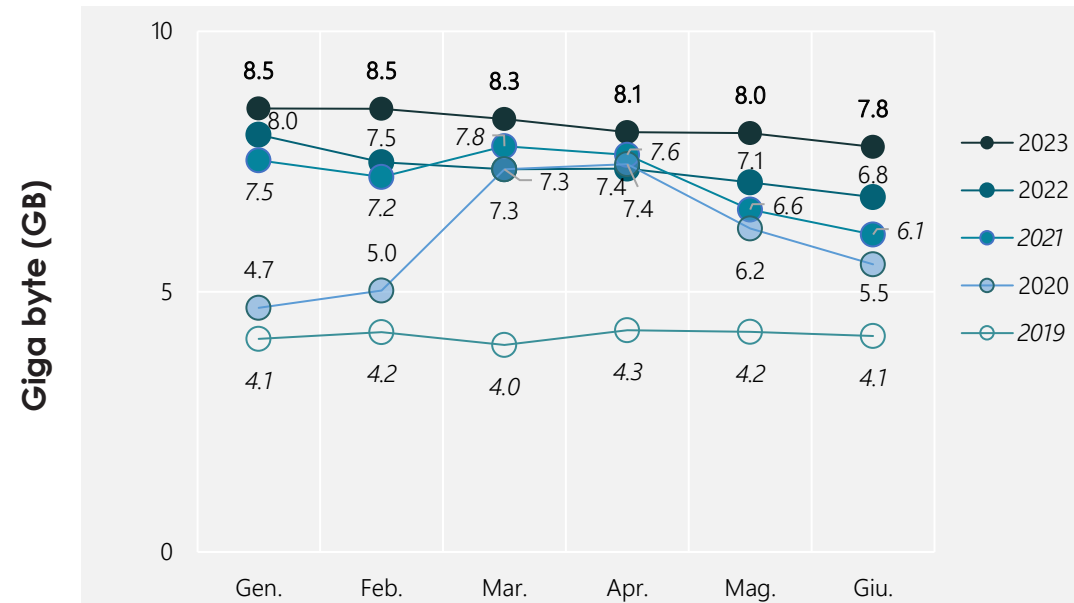
1.7 FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)



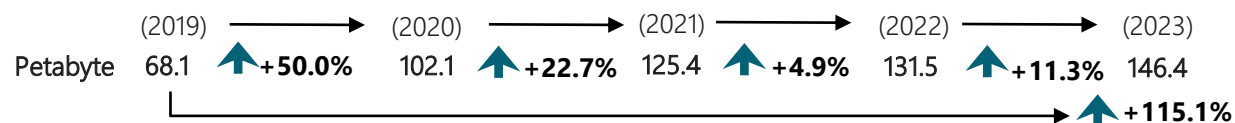
TOTAL TRAFFIC



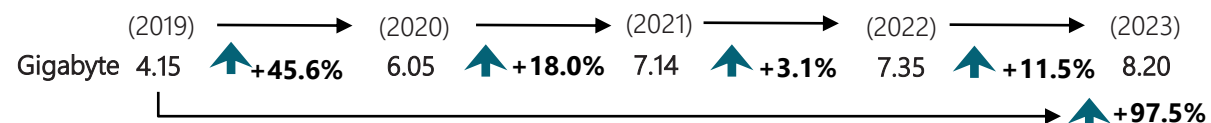
PER BROADBAND LINE



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



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



② Monthly comparison (change in %)

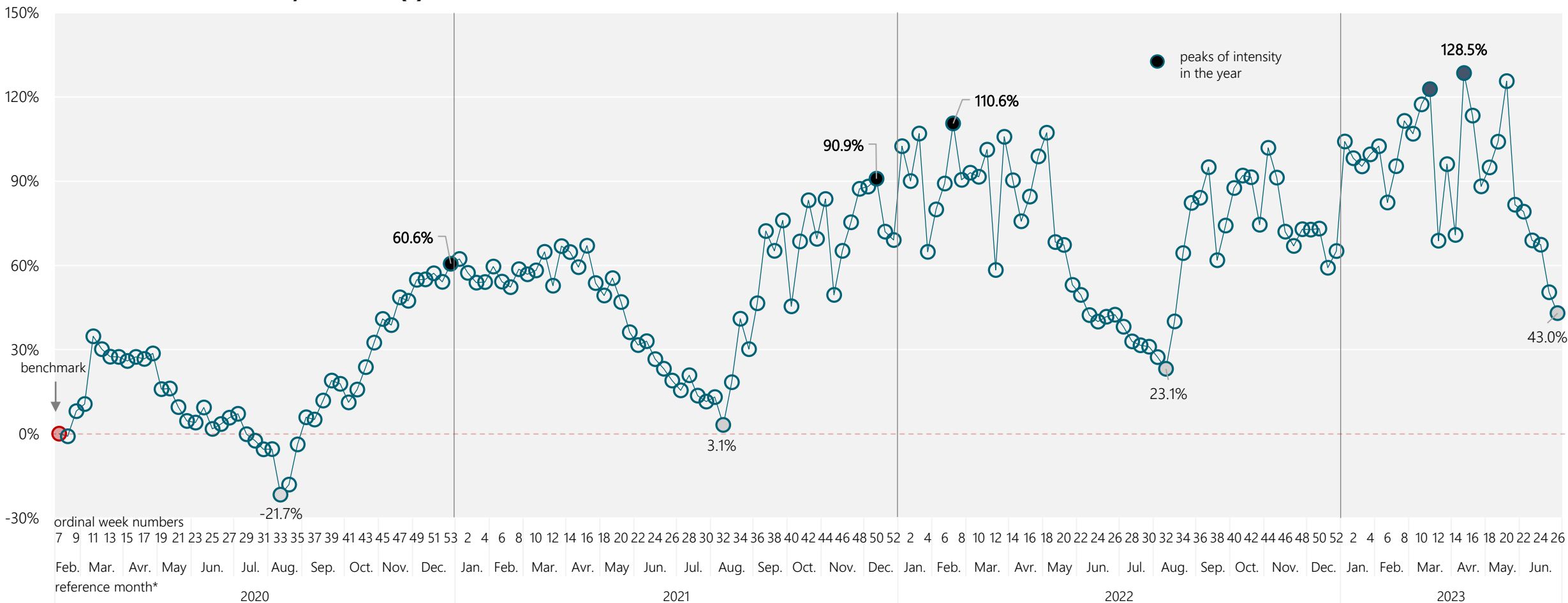
	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+17,7	+66,2	+9,2	+6,2	+126,9
February	+22,4	+49,1	+6,2	+13,5	+120,1
March	+90,5	+10,6	-3,9	+12,8	+128,3
Avril	+80,3	+6,7	-1,8	+9,3	+106,3
May	+51,5	+10,2	+9,5	+13,1	+106,7
June	+37,4	+14,7	+13,2	+14,0	+103,4

② Quarterly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+14,5	+60,4	+6,6	+6,2	+108,0
February	+18,9	+43,4	+3,9	+13,7	+101,6
March	+84,7	+6,1	-5,7	+13,1	+109,0
Avril	+74,8	+2,4	-3,5	+9,5	+89,3
May	+47,0	+5,9	+7,9	+13,3	+90,2
June	+33,2	+10,3	+11,8	+14,2	+87,5

1.8 FIXED NETWORK: WEEKLY DATA TRAFFIC INTENSITY

Data traffic intensity variation (*)



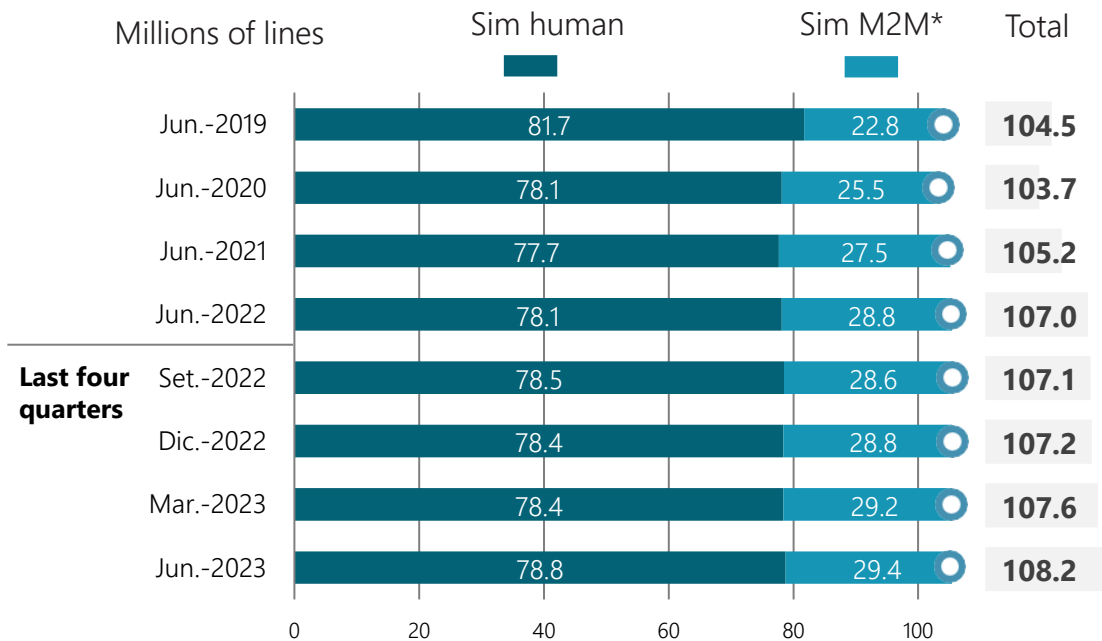
Definition: data traffic intensity (Gbps) represents the peak inbound traffic volume registered in a timespan of 5 to 60 minutes.

*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.

1.9 MOBILE NETWORK: TOTAL SUBSCRIBERS



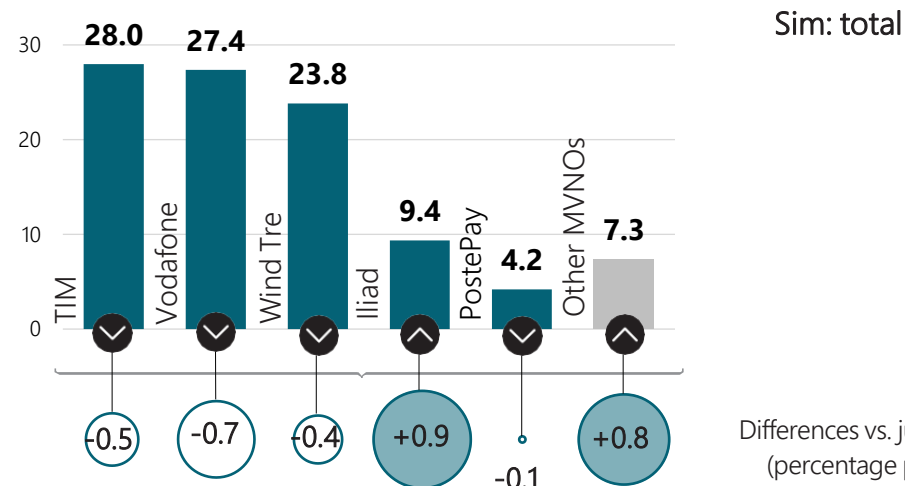
(*) Note: Machine-to-Machine sims are based on the technologies that enable devices and sensors or "things" (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

	Quarterly change (March 2023 – June 2023)		Annual change (June 2022 – June 2023)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
Total sim cards:	+516	↑ +0.5	+1,184	↑ +1.1
Sim human:	+354	↑ -0.8	+602	↑ +0.8
Sim M2M:	+161	↑ +0.6	+582	↑ +2.0

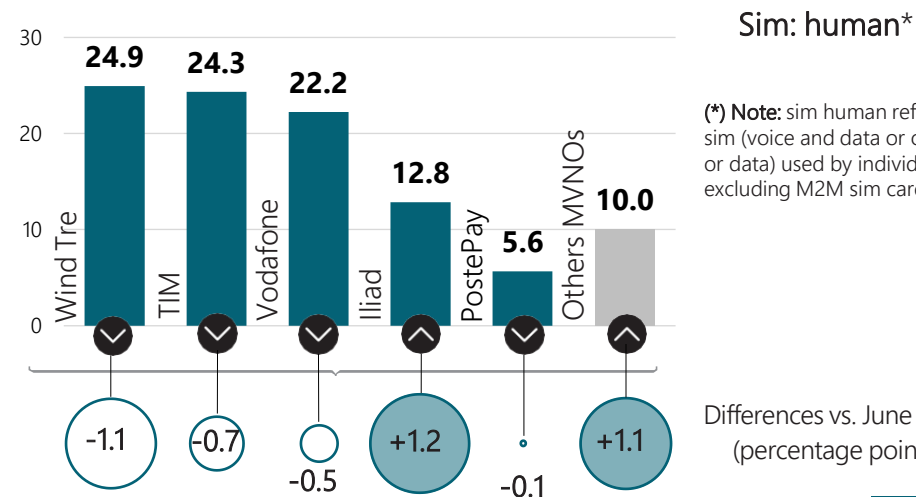
Note: the data collected on TIM and Vodafone include the lines of the subsidiaries. respectively Kena mobile and VEI (which offers mobile telephony services called .ho)

MARKET SHARES (%)

JUNE 2023



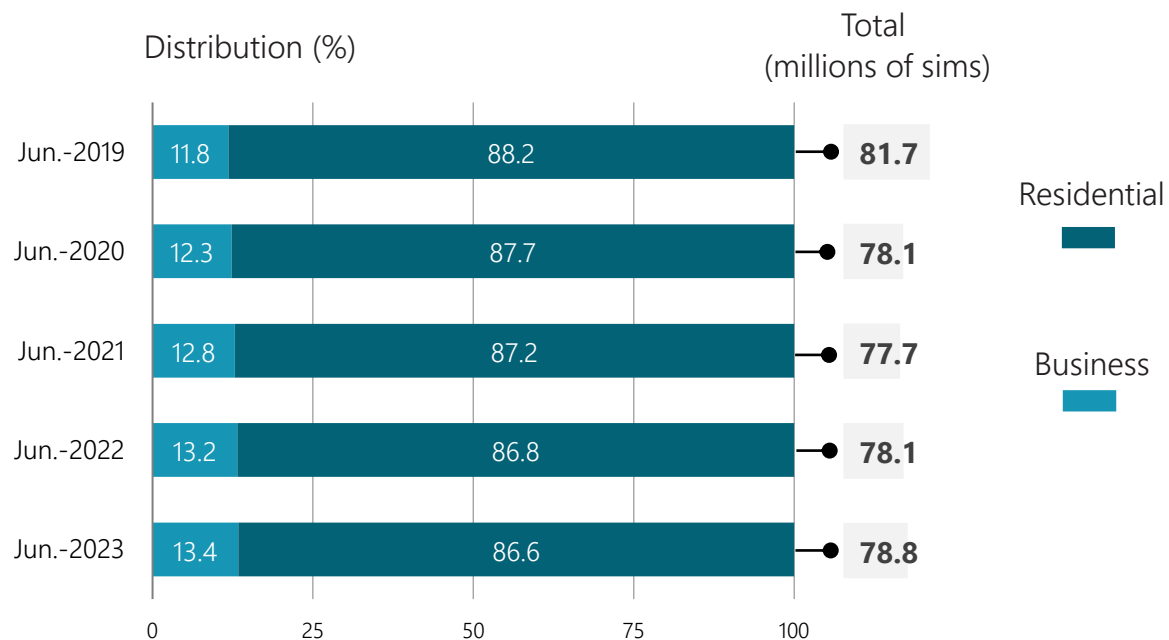
Differences vs. June 2022 (percentage points)



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

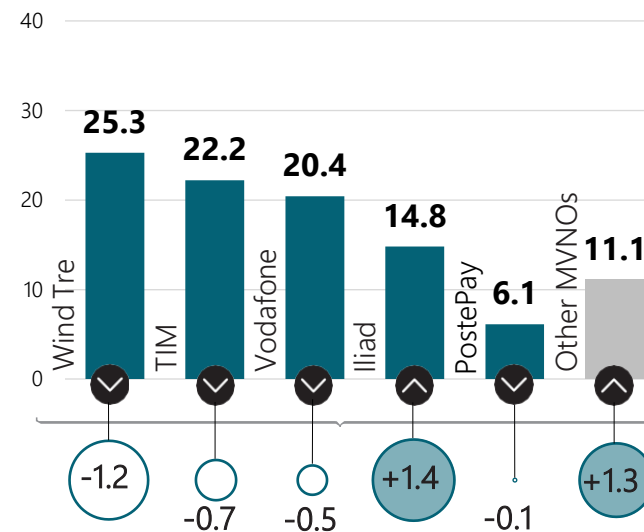
Differences vs. June 2022 (percentage points)

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



MARKET SHARES (%)

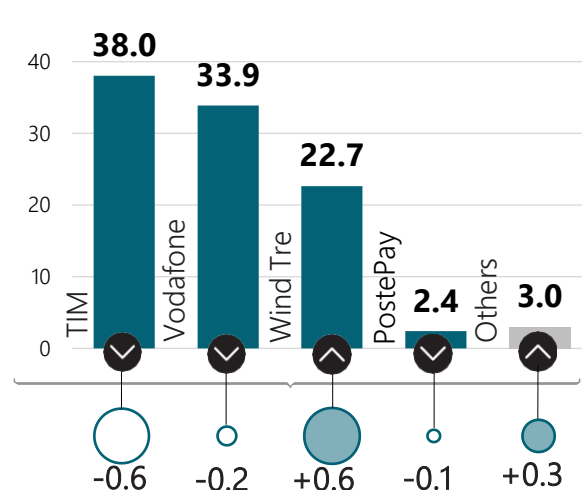
JUNE 2023



Residential

Differences vs. June 2022 (percentage points)

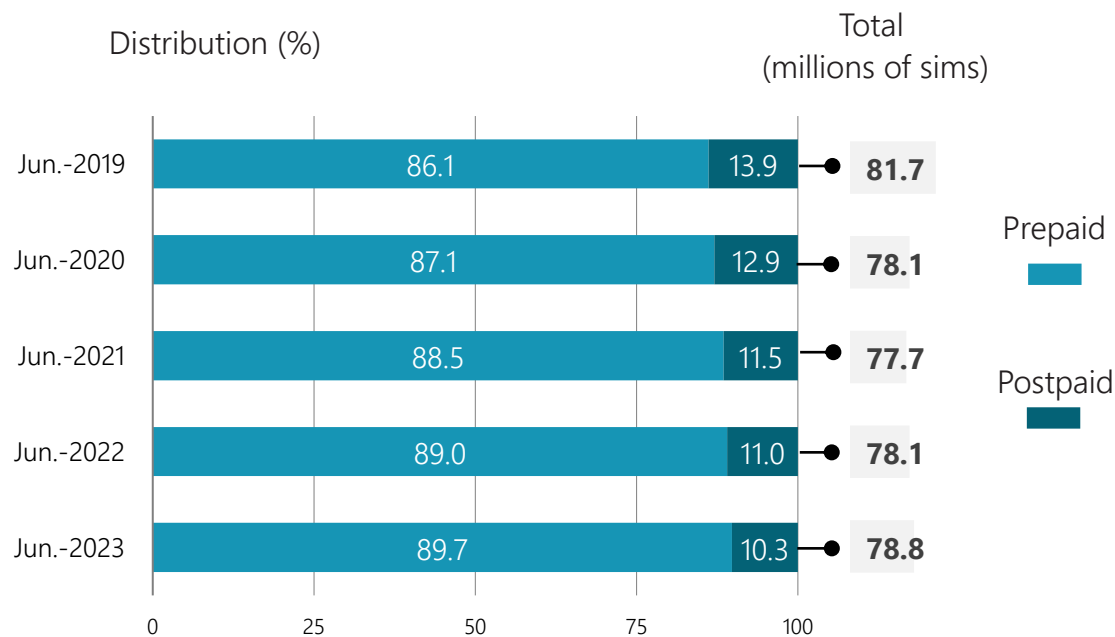
	Annual change (June 2022 – June 2023)		4-Year change (June 2019 – June 2023)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
Total human sim cards:	+602	↑ +0.8	-2,971	↓ -3.6
Residential sim card:	+399	↑ +0.6	-3,853	↓ -5.3
Business sim cards:	+203	↑ +2.0	+882	↑ +9.1



Business

Differences vs. June 2022 (percentage points)

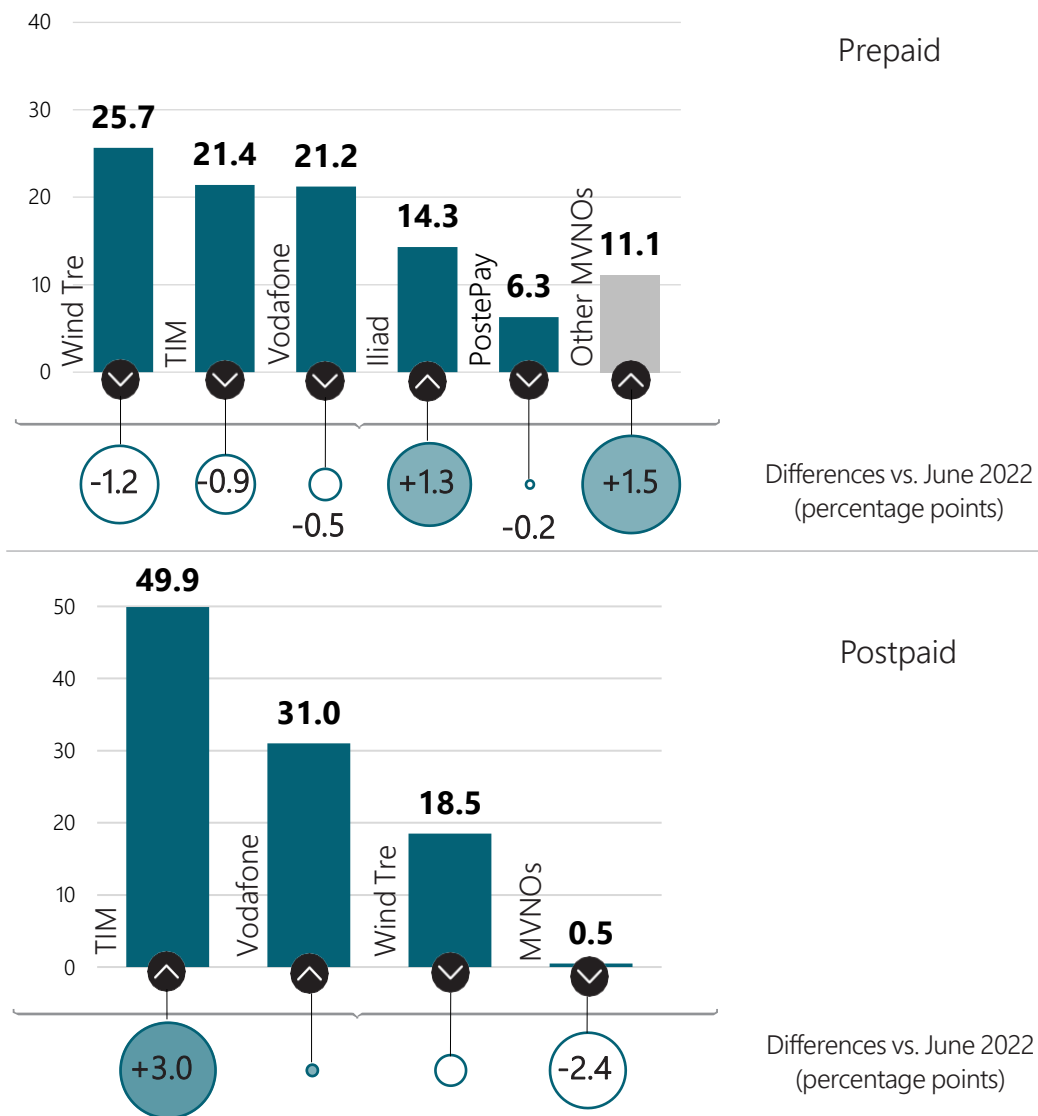
1.11 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT



	Annual change (June 2022 – June 2023)		4-Year change (June 2019 – June 2023)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
Total human sim cards:	+602	↑ +0.8	-2,971	↓ -3.6
Prepaid sim cards:	+1,100	↑ +1.6	+278	↑ +0.4
Postpaid sim cards:	-497	↓ -5.8	-3,249	↓ -28.7

MARKET SHARES (%)

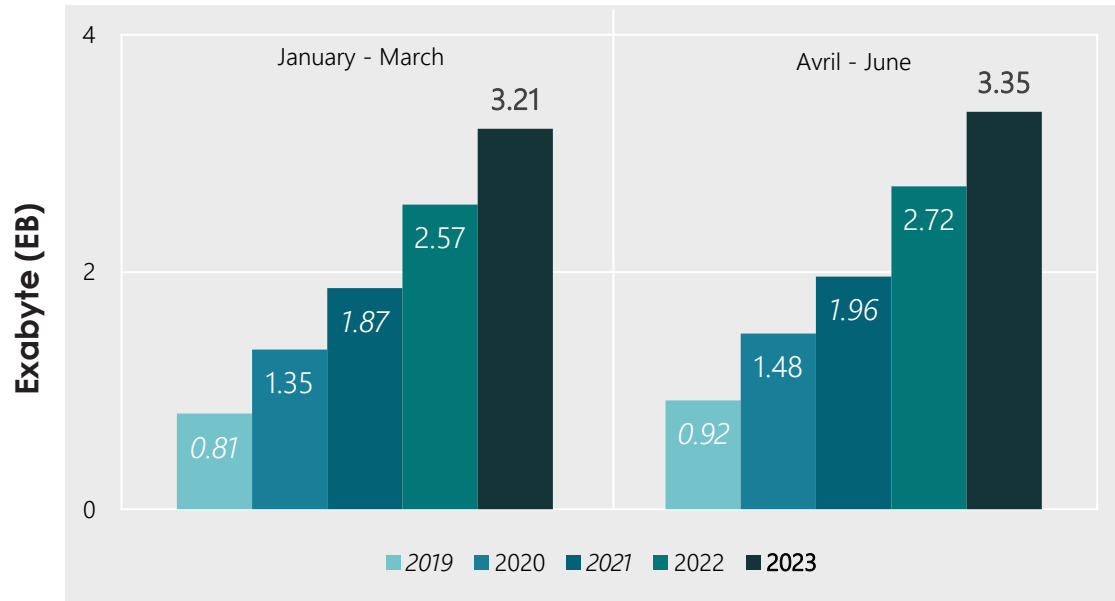
JUNE 2023



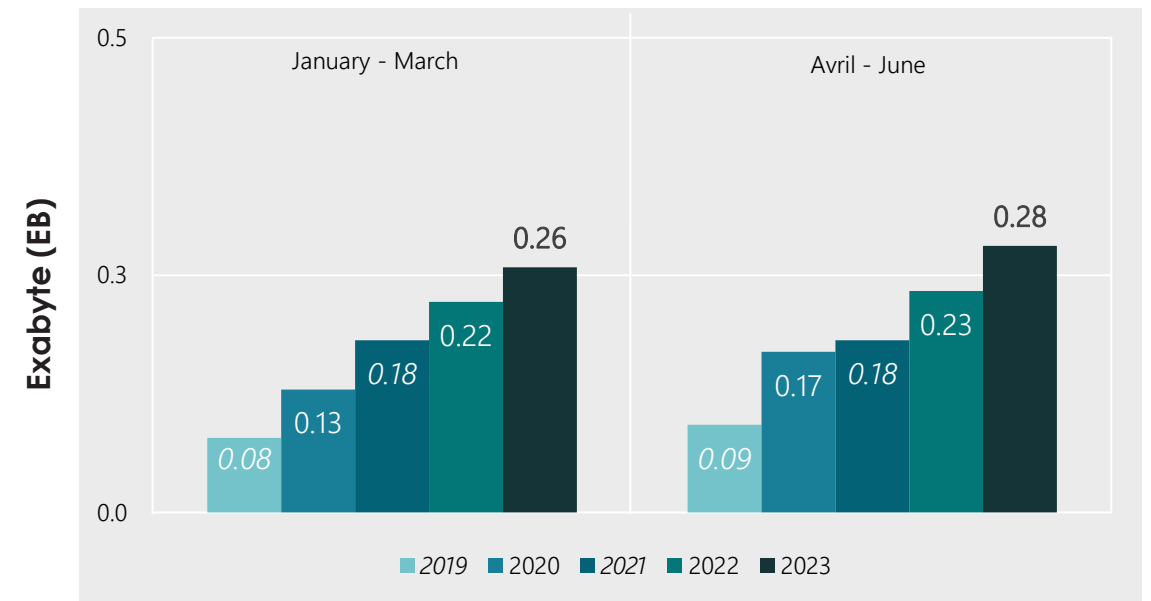
1.12 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD



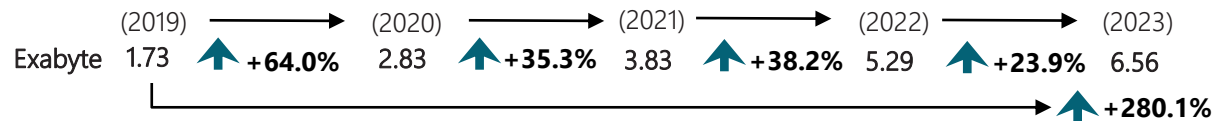
DOWNLOAD (cumulative monthly data)



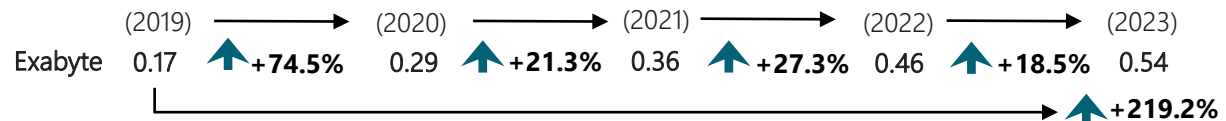
UPLOAD (cumulative monthly data)



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



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



② Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+56.8	+49.5	+40.0	+25.6	+312.2
February	+62.3	+37.9	+41.3	+25.6	+297.3
March	+80.4	+29.9	+32.6	+23.4	+283.5
Avril	+77.5	+27.7	+34.9	+24.0	+279.0
May	+55.7	+35.5	+40.2	+23.1	+264.2
June	+52.5	+34.5	+40.8	+22.3	+253.1

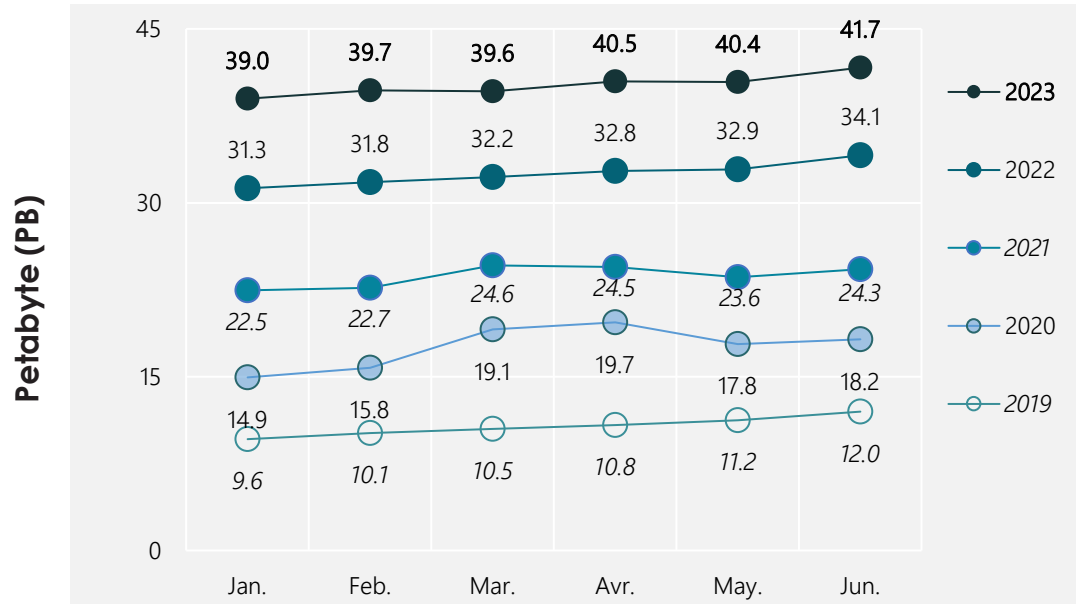
② Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+39.7	+60.0	+30.9	+14.5	+235.0
February	+51.3	+48.5	+29.7	+16.9	+240.8
March	+98.7	+21.1	+13.7	+17.9	+222.5
Avril	+125.3	-3.0	+23.1	+18.8	+2197
May	+83.9	+6.7	+31.1	+20.7	+210.4
June	+46.0	+20.9	+37.6	+21.8	+195.7

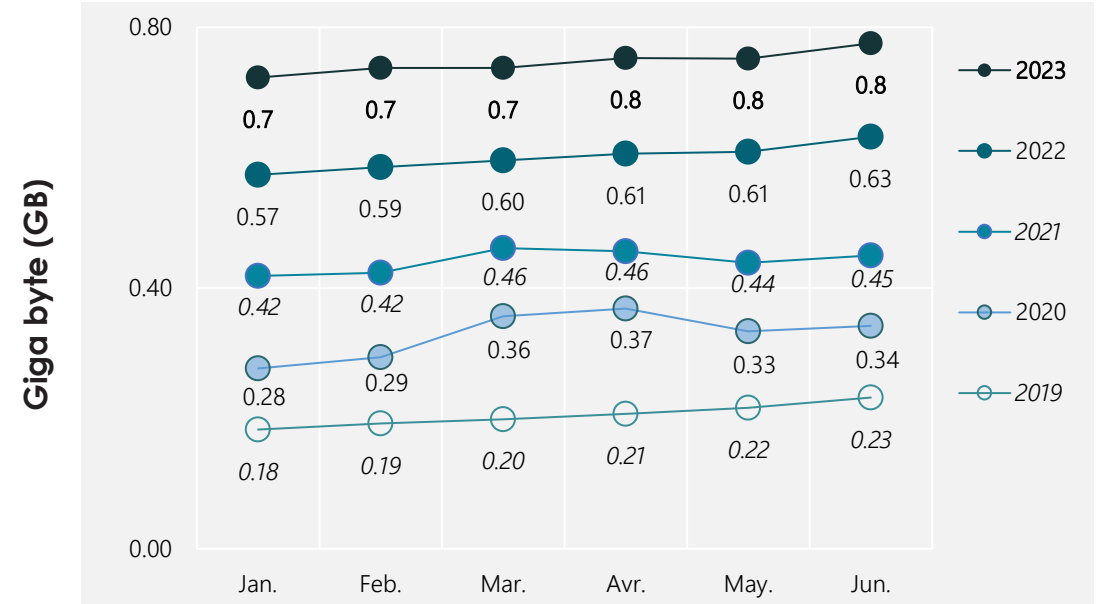
1.13 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)



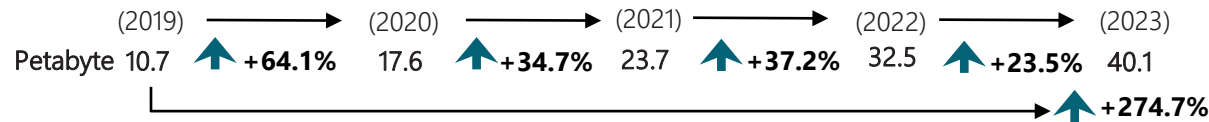
TOTAL TRAFFIC



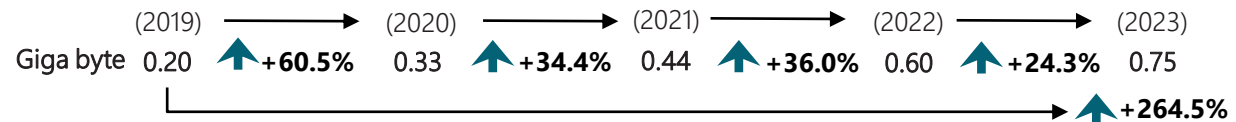
PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



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



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



② Monthly comparison (change in %)

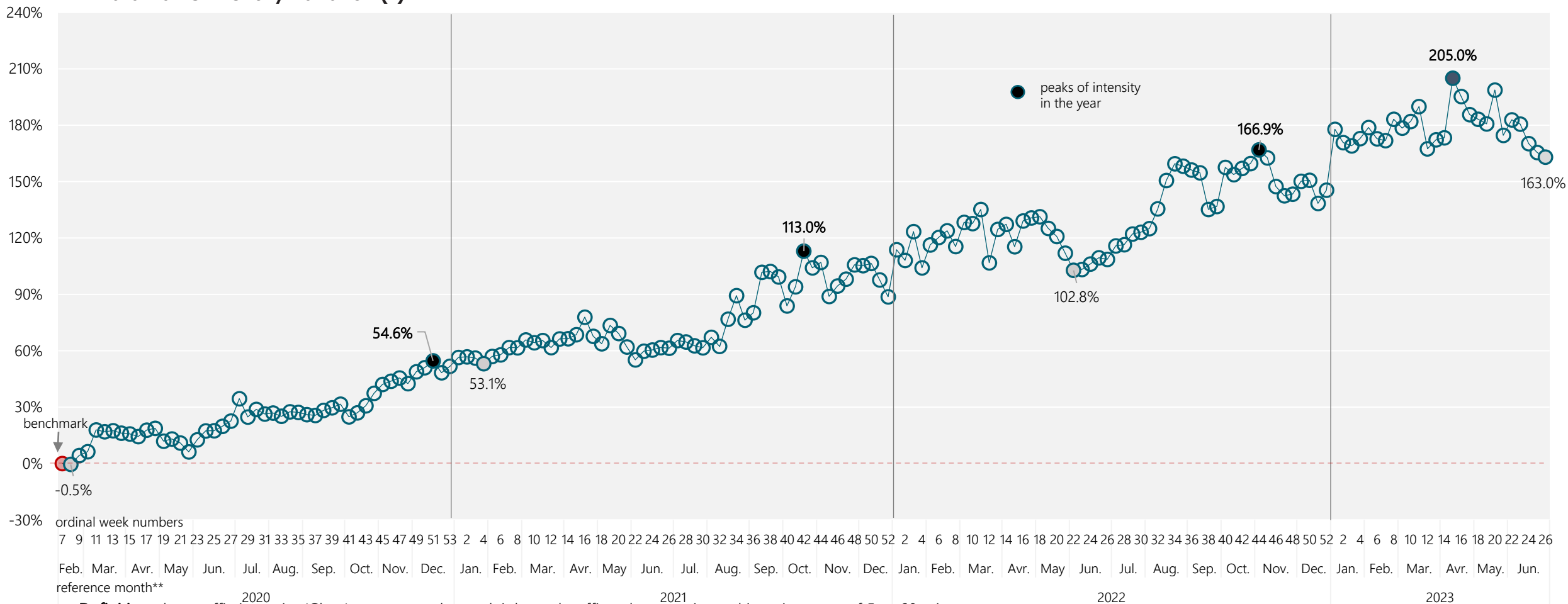
	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+55.3	+50.4	+39.2	+24.7	+305.3
February	+55.8	+43.7	+40.3	+24.9	+292.5
March	+82.0	+29.0	+30.9	+23.0	+278.1
Avril	+81.7	+24.3	+33.9	+23.6	+273.7
May	+58.2	+32.5	+39.4	+22.9	+259.4
June	+51.9	+33.3	+40.5	+22.2	+247.7

② Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+51.4	+51.2	+37.0	+26.0	+295.2
February	+52.8	+44.2	+38.2	+26.0	+283.8
March	+79.4	+29.2	+29.2	+23.8	+270.8
Avril	+78.2	+23.9	+32.7	+24.2	+264.2
May	+54.4	+31.4	+38.9	+23.5	+247.9
June	+47.5	+31.5	+40.6	+22.6	+234.4

1.14 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.

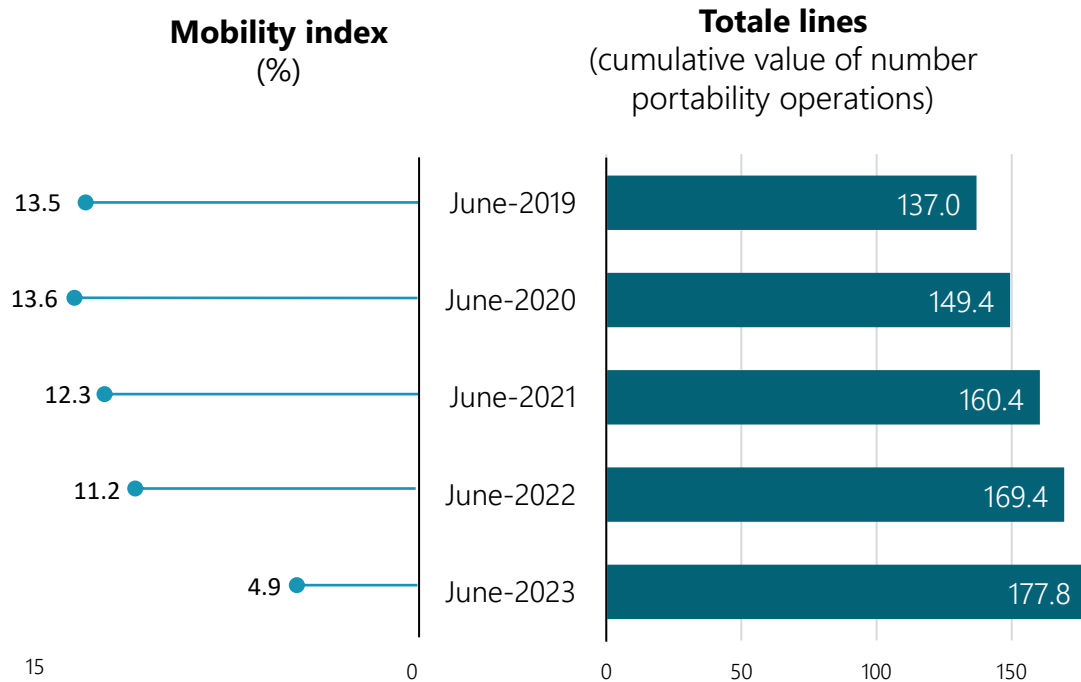
*For each week, the intensity indicator is represented by the percentage change, compared to the 7th week of 2020 (10 to 16 February - red dot in the graph), of the weighted average of the traffic data calculated on the operators' data using, as weighting coefficient, the percentual market share of each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

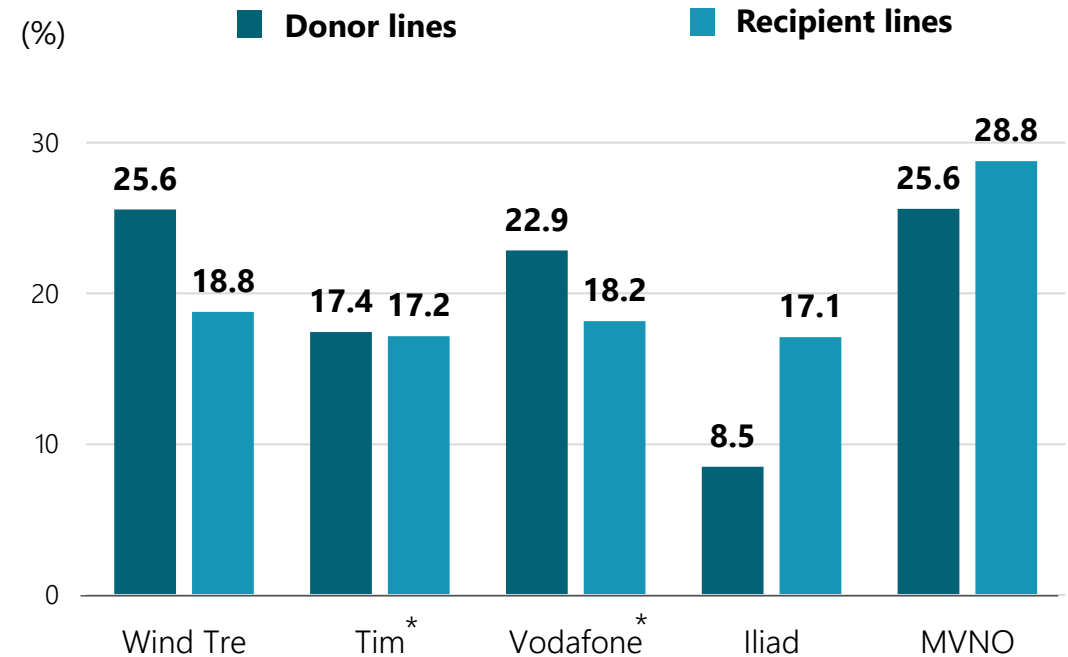
1.15 MOBILE NETWORK: NUMBER PORTABILITY

In one year (June 2022 – June 2023), there have been **8.3 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)

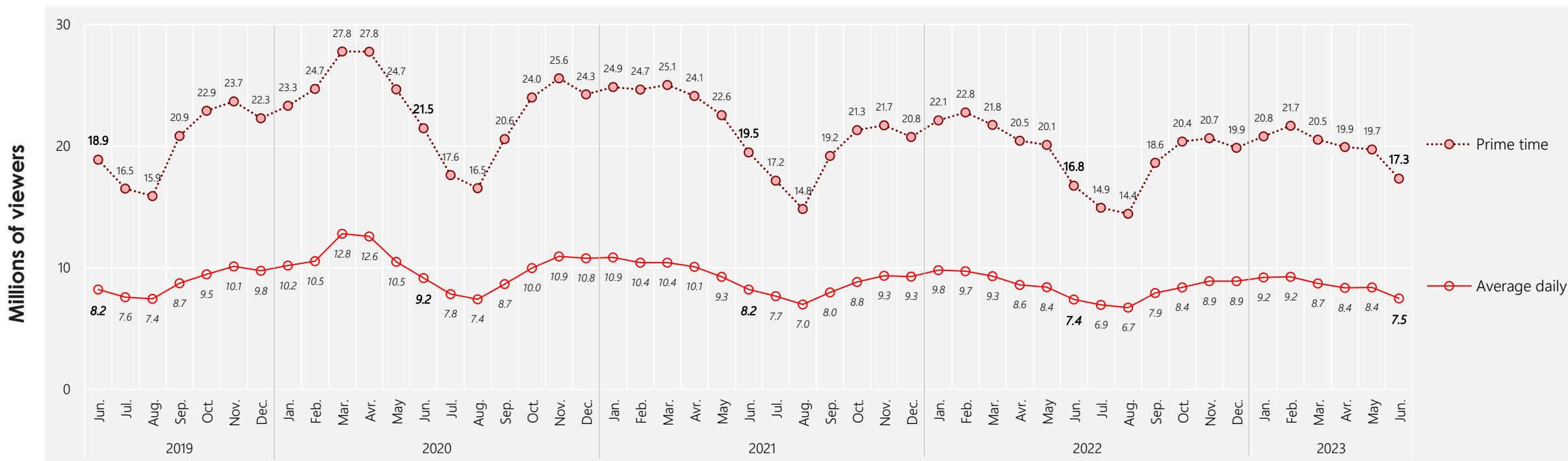
DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months) JUNE 2023



(*) 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

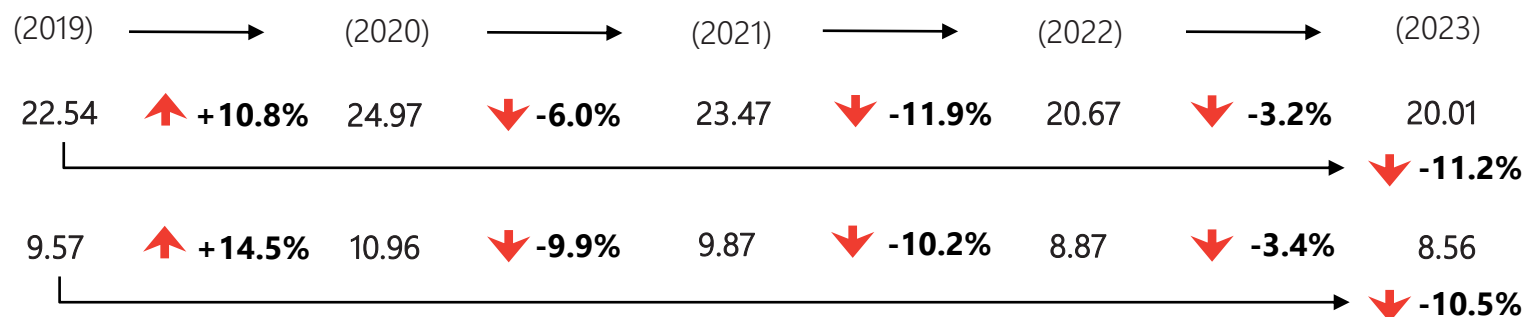
JUNE 2019 – JUNE 2023 (average daily audience)



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

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

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



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	2019	2020	2021	2022	2023	Change in %	
						'19-'23	'22-'23
RAI	9.10	9.95	9.71	8.33	7.81	-14.2	-6.3
Mediaset	7.73	9.09	8.23	7.81	7.53	-2.6	-3.6
Comcast / Sky	1.92	1.73	1.71	1.40	1.50	-22.1	+7.3
Warner Bros. Discovery	1.41	1.59	1.55	1.33	1.40	-0.9	+5.4
Cairo Comm. / La 7	1.30	1.48	1.33	1.13	1.01	-22.8	-10.7
Others	1.07	1.14	0.94	0.68	0.77	-27.7	13.9

Broadcasters	2019	2020	2021	2022	2023	Change in p.p.	
						'19-'23	'22-'23
RAI	40.4	39.9	41.4	40.3	39.0	-1.4	-1.3
Mediaset	34.3	36.4	35.1	37.8	37.6	+3.3	-0.2
Comcast / Sky	8.5	6.9	7.3	6.8	7.5	-1.1	+0.7
Warner Bros. Discovery	6.3	6.4	6.6	6.4	7.0	+0.7	+0.6
Cairo Comm. / La 7	5.8	5.9	5.7	5.4	5.0	-0.8	-0.4
Others	4.7	4.5	4.0	3.3	3.8	-0.9	+0.6

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year

(Jan. – Jun.) in million

Broadcasters	2019	2020	2021	2022	2023	Change in %	
						'19-'23	'22-'23
RAI	3.77	4.28	3.95	3.43	3.27	-13.2	-4.5
Mediaset	3.26	3.82	3.47	3.32	3.21	-1.5	-3.1
Warner Bros. Discovery	0.71	0.90	0.80	0.69	0.68	-3.6	-1.1
Comcast / Sky	0.73	0.76	0.67	0.62	0.62	-14.8	+0.3
Cairo Comm. / La 7	0.44	0.49	0.43	0.40	0.32	-25.5	-18.8
Others	0.66	0.71	0.55	0.41	0.45	-32.2	+8.8

Broadcasters	2019	2020	2021	2022	2023	Change in p.p.	
						'19-'23	'22-'23
RAI	39.4	39.1	40.0	38.6	38.2	-1.2	-0.4
Mediaset	34.1	34.8	35.1	37.4	37.5	+3.4	+0.1
Warner Bros. Discovery	7.4	8.2	8.1	7.8	8.0	+0.6	+0.2
Comcast / Sky	7.6	6.9	6.8	7.0	7.3	-0.4	+0.3
Cairo Comm. / La 7	4.6	4.5	4.4	4.5	3.8	-0.8	-0.7
Altri	6.9	6.5	5.6	4.7	5.2	-1.7	+0.6

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						Change in %	
		2019	2020	2021	2022	2023	'19-'23	'22-'23
RAI	Rai 1	4.73	5.38	5.11	4.65	4.27	-9.6	-8.2
	Rai 2	1.49	1.62	1.34	1.09	1.00	-33.1	-8.6
	Rai 3	1.41	1.32	1.70	1.42	1.39	-1.4	-1.7
Mediaset	Canale 5	3.74	4.09	3.70	3.45	3.36	-10.1	-2.4
	Italia 1	1.22	1.45	1.28	1.22	1.16	-5.4	-5.1
	Rete 4	1.05	1.29	1.18	0.99	0.84	-20.0	-15.0
Cairo Comm.	La7	1.21	1.38	1.25	1.05	0.91	-24.7	-13.3
Comcast / Sky	TV8	0.60	0.59	0.51	0.44	0.53	-11.0	+21.6
Warner Bros. Discovery	Nove	0.38	0.40	0.46	0.36	0.41	+6.9	+12.8

Average share Jan. – Jun. (in %)

Broadcasters	TV channels						Change in p.p.	
		2019	2020	2021	2022	2023	'19-'23	'22-'23
RAI	Rai 1	21.0	21.5	21.8	22.5	21.3	+0.4	-1.2
	Rai 2	6.6	6.5	5.7	5.3	5.0	-1.6	-0.3
	Rai 3	6.3	5.3	7.3	6.9	7.0	+0.7	+0.1
Mediaset	Canale 5	16.6	16.4	15.8	16.7	16.8	+0.2	+0.1
	Italia 1	5.4	5.8	5.4	5.9	5.8	+0.4	-0.1
	Rete 4	4.7	5.2	5.0	4.8	4.2	-0.5	-0.6
Cairo Comm.	La7	5.4	5.5	5.3	5.1	4.6	-0.8	-0.5
Comcast / Sky	TV8	2.7	2.4	2.2	2.1	2.7	=	+0.5
Warner Bros. Discovery	Nove	1.7	1.6	1.9	1.8	2.0	+0.3	+0.3

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year

(Jan. – Jun.) in million

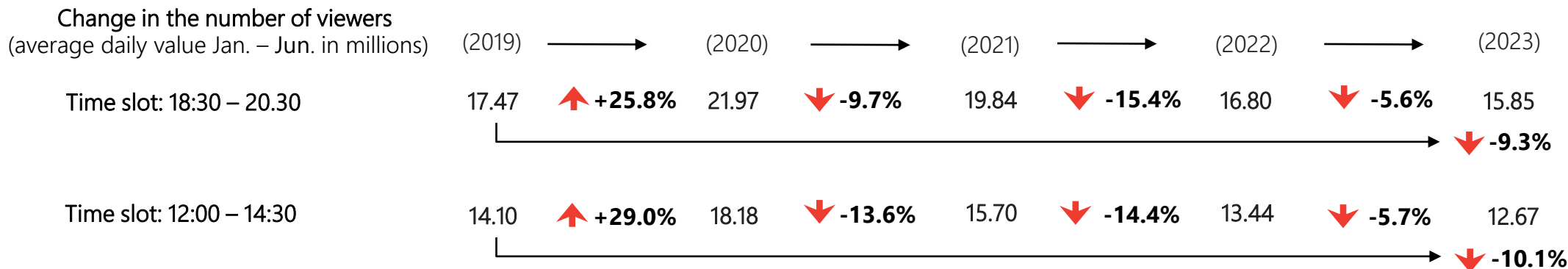
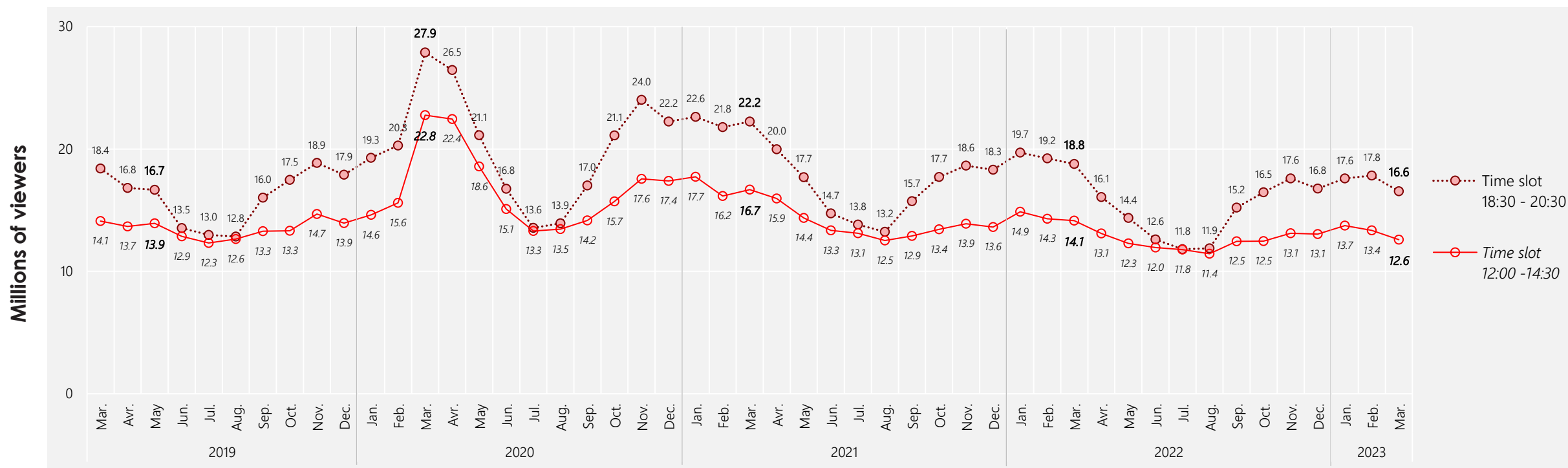
Broadcasters	TV channels						Change in %	
		2019	2020	2021	2022	2023	'19-'23	'22-'23
RAI	Rai 1	1.75	2.03	1.89	1.74	1.65	-6.1	-5.3
	Rai 2	0.60	0.60	0.52	0.45	0.46	-24.2	+2.1
	Rai 3	0.71	0.82	0.81	0.66	0.61	-14.8	-7.6
Mediaset	Canale 5	1.66	1.80	1.70	1.60	1.54	-7.4	-4.0
	Italia 1	0.47	0.57	0.48	0.42	0.40	-16.4	-6.3
	Rete 4	0.40	0.46	0.42	0.38	0.33	-17.0	-11.8
Cairo Comm.	La7	0.39	0.44	0.38	0.36	0.28	-26.2	-20.5
Comcast / Sky	TV8	0.22	0.25	0.19	0.18	0.20	-7.5	+12.4
Warner Bros. Discovery	Nove	0.15	0.19	0.19	0.16	0.15	-2.8	-5.3

Average share Jan. – Jun. (in %)

Broadcasters	TV channels						Change in p.p.	
		2019	2020	2021	2022	2023	'19-'23	'22-'23
RAI	Rai 1	18.3	18.5	19.2	19.6	19.2	+0.9	-0.4
	Rai 2	6.3	5.4	5.2	5.0	5.3	-1.0	+0.3
	Rai 3	7.5	7.5	8.2	7.4	7.1	-0.4	-0.3
Mediaset	Canale 5	17.3	16.4	17.2	18.0	17.9	+0.6	-0.1
	Italia 1	5.0	5.2	4.9	4.8	4.6	-0.3	-0.1
	Rete 4	4.2	4.2	4.2	4.2	3.9	-0.3	-0.4
Cairo Comm.	La7	4.0	4.0	3.9	4.0	3.3	-0.7	-0.7
Comcast / Sky	TV8	2.3	2.3	1.9	2.1	2.4	+0.1	+0.3
Warner Bros. Discovery	Nove	1.6	1.7	1.9	1.8	1.8	+0.1	=

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

JUNE 2019 – JUNE 2023 (average daily audience)



* **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**

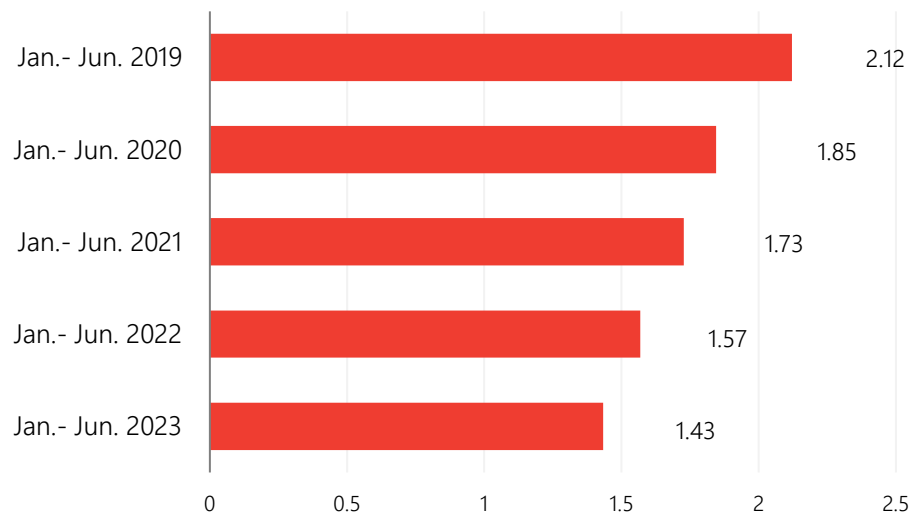
		Average audience since the beginning of the year (Jan. – Jun.) in millions					Change (in thousand)		Change (in %)	
National news programs		2019	2020	2021	2022	2023	'19-'23	'22-'23	'19-'23	'22-'23
RAI	Tg 1 (13:30 edition)	3.40	4.38	4.03	3.58	3.38	-18	-197	-5.5	-0.5
	Tg 2 (13:00 edition)	2.11	2.54	5.01	1.80	1.65	-458	-147	-8.2	-21.7
	Tg 3 (12:00 edition)	0.93	1.23	1.06	0.83	0.74	-194	-94	-11.3	-20.8
	Tg 3 Regionale (14:00 edition)	2.41	3.31	2.98	2.31	2.11	-297	-196	-8.5	-12.3
Mediaset	Tg 4 (12:00 edition)	2.90	3.65	3.13	2.87	2.91	+13	+36	+1.3	+0.5
	Tg 5 (13:00 edition)	0.37	0.44	0.34	0.29	0.29	-83	-2	-0.8	-22.4
	Studio Aperto (12:25 edition)	1.35	1.86	1.51	1.19	1.09	-254	-83	-7.8	-18.9
La 7	Tg La 7 (13:30 edition)	0.63	0.78	0.65	0.57	0.50	-135	-77	-13.5	-21.4

**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		2019	2020	2021	2022	2023	'19-'23	'22-'23	'19-'23	'22-'23
RAI	Tg 1 (20:00 edition)	4.99	6.08	5.61	4.99	4.56	-430	-429	-8.6	-8.6
	Tg 2 (20:30 edition)	1.64	1.98	1.70	1.28	1.13	-516	-152	-31.4	-11.9
	Tg 3 (19:00 edition)	1.83	2.45	2.30	1.84	1.80	-29	-40	-1.6	-2.2
	Tg 3 Regionale (19:30 edition)	2.36	3.36	3.04	2.36	2.32	-41	-44	-1.7	-1.9
Mediaset	Tg 4 (12:00 edition)	4.09	4.99	4.46	4.02	3.90	-186	-121	-4.5	-3.0
	Tg 5 (13:00 edition)	0.60	0.75	0.66	0.63	0.59	-9	-39	-1.5	-6.1
	Studio Aperto (18:30 edition)	0.73	0.99	0.80	0.57	0.53	-202	-42	-27.5	-7.4
La 7	Tg La 7 (20:00 edition)	1.22	1.35	1.26	1.10	1.02	-205	-80	-16.8	-7.3

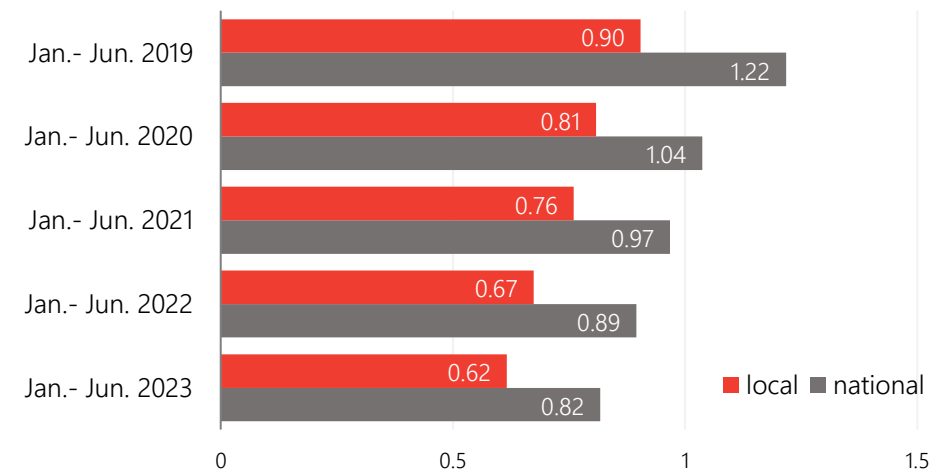
2.6 NEWSPAPERS: DAILY COPIES SOLD SINCE THE BEGINNING YEAR (1/2)

CUMULATIVE SALES
(copies sold in millions)



CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)

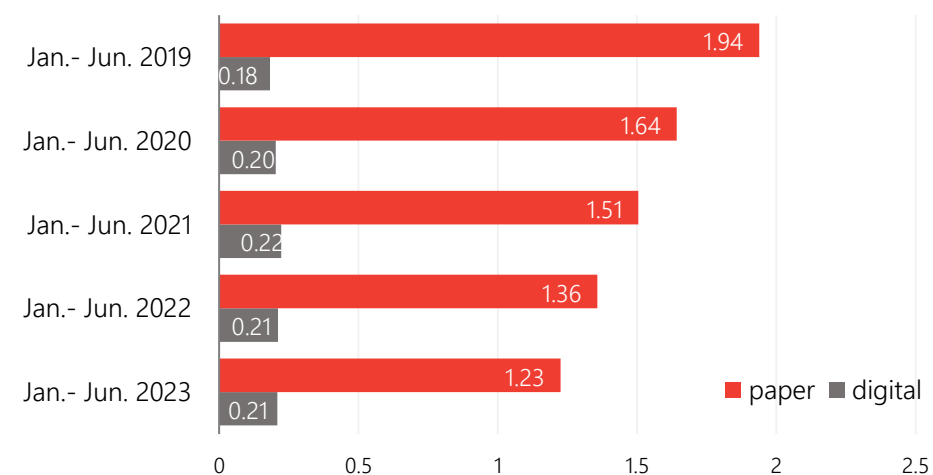
NATIONAL vs. LOCAL NEWSPAPERS COPIES



Change in %
Period Jan. – Jun.

	(2022 – 2023)	(2019 – 2023)
Total copies:	-8.6 ↓	-32.4 ↓
Paper copies:	-9.7 ↓	-36.8 ↓
Digital copies:	-1.2 ↓	+13.9 ↑
National newspapers copies:	-8.7 ↓	-32.9 ↓
Local newspapers copies:	-8.5 ↓	-31.8 ↓

PAPER vs. DIGITAL COPIES



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

PAPER COPIES BY NEWSPAPER MACRO-CATEGORY

(copies sold in thousands)

		Jan. – Jun. 2019	2020	2021	2022	2023
National newspapers	General press - Top 5	618	537	481	431	379
	Other general press	135	131	123	110	102
	Business	85	73	62	54	48
	Sport	239	145	140	147	137
Local newspapers	Top 10	400	360	339	303	273
	Others	462	397	359	313	287

Change in %		Jan. – Jun.	('22 – '23)	('19 – '23)
National newspapers	General press Top 5		-38.7 ↓	-12.1 ↓
	Other general press		-24.7 ↓	-7.3 ↓
	Business		-43.4 ↓	-10.8 ↓
	Sports		-42.7 ↓	-7.1 ↓
Local newspapers	Top 10		-31.8 ↓	-10.0 ↓
	Others		-37.8 ↓	-8.2 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in thousands)

		Jan. – Jun. 2019	2020	2021	2022	2023
National newspapers	General press - Top 5	75	81	93	88	91
	Other general press	17	26	32	31	27
	Business	41	38	29	28	29
	Sport	8	7	6	6	5
Local newspapers	Top 10	17	31	26	24	23
	Others	25	30	35	34	34

Change in %		Jan. – Jun.	('22 – '23)	('19 – '23)
National newspapers	General press Top 5		+21.8 ↑	+3.9 ↑
	Other general press		+59.6 ↑	-12.5 ↓
	Business		-30.7 ↓	-0.2 ↓
	Sports		-34.2 ↓	-10.3 ↓
Local newspapers	Top 10		+31.3 ↑	-7.5 ↓
	Others		+35.4 ↑	+1.2 ↑

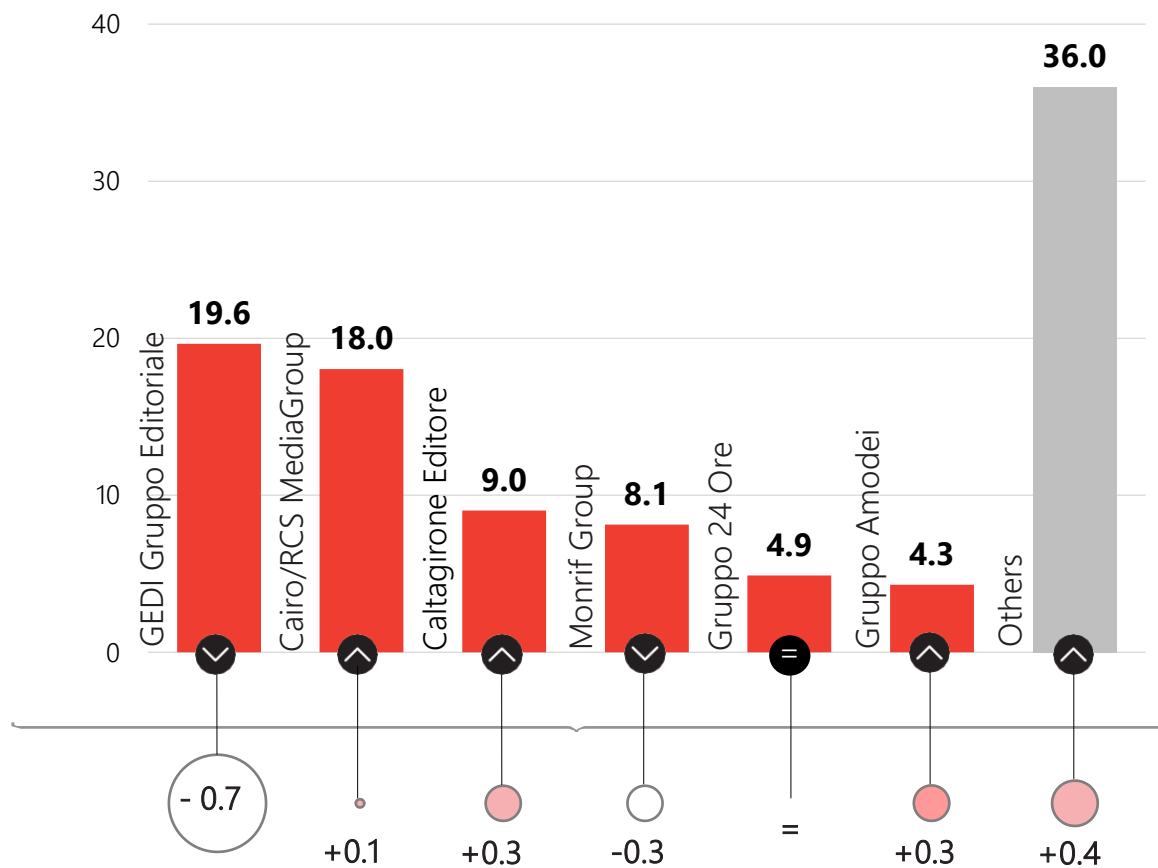
Newspapers categories

- **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

2.8 NEWSPAPERS: VOLUME SALES AND SHARES BY MAIN PUBLISHING GROUPS

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

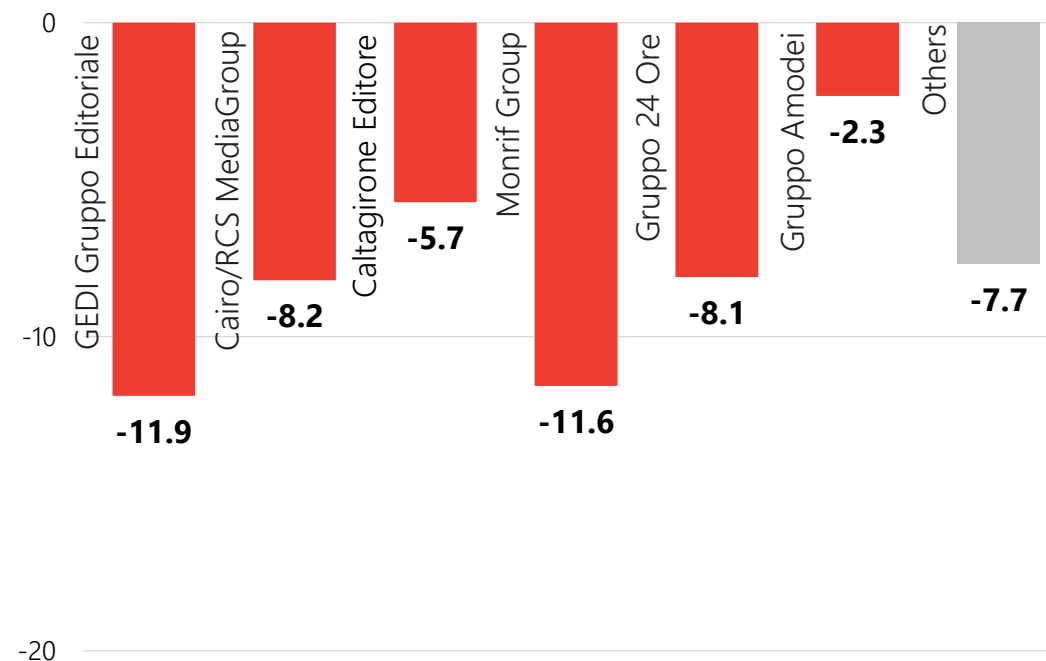
JANUARY – JUNE 2023



Difference vs. Jan. – Jun. 2022
(percentage points)

CHANGE IN TOTAL COPIES SOLD (%)

Difference vs. Jan. – Jun. 2022



2.9 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 2022 – June 2023)

Major Newspapers	TOTAL COPIES (paper + digital)							PAPER COPIES			DIGITAL COPIES		
	18/19	19/20	20/21	21/22	22/23	Change pp. 21/22 vs 22/23	Change pp. 18/19 vs 22/23	22/23	Change pp. 21/22 vs 22/23	Change pp. 18/19 vs 22/23	22/23	Change pp. 21/22 vs 22/23	Change pp. 18/19 vs 22/23
Corriere della sera	10.6	11.2	11.2	11.8	12.3	+0.55	+1.73	11.1	+0.03	+1.16	20.1	+3.02	+1.86
Repubblica (La)	8.3	8.6	8.8	8.1	7.3	-0.78	-0.91	6.3	-0.55	-1.27	13.6	-2.67	-1.97
Gazzetta dello sport (La) (*)	6.8	5.8	4.9	5.8	5.7	-0.05	-1.04	6.4	+0.02	-0.65	1.5	-0.26	-1.94
Stampa (La)	5.7	5.5	5.4	5.4	5.2	-0.17	-0.50	5.3	-0.14	-0.57	4.8	-0.27	+0.62
Sole 24 Ore (Il)	5.1	5.1	4.8	4.7	4.8	+0.08	-0.38	3.4	-0.07	-0.13	0.8	-0.20	-0.28
QN - Il Resto del Carlino	4.1	4.1	4.2	4.2	4.1	-0.08	+0.04	4.7	-0.03	+0.31	0.8	-0.20	-0.28
Avvenire	3.9	4.0	4.2	4.1	4.0	-0.11	+0.09	4.4	-0.12	+0.22	1.2	+0.10	+0.91
Messaggero (Il)	3.9	3.8	3.5	3.8	3.8	+0.05	-0.08	4.0	+0.04	-0.10	3.1	+0.10	+0.78
Corriere dello sport (*)	3.2	2.8	2.4	2.7	2.8	+0.12	-0.35	3.2	+0.15	+0.23	0.6	+0.08	+0.07
QN - La Nazione	3.0	2.9	2.9	2.8	2.7	-0.08	-0.26	3.1	-0.06	-0.10	0.5	-0.07	-0.21
Gazzettino (Il)	2.2	2.3	2.5	2.5	2.6	+0.06	+0.34	2.5	+0.06	+0.27	3.1	+0.01	+0.66
Fatto quotidiano (Il)	1.7	1.9	2.5	2.5	2.5	=	+0.84	1.5	+0.06	+0.25	8.4	-0.78	+2.59
Giornale (Il)	2.2	2.2	2.5	2.1	2.0	-0.07	-0.19	2.2	-0.06	-0.10	0.6	-0.04	-0.05

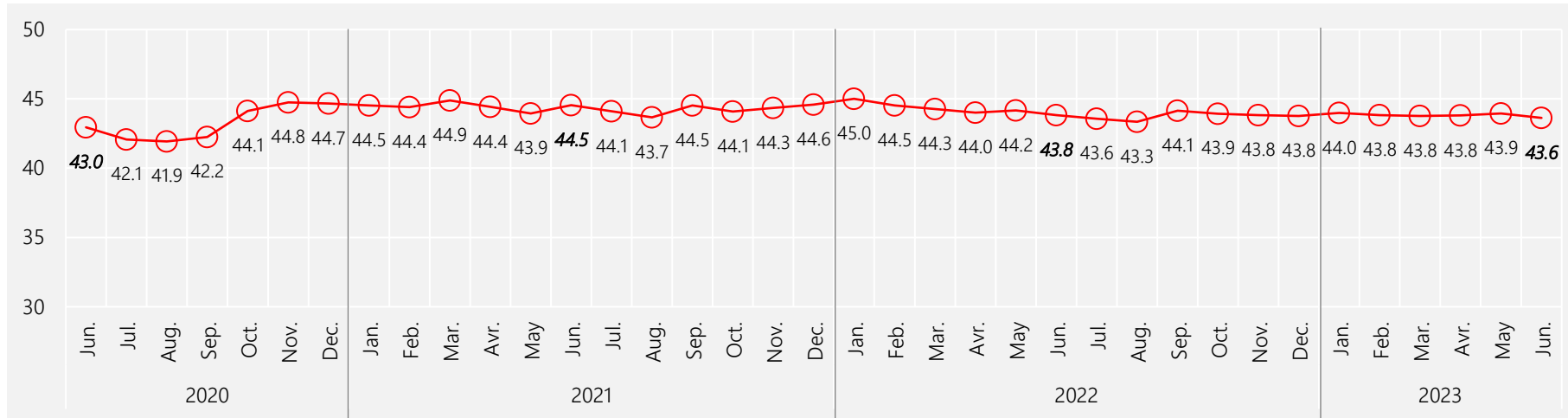
(*) – includes the Monday edition

Source: Agcom elaboration on data from ADS

2.10 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

(June 2020 – June 2023)

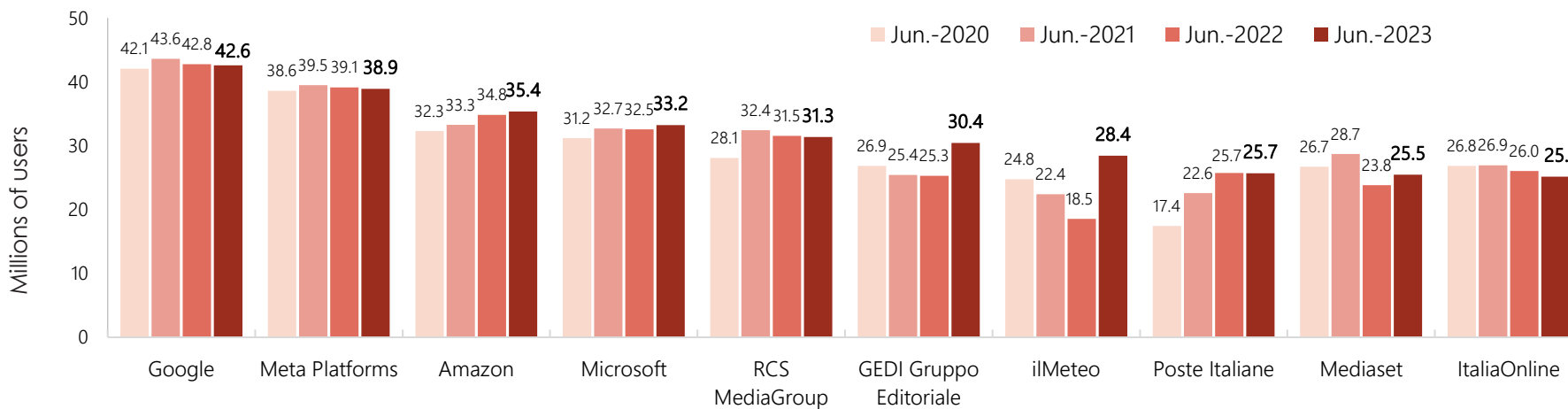


43 million and **616** thousand unique users logged on to the internet in June 2023 (-212 thousand compared to June 2022)

Approximately **64 hours and 46 minute** spent, on average, by each user surfing the Internet 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.

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.

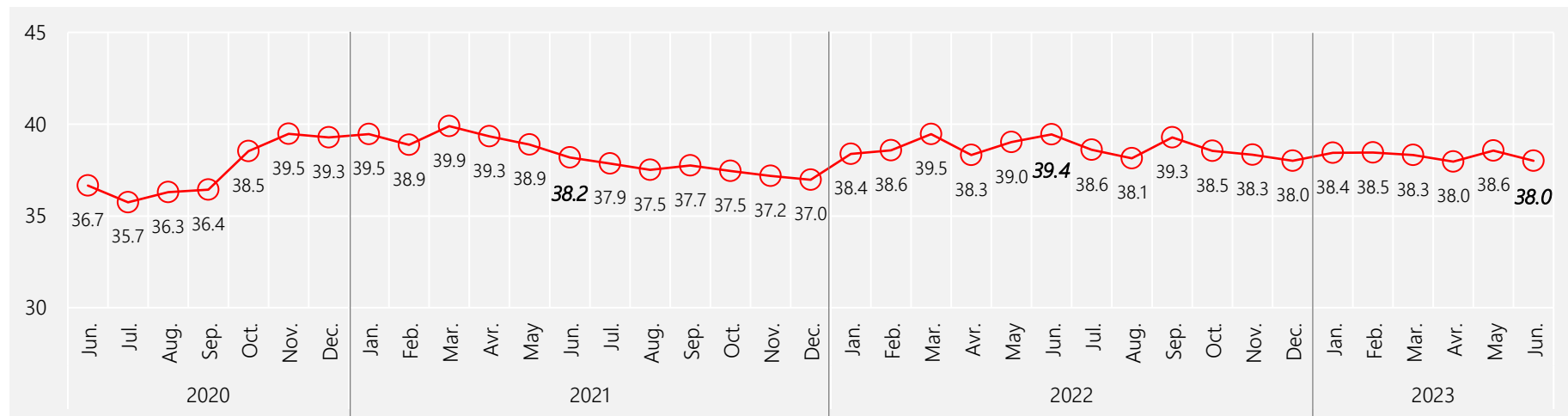
Note: Google, Meta Platforms, Amazon, Microsoft and Poste Italiane are detected only through Audiweb Panel.

Source: Agcom elaboration on data from Audicom – sistema Audiweb

2.11 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

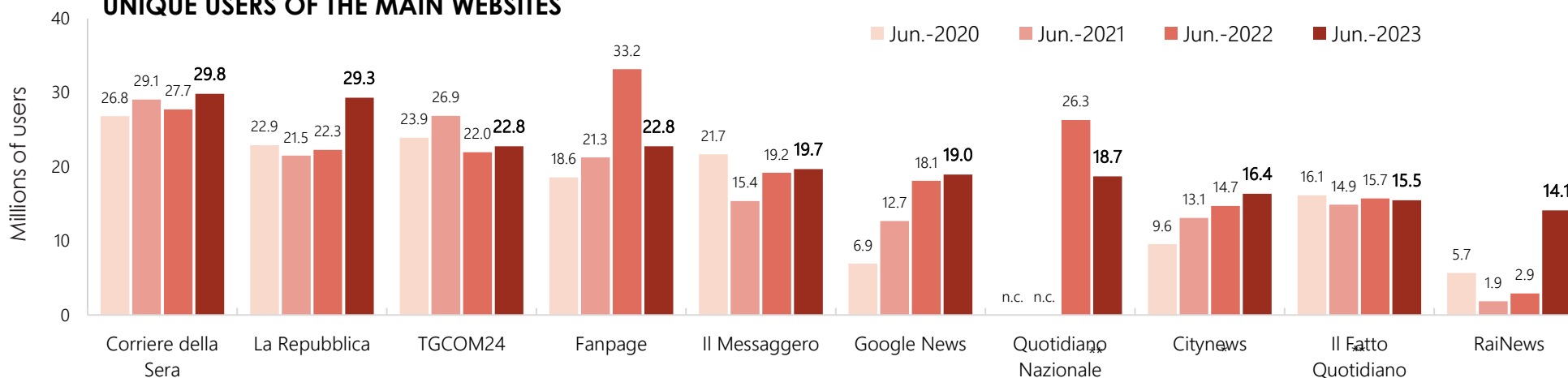
(June 2020 – June 2023)



38 million unique users logged on to the generalist news sites/APPs in June 2023 (-1 and **442** thousand million users compared to June 2022)

About **1 hour and 10 minute** spent, on average, by each user browsing general news websites/APPs in June 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.

* 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.

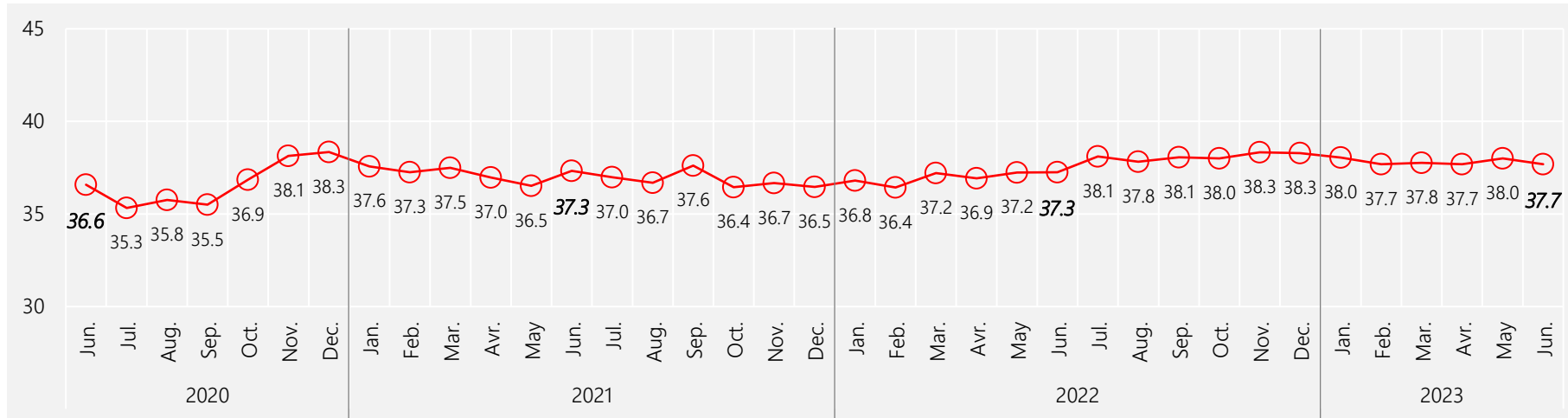
** Google News and Citynews are detected only through the Audiweb Panel.

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

2.12 PLATFORMS: E-COMMERCE WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

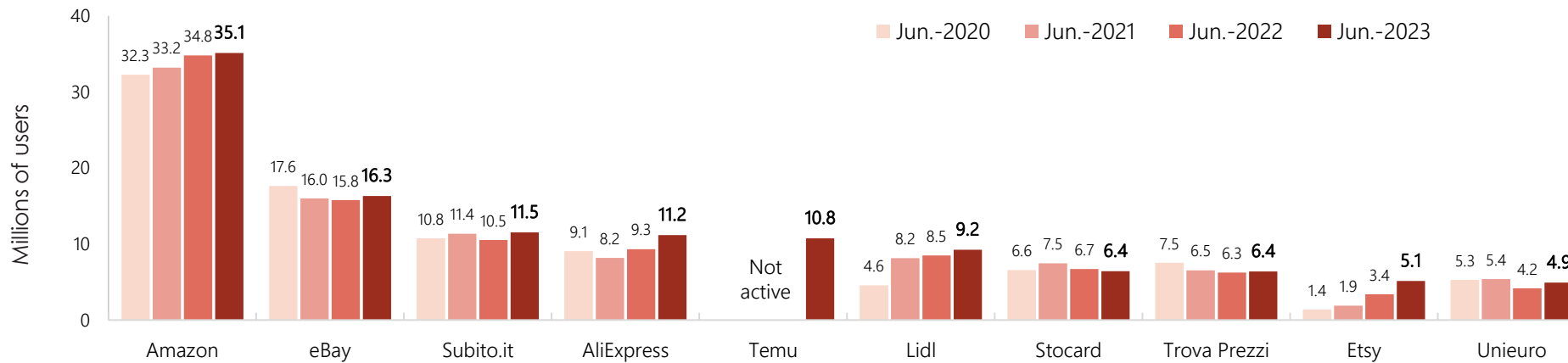
(June 2020 – June 2023)



37 million and **680** thousand unique users logged on to e-commerce sites/APPs in June 2023 (+**442** thousand users compared to June 2022)

2 hour and 30 minute spent, on average, by each user browsing e-commerce websites/APPs in June 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.

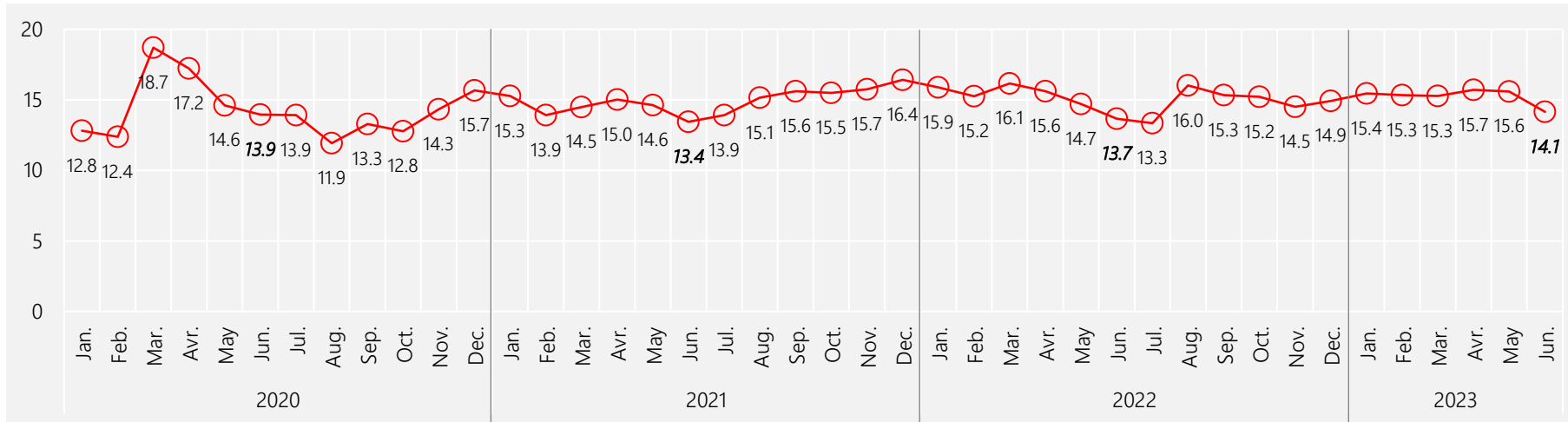
Source: Agcom elaboration on data from Audicom – sistema Audiweb (Values referring to the category: «Multi-category Commerce»)

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

2.13 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

UNIQUE USERS IN MILLIONS

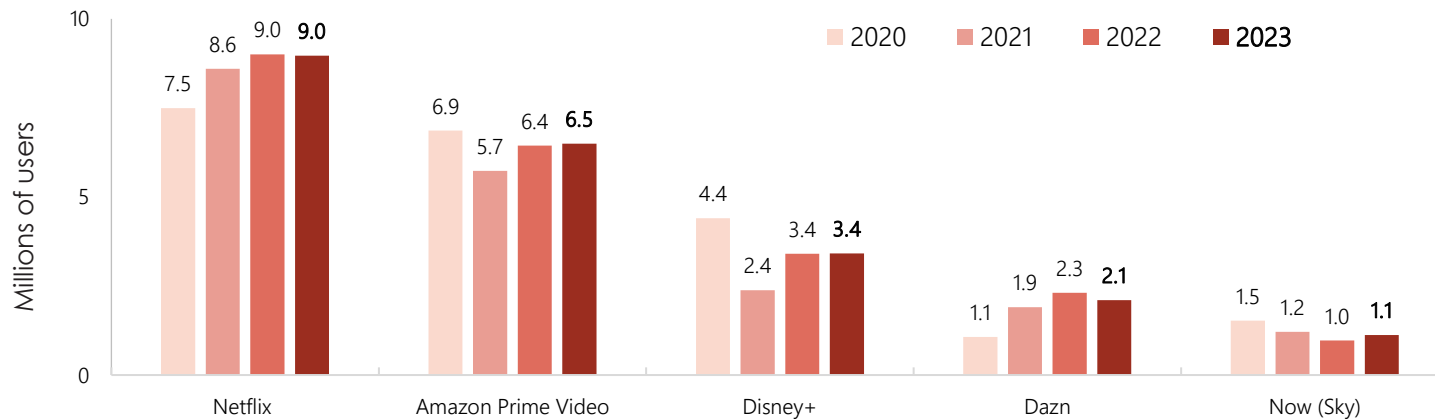
(January 2020 – June 2023)



14 million and 138 thousand unique users logged on to video-on-demand sites/APPs in June 2023 (+475 thousand compared to June 2022)

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. – Jun.)



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.

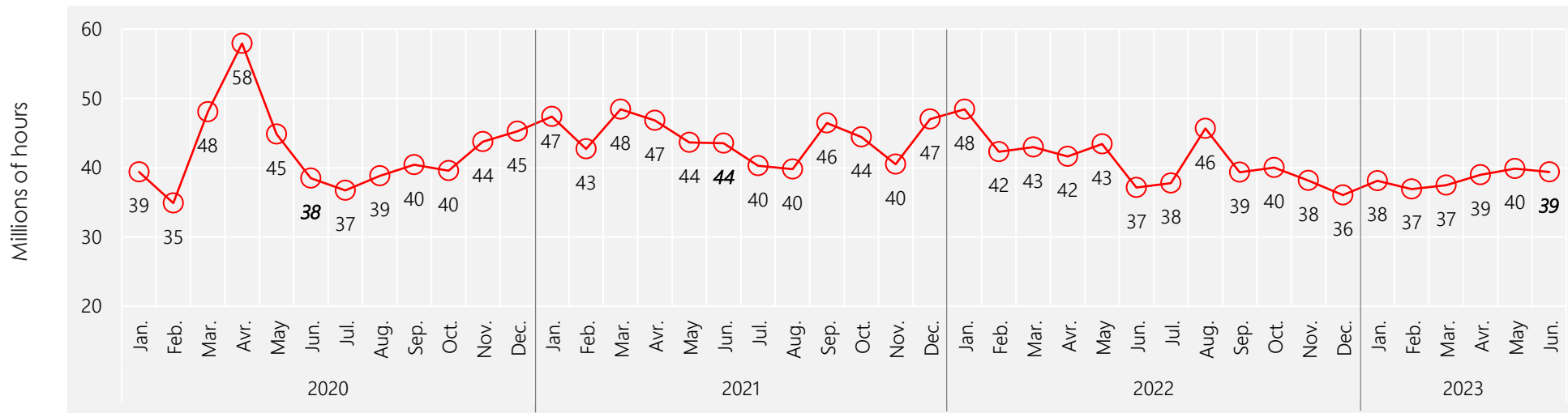
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

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

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

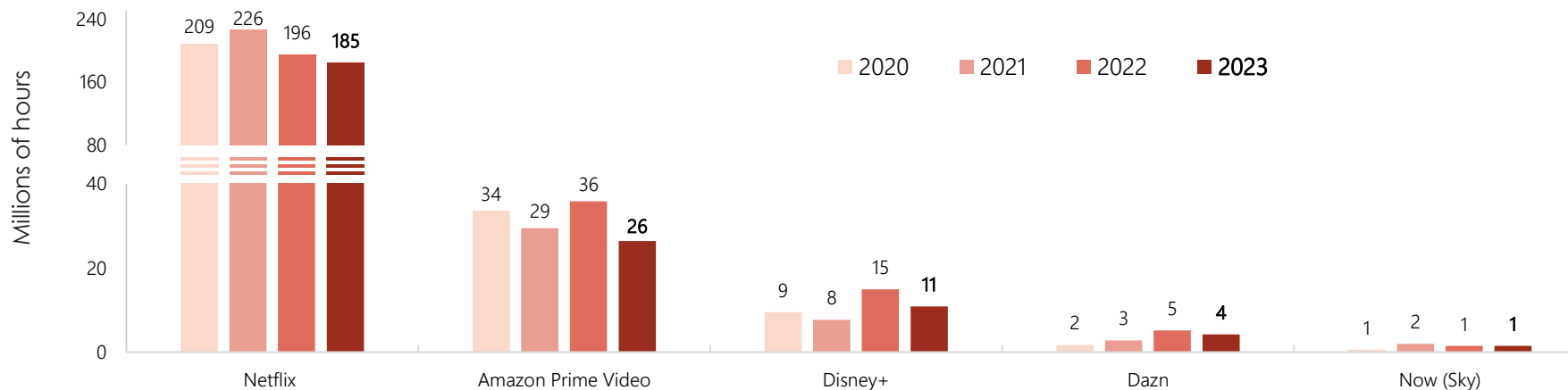
2.14 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT (January 2020 – June 2023)



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 47 minute** in June 2023

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



* Note: the total hours of the first 5 operators for unique users (slide 2.13) are represented

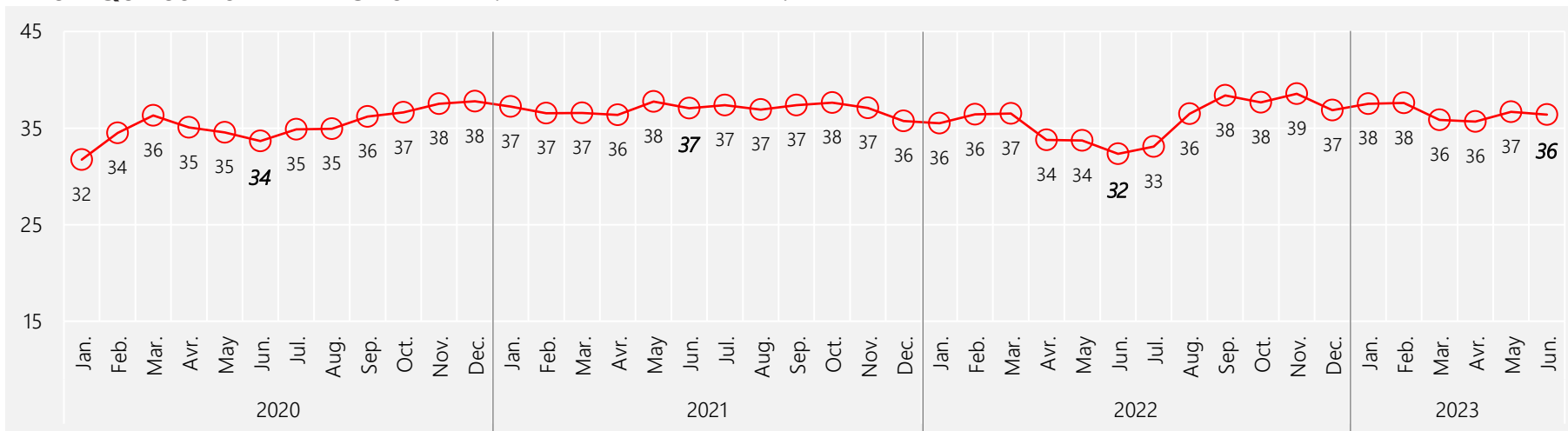
Source: Agcom elaboration on data from ComScore
The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy: Netflix; Primevideo.com (Amazon); Nowtv.it (Sky); Timvision.it (TIM); Disney digital (Disney); Dazn.com (Dazn); Chili.com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

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

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

2.15 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS

UNIQUE USERS IN MILLIONS (January 2020 – June 2023)



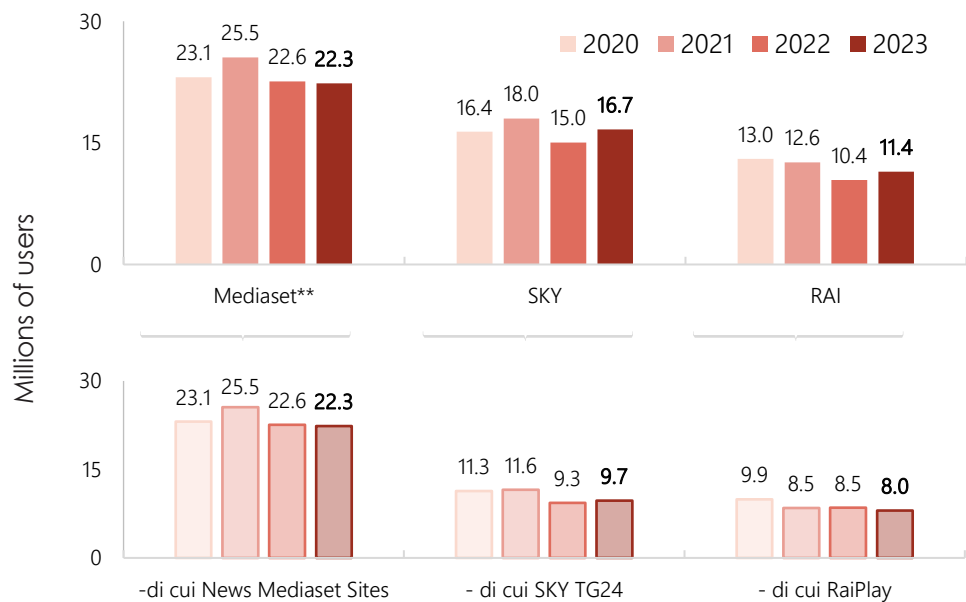
36 million and 390 thousand unique users logged on to free video-on-demand sites/APPs in June 2023 (+4 million compared to June 2022)

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 TGC0M 24 Sites Jan.20 - Avr.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)



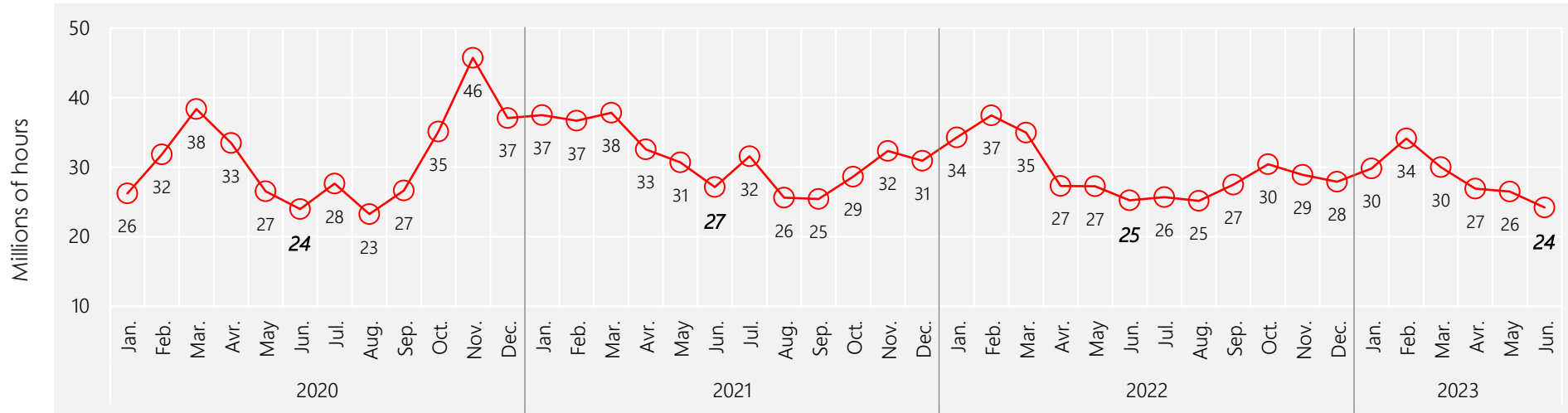
* For each publishers it is displayed separately the component, of those considered (News, Sport and Entertainment), that is most relevant in terms of unique audience.

** MEF/Mediaset unique users are those relating to the component News Mediaset Sites due to an editorial choice which does not allow to separate the part of the paid services related to Mediaset Infinity. By considering the latter (that since the beginning of the year has an average 13mm and 336k of unique users) MEF/Mediaset monthly average results, in the period Jan.-Jun. 2023, in 28 mm and 607k of unique users.

Source: Agcom elaboration on data from ComScore

2.16 PLATFORMS: TIME SPENT ON FREE VIDEO ON DEMAND PLATFORMS

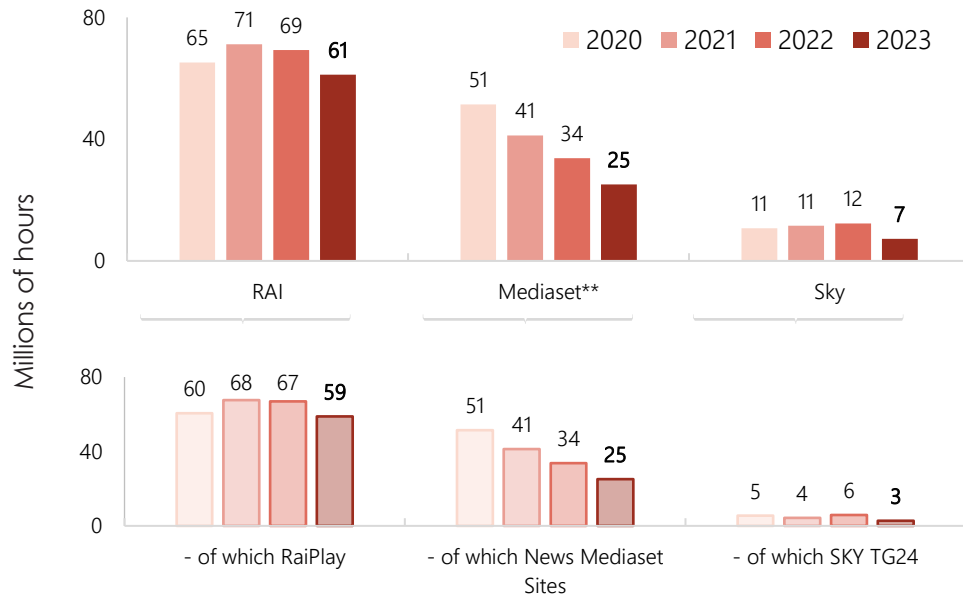
TOTAL HOURS SPENT (in millions of hours) (January 2020 – June 2023)



The average time spent per month by each visitor on free video on demand platforms is **40 minute** in June 2023

The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: Mediaset (Mediaset Infinity Sites and TGC.COM 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.

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



* For each publishers (slide 2.15) 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 which does not allow to separate the part of the paid services related to Mediaset Infinity. By considering the latter (with an amount just under 36 mm of hours since the beginning of the year), MEF/Mediaset reach 72 mm total hours in the period Jan.-Jun. 2023.

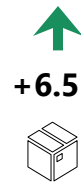
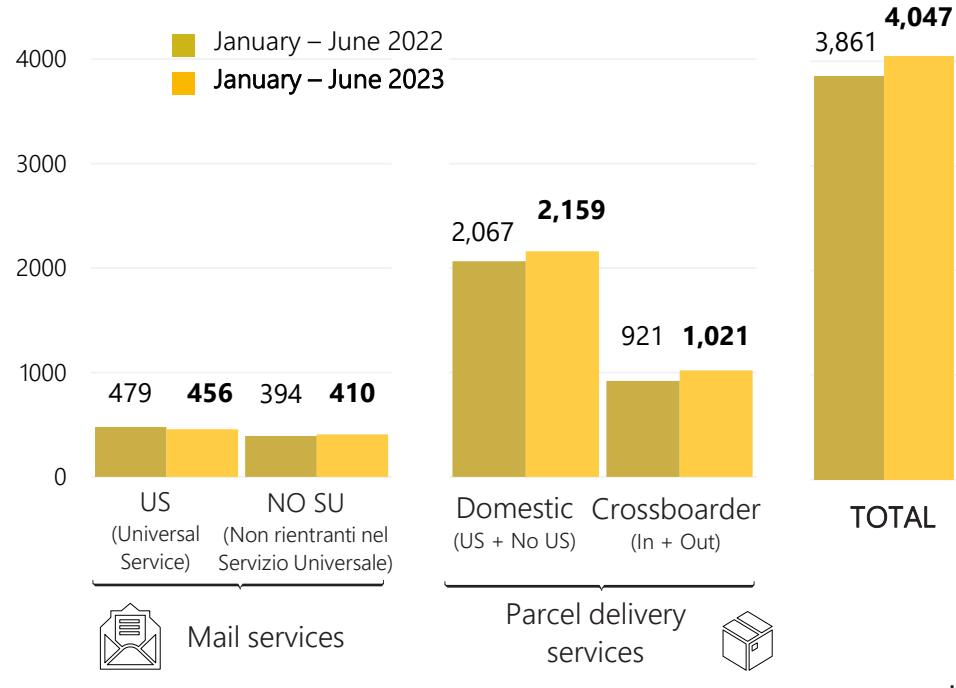
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV.

Source: Agcom elaboration on data from ComScore

3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

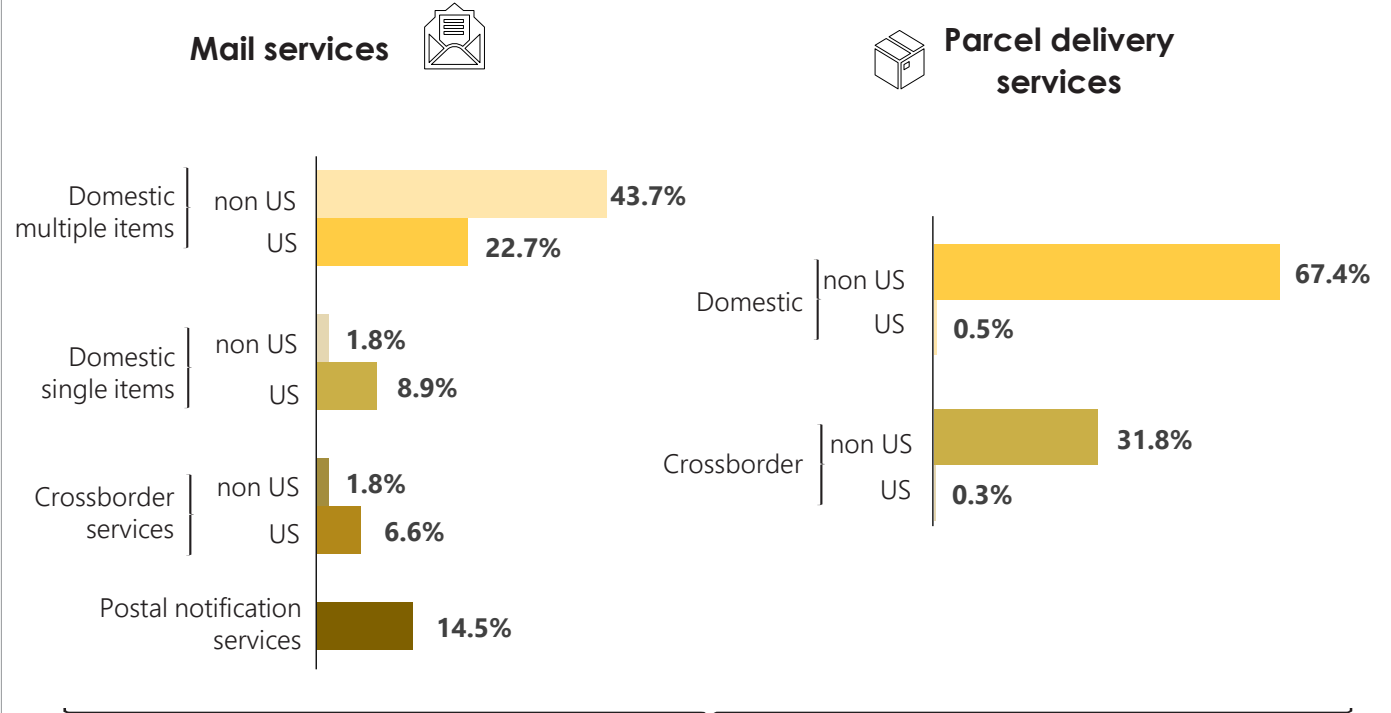
MILLIONS OF €



Annual change in %
(Jan. - Jun. 2022) - (Jan. - Jun. 2023)

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

(January - June 2023)



Annual change in %
(Jan. - Jun. 2022) - (Jan. - Jun. 2023)



Domestic multiple items

Domestic single items

Crossborder services

Postal notification services

Domestic

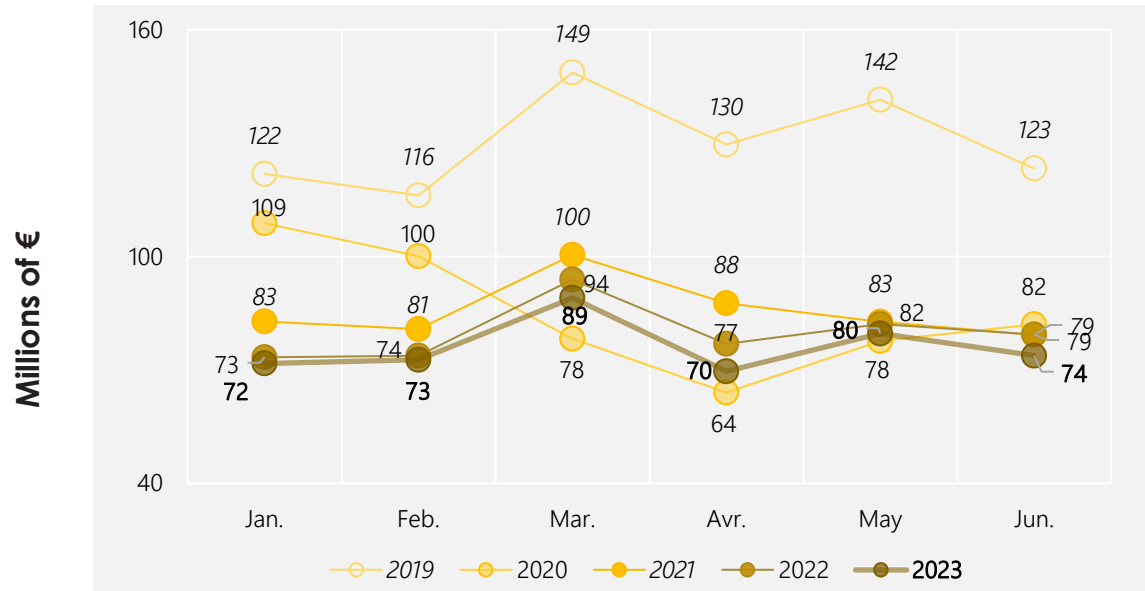
Crossborder

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

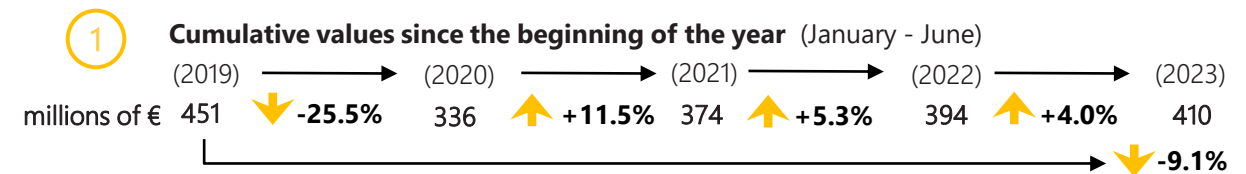
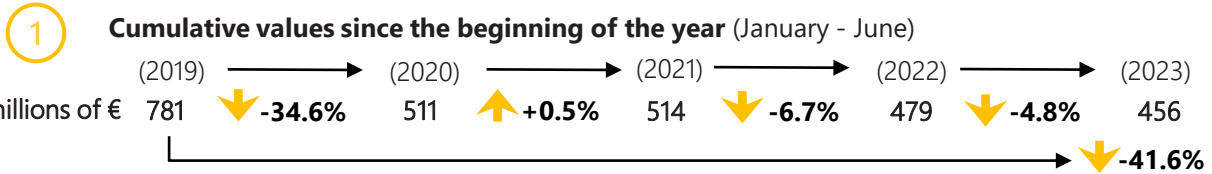
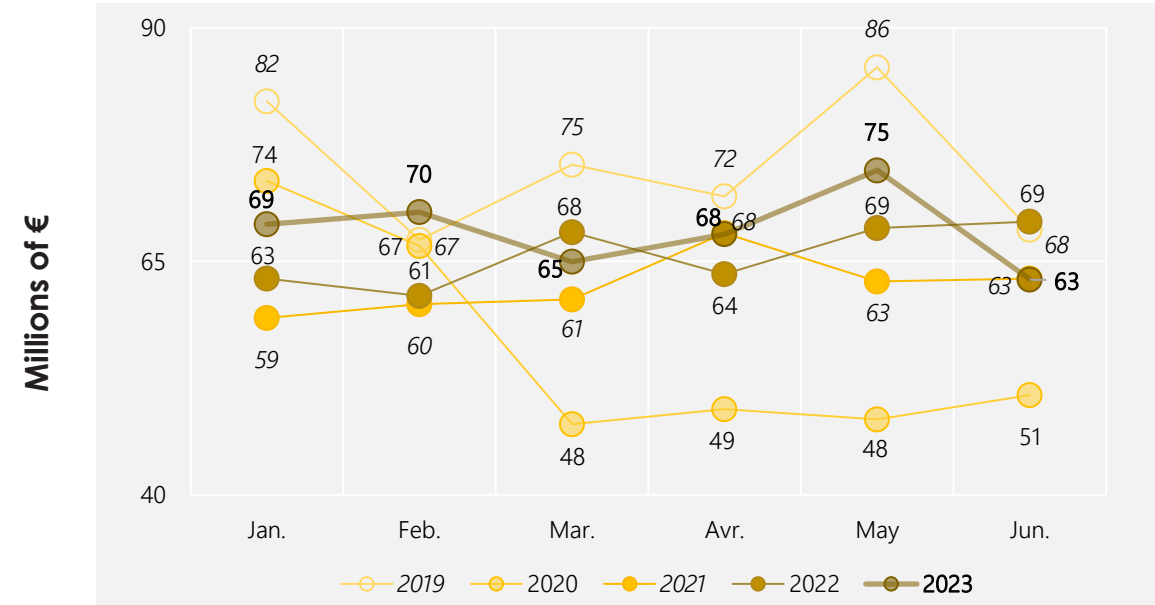
Data refers to the following postal operators: Amazon Italia Transport S.r.l., BRT S.p.A., DHL Express Italy S.r.l., FedEx Express Italy S.r.l., Fulmine Group S.r.l., GLS Italy S.p.A., Nexive Group S.r.l., Poste Italiane S.p.A., Sailpost S.p.A., SDA Express Courier S.p.A., TNT Global Express S.r.l. e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

3.2: POSTAL SERVICES: MONTHLY MAIL SERVICES REVENUES (US/NO US)

UNIVERSAL SERVICE (US)



OTHER SERVICES (NON US)



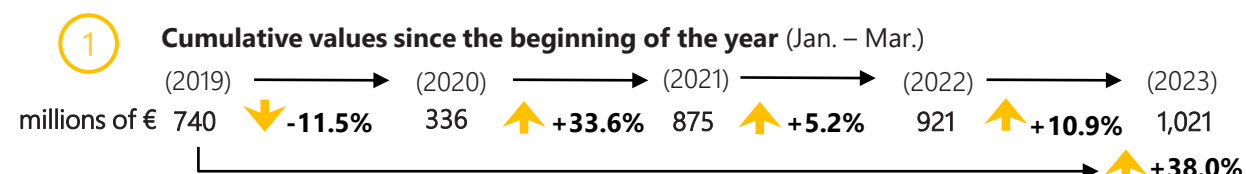
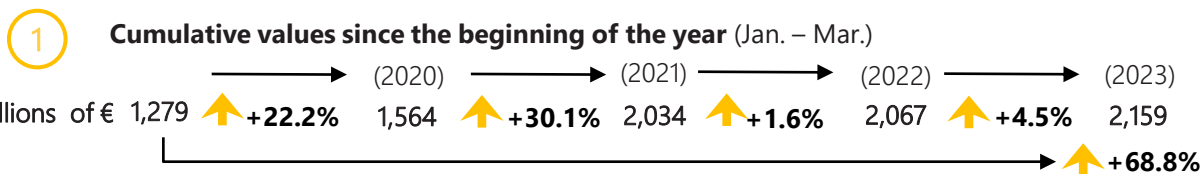
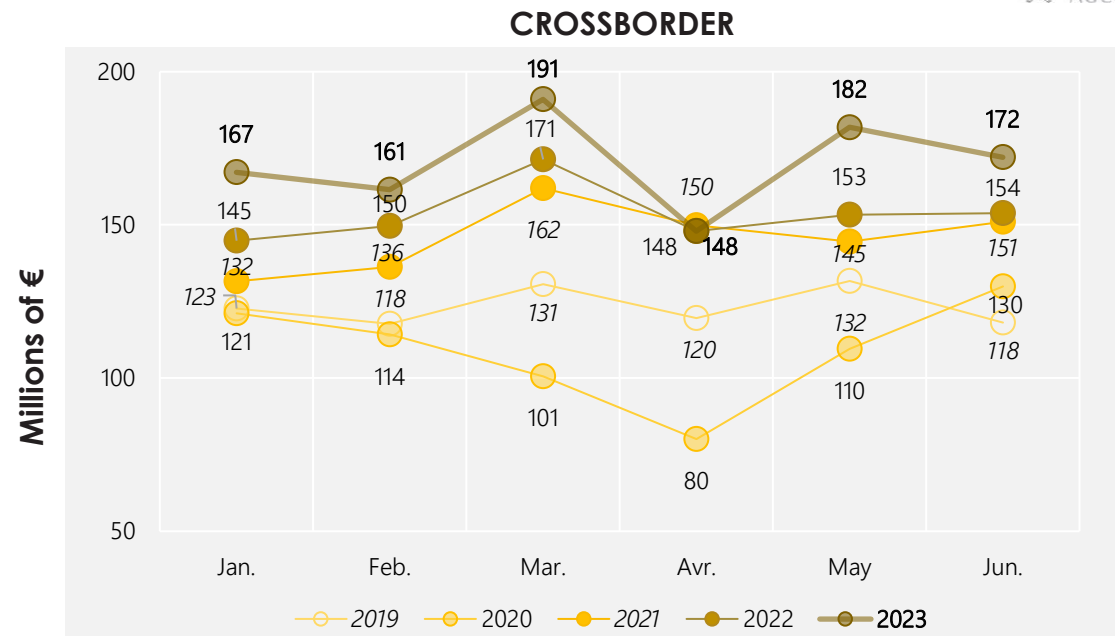
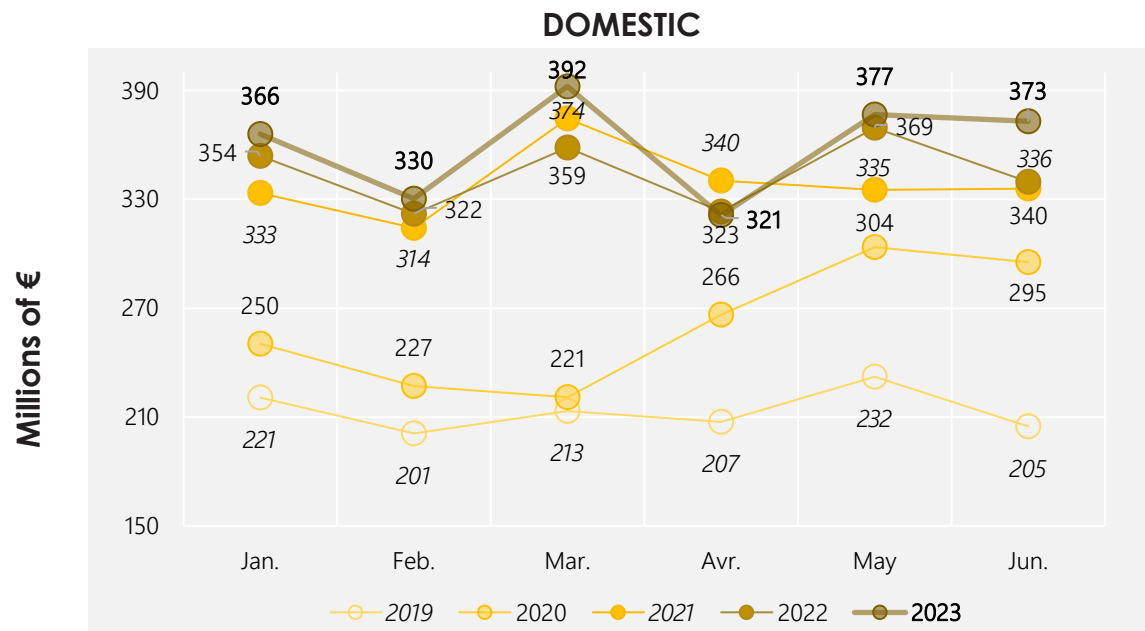
② Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	-10.7	-23.9	-11.5	--2.2	-41.2
February	-13.8	-19.3	-8.6	-1.5	-37.5
March	-47.4	+28.3	-6.5	-5.2	-40.1
April	-50.6	+36.9	-12.3	-9.4	-46.3
May	-45.1	+6.5	-0.7	-3.1	-43.7
June	-33.5	-3.3	+0.1	-7.0	-40.2

② Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	-10.4	-19.9	+7.1	+9.2	-16.0
February	-1.0	-9.3	+1.5	+14.6	+4.4
March	-36.9	+28.1	+11.8	-4.6	-13.8
April	-31.6	+38.2	-6.4	+6.7	-5.6
May	-43.9	+30.7	+9.1	+9.0	-12.8
June	-25.9	+24.6	+9.6	-8.9	-7.8

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



② Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+13.4	+33.2	+6.1	+3.4	+65.8
February	+13.0	+38.4	+2.4	+2.6	+64.4
March	+3.6	+69.6	-4.3	+9.4	+83.9
April	+28.4	+27.8	-5.0	-0.6	+54.9
May	+30.8	+10.4	+10.2	+1.9	+62.2
June	+44.2	+13.7	+1.1	+9.8	+82.1

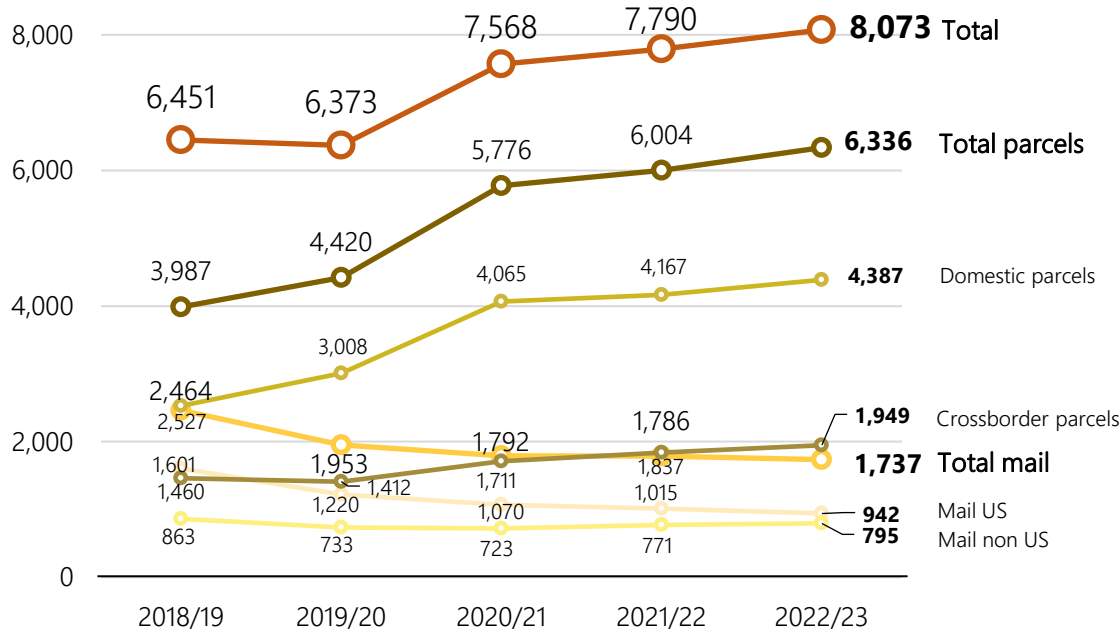
② Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	-1.3	+8.7	+10.1	+15.4	+36.3
February	-3.0	+19.3	+9.8	+7.9	+37.2
March	-23.0	+61.1	+5.8	+11.4	+46.2
April	-33.0	+87.2	-1.3	0.0	+23.7
May	-16.8	+31.9	+6.0	+18.7	+38.1
June	+9.9	+16.3	+1.9	+11.8	+45.6

3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

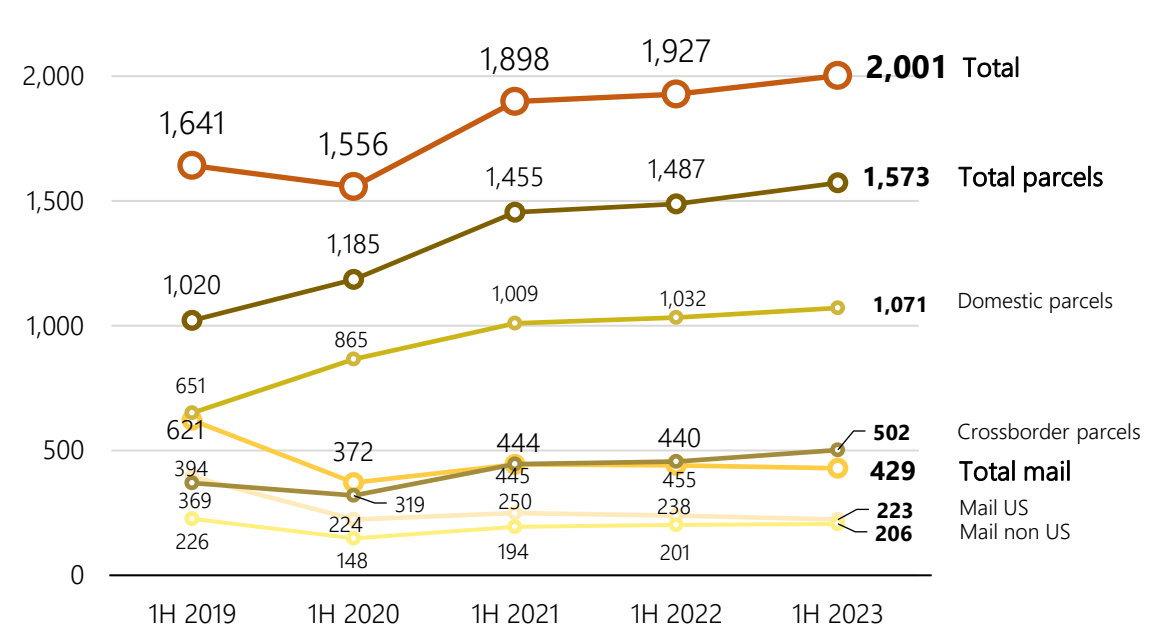
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



Change in %

(2018/19 – 2022/23)

(2021/22 – 2022/23)

Total:	+25.1	↑	+3.6	↑
Mail services:	-29.5	↓	-2.7	↓
- Universal Service:	-41.2	↓	-7.2	↓
- No Universal Service:	-7.8	↓	+3.2	↑
Parcel delivery services:	+58.9	↑	+5.5	↑
- Domestic:	+73.6	↑	+5.3	↑
- Crossborder:	+33.5	↑	+6.1	↑

Change in %

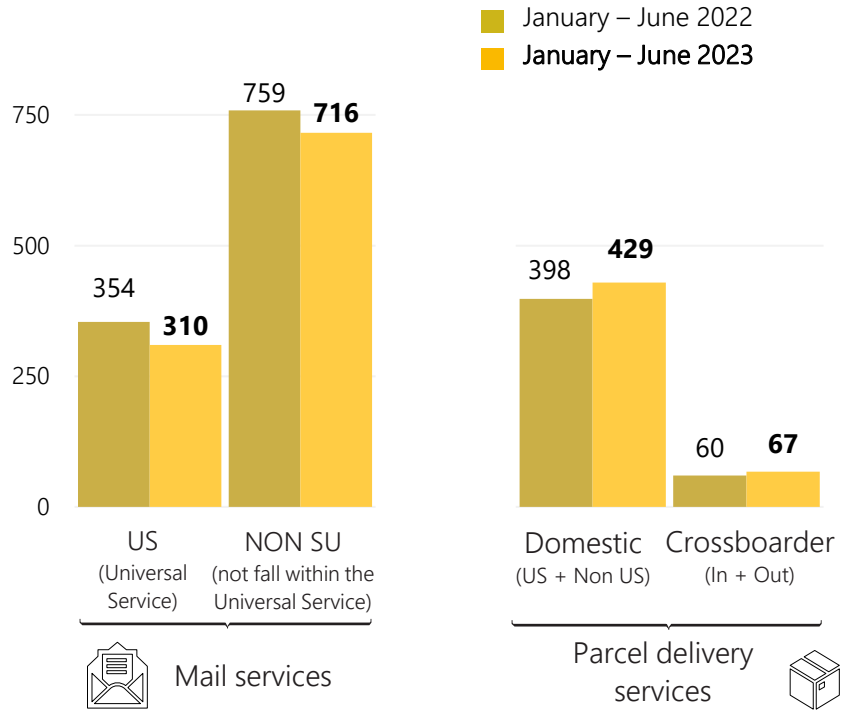
(1H 2019 – 1H 2023)

(1H 2022 – 1H 2023)

Total:	+22.0	↑	+3.9	↑
Mail services:	-30.9	↓	-2.5	↓
- Universal Service:	-43.5	↓	-6.4	↓
- No Universal Service:	-9.0	↓	+2.1	↑
Parcel delivery services:	+54.1	↑	+5.7	↑
- Domestic:	+64.5	↑	+3.7	↑
- Crossborder:	+35.9	↑	+10.3	↑

3.5: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR
MILLIONS OF UNITS



-7.8



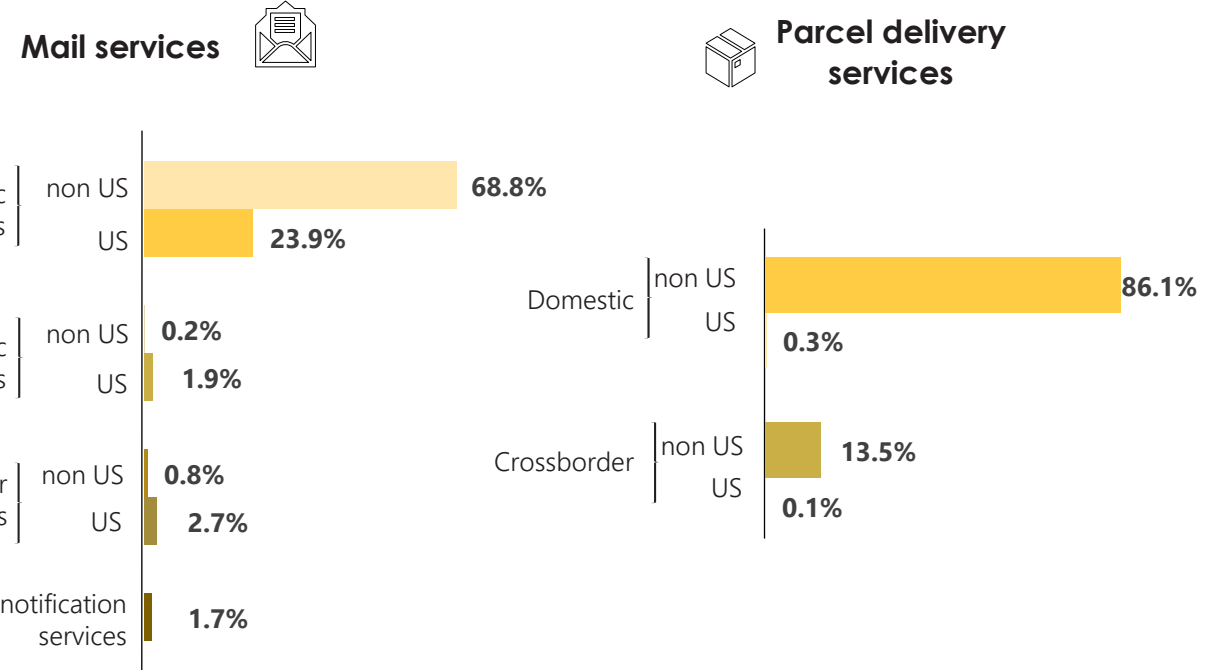
+8.4



Annual change in %
(Jan. - Jun. 2022) – (Jan. - Jun. 2023)

VOLUMES BY SOURCE TYPE (%)

(January – June 2023)



Annual change in %

(Jan. - Jun. 2022) – (Jan. - Jun. 2023)



-7.7

Domestic multiple items



-12.3

Domestic single items



-7.8

Crossborder services



-5.4

Postal notification services



+7.8

Domestic

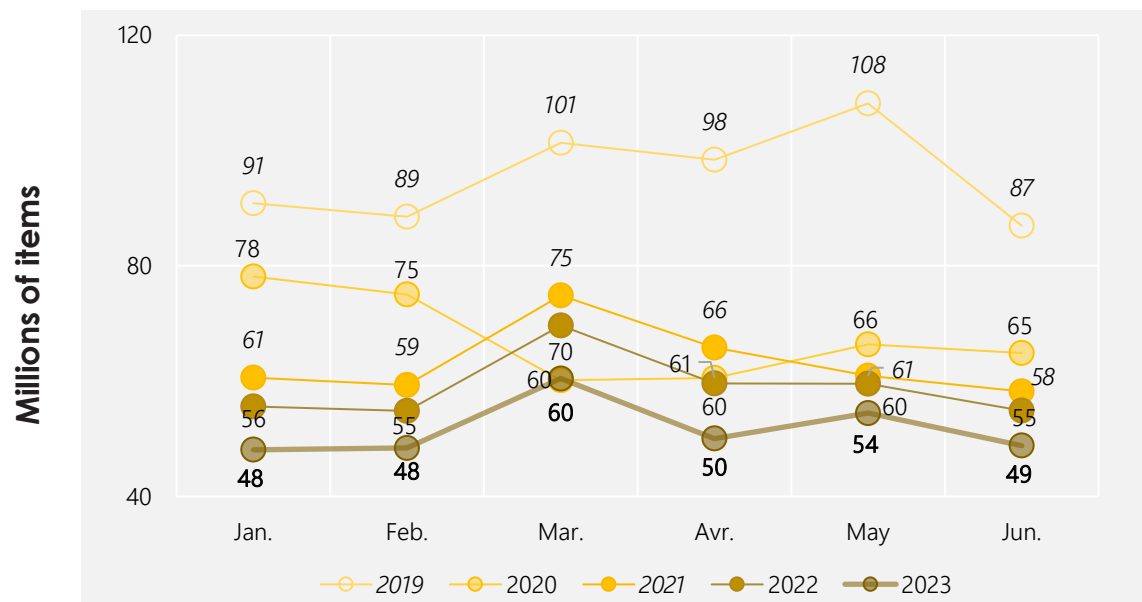


+12.6

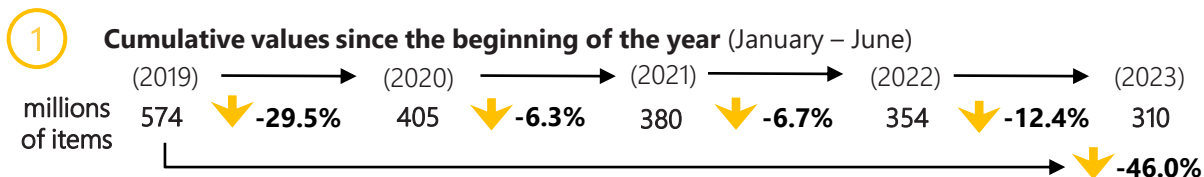
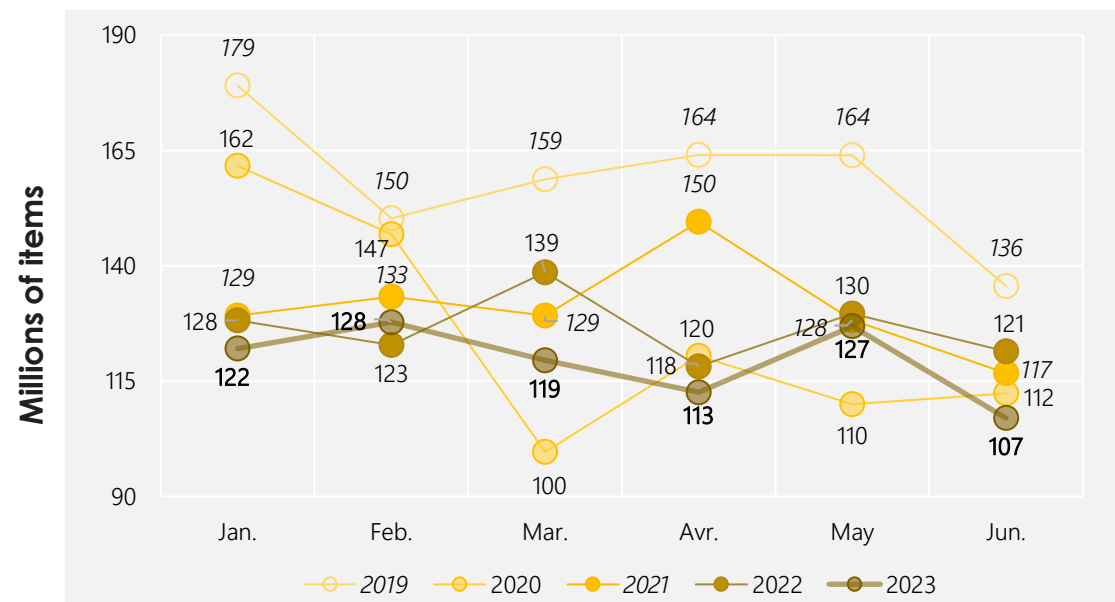
Crossborder

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

UNIVERSAL SERVICE

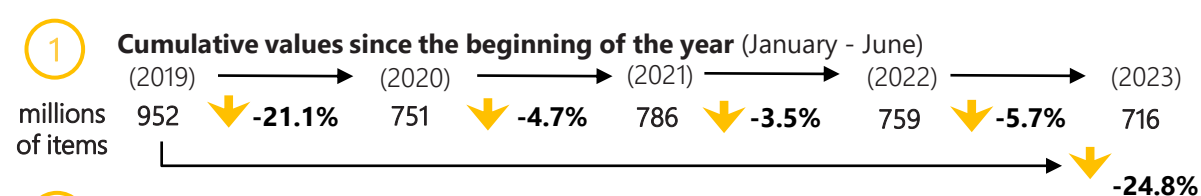


OTHER SERVICES (NON US)



2 Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	-14.0	-22.5	-8.2	-13.5	-47.1
February	-15.2	-21.0	-7.5	-11.8	-45.3
March	-40.6	+24.4	-7.0	-13.2	-40.4
April	-38.5	+8.7	-9.5	-16.0	-49.2
May	-38.7	-8.2	-2.2	-8.6	-49.7
June	-25.4	-10.3	-5.8	-11.0	-43.9

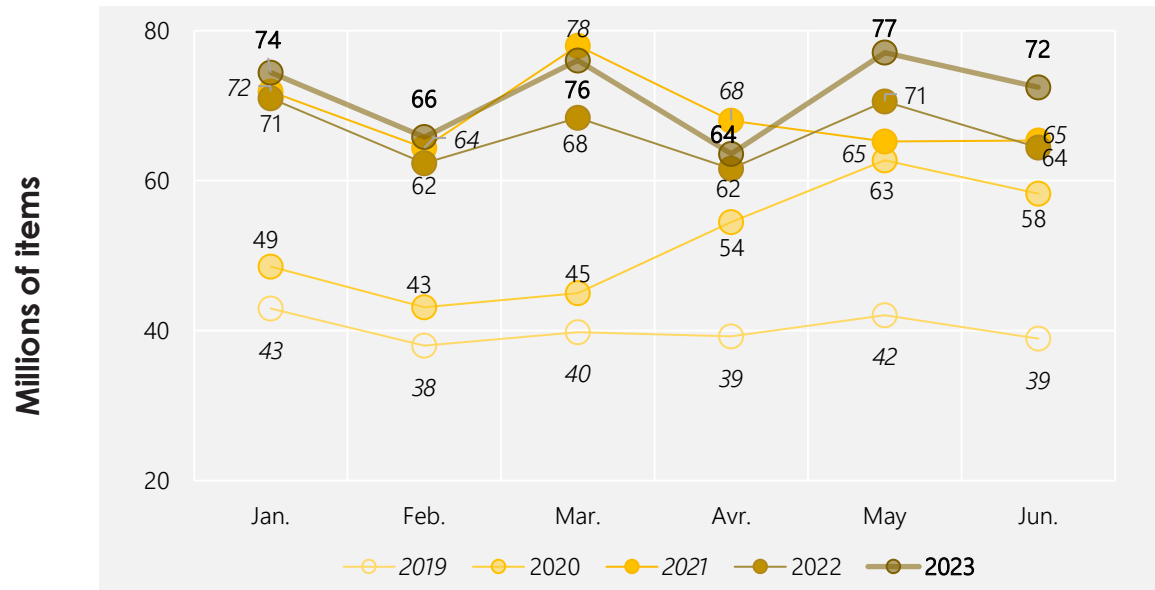


2 Monthly comparison (change in %)

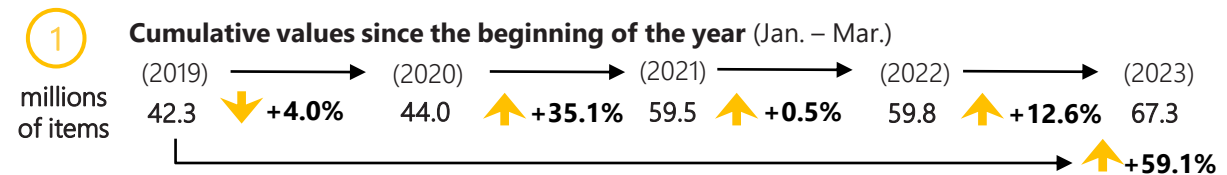
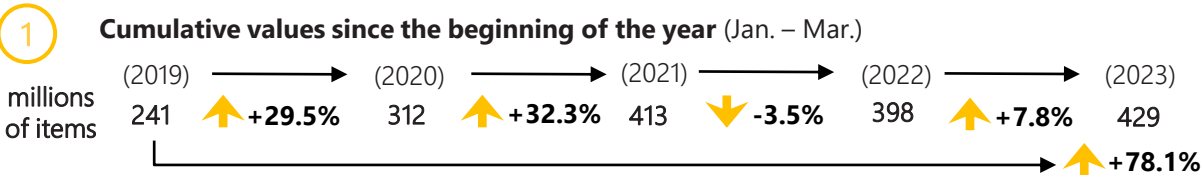
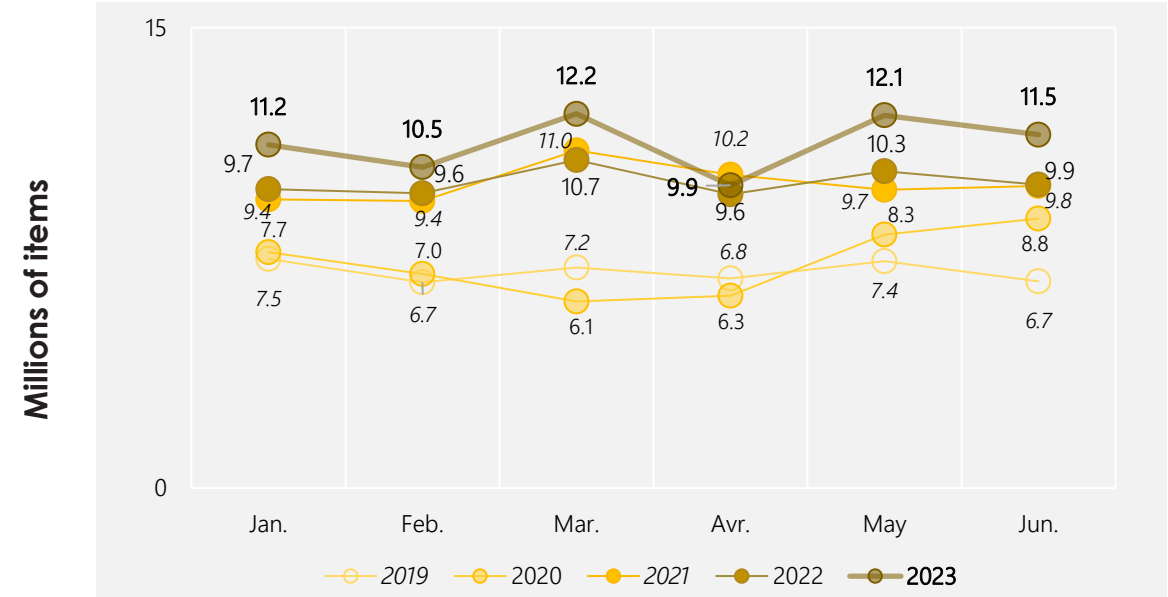
	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	-9.7	-20.1	-0.8	-4.8	-31.9
February	-2.3	-9.2	-7.9	+4.0	-15.0
March	-37.2	+29.7	+7.2	-13.8	-24.8
April	-26.6	+24.2	-21.0	-4.8	-31.4
May	-32.9	+16.6	+1.1	-2.1	-22.6
June	-17.1	+3.9	+4.1	-11.9	-21.1

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

DOMESTIC



CROSSBORDER



2 Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+13.0	+48.1	-1.3	+4.8	+73.3
February	+13.5	+49.3	-3.2	+5.6	+73.2
March	+13.0	+73.4	-12.3	+11.2	+90.9
April	+38.8	+24.8	-9.4	+3.2	+62.0
May	+49.0	+4.0	+8.2	+9.3	+83.2
June	+49.6	+12.1	-1.4	+12.5	+85.9

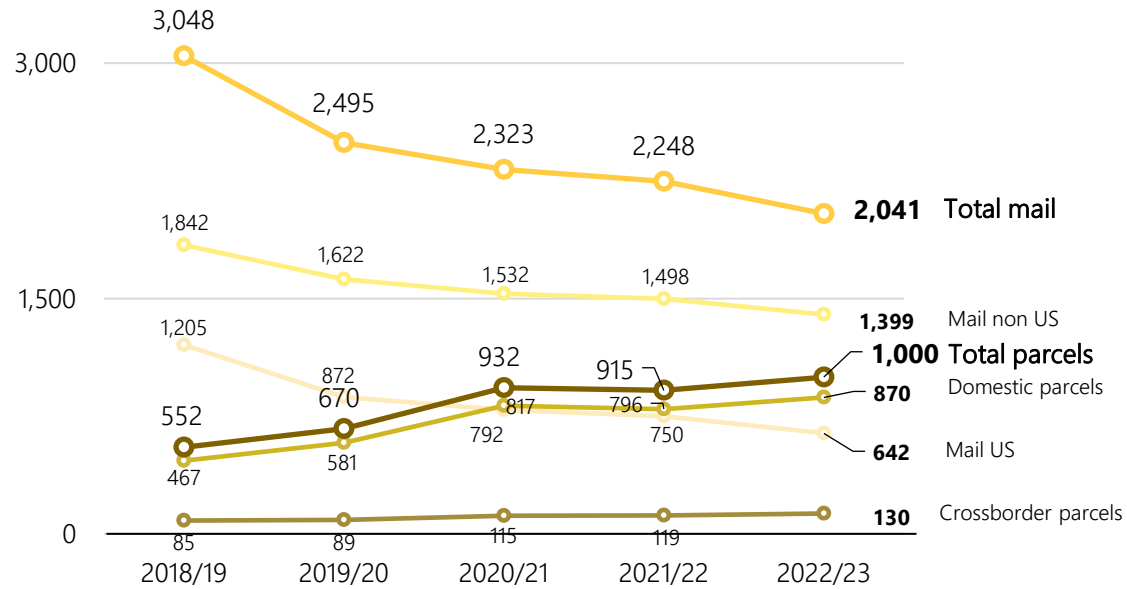
2 Monthly comparison (change in %)

	YoY				Whole period 2019/2023
	2019/2020	2020/2021	2021/2022	2022/2023	
January	+2.9	+22.3	+3.6	+14.8	+49.7
February	+3.9	+34.2	+2.6	+8.9	+55.8
March	-15.5	+81.0	-2.8	+14.1	+69.6
April	-8.3	+62.9	-6.2	+3.1	+44.4
May	+11.7	+17.6	+6.2	+17.7	+64.2
June	+30.4	+12.1	+0.4	+16.5	+70.9

3.8: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

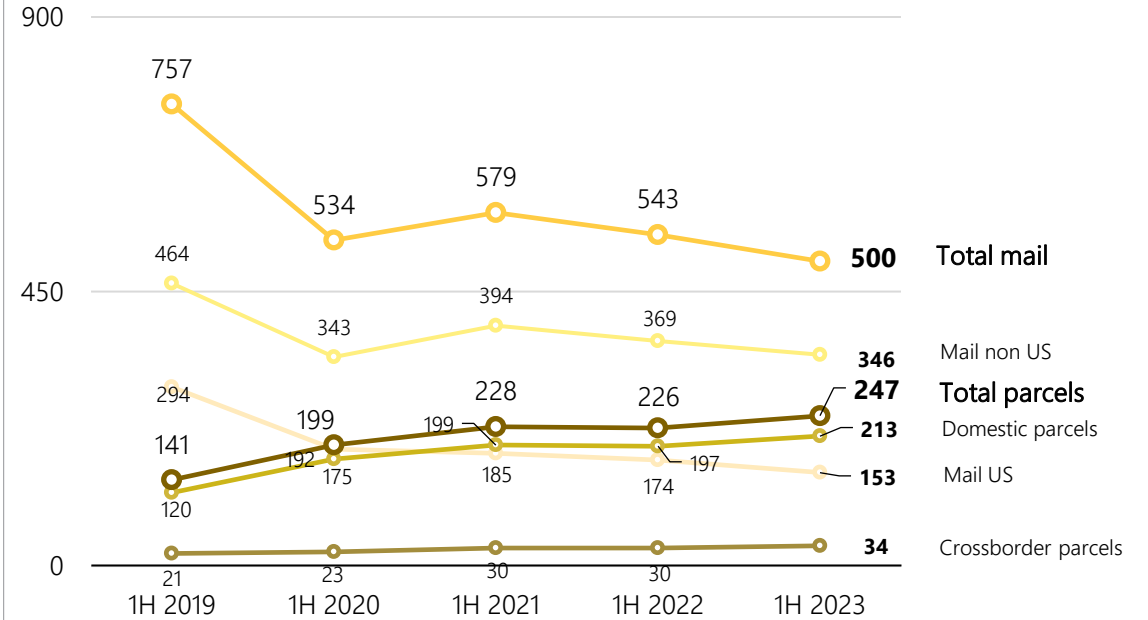
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



Change in %

(2018/19 – 2022/23) (2021/22 – 2022/23)

Mail services:	-33.0	▼	-9.2	▼
- Universal Service:	-46.8	▼	-14.4	▼
- Non Universal Service:	-24.0	▼	-6.6	▼
Parcel delivery services:	+81.2	▲	+9.3	▲
- Domestic:	+86.5	▲	+9.3	▲
- Crossborder:	+32.0	▲	+9.0	▲

Change in %

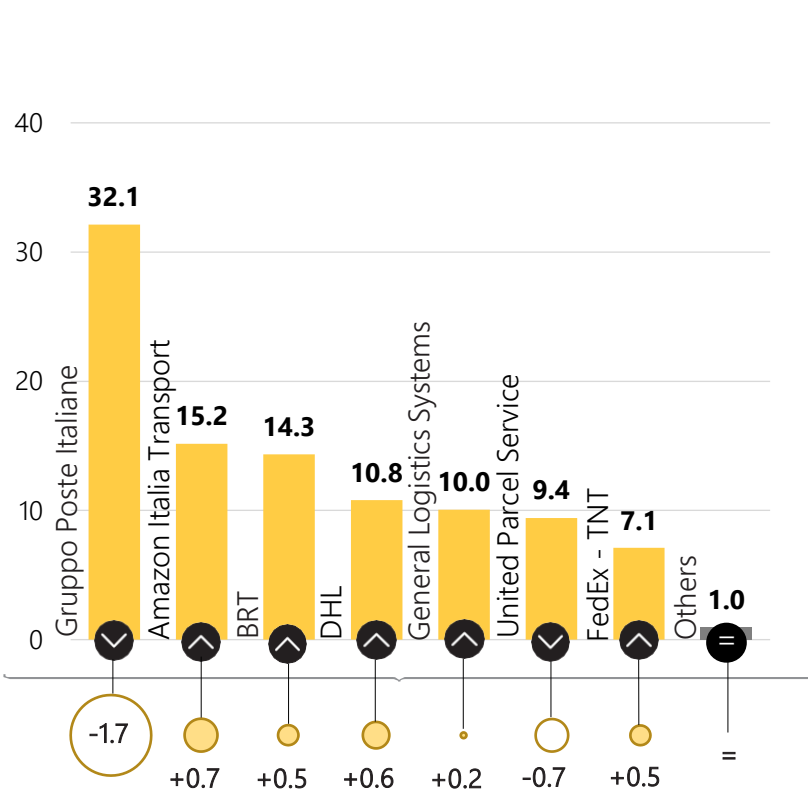
(1H 2019 – 1H 2023) (1H 2022 – 1H 2023)

Mail services:	-34.0	▼	-8.0	▼
- Universal Service:	-47.8	▼	-11.9	▼
- Non Universal Service:	-25.3	▼	-6.2	▼
Parcel delivery services:	+74.6	▲	+9.0	▲
- Domestic:	+77.2	▲	+8.4	▲
- Crossborder:	+59.9	▲	+12.6	▲

3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

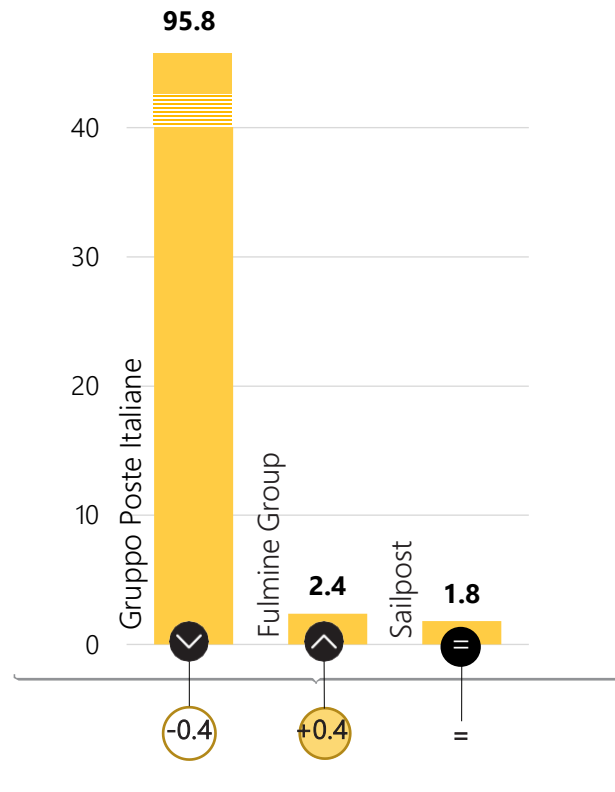
JANUARY - JUNE 2023 – IN % OF TOTALE REVENUES (Universal service + Non Universal service)

MAIL AND PARCEL DELIVERY SERVICES

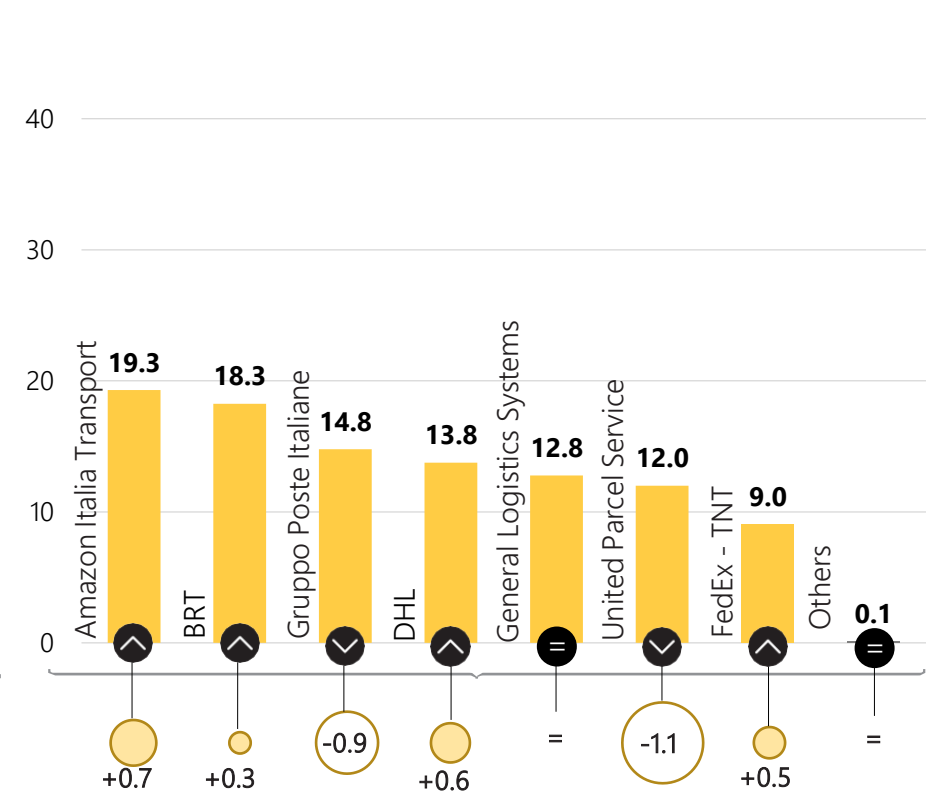


MAIL SERVICES

(single + multiple items)



PARCEL DELIVERY SERVICES COURIERS

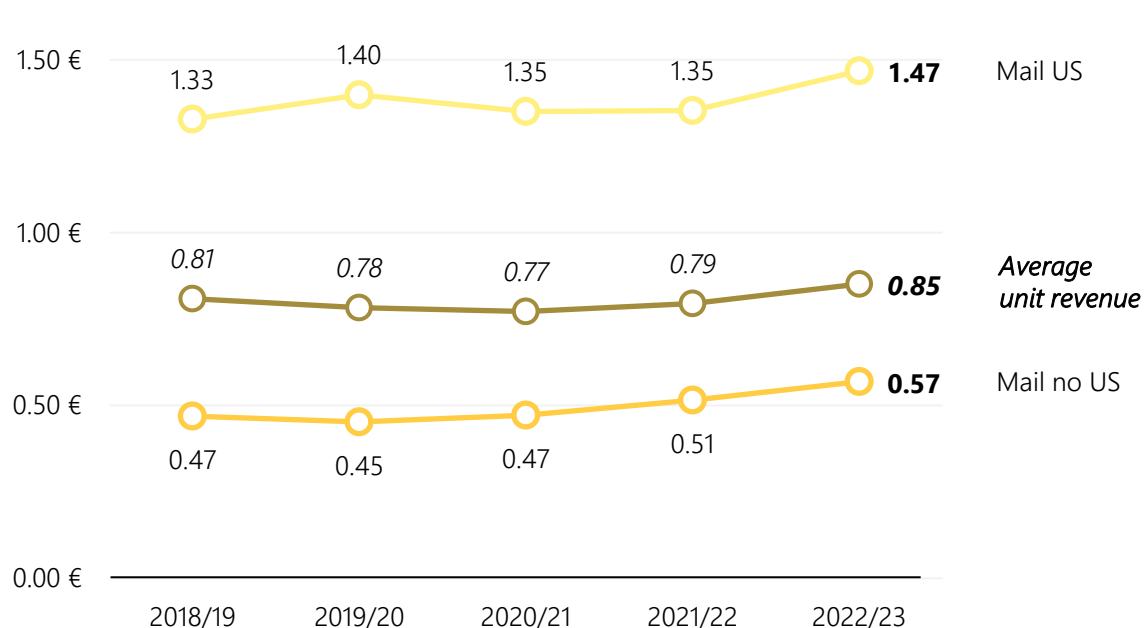


Differences vs. Jan. – Jun. 2022
(percentage points)

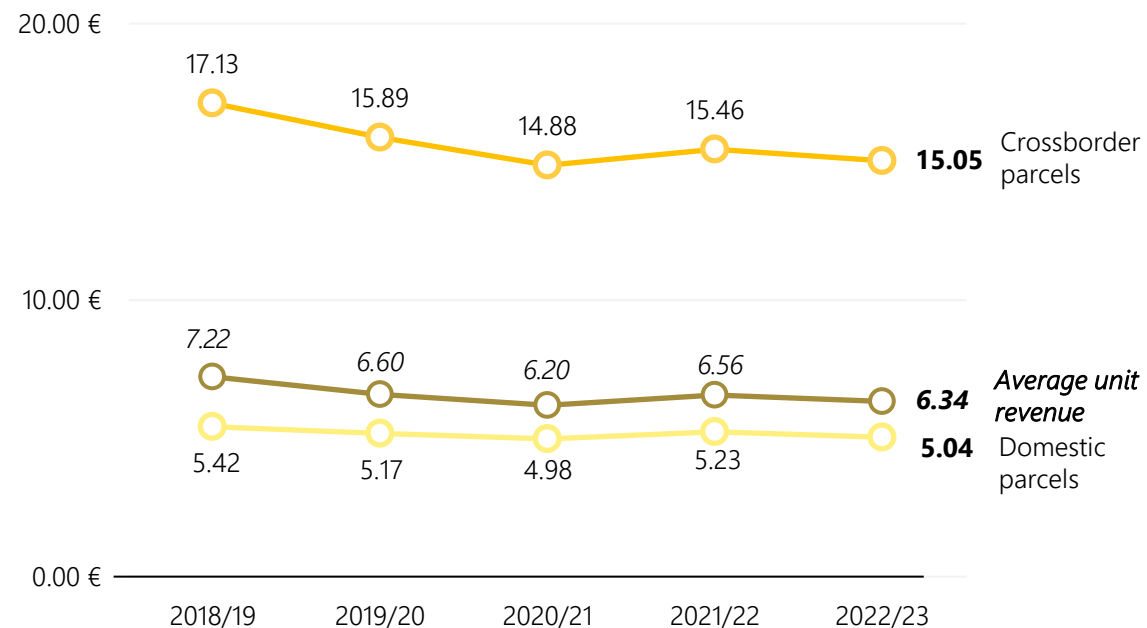
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group. Nexive Group S.r.l. and SDA Express Courier S.p.A.

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

MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

(2018/19 – 2022/23) (2021/22 – 2022/23)

Average unit revenue:	+5.3	↑	+7.1	↑
- Mail US:	+10.5	↑	+8.5	↑
- Mail non US:	+21.3	↑	+10.5	↑

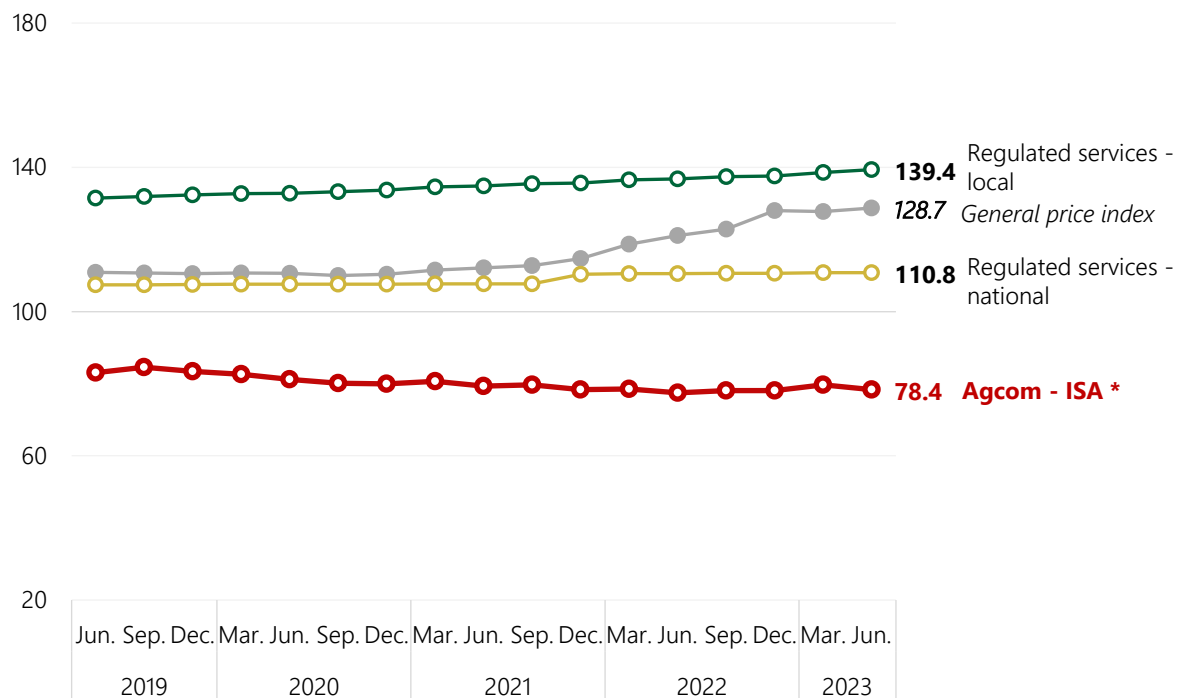
Change in %

(2018/19 – 2022/23) (2021/22 – 2022/23)

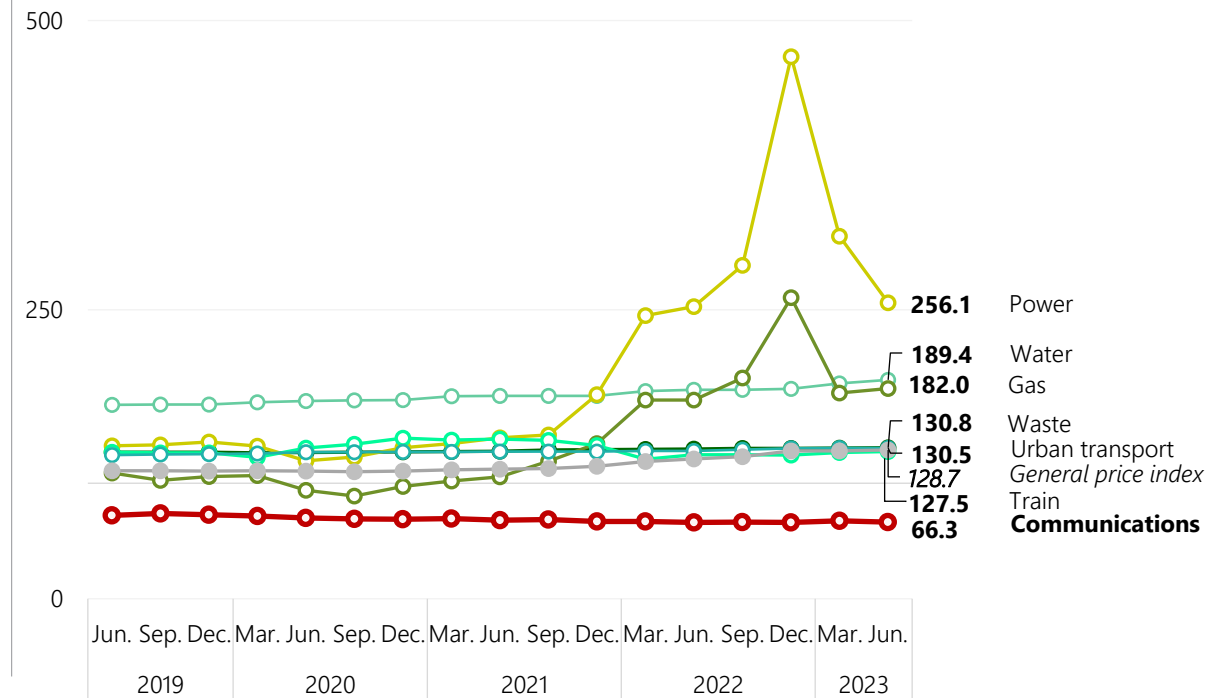
Average unit revenue:	-12.3	↓	-3.5	↓
Crossborder parcels:	-12.1	↓	-2.6	↓
- US:	+11.1	↑	+2.8	↑
- Non US:	-12.1	↓	-2.7	↓
Domestic parcels:	-7.0	↓	-3.7	↓
- US:	+3.5	↑	+7.5	↑
- Non US:	-7.0	↓	-3.8	↓

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

GENERAL PRICE INDEX



UTILITIES PRICE INDEX



Source: Agcom elaboration on data from Istat

	Change in %	
	4-Year	YoY
ISA (Agcom summary price index):	-5.7 ↓	+1.2 ↑
General price index:	+16.1 ↑	+6.3 ↑
Regulated services - local:	+6.0 ↑	+1.9 ↑
Regulated services - national:	+3.2 ↑	+0.3 ↑

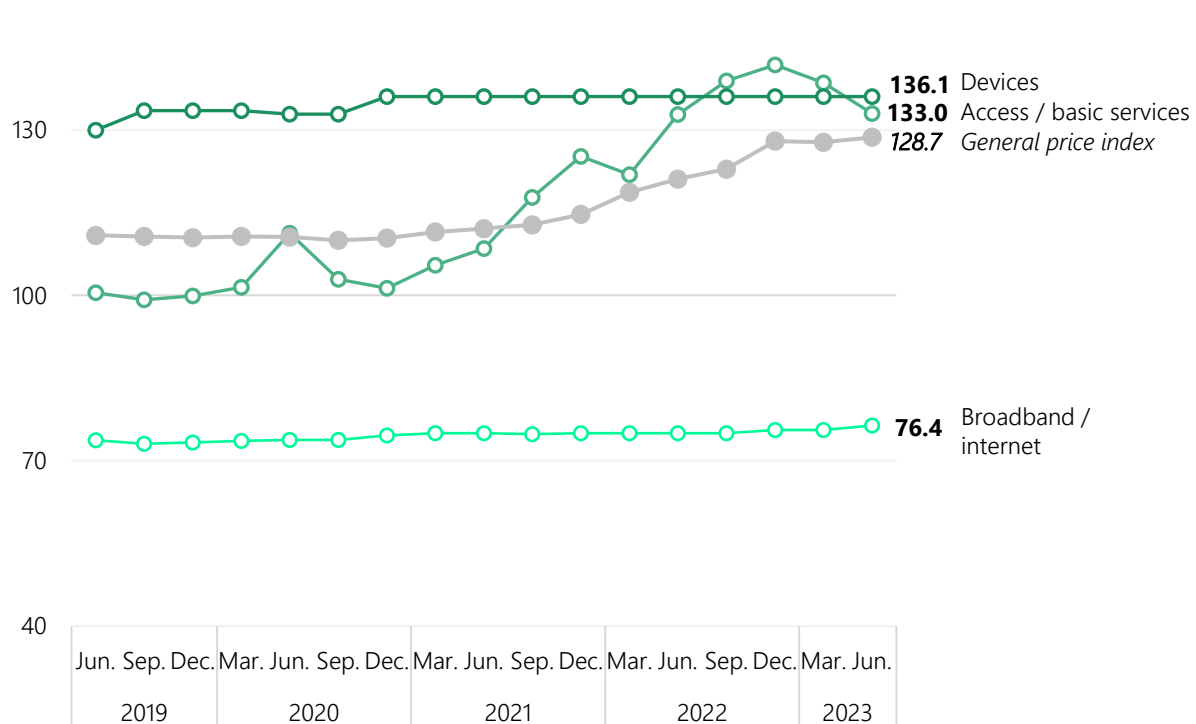
	Change in %			Change in %	
	4-Year	YoY		4-Year	YoY
Water (04.4.1):	+12.9 ↑	+4.8 ↑	Train (07.3.1):	+0.6 ↑	+2.3 ↑
Waste (04.4.2):	+3.2 ↑	+0.9 ↑	Urban transport (07.3.2.1.1):	+4.9 ↑	+2.0 ↑
Power (04.5.1):	+93.6 ↑	+1.4 ↑	Communications (08):	-8.3 ↓	+0.5 ↑
Gas (04.5.2):	+67.4 ↑	+5.8 ↑			

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

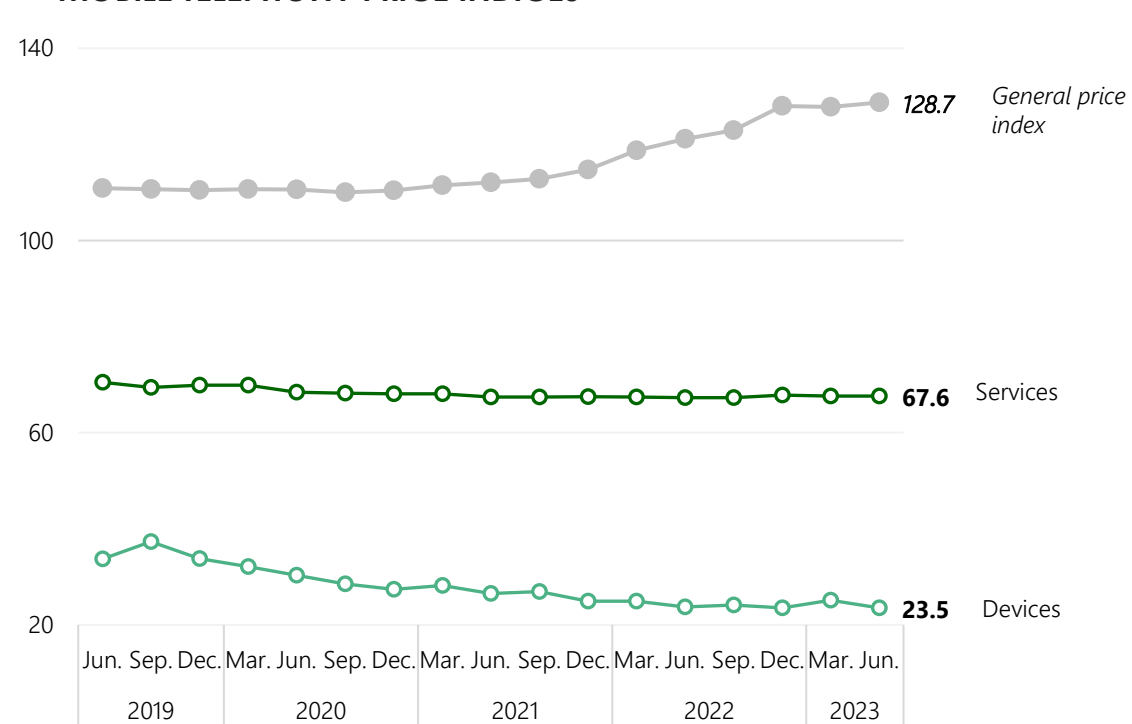
(COICOP - Classification of Individual Consumption by Purpose)

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

FIXED TELEPHONY PRICE INDICES



MOBILE TELEPHONY PRICE INDICES



Source: Agcom elaboration on data from Istat

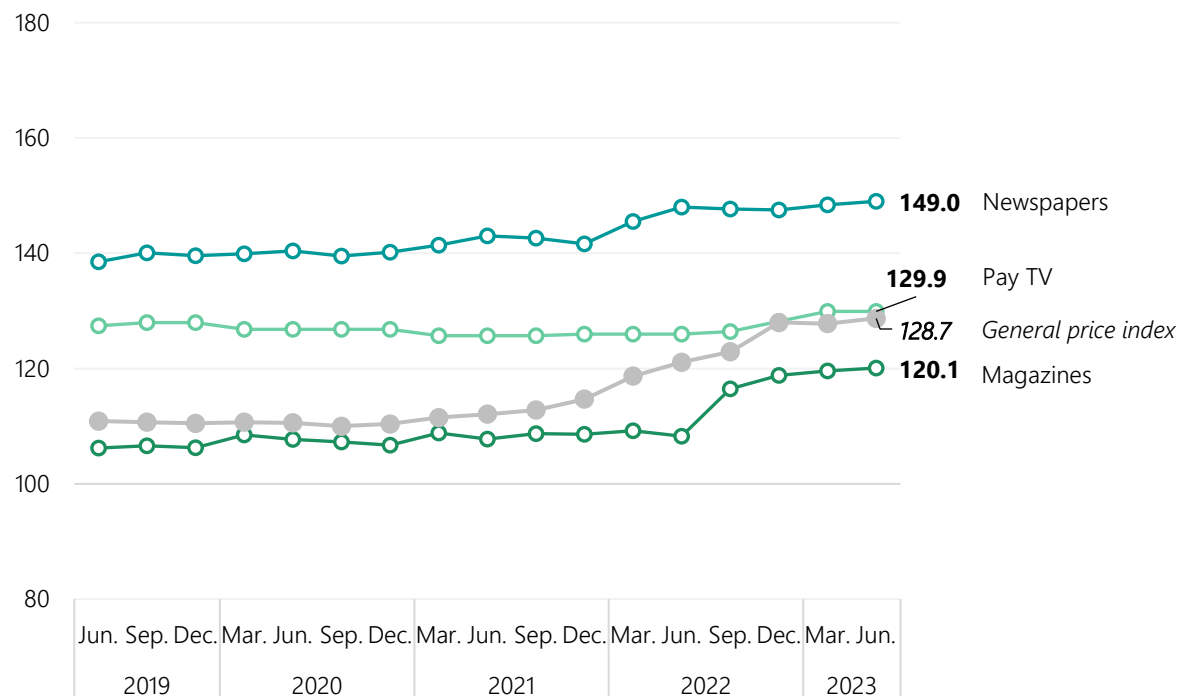
	Change in %	
	4-Year	YoY
Access / basic services (08.3.0.1):	+4.7 ▲	=
Devices (08.2.0.1):	+32.3 ▲	+0.2 ▲
Broadband / internet (08.3.0.3.0.01):	+3.7 ▲	+1.9 ▲

	Change in %	
	4-Year	YoY
Services (08.3.0.2):	-4.1 ▼	+0.4 ▲
Devices (08.2.0.2):	-30.3 ▼	-0.8 ▼

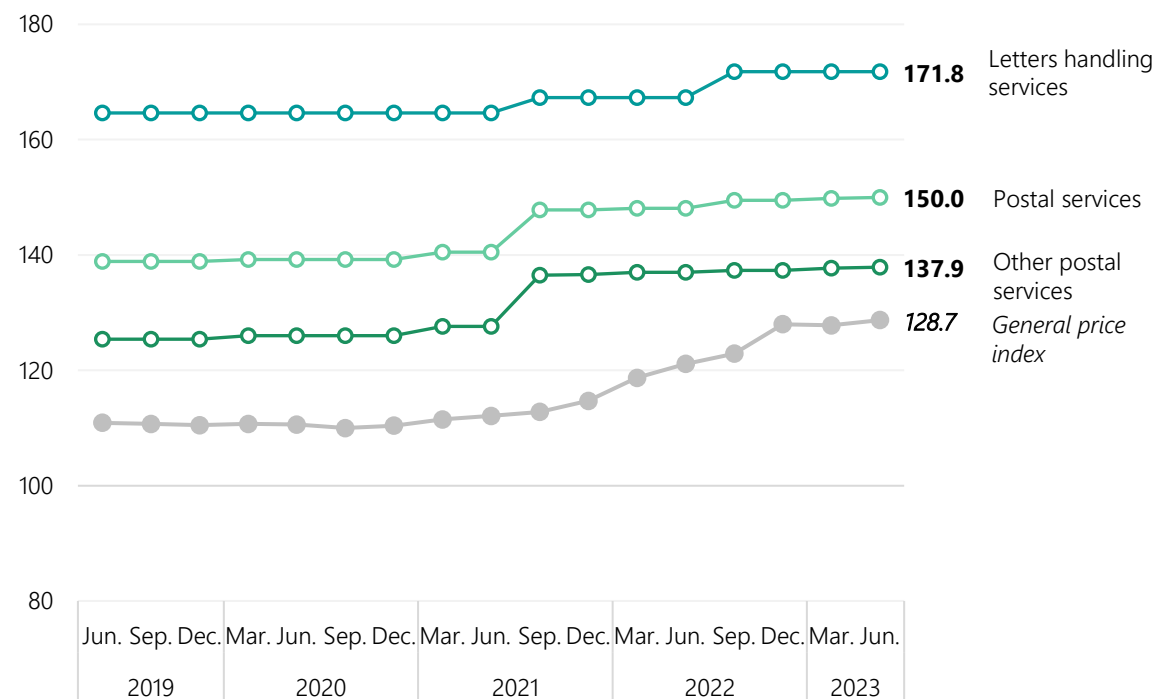
(COICOP - Classification of Individual Consumption by Purpose)

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):	+7.6 ↑	+0.7 ↑
Pay TV (09.4.2.3.0.02):	+2.0 ↑	+3.1 ↑
Magazines (09.5.2.2.0):	+13.1 ↑	+10.9 ↑

	Change in %	
	4-Year	YoY
Postal services (08.1):	+8.0 ↑	+1.3 ↑
Letters handling services (08.1.0.1.0.00):	+4.4 ↑	+2.7 ↑
Other postal services (08.1.0.9.0.00):	+10.0 ↑	+0.7 ↑

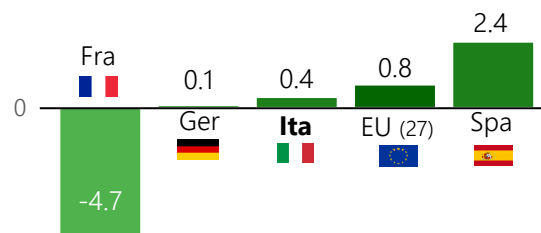
(COICOP codes - Classification of Individual Consumption by Purpose)

4.4 PRICE: INTERNATIONAL BENCHMARK

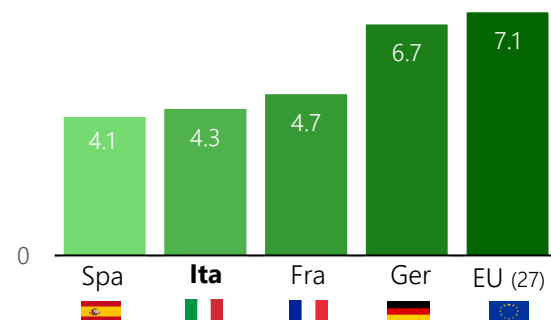
1-Year change %

Jun. 2022
-
Jun. 2023

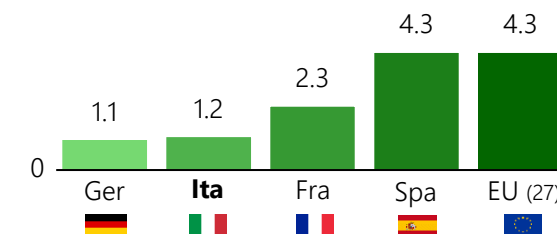
TLC – SERVICES AND EQUIPMENTS (COICOP 08.2 - 08.3)



NEWSPAPERS AND MAGAZINES (COICOP 09.5.2)

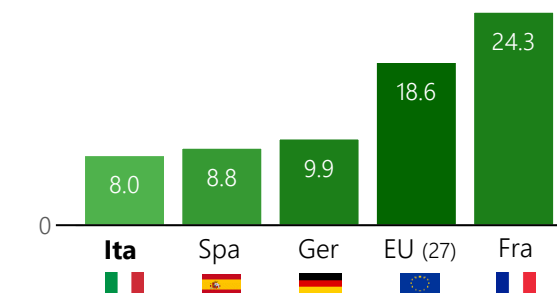
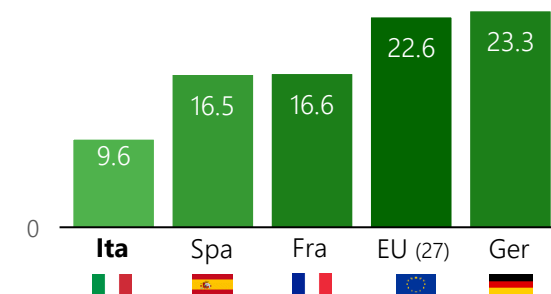
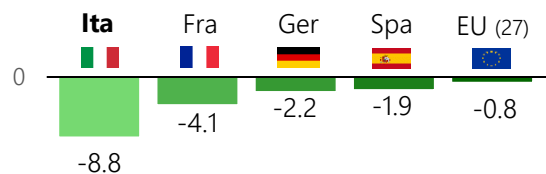


POSTAL SERVICES (COICOP 08.1)



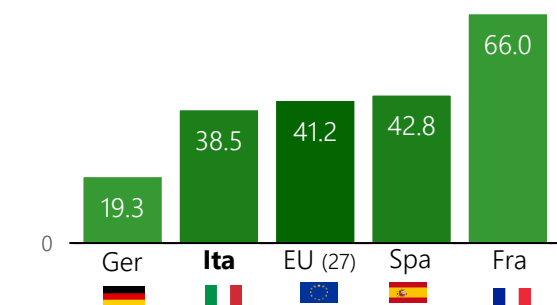
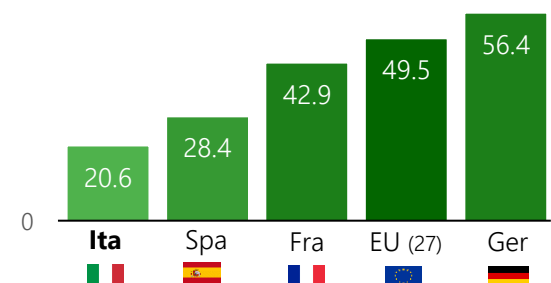
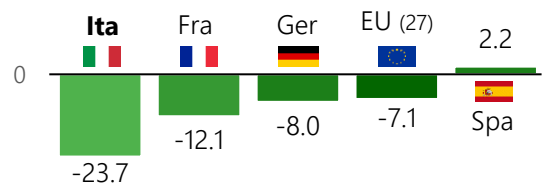
5-Year change %

Jun. 2019
-
Jun. 2023



10-Year change %

Jun. 2013
-
Jun. 2023





COMMUNICATION MARKETS MONITORING SYSTEM

no. 3/2023

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