



AUTORITÀ PER LE
GARANZIE NELLE
COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

N. 1/2023



01 ELECTRONIC COMMUNICATIONS

Fixed network

- 1.1 Total lines
- 1.2 Broadband and ultrabroadband lines
- 1.3 Broadband and ultrabroadband lines by type of customer and operators
- 1.4 Broadband and ultrabroadband lines by technology and operators
- 1.5 Data traffic in download and upload
- 1.6 Average daily data traffic
- 1.7 Average daily data traffic per broadband line
- 1.8 Weekly data traffic intensity
- 1.9 Coverage by technology and speed

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- 1.11 Subscribers by type of customer
- 1.12 Subscribers by type of contract
- 1.13 Data traffic in download and upload
- 1.14 Average daily data traffic
- 1.15 Average daily data traffic per sim "human"
- 1.16 Weekly data traffic intensity
- 1.17 Number portability

02 MEDIA AND PLATFORMS

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- 2.1 Total audience of national broadcaster
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- 2.3 Average daily audience of the main national TV channels
- 2.4 Total audience of the main national news programs
- 2.5 Average daily audience of main national news programs

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- 2.6 Daily copies sold since the beginning year (1/2)
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- 2.13 Time spent on pay video on demand platforms
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- 2.15 Time spent on free video on demand platforms

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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.

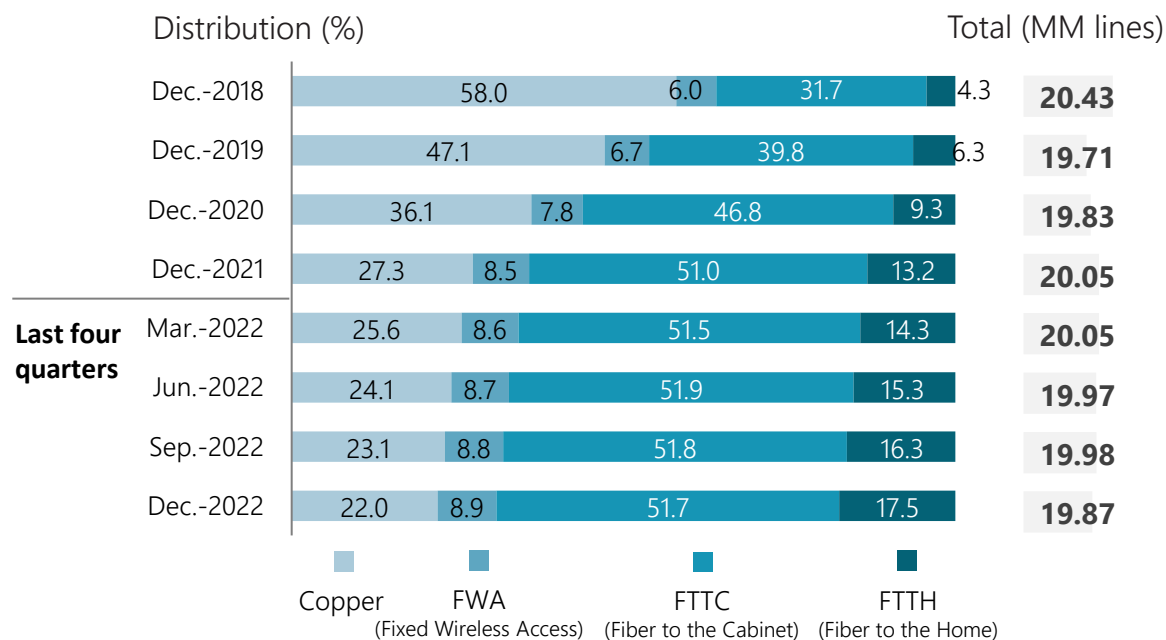
The values indicated in sections 1 and 3 are based on information provided by the main companies present in the electronic communications and mail and parcel delivery services markets. Regarding the section dedicated to media and internet platforms (section 2), the data refer to elaborations on information 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 December 2022. The percentage compositions are automatically rounded to the first decimal place. Due to changes in firms' accounting methods, some figures cannot be compared directly with those reported in previous issues.

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

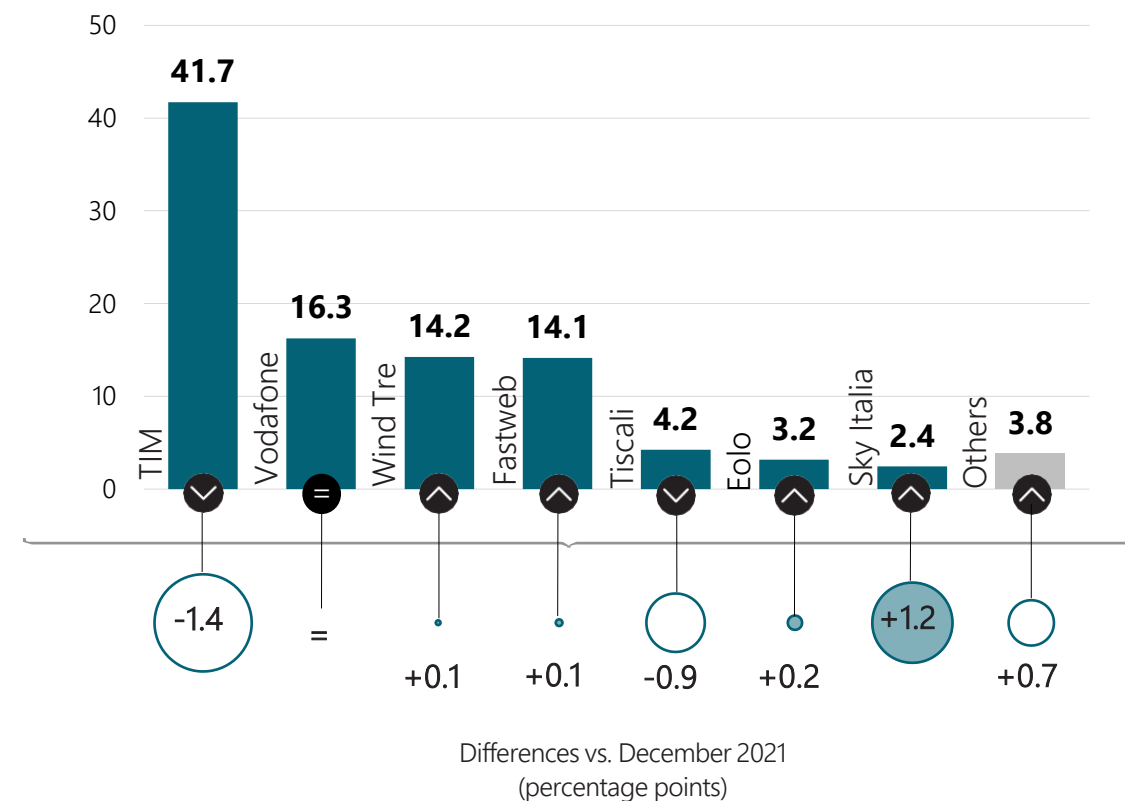
1.1 FIXED NETWORK: TOTAL LINES



Total lines	(no. of lines)	(Δ %)	Distribution (Δ 2021-2022) percentage points
Quarterly change (Sep. 2022 – Dec. 2022)	-115 k accesses	-0.6 ↓	Copper: -5.3 ↓
Annual change (Dec. 2021 – Dec. 2022)	-184 k accesses	-0.9 ↓	FWA: +0.4 ↑
4-Year change (Dec. 2018 – Dec. 2022)	-559 k accesses	-2.7 ↓	FTTC: +0.7 ↑
			FTTH: +4.2 ↑

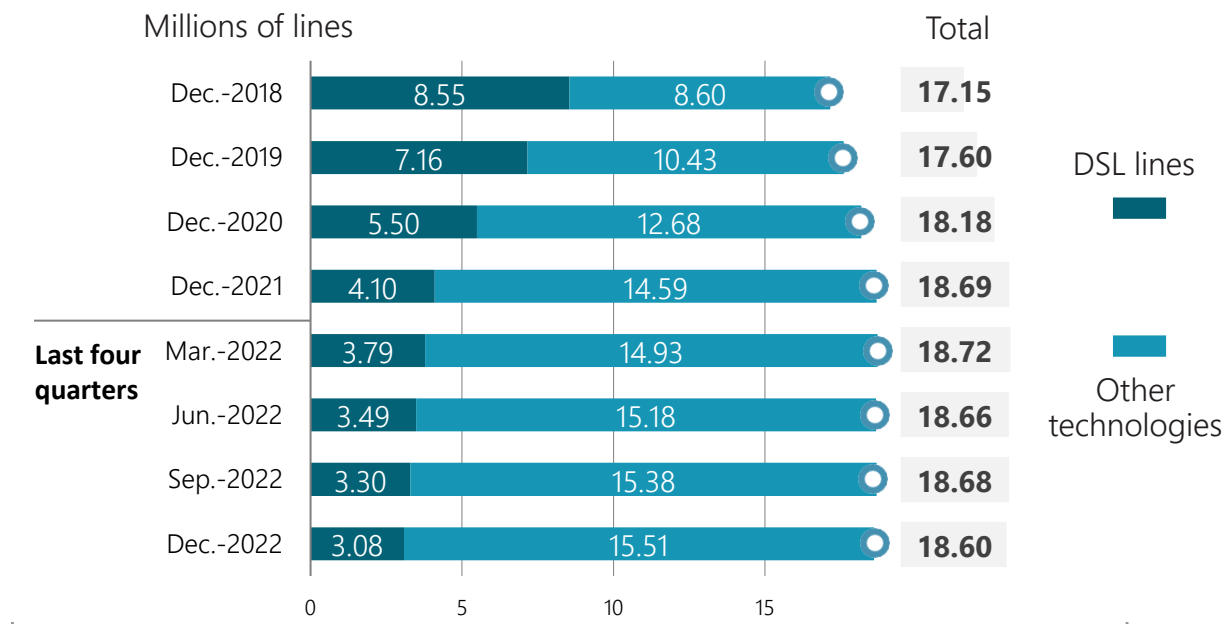
MARKET SHARES (%)

DECEMBER 2022



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

1.2 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES



Quarterly change
(Sep. 2022 – Dec. 2022)

Total lines



-83 k
lines
(-0.4%)

Annual change
(Dec. 2021 – Dec. 2022)

Total lines



-90 k
lines
(-0.5 %)

DSL lines



-1.013 MM
lines
(-24.7%)

Other technologies

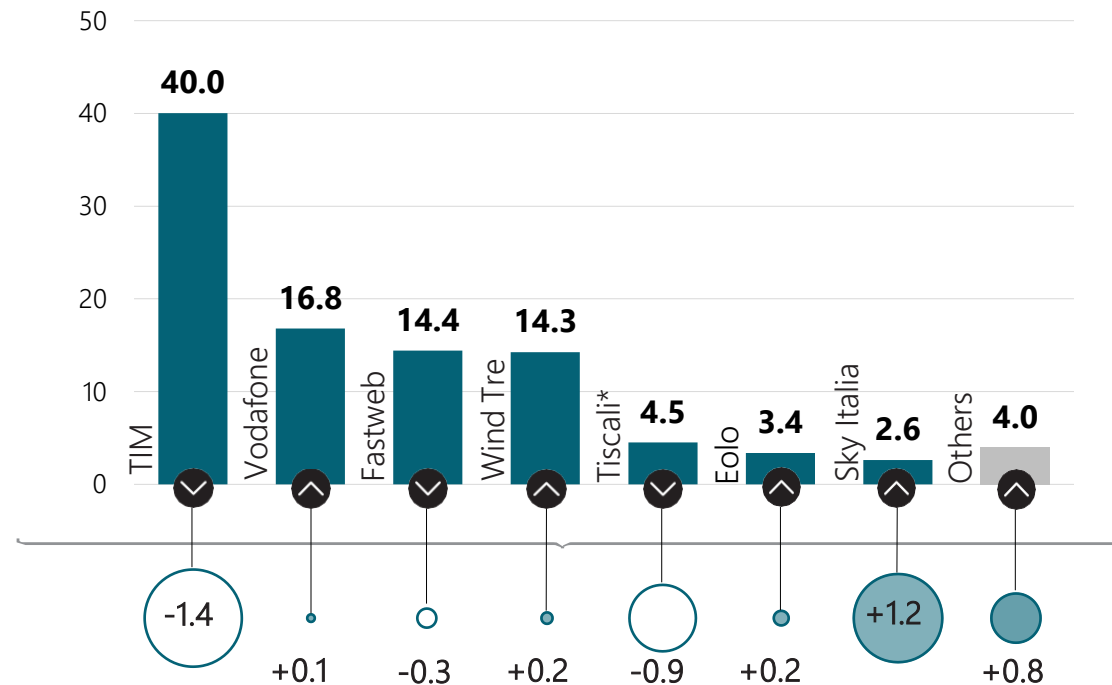


+923 k
lines
(+6.3%)

k = thousand
MM = million

MARKET SHARES (%)

DECEMBER 2022



Differences vs. December 2021
(percentage points)

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

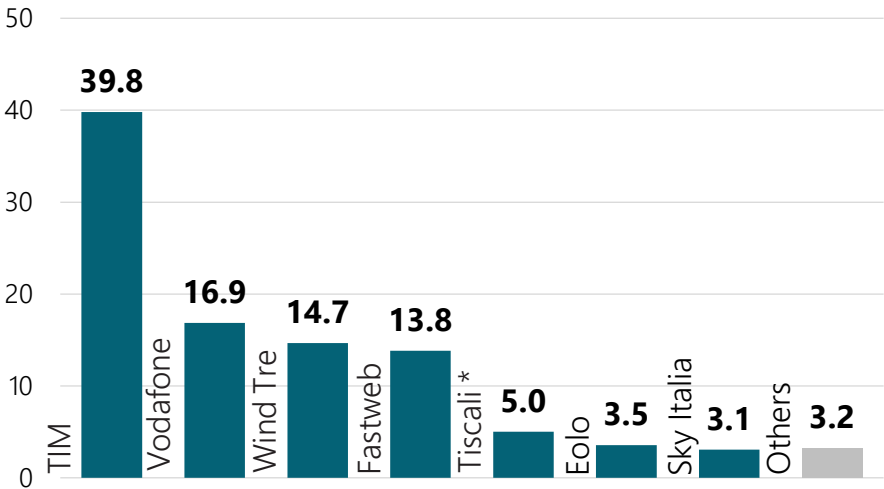
1.3: FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES BY TYPE OF CUSTOMER AND OPERATORS



DECEMBER 2022

RESIDENTIAL CUSTOMERS

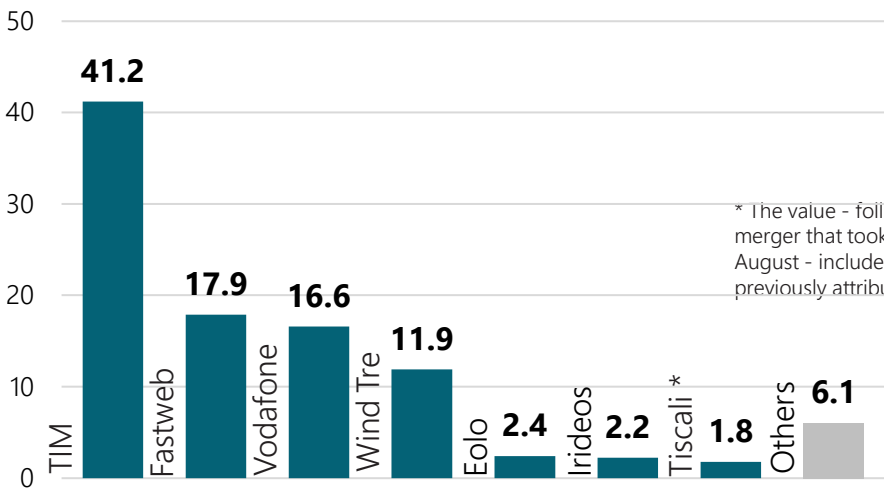
Total lines: 15.830 million lines



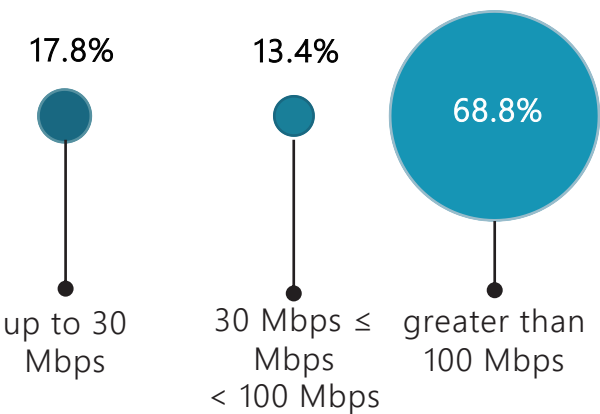
by operator (%)

BUSINESS CUSTOMERS

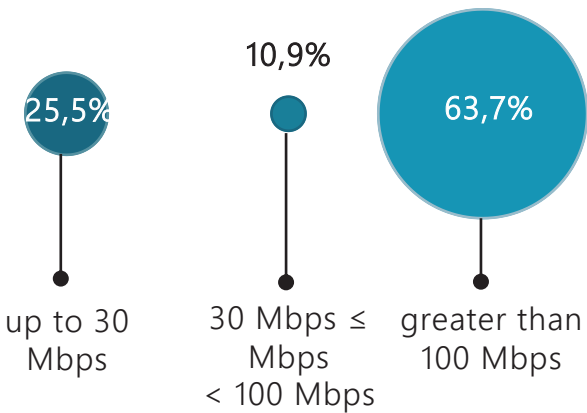
Total lines: 2.766 million lines



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



by marketed speed classes (%)



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

DECEMBER 2022

FWA

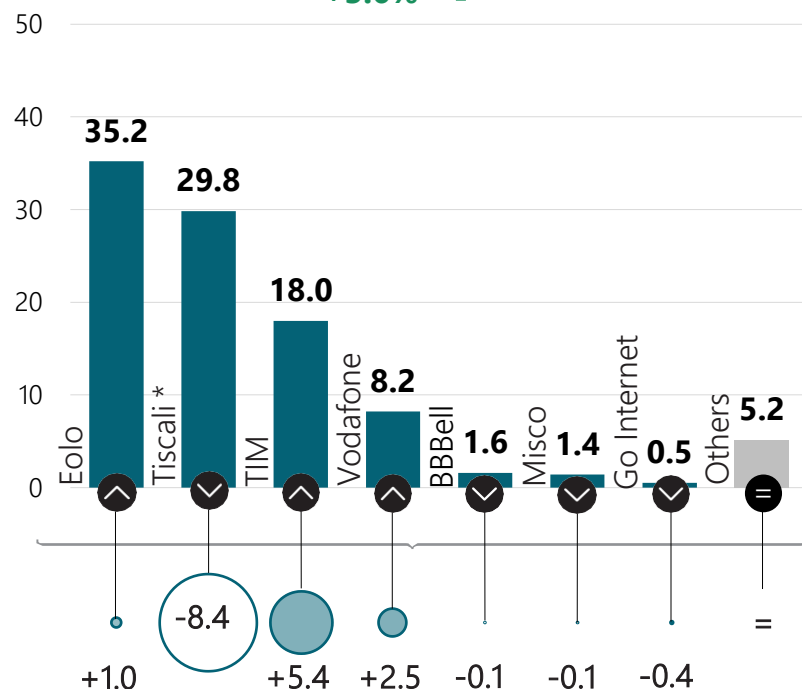
FTTC

FTTH

Total lines: **1.77** million access

Annual change
(Dec. 2021 – Dec. 2022)

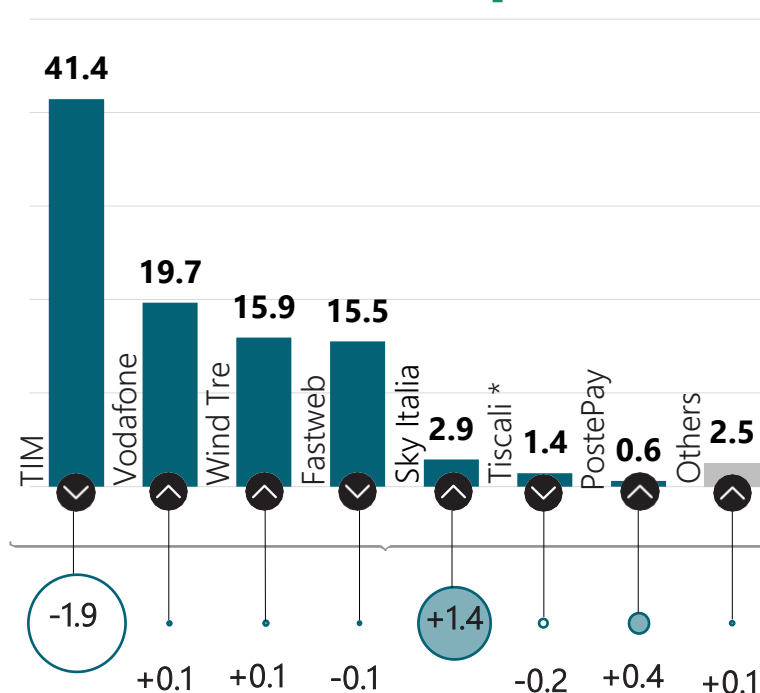
+3.6% ↑



Total lines: **10.26** million access

Annual change
(Dec. 2021 – Dec. 2022)

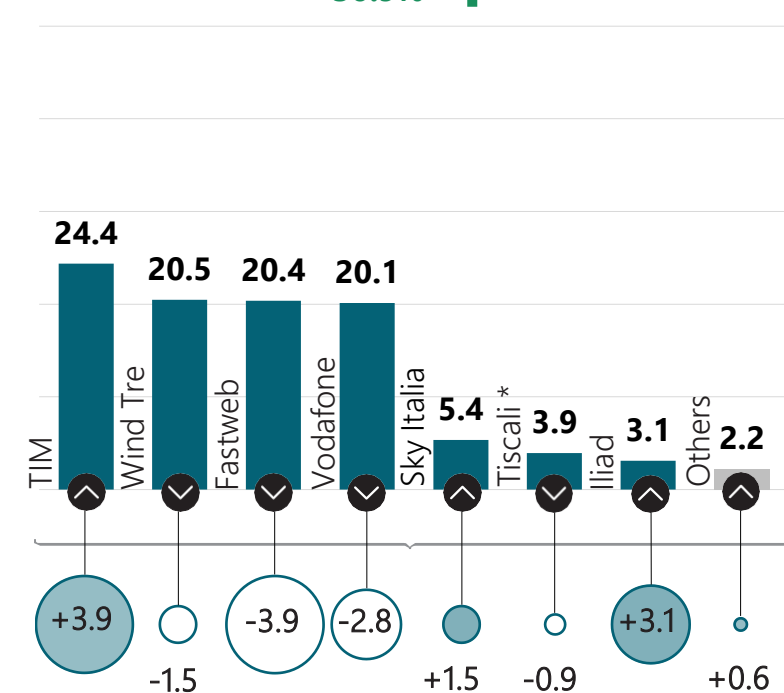
+0.4% ↑



Total lines: **3.47** million access

Annual change
(Dec. 2021 – Dec. 2022)

+30.9% ↑

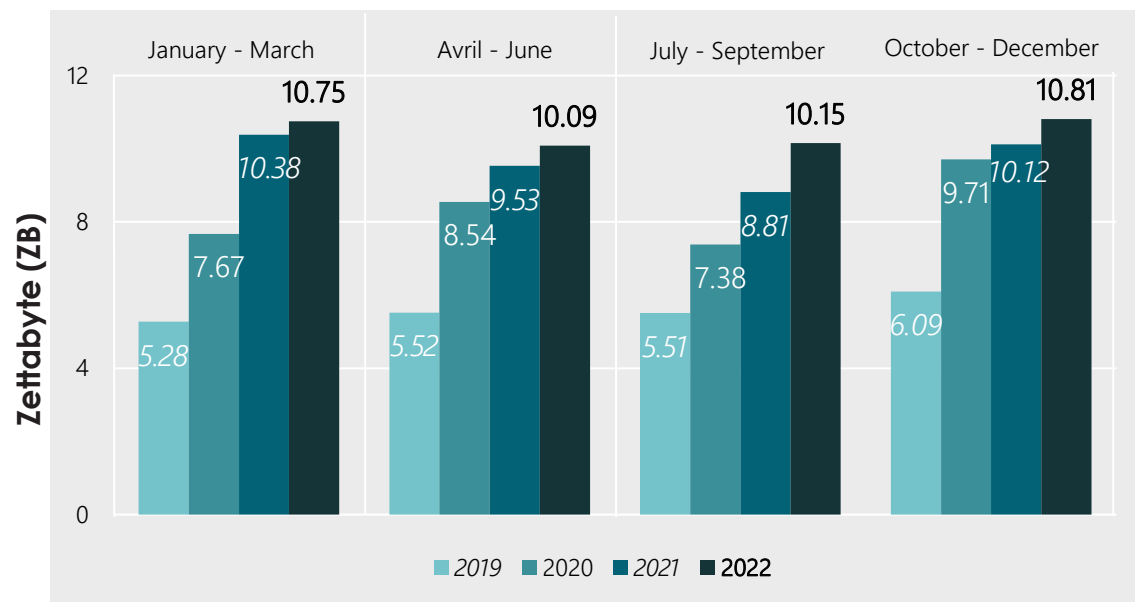


Differences vs. December 2021
(percentage points)

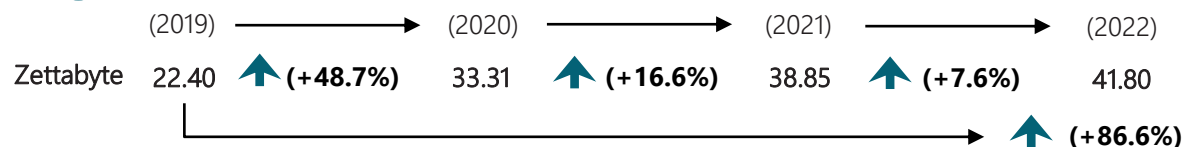
Note: elaborations based on data provided by companies in the context of the preparation of European reporting A few thousand lines allocated by the companies in the categories "Other non-NGA" and "Other NGA" are excluded from the analysis..

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

DOWNLOAD (cumulative quarterly data)



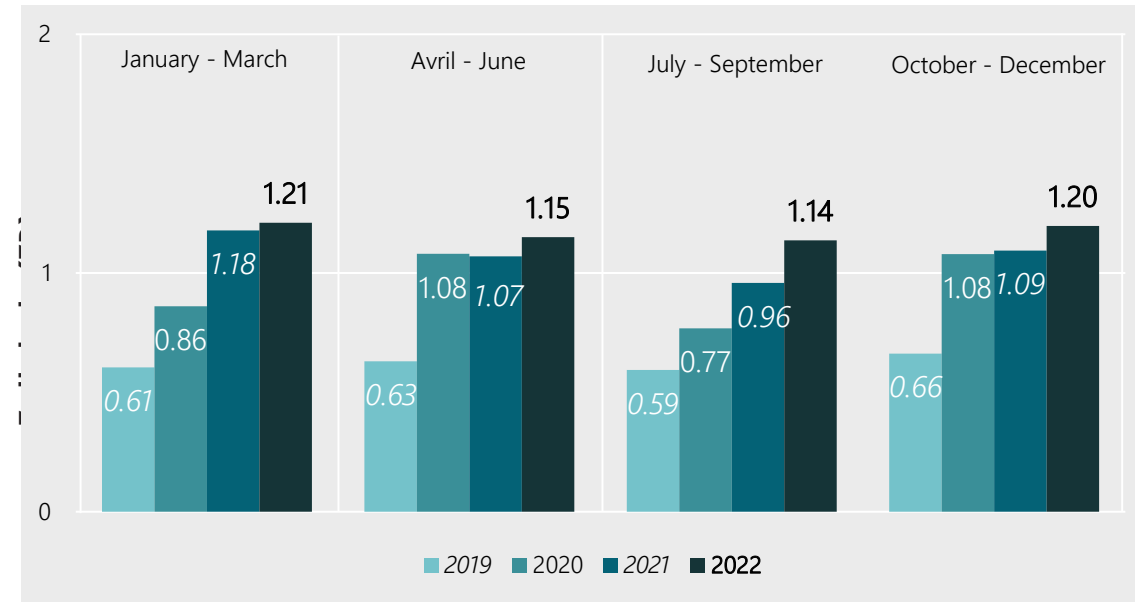
① Cumulative data since the beginning of the year (Jan. – Dec.)



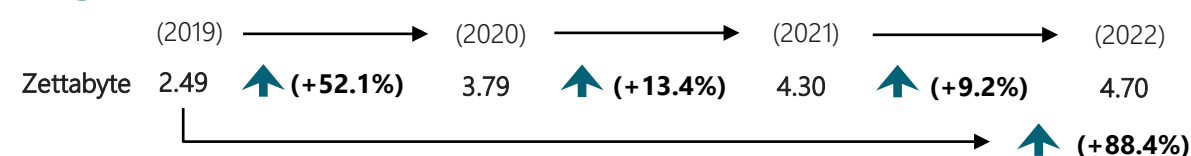
② Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+45.3	+35.4	+3.6	+103.7
2 Q (Avr. - Jun.)	+54.8	+11.6	+5.8	+82.7
3 Q (Jul. - Sep.)	+34.0	+19.4	+15.2	+84.2
4 Q (Oct. - Dec.)	+59.4	+4.2	+6.8	+77.4

UPLOAD (cumulative quarterly data)



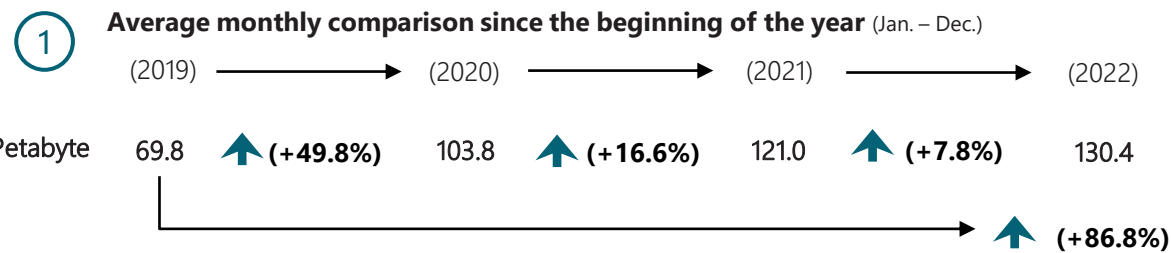
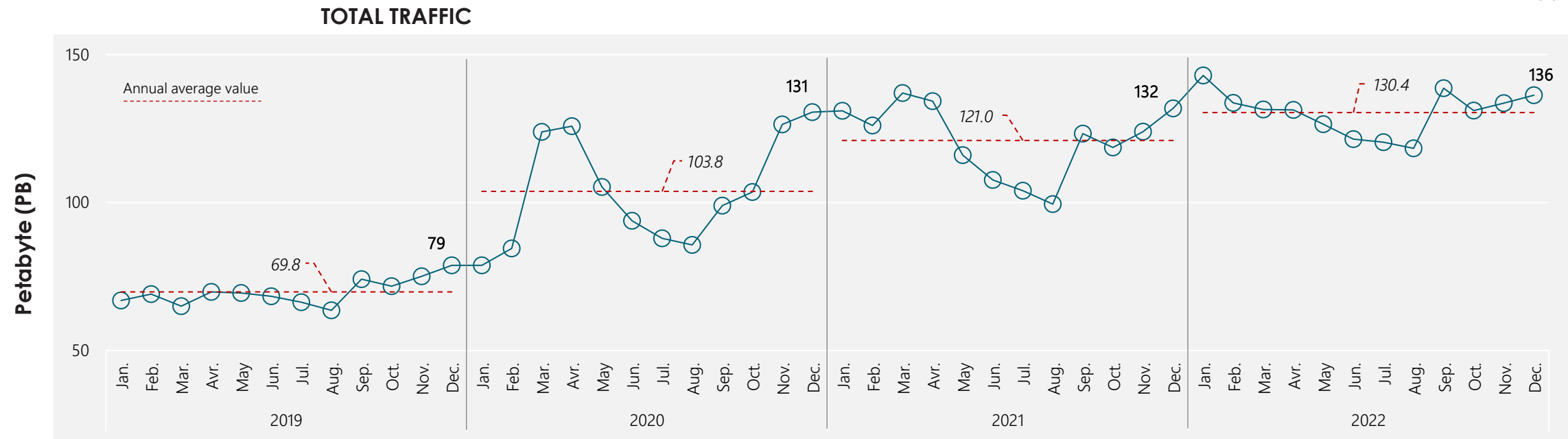
① Cumulative data since the beginning of the year (Jan. – Dec.)



② Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+42.1	+36.9	+2.8	+100.0
2 Q (Avr. - Jun.)	+71.5	-1.3	+7.8	+82.6
3 Q (Jul. - Sep.)	+29.6	+24.5	+18.6	+91.3
4 Q (Oct. - Dec.)	+62.8	+1.4	+9.4	+80.6

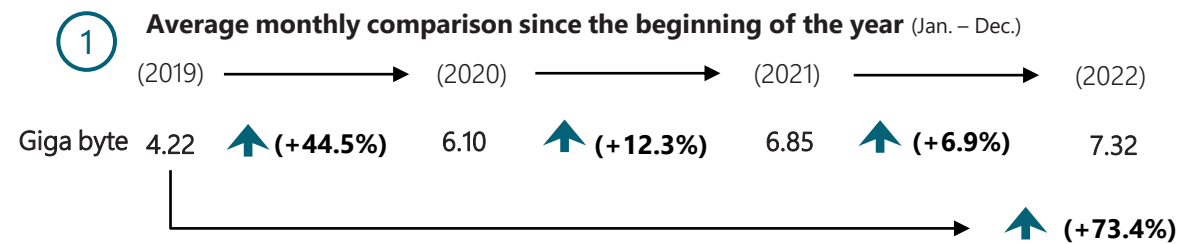
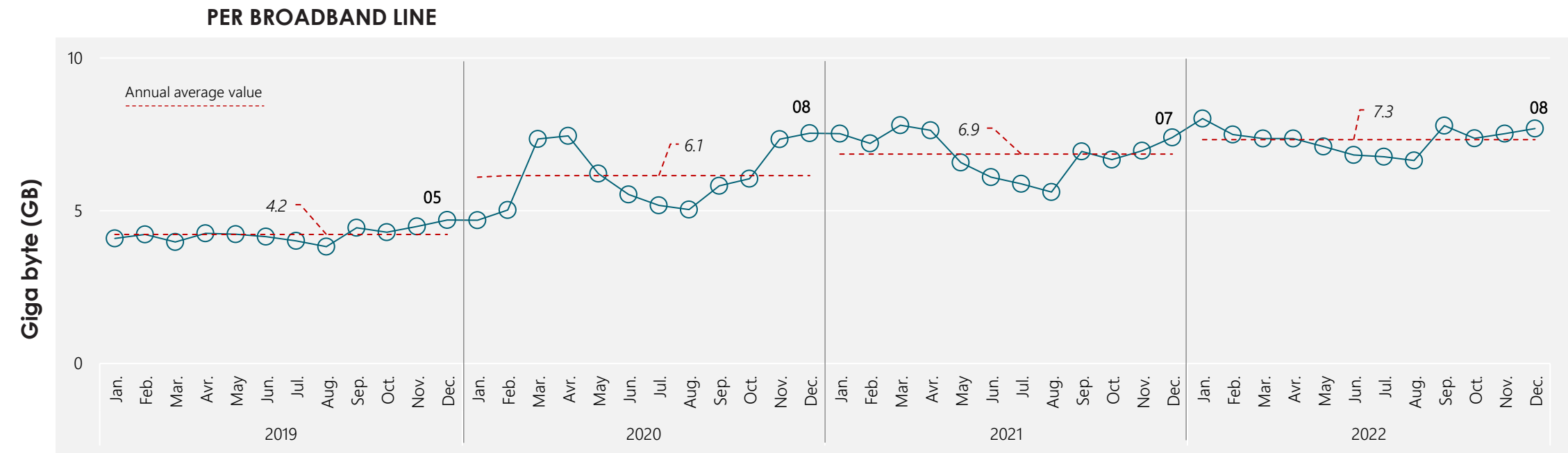
1.6 FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload)



2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+43.4	+37.0	+3.5	+103.3
2 Q (Apr. - Jun.)	+56.5	+10.2	+6.0	+82.7
3 Q (Jul. - Sep.)	+33.6	+19.9	+15.5	+84.9
4 Q (Oct. - Dec.)	+59.7	+1.2	+7.1	+77.7

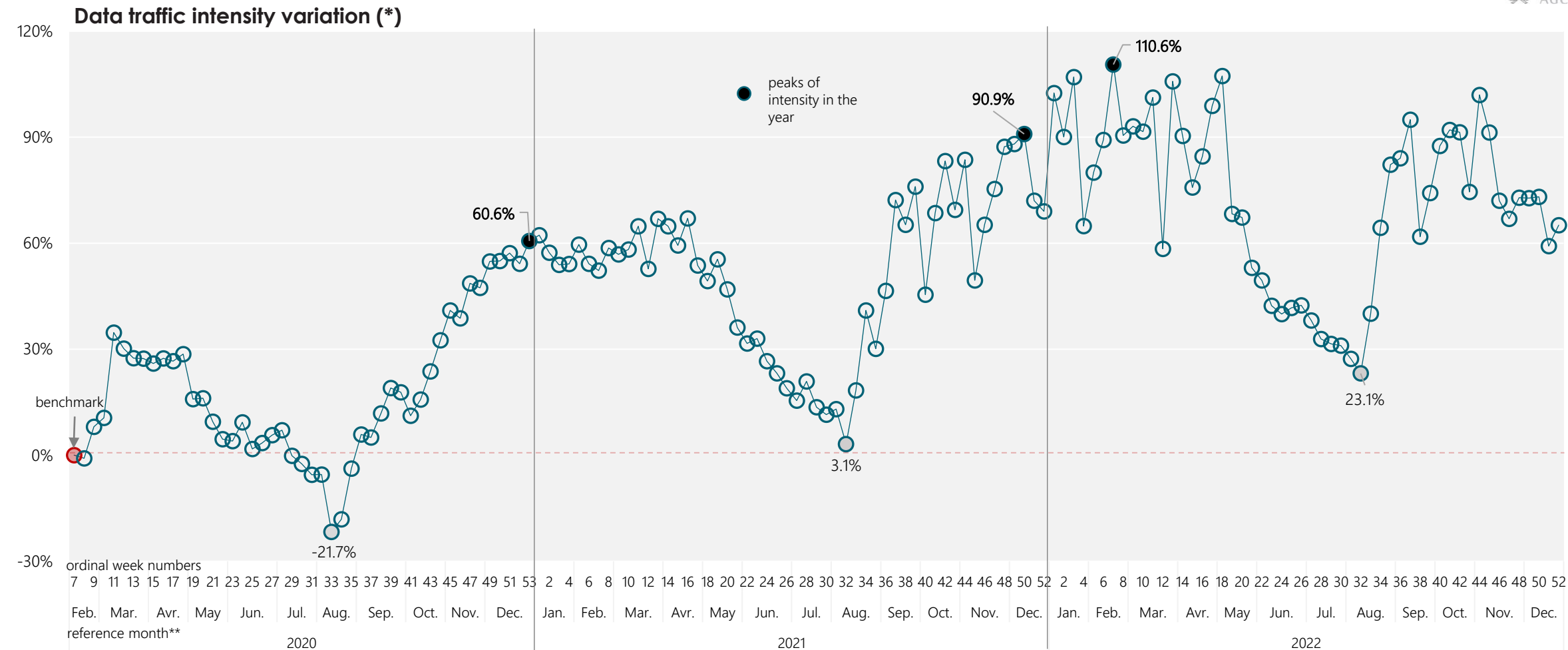
1.7 FIXED NETWORK: AVERAGE DAILY DATA TRAFFIC PER BROADBAND LINE (download + upload)



2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+39.3	+31.8	+1.5	+86.3
2 Q (Avr. - Jun.)	+51.8	+5.8	+4.9	+68.5
3 Q (Jul. - Sep.)	+30.4	+15.0	+15.0	+72.5
4 Q (Oct. - Dec.)	+55.2	+0.6	+7.3	+67.6

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 FIXED NETWORK: COVERAGE BY TECHNOLOGY AND SPEED

% of households reached

Technology

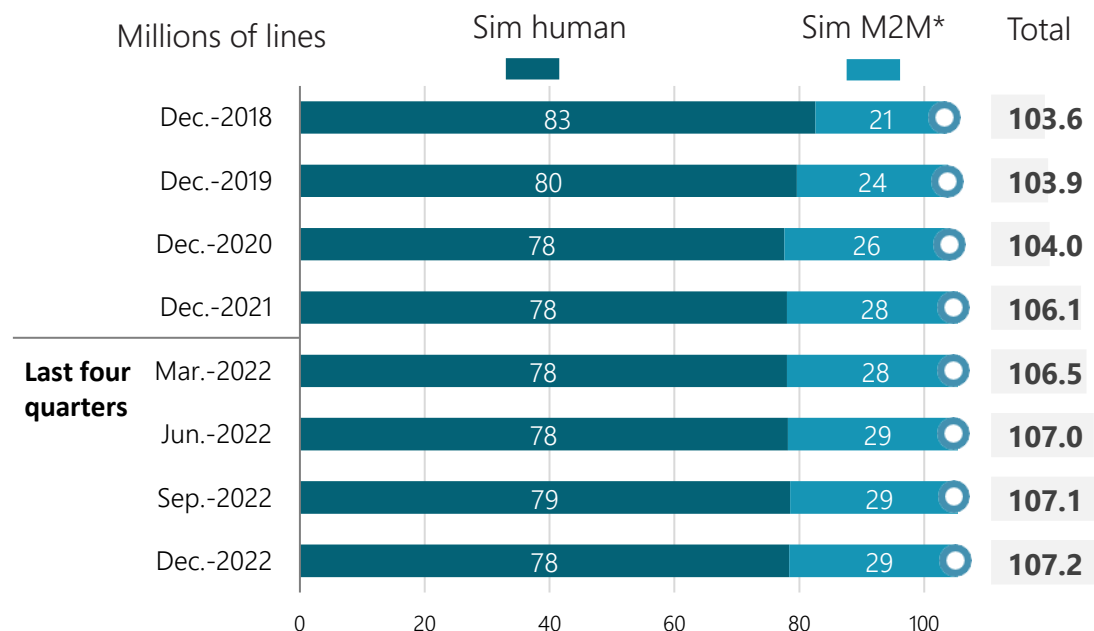
Macro Area	VDSL				VDSL Vectoring (*)				FTTH				FWA			
	2019	2020	2021	2022	2019	2020	2021	2022	2019	2020	2021	2022	2019	2020	2021	2022
Italy	88.9	92.7	96.0	96.2	55.8	59.9	68.4	70.1	30.0	33.4	44.4	53.7	72.9	72.3	97.3	n.d.
Nord_West	88.3	90.3	95.0	95.3	51.7	56.6	65.1	67.0	34.2	37.2	45.4	53.7	80.7	93.0	98.5	n.d.
Nord East	87.2	92.0	95.5	95.6	51.6	56.1	66.3	68.2	24.2	29.7	40.9	50.7	78.2	85.4	98.5	n.d.
Centre	90.9	94.9	97.3	97.4	60.5	63.8	72.0	72.9	34.7	36.7	50.4	58.4	68.8	84.7	97.7	n.d.
South	89.9	94.2	96.8	96.9	56.1	60.1	68.1	69.9	27.2	29.4	41.4	52.0	66.5	40.9	95.3	n.d.
Islands	87.9	93.2	95.8	96.2	65.1	67.5	75.1	77.6	25.8	32.5	43.1	53.6	62.7	32.8	95.5	n.d.

Speed

	> 30 Mbps				> 100 Mbps			
	2019	2020	2021	2022	2019	2020	2021	2022
Italy	77.7	84.8	90.7	92.4	61.3	67.6	77.7	82.9
Nord West	77.5	83.6	89.6	91.6	62.5	69.9	78.8	83.3
Nord East	71.8	80.2	88.2	89.9	55.0	62.4	74.6	80.4
Centre	79.7	86.1	92.2	93.6	63.2	68.1	78.7	83.5
South	80.1	87.0	92.0	93.6	60.7	65.6	75.7	82.1
Islands	80.5	89.2	93.3	94.2	67.2	74.2	82.9	87.0

*In the European DESI reporting, FTTC-Vectoring technology is assimilated with FTTC-200 lines (in EVDSL technology) capable of supporting a download speed of 100 Mbit/s. The (theoretical) distance-speed conversion curves provided by the Agcom regulation are used to estimate speeds.

1.10 MOBILE NETWORK: TOTAL SUBSCRIBERS



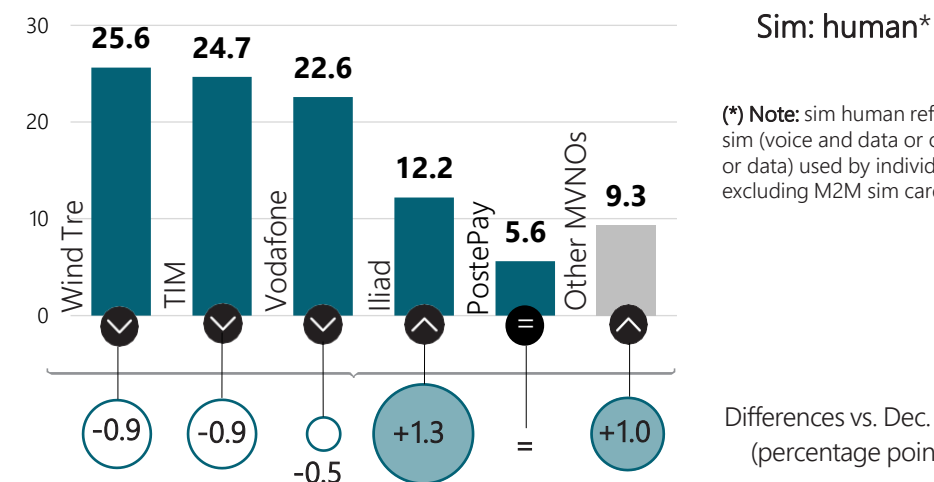
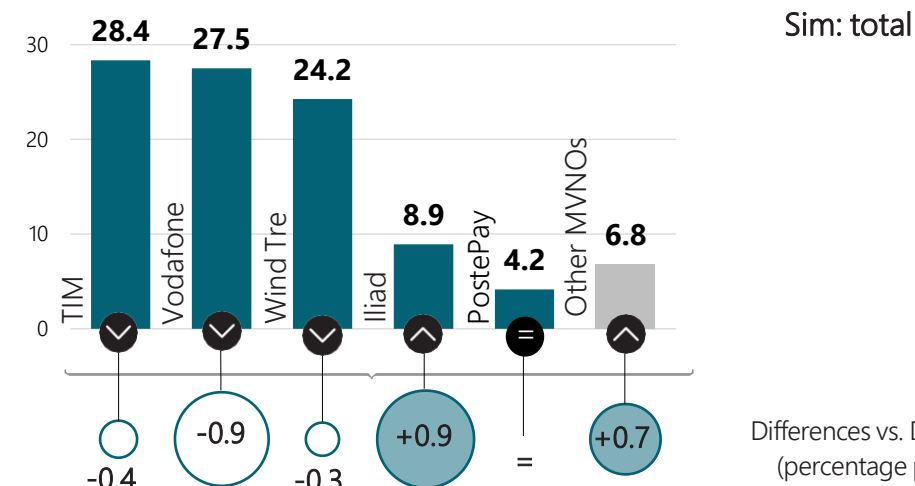
(*) Note: Machine-to-Machine sims are based on the technologies that enable devices and sensors or "things" (within the IoT) to communicate with each other and with other Internet-enabled devices and systems

	Quarterly change (Sep. 2022 – Dec. 2022)		Annual change (Dec. 2021 – Dec. 2022)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
Total sim cards:	+88	↑ +0.1	+1.124	↑ +1.1
Sim human:	-105	↓ -0.1	+385	↑ +0.5
Sim M2M:	+193	↑ +0.7	+739	↑ +2.6

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)

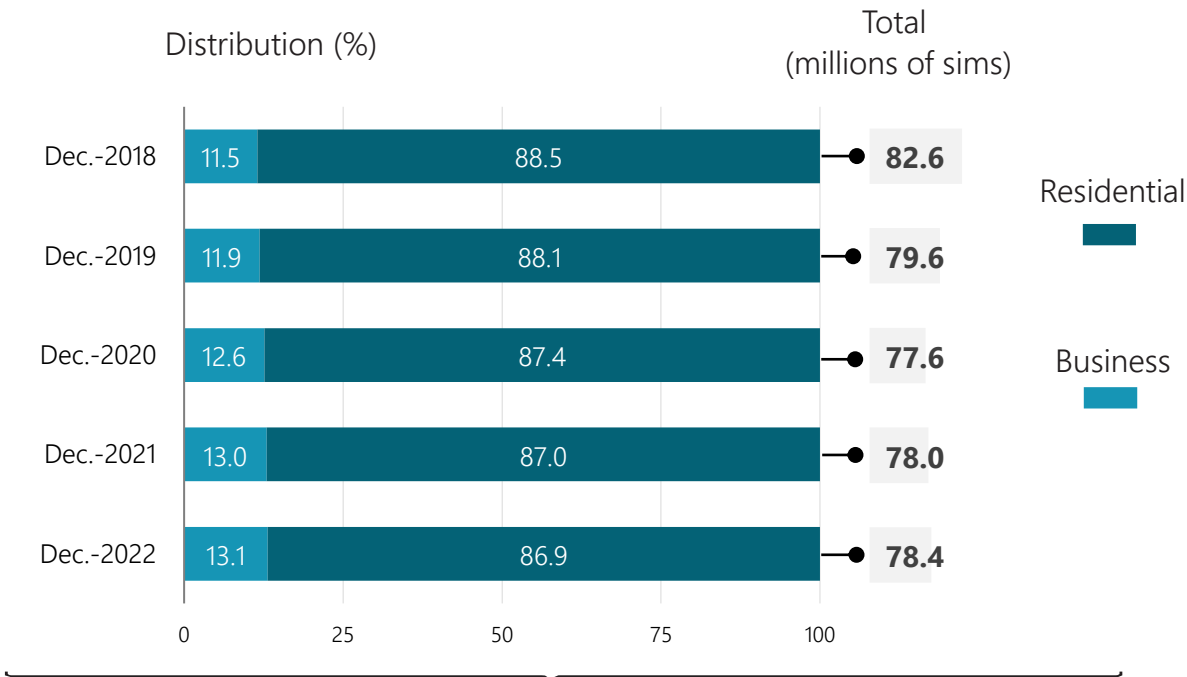
MARKET SHARES (%)

DECEMBER 2022

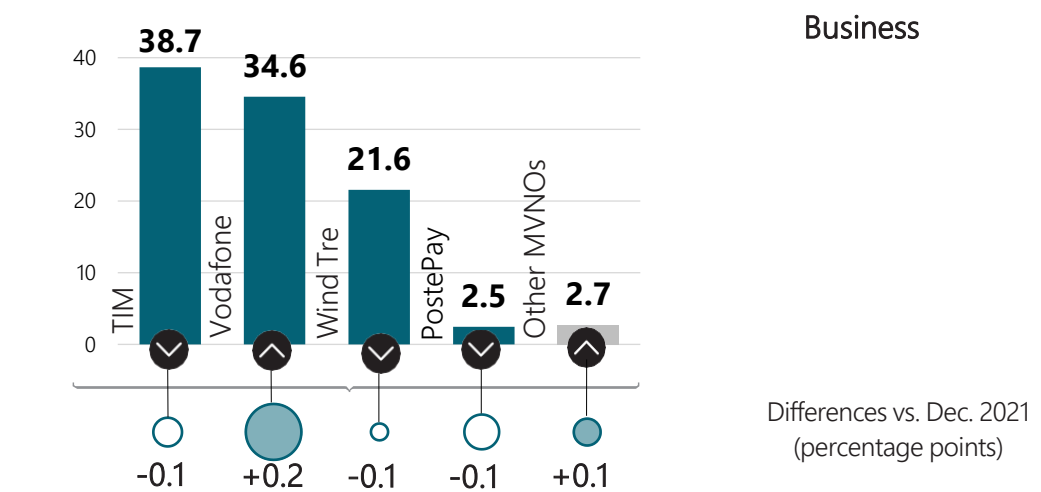
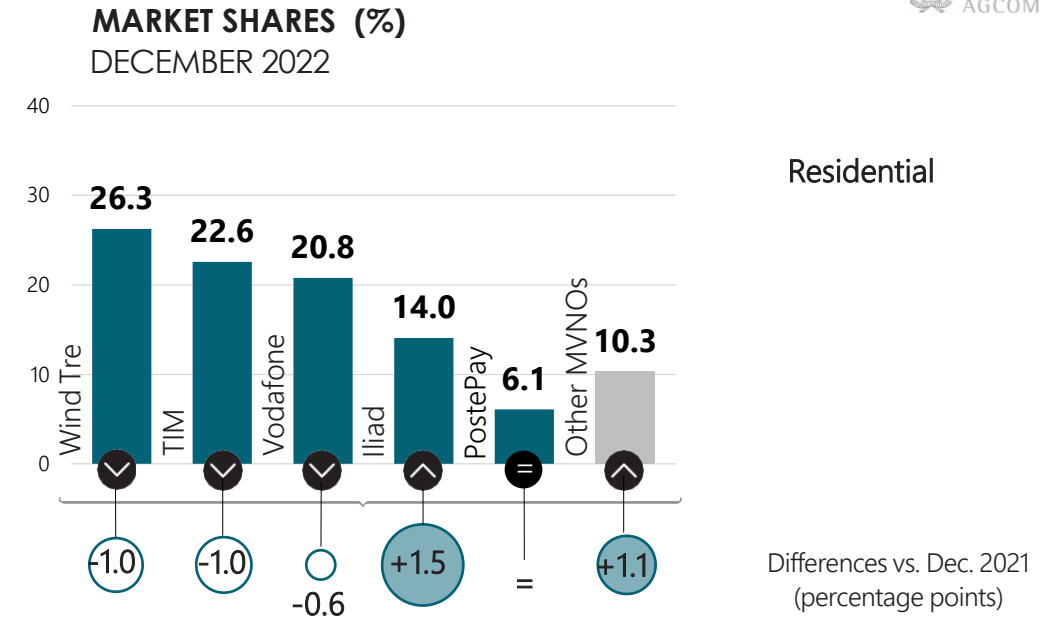


(*) Note: sim human refers to sim (voice and data or only voice or data) used by individual. excluding M2M sim cards

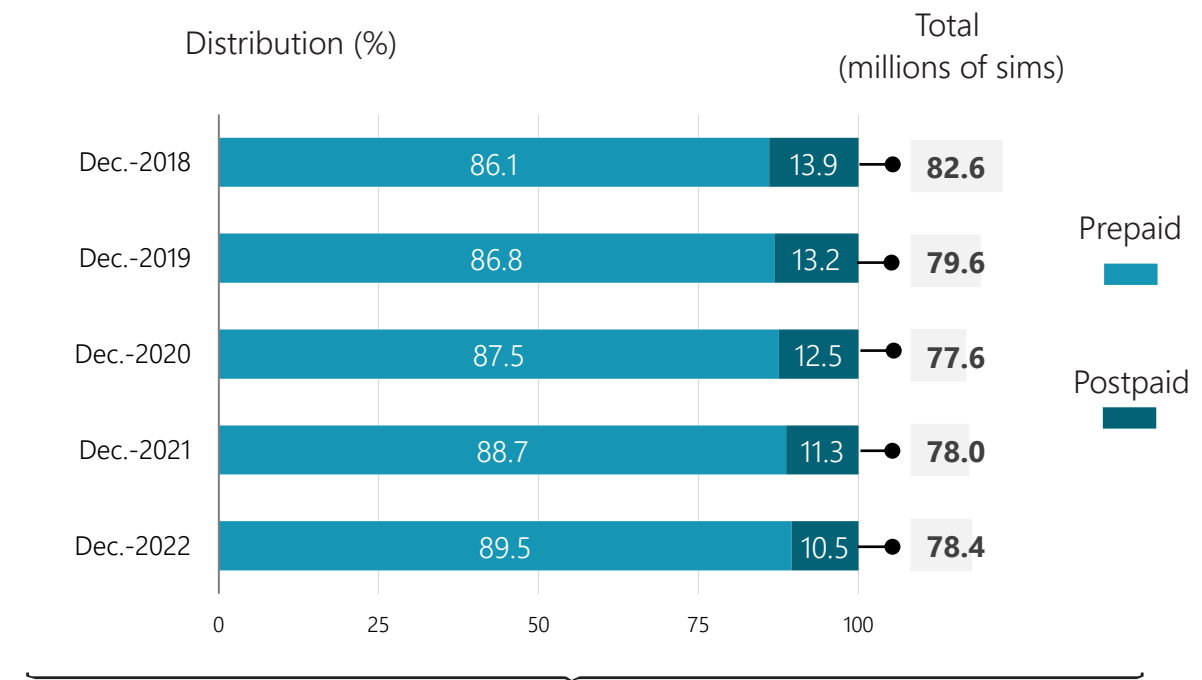
1.11 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CUSTOMER (sim human)



	Annual change (Dec. 2021 – Dec. 2022)			4-Year change (Dec. 2018 – Dec. 2022)		
	(no of sim in thousand)	(Δ %)		(no of sim in thousand)	(Δ %)	
Total human sim cards:	+385	↑ +0.5		-4.191	↓ -5.1	
Residential sim card:	+224	↑ +0.3		-4.968	↓ -6.8	
Business sim cards:	+161	↑ +1.6		+777	↑ +8.2	



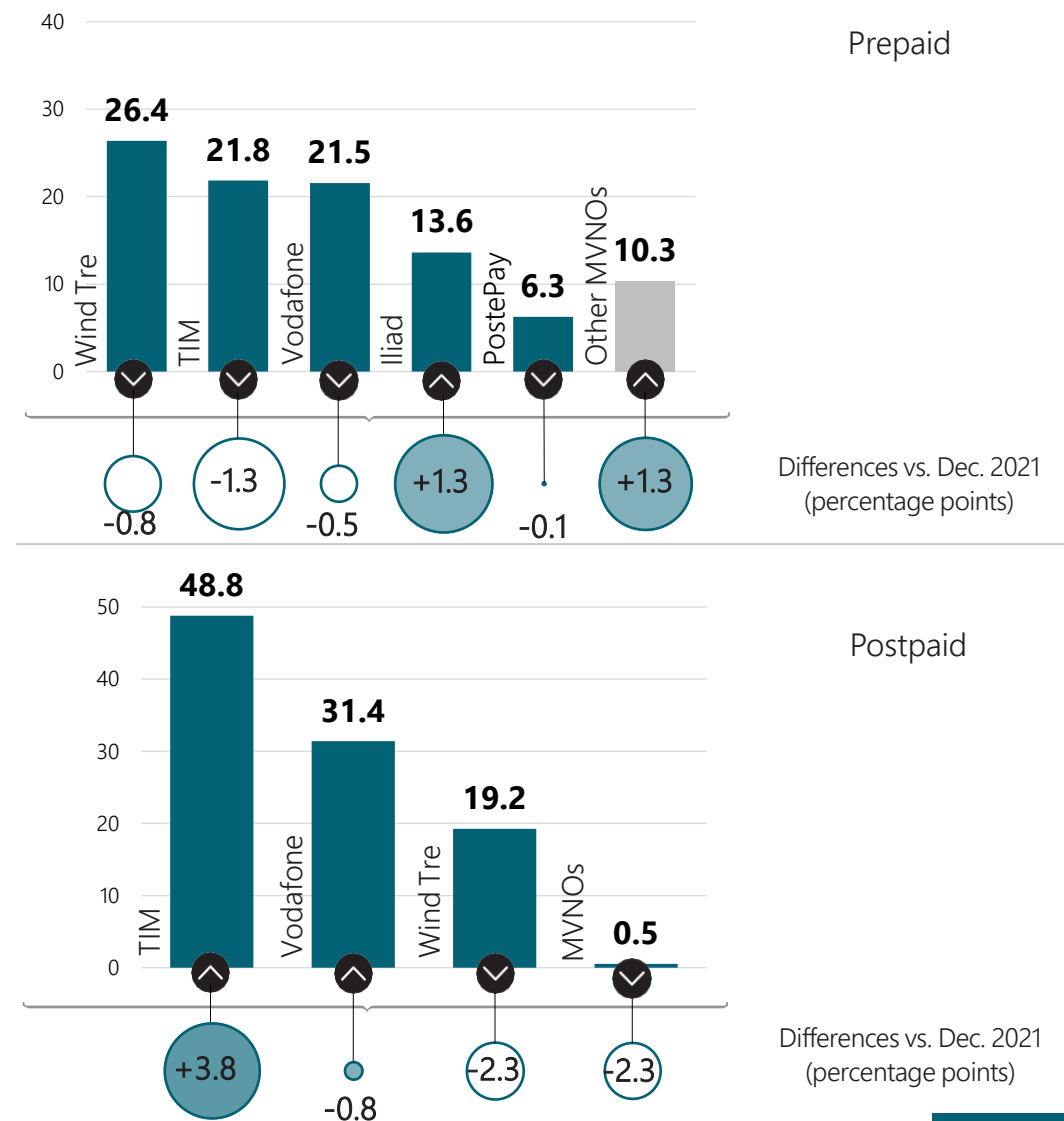
1.12 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT



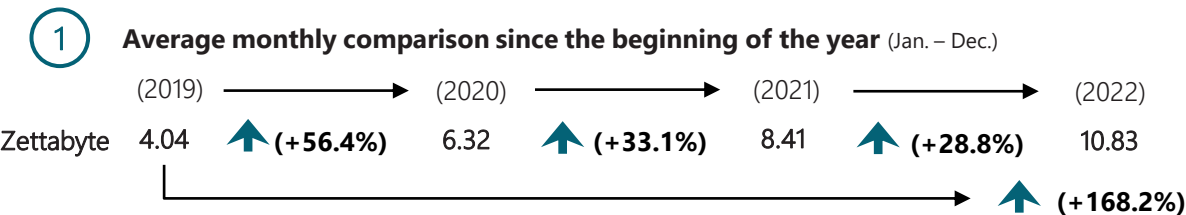
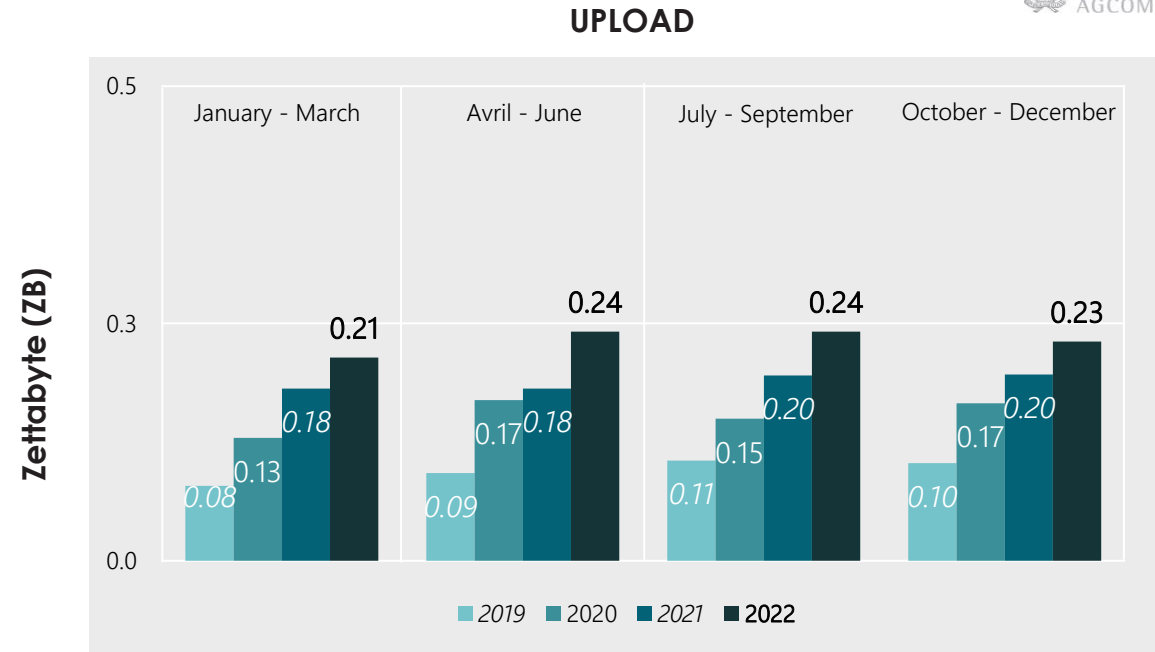
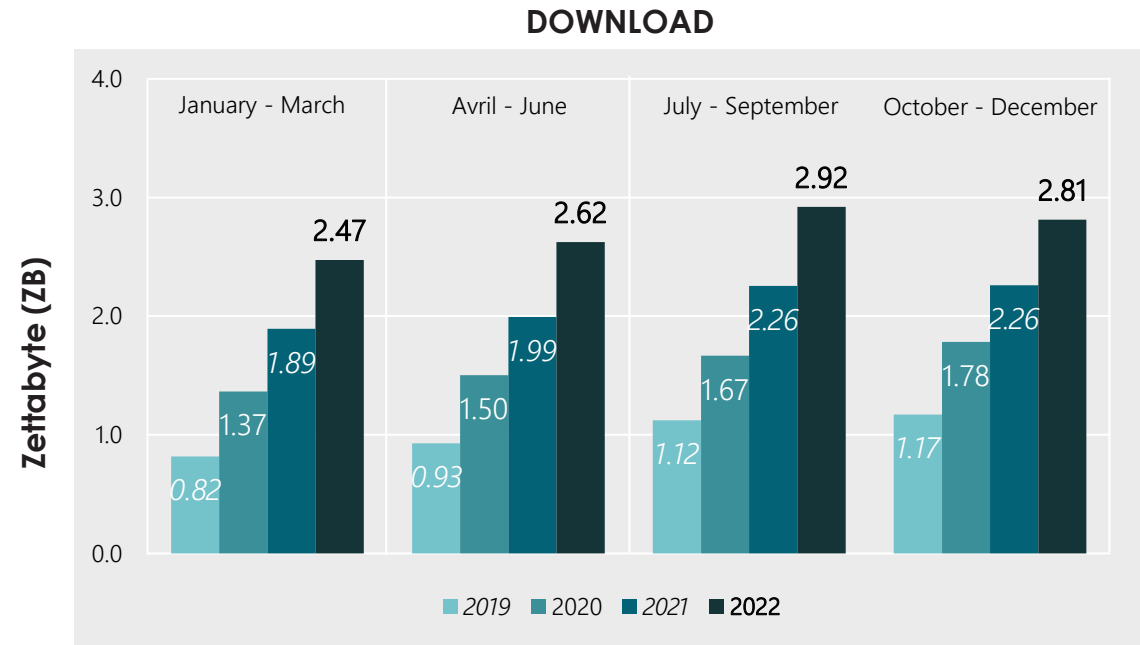
	Annual change (Dec. 2021 – Dec. 2022)			4-Year change (Dec. 2018 – Dec. 2022)		
	(no of sim in thousand)	(Δ %)		(no of sim in thousand)	(Δ %)	
Total human sim cards:	+385	↑	+0.5	-4.191	↓	-5.1
Prepaid sim cards:	+985	↑	+1.4	-886	↓	-1.2
Postpaid sim cards:	-600	↓	-6.8	-3.305	↓	-28.7

MARKET SHARES (%)

DECEMBER 2022

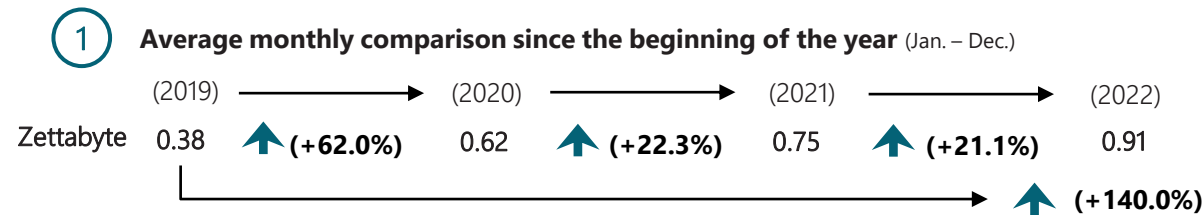


1.13 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD



2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+67.1	+38.6	+30.7	+202.8
2 Q (Avr. - Jun.)	+61.7	+32.7	+31.7	+182.5
3 Q (Jul. - Sep.)	+48.6	+35.4	+29.4	+160.4
4 Q (Oct. - Dec.)	+52.2	+27.0	+24.2	+140.2



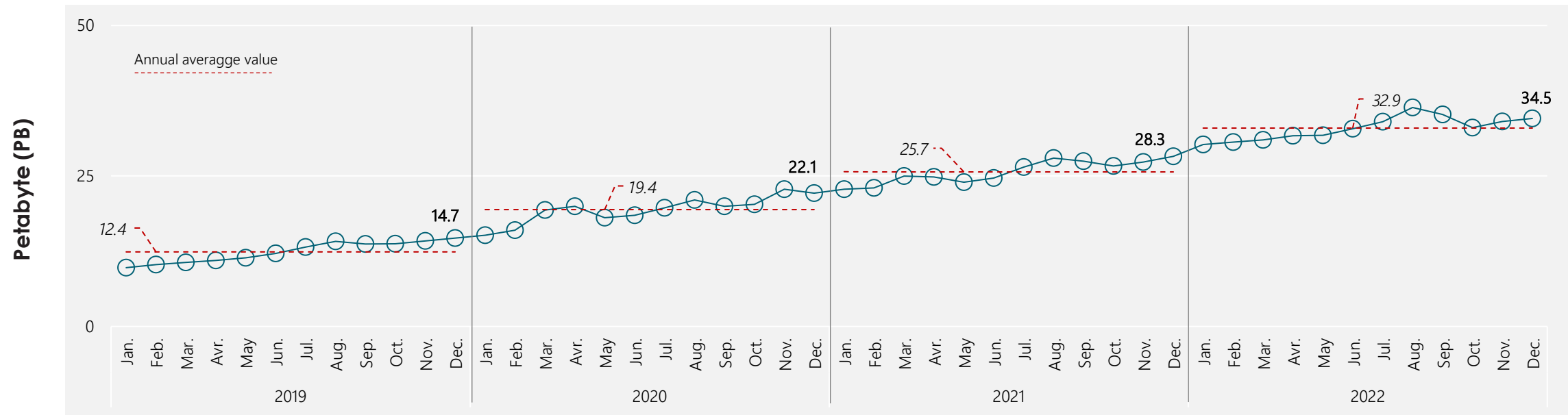
2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+64.6	+40.1	+18.4	+173.0
2 Q (Avr. - Jun.)	+83.3	+7.3	+25.1	+146.0
3 Q (Jul. - Sep.)	+41.7	+30.3	+23.7	+128.5
4 Q (Oct. - Dec.)	+61.8	+16.7	+17.3	+121.5

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

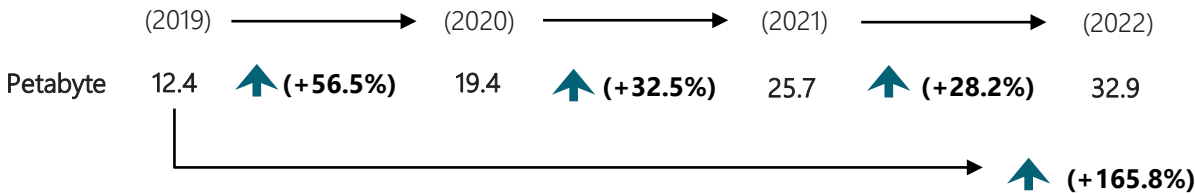


TOTAL TRAFFIC



1

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



2

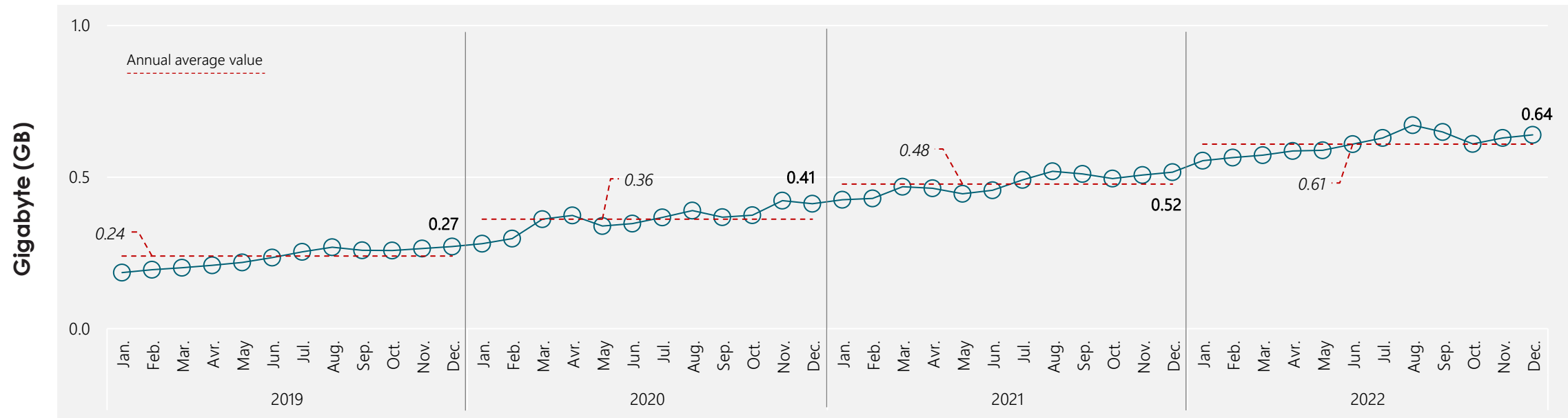
Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+65.0	+40.3	+29.6	+200.1
2 Q (Avr. - Jun.)	+63.6	+30.1	+31.2	+179.2
3 Q (Jul. - Sep.)	+48.0	+35.0	+29.0	+157.6
4 Q (Oct. - Dec.)	+53.0	+26.1	+23.6	+138.6

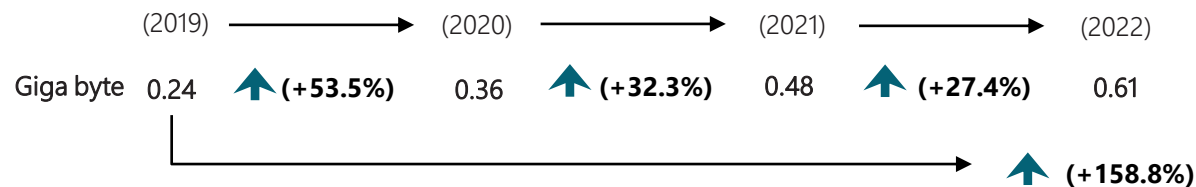
1.15 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC PER SIM CARDS (download + upload)



PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



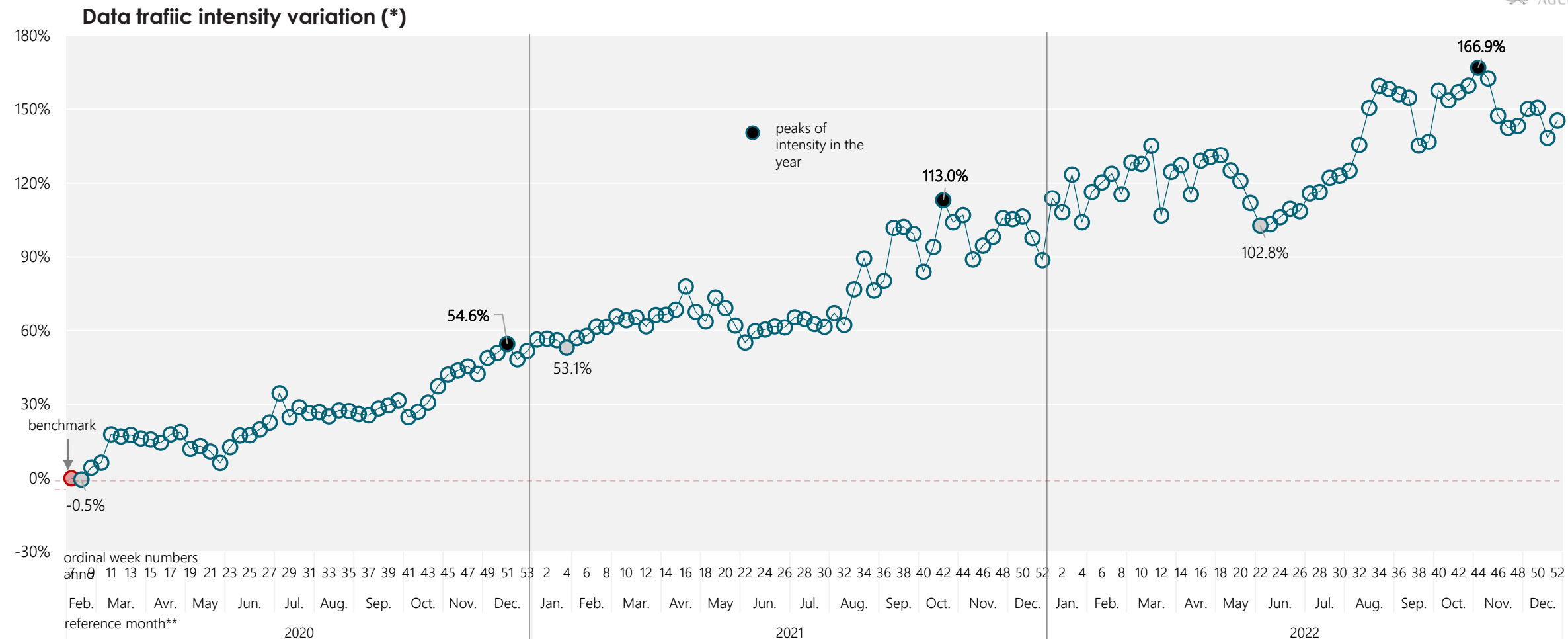
1 Average monthly comparison since the beginning of the year (Jan. – Dec.)



2 Quarterly comparison (change in %)

	2019/2020	YoY 2020/2021	2021/2022	Whole period 2019/2022
1 Q (Jan. - Mar.)	+61.8	+40.8	+27.7	+191.0
2 Q (Avr. - Jun.)	+59.6	+29.0	+30.6	+169.1
3 Q (Jul. - Sep.)	+43.9	+35.2	+28.2	+149.5
4 Q (Oct. - Dec.)	+52.4	+25.7	+23.7	+136.9

1.16 MOBILE 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.

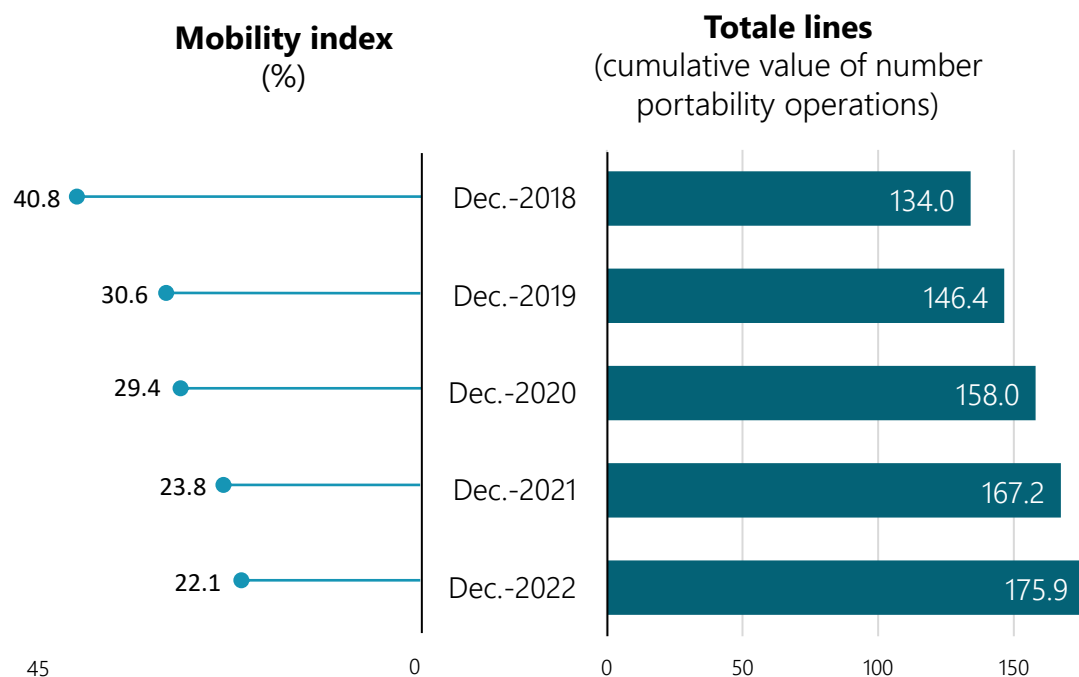
*For each week, the intensity indicator is represented by the percentage change, compared to the 7th week of 2020 (10 to 16 February - red dot in the graph), of the weighted average of the traffic data calculated on the operators' data using, as weighting coefficient, the percentual market share of each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

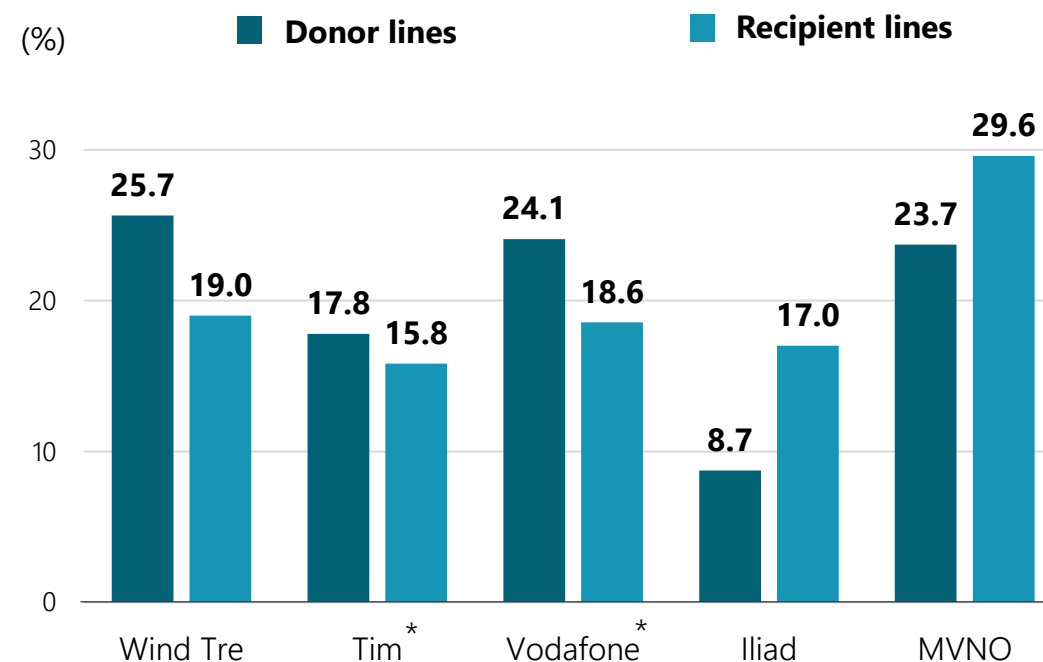
1.17 MOBILE NETWORK: NUMBER PORTABILITY

In one year (Dec. 2021 – Dec. 2022), there have been
8.6 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)

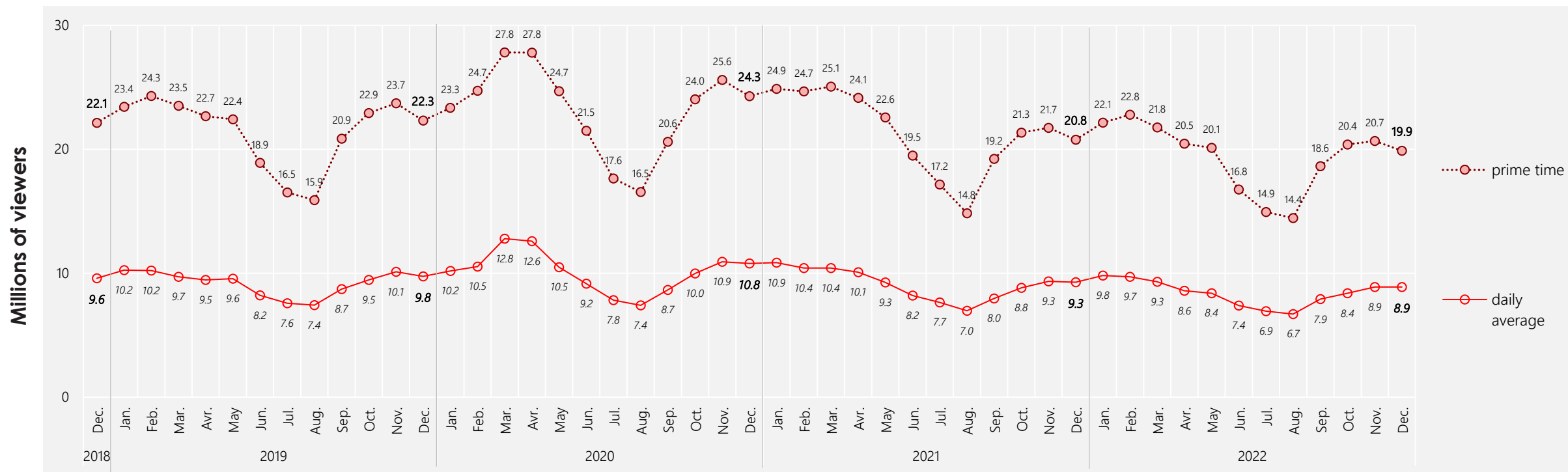
DISTRIBUTION (%) OF DONOR AND RECIPIENT LINES (12 months) DECEMBER 2022



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

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

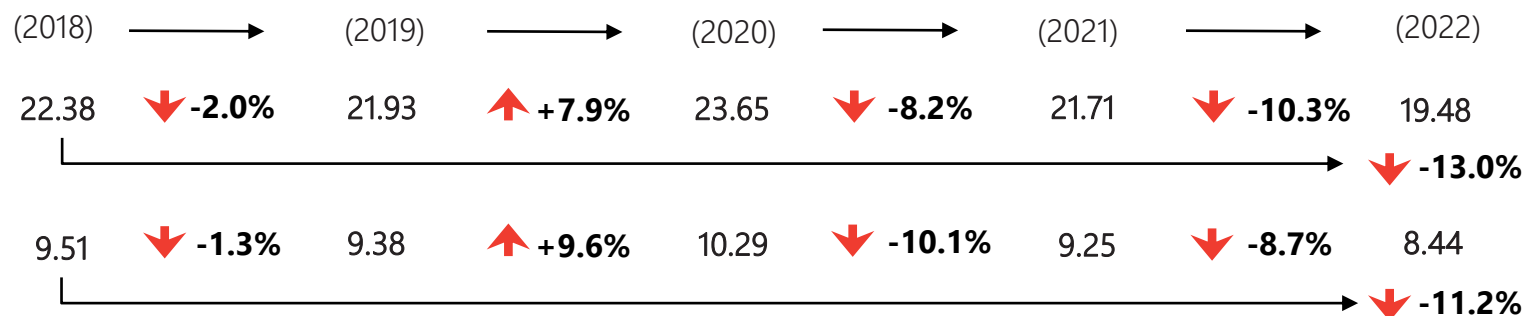
DECEMBER 2018 – DECEMBER 2022 (average daily audience)



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 E SAT): LEADING TV BROADCASTERS BY AUDIENCE

PRIME TIME AUDIENCE

Average daily audience since the beginning of the year

(Jan. – Dec.) in million

Broadcasters	2018	2019	2020	2021	2022	Change in %	
						'18-'22	'21-'22
RAI	8.85	8.47	9.09	8.78	7.62	-13.9	-13.2
Mediaset	7.57	7.48	8.41	7.54	7.26	-4.1	-3.7
Comcast / Sky	1.75	1.80	1.73	1.54	1.38	-21.4	-10.4
Warner Bros. Discovery	1.30	1.44	1.57	1.44	1.33	+2.0	-8.0
Cairo Comm. / La 7	1.24	1.20	1.29	1.12	1.04	-16.1	-7.1
Others	1.66	1.54	1.55	1.29	0.85	-48.6	-33.8

Broadcasters	2018	2019	2020	2021	2022	Change in p.p.	
						'18-'22	'21-'22
RAI	39.6	38.6	38.5	40.4	39.1	-0.4	-1.3
Mediaset	33.8	34.1	35.6	34.7	37.3	+3.4	+2.5
Comcast / Sky	7.8	8.2	7.3	7.1	7.1	-0.8	0.0
Warner Bros. Discovery	5.8	6.6	6.7	6.6	6.8	+1.0	+0.2
Cairo Comm. / La 7	5.5	5.5	5.5	5.2	5.3	-0.2	+0.2
Others	7.4	7.0	6.5	5.9	4.4	-3.0	-1.6

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year

(Jan. – Dec.) in million

Broadcasters	2018	2019	2020	2021	2022	Change in %	
						'18-'22	'21-'22
RAI	3.67	3.55	3.90	3.62	3.20	-12.7	-11.7
Mediaset	3.16	3.14	3.55	3.21	3.11	-1.5	-3.0
Warner Bros. Discovery	0.68	0.74	0.85	0.75	0.67	-1.8	-10.7
Comcast / Sky	0.71	0.72	0.72	0.63	0.62	-12.5	-1.2
Cairo Comm. / La 7	0.42	0.41	0.43	0.37	0.36	-14.7	-1.4
Others	0.87	0.82	0.83	0.68	0.48	-44.5	-28.7

Broadcasters	2018	2019	2020	2021	2022	Change in p.p.	
						'18-'22	'21-'22
RAI	38.6	37.8	37.9	39.2	37.9	-0.7	-1.3
Mediaset	33.2	33.5	34.5	34.7	36.8	+3.6	+2.2
Warner Bros. Discovery	7.2	7.8	8.3	8.1	7.9	+0.8	-0.2
Comcast / Sky	7.4	7.7	7.0	6.8	7.3	-0.1	+0.6
Cairo Comm. / La 7	4.5	4.4	4.1	4.0	4.3	-0.2	+0.3
Others	9.2	8.8	8.1	7.3	5.7	-3.4	-1.6

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. – Dec.) in million

Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in %	
							'18-'22	'21-'22
RAI	Rai 1	4.53	4.29	4.72	4.64	4.12	-9.0	-11.2
	Rai 2	1.48	1.41	1.48	1.24	1.03	-30.0	-16.8
	Rai 3	1.35	1.32	1.36	1.50	1.28	-5.0	-14.4
Mediaset	Canale 5	3.67	3.44	3.72	3.32	3.09	-15.7	-7.0
	Italia 1	1.33	1.25	1.34	1.17	1.14	-14.4	-2.5
	Rete 4	0.96	1.07	1.19	1.05	0.95	-0.7	-9.3
Cairo Comm.	La7	1.15	1.11	1.20	1.04	0.97	-15.5	-6.8
Warner Bros. Discovery	TV8	0.55	0.56	0.57	0.45	0.44	-18.8	-2.2
Comcast / Sky	Nove	0.34	0.38	0.42	0.42	0.38	+13.1	-7.8

Average share Jan. – Dec. (in %)

Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in p.p.	
							'18-'22	'21-'22
RAI	Rai 1	20.2	19.5	20.0	21.4	21.1	+0.9	-0.2
	Rai 2	6.6	6.4	6.2	5.7	5.3	-1.3	-0.4
	Rai 3	6.0	6.0	5.7	6.9	6.6	+0.6	-0.3
Mediaset	Canale 5	16.4	15.7	15.7	15.3	15.9	-0.5	+0.6
	Italia 1	5.9	5.7	5.7	5.4	5.8	-0.1	+0.5
	Rete 4	4.3	4.9	5.0	4.8	4.9	+0.6	0.0
Cairo Comm.	La7	5.1	5.1	5.1	4.8	5.0	-0.1	+0.2
Warner Bros. Discovery	TV8	2.4	2.6	2.4	2.1	2.3	-0.2	+0.2
Comcast / Sky	Nove	1.5	1.8	1.8	1.9	2.0	+0.5	+0.1

AVERAGE DAILY AUDIENCE

Average daily audience since the beginning of the year

(Jan. – Dec.) in million

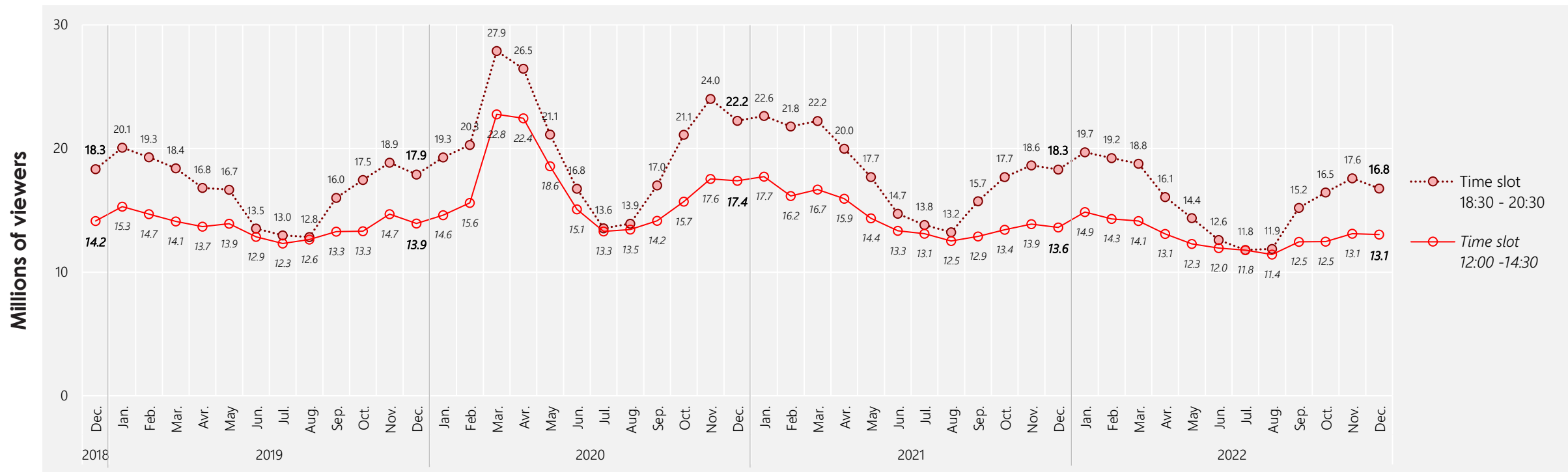
Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in %	
							'18-'22	'21-'22
RAI	Rai 1	1.69	1.62	1.82	1.72	1.59	-6.1	-7.9
	Rai 2	0.59	0.55	0.55	0.51	0.43	-26.6	-15.2
	Rai 3	0.68	0.67	0.77	0.72	0.60	-10.7	-16.2
Mediaset	Canale 5	1.57	1.53	1.65	1.55	1.46	-6.7	-5.5
	Italia 1	0.51	0.48	0.53	0.44	0.40	-20.7	-8.4
	Rete 4	0.39	0.39	0.42	0.38	0.35	-8.6	-7.1
Cairo Comm.	La7	0.37	0.36	0.37	0.32	0.32	-13.6	+0.8
Warner Bros. Discovery	TV8	0.20	0.22	0.23	0.19	0.19	-5.5	+2.6
Comcast / Sky	Nove	0.15	0.16	0.19	0.17	0.16	+7.8	-9.1

Average share Jan. – Dec. (in %)

Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in p.p.	
							'18-'22	'21-'22
RAI	Rai 1	17.8	17.2	17.7	18.6	18.8	+1.0	+0.2
	Rai 2	6.2	5.9	5.3	5.5	5.1	-1.1	-0.4
	Rai 3	7.1	7.2	7.4	7.8	7.2	+0.0	-0.6
Mediaset	Canale 5	16.5	16.3	16.1	16.7	17.3	+0.8	+0.6
	Italia 1	5.3	5.1	5.1	4.7	4.7	-0.6	0.0
	Rete 4	4.1	4.2	4.1	4.1	4.2	+0.1	+0.1
Cairo Comm.	La7	3.9	3.9	3.6	3.4	3.8	-0.1	+0.4
Warner Bros. Discovery	TV8	2.1	2.3	2.2	2.0	2.3	+0.1	+0.2
Comcast / Sky	Nove	1.5	1.7	1.8	1.9	1.9	+0.3	0.0

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

DECEMBER 2018 – DECEMBER 2022 (average daily audience)



Change in the number of viewers (average daily value Jan. – Dec. in millions)	(2018)		(2019)		(2020)		(2021)		(2022)
Time slot: 18:30 – 20:30	17.10	↓ -2.3%	16.71	↑ +21.6%	20.33	↓ -11.4%	18.01	↓ -12.0%	15.85
									↓ -7.3%
Time slot: 12:00 – 14:30	14.13	↓ -2.8%	13.73	↑ +22.3%	16.79	↓ -13.7%	14.48	↓ -10.8%	12.92
									↓ -8.6%

* **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

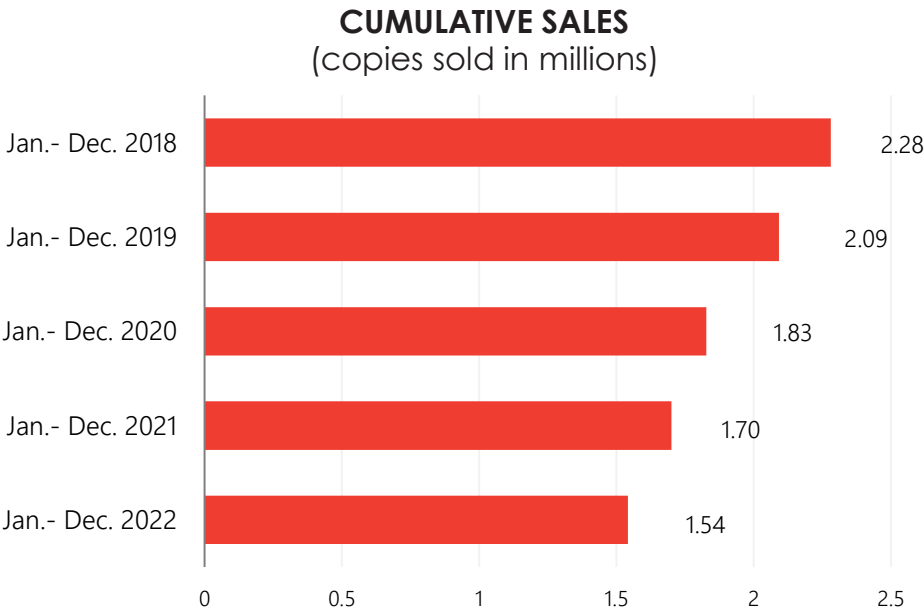
**TIME SLOT:
12:00 – 14:30**

Average audience since the beginning of the year (Jan. – Dec.) in millions							Change (in thousand)			Change (in %)	
	National news programs	2018	2019	2020	2021	2022	'21 – '22	'18 – '22		'21 – '22	'18 – '22
RAI	Tg 1 (13:30 edition)	3.53	3.28	4.06	3.68	3.40	-126	-273		-3.6	-7.4
	Tg 2 (13:00 edition)	2.16	1.98	2.32	1.94	1.74	-417	-206		-19.4	-10.6
	Tg 3 (12:00 edition)	2.43	2.36	3.08	2.72	2.23	-202	-488		-8.3	-17.9
	Tg 3 Regionale (14:00 edition)	0.89	0.92	1.15	0.95	0.78	-110	-170		-12.4	-17.9
Mediaset	Tg 5 (13:00 edition)	2.77	2.79	3.35	2.92	2.79	+16	-131		+0.6	-4.5
	Tg 4 (12:00 edition)	1.38	1.39	1.74	1.39	1.16	-221	-237		-16.1	-17.0
	Studio Aperto (12:25 edition)	0.35	0.38	0.40	0.32	0.29	-56	-33		-16.2	-10.3
La 7	Tg La 7 (13:30 edition)	0.63	0.62	0.69	0.56	0.54	-91	-20		-14.4	-3.6

**TIME SLOT:
18:30 – 20:30**

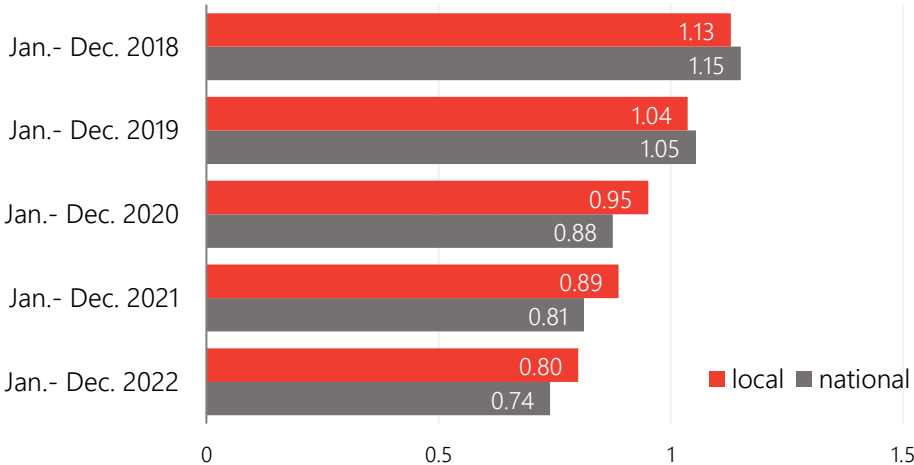
Average audience since the beginning of the year (Jan. – Dec.) in millions							Change (in thousand)			Change (in %)	
	National news programs	2018	2019	2020	2021	2022	'21 – '22	'18 – '22		'21 – '22	'18 – '22
RAI	Tg 1 (20:00 edition)	4.92	4.68	5.64	5.13	4.61	-312	-518		-6.3	-10.1
	Tg 2 (20:30 edition)	1.75	1.58	1.85	1.56	1.25	-502	-317		-28.7	-20.3
	Tg 3 (19:00 edition)	2.30	2.29	3.12	2.78	2.29	-8	-489		-0.3	-17.6
	Tg 3 Regionale (19:30 edition)	1.78	1.76	2.31	2.09	1.80	+20	-294		+1.1	-14.0
Mediaset	Tg 5 (20:00 edition)	3.82	3.90	4.58	4.02	3.71	-109	-309		-2.9	-7.7
	Tg 4 (19:00 edition)	0.74	0.76	0.92	0.71	0.55	-188	-164		-25.6	-23.1
	Studio Aperto (18:30 edition)	0.64	0.58	0.68	0.62	0.62	-23	-9		-3.5	-1.4
La 7	Tg La 7 (20:00 edition)	1.16	1.16	1.23	1.09	1.03	-130	-65		-11.2	-5.9

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



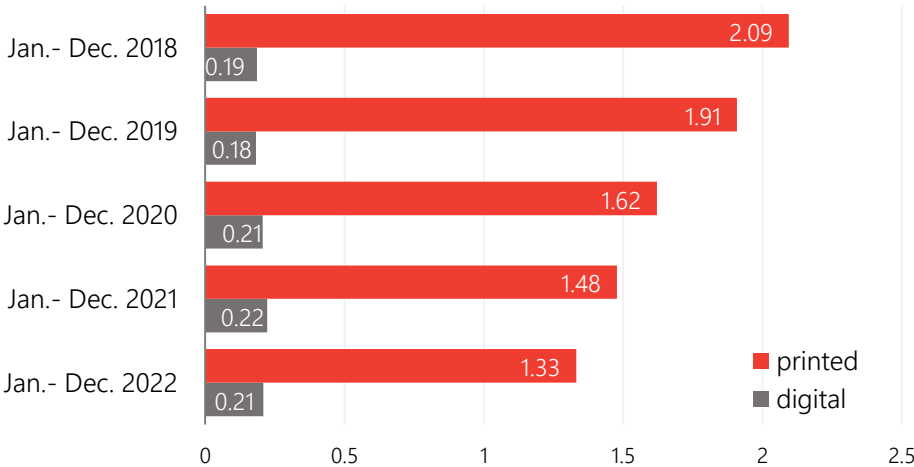
CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



	Change in % Period Jan. – Dec.	
	(2021 – 2022)	(2018 – 2022)
Total copies:	-9.4 ↓	-32.4 ↓
Paper copies:	-9.9 ↓	-36.4 ↓
Digital copies:	-6.0 ↓	+12.5 ↑
National newspapers copies:	-8.9 ↓	-35.7 ↓
Local newspapers copies:	-9.8 ↓	-29.1 ↓

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. – Dec. 2018	2019	2020	2021	2022
National newspapers	General press - Top 5	661	608	525	472	419
	Other general press	149	137	133	120	110
	Business	92	80	67	58	51
	Sport	269	243	158	153	148
Local newspapers	Top 10	420	390	353	329	295
	Others	504	451	385	346	308

	Change in %	Jan. – Dec.	('21 – '22)	('18 – '22)
National newspapers	General press Top 5		-36.5 ↓	-11.1 ↓
	Other general press		-26.0 ↓	-8.2 ↓
	Business		-44.1 ↓	-11.9 ↓
	Sports		-44.9 ↓	-2.9 ↓
Local newspapers	Top 10		-29.6 ↓	-10.3 ↓
	Others		-38.9 ↓	-11.1 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY

(copies sold in thousands)

		Jan. – Dec. 2018	2019	2020	2021	2022
National newspapers	General press - Top 5	74	75	83	95	87
	Other general press	15	17	26	31	30
	Business	46	40	35	29	28
	Sport	9	8	7	6	6
Local newspapers	Top 10	16	17	23	26	24
	Others	25	25	32	35	34

	Change in %	Jan. – Dec.	('21 – '22)	('18 – '22)
Testate nazionali	General press Top 5		+17.6 ↑	-7.9 ↓
	Other general press		+96.6 ↑	-5.1 ↓
	Business		-38.2 ↓	-1.5 ↓
	Sports		-33.2 ↓	-10.6 ↓
Testate locali	Top 10		+48.0 ↑	-5.8 ↓
	Others		+32.3 ↑	-4.6 ↓

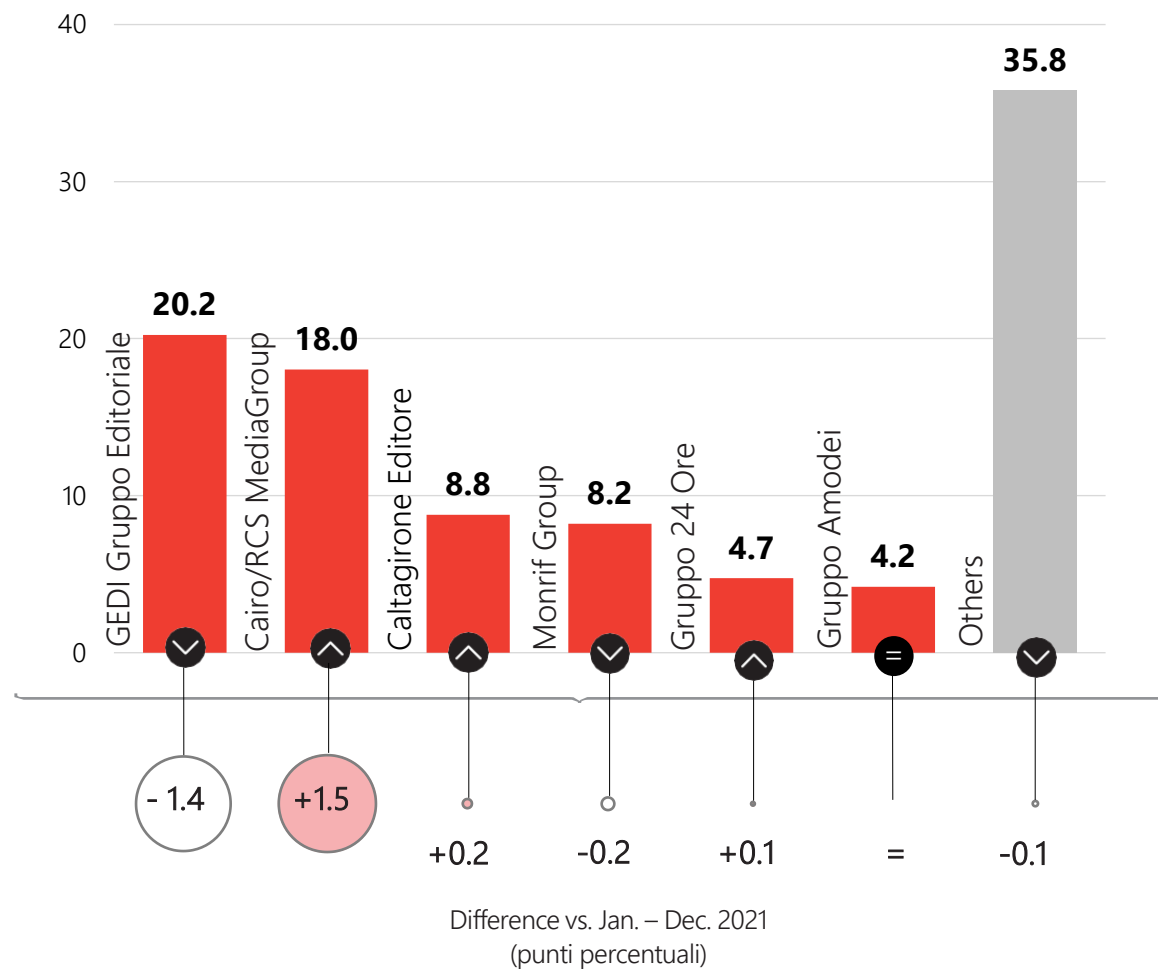
Newspapers categories

- **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

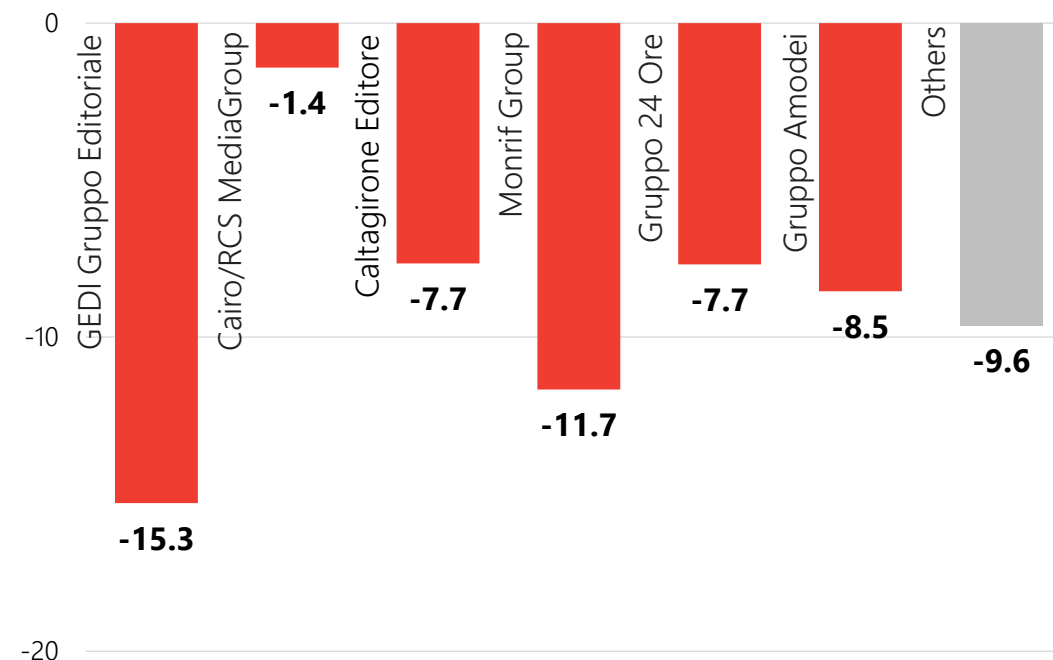
DISTRIBUTION OF TOTAL COPIES SOLD SINCE THE BEGINNING OF THE YEAR BY PUBLISHING GROUPS (%)

JAN. – DEC. 2022



CHANGE IN TOTAL COPIES SOLD (%)

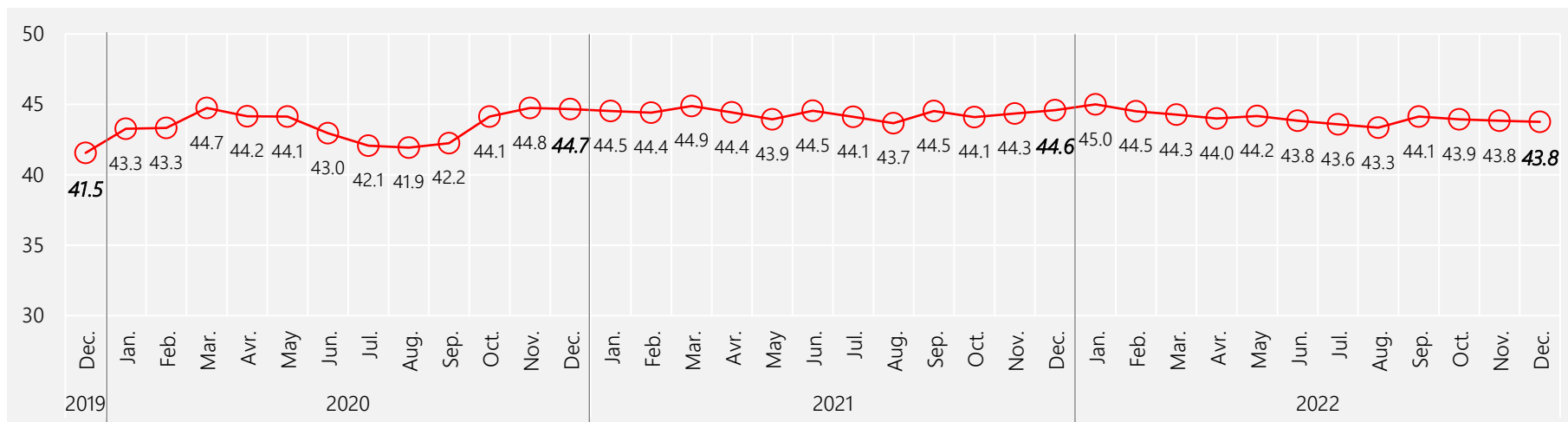
Difference vs. Jan. – Dec. 2021



2.9 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

(December 2019 – December 2022)

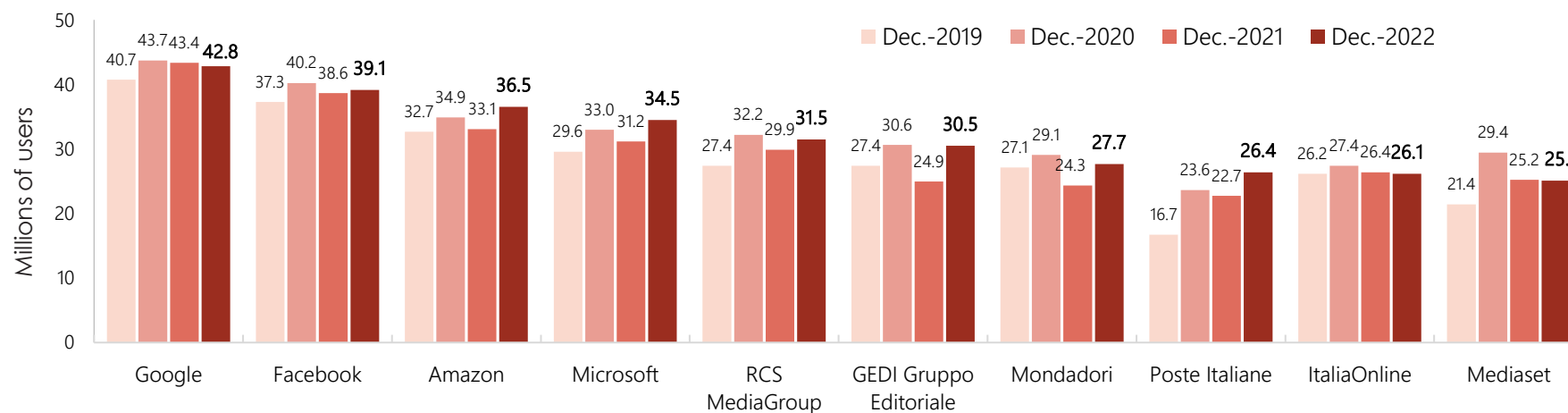


43 million and **767** thousand unique users logged on to the internet in December 2021 (-**819** thousand compared to December 2021)

Approximately **68 total hours** spent, on average, by each user surfing the Internet in December 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 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.

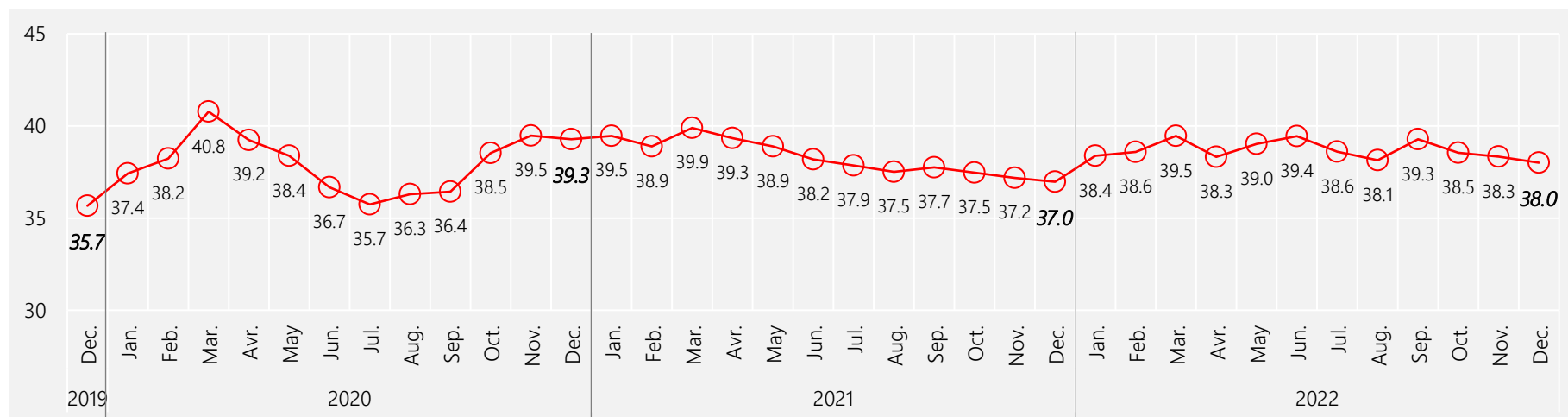
Google, Facebook, Amazon and Microsoft are detected only through the Audiweb Panel.

Source: Agcom elaboration on data from Audicom – sistema Audiweb

2.10 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

UNIQUE USERS IN MILLIONS

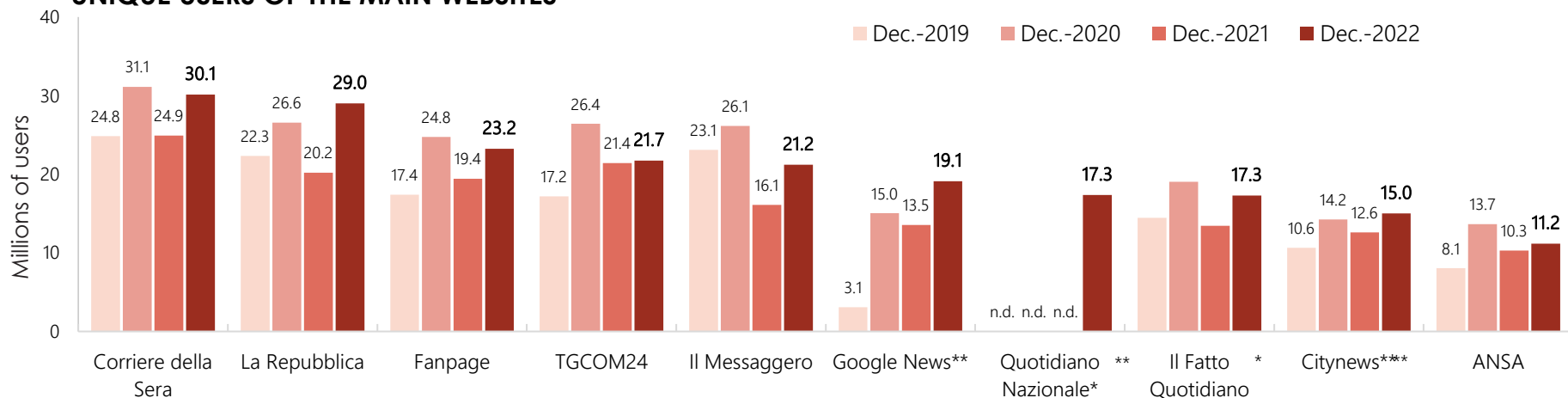
(December 2019 – December 2022)



38 million unique users logged on to the generalist news sites/APPs in December 2022 (+1 million users compared to December 2021)

About **1 hour and 3minute** spent, on average, by each user browsing general news websites/APPs in December 2022

UNIQUE USERS OF THE MAIN WEBSITES



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

* 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 December 2022 are not directly comparable with those of previous years.

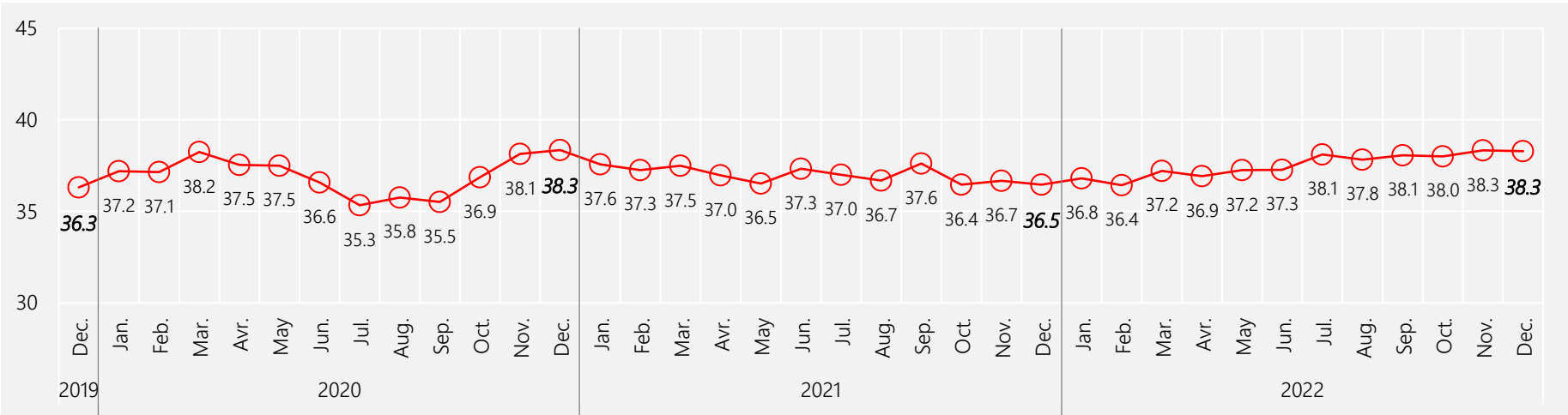
** Google News and Citynews are detected only through the Audiweb Panel.

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

2.11 PLATFORMS: E-COMMERCE WEBSITES/APP UNIQUE USERS



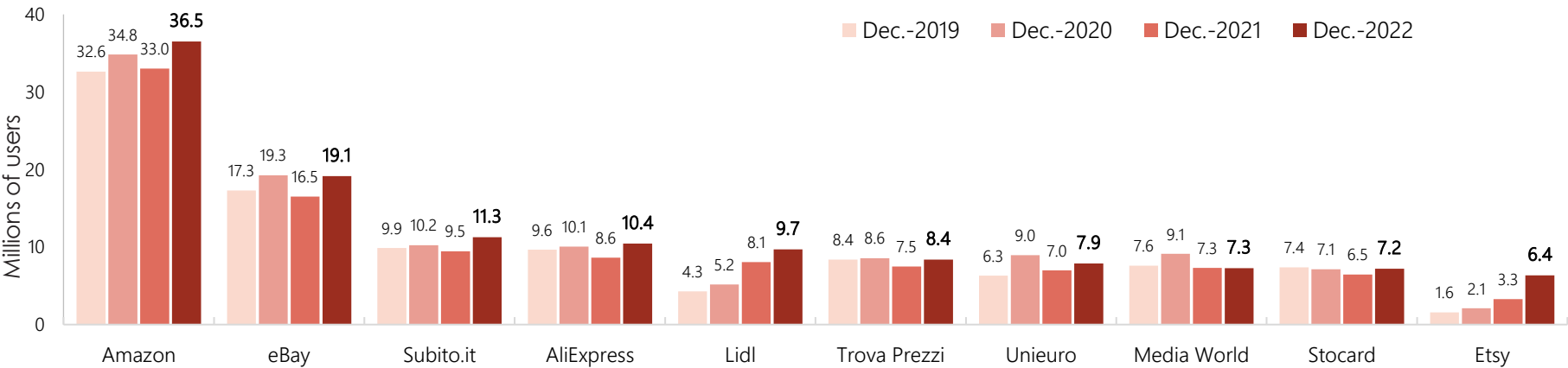
UNIQUE USERS IN MILLIONS (December 2019 – December 2022)



38 million and **277** thousand unique users logged on to e-commerce sites/APPs in December 2022 (+1 million and **816** thousand users compared to December 2021)

3 hour and 7 minute spent, on average, by each user browsing e-commerce websites/APPs in December 2022

UNIQUE USERS OF THE MAIN WEBSITES*



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

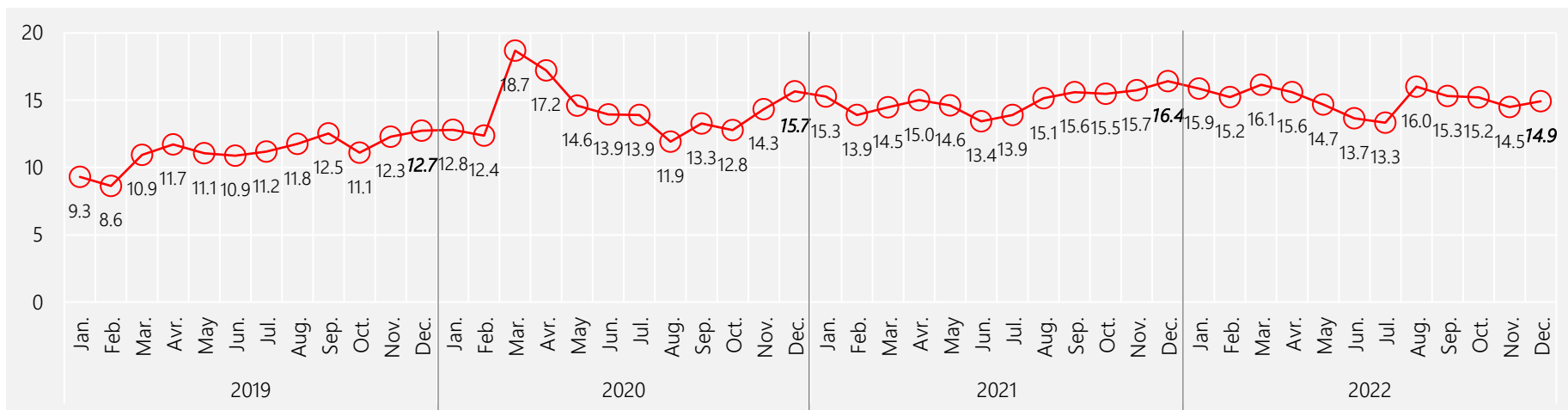
Source: Agcom elaboration on data from Audicom – sistema Audiweb (Values referring to the category: «Multi-category Commerce»)

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

2.12 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

UNIQUE USERS IN MILLIONS

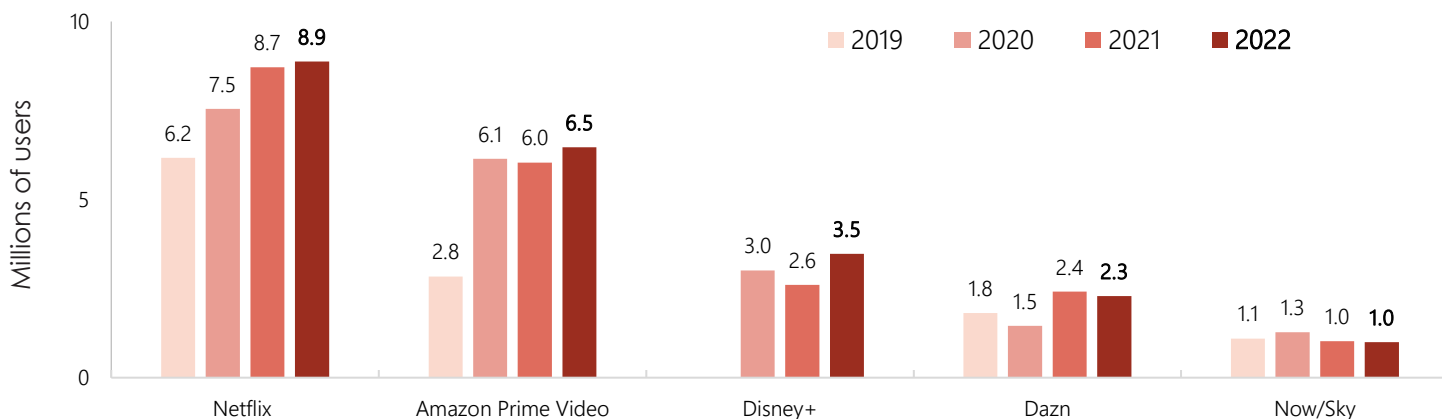
(January 2019 – December 2022)



14 million and **924** thousand unique users logged on to video-on-demand sites/APPs in December 2022 (-1 million and **492** thousand compared to December 2021)

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

UNIQUE USERS OF THE MAIN PLATFORMS* (average since the beginning of the year Jan. – Dec.)



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

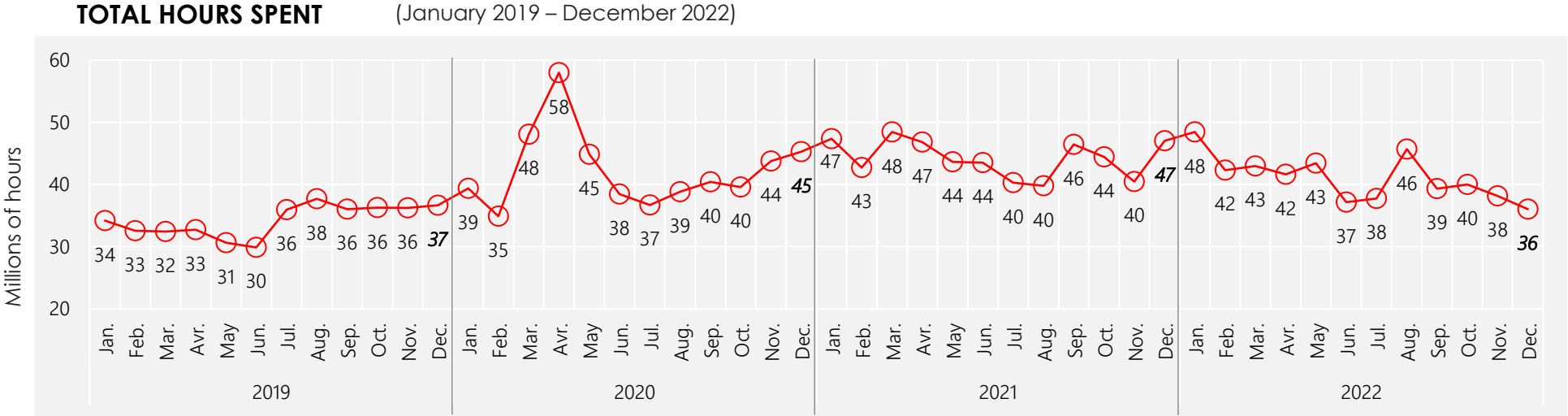
Source: Agcom elaboration on data from ComScore
The chart shows the unique users of the category consisting of the main operators offering paid video on demand services in Italy: Netflix; Primevideo.com (Amazon); Nowtv.it (Sky); Timvision.it (TIM); Disney digital (Disney); Dazn.com (Dazn); Chili.com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

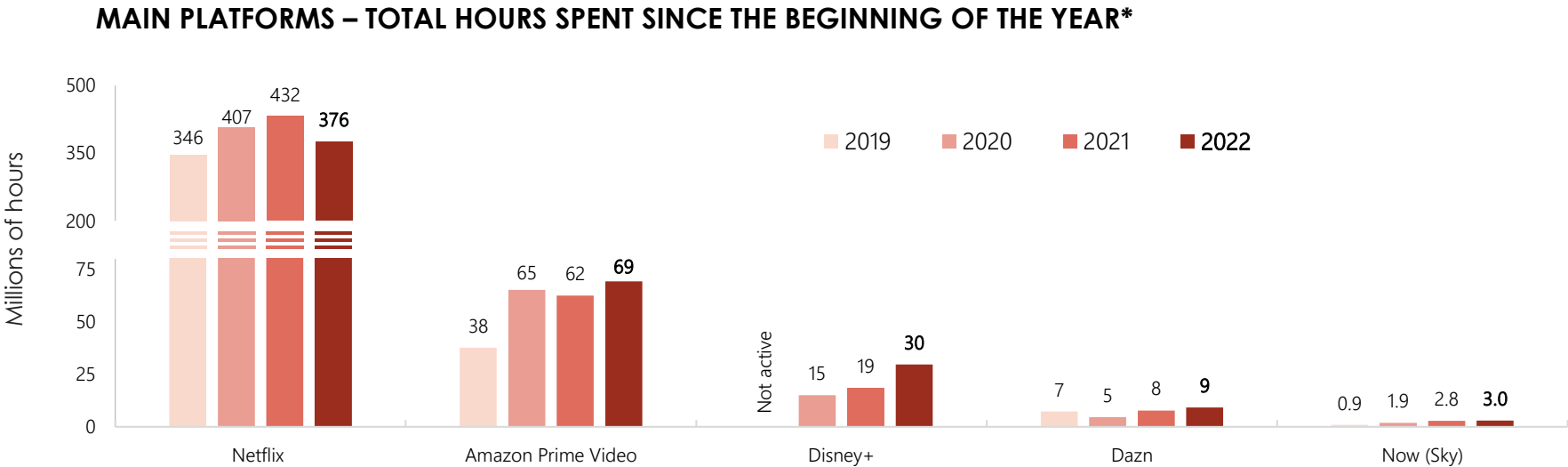
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

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

2.13 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 25 minute** in December 2022



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

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

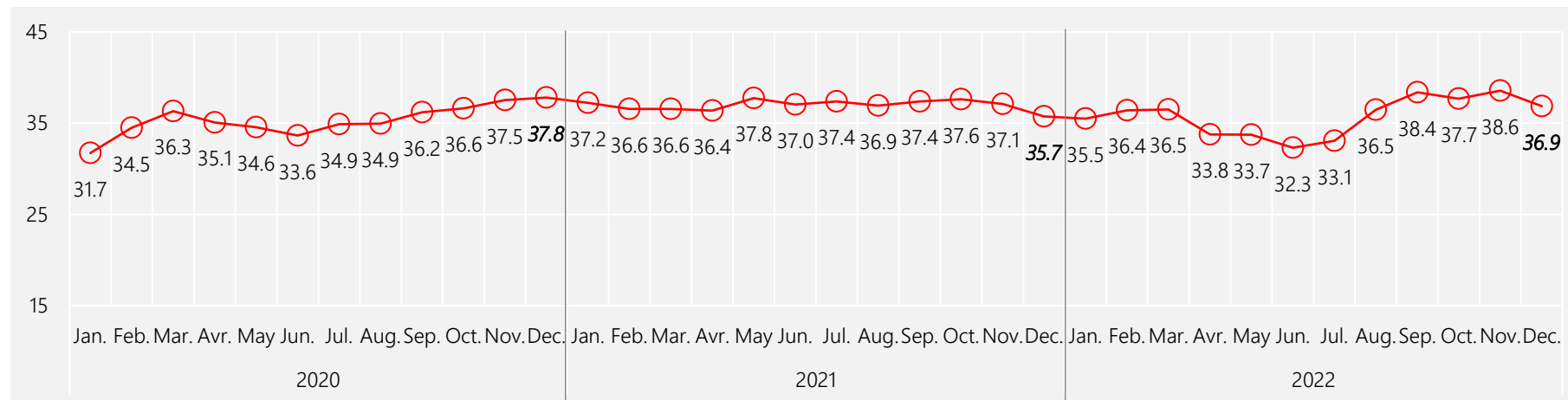
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

* Note: the total hours of the first 5 operators for unique users (slide 2.12) are represented

2.14 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS

UNIQUE USERS IN MILLIONS

(January 2020 – December 2022)



36 million and 854 thousand unique users logged on to free video-on-demand sites/APPs in December 2022 (+1 million and **108 thousand** compared to December 2021)

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

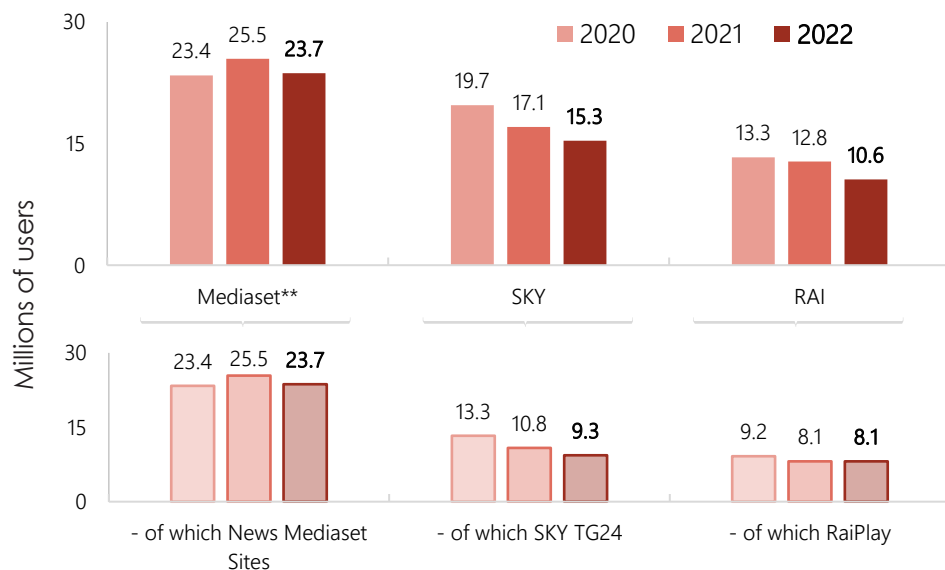
The chart shows the unique users of the category consisting of the main operators offering free video on demand services in Italy: Mediaset (Mediaset Infinity Sites and TGC24 Sites Jan.19 - Spr.22; Mediaset.it Sites since May 22). Rai (RaiPlay; Rai News. Rai Sport). Discovery (Discovery Inc). Sky (Cielotv.it.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

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

* 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.

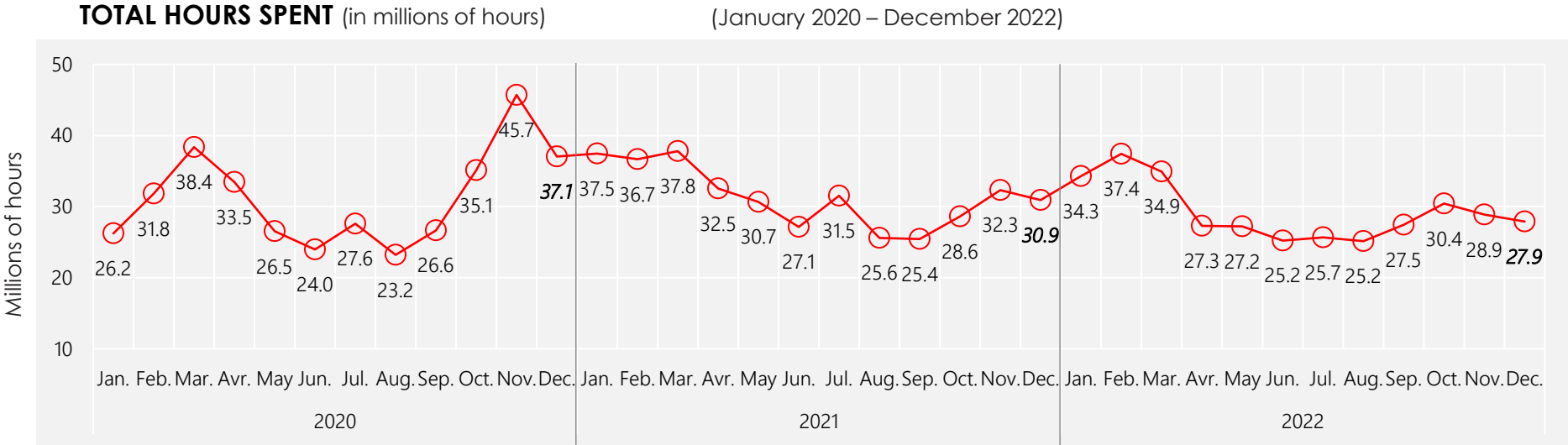
** MEF/Mediaset unique users are those relating to the component News Mediaset Sites due to an editorial choice which does not allow to separate the part of the paid services related to Mediaset Infinity. By considering the latter (that since the beginning of the year has an average of more than 11 mm of unique users) MEF/Mediaset monthly average results, in 2022, in more than 28 mm of unique users.

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



Source: Agcom elaboration on data from ComScore

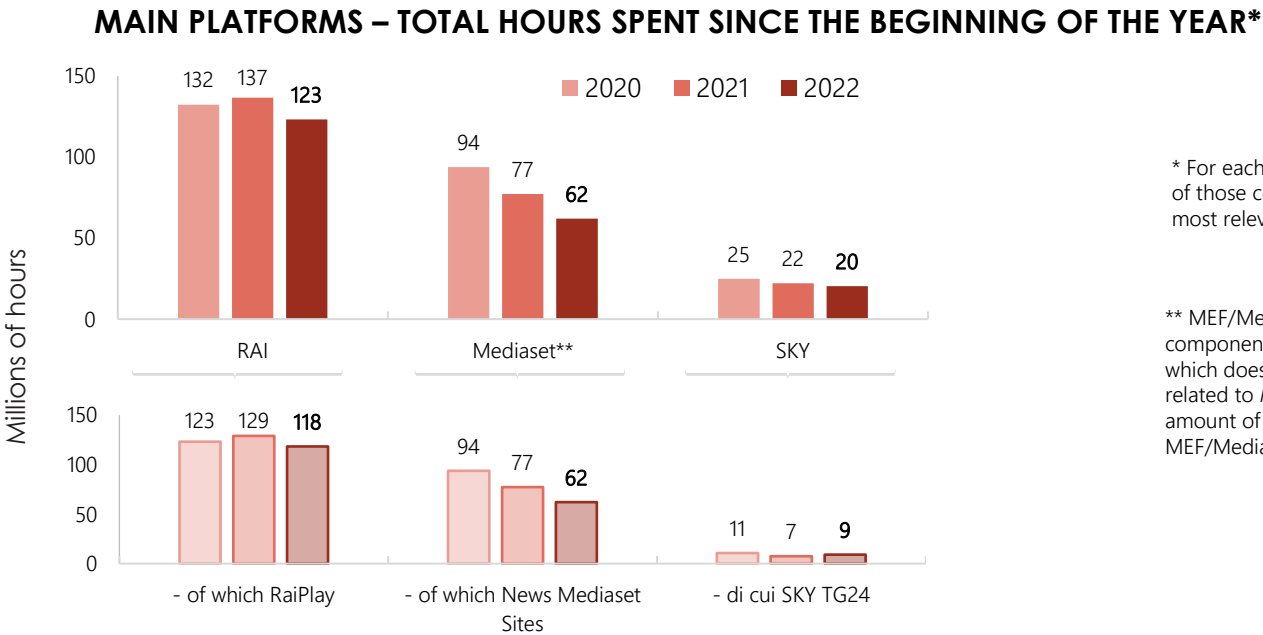
2.15 PLATFORMS: TIME SPENT ON FREE VIDEO ON DEMAND PLATFORMS



The average time spent per month by each visitor on free video on demand platforms is **45 minute** in December 2022

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 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; POPCORN.IT; WITTYTV.IT.

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



* 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.

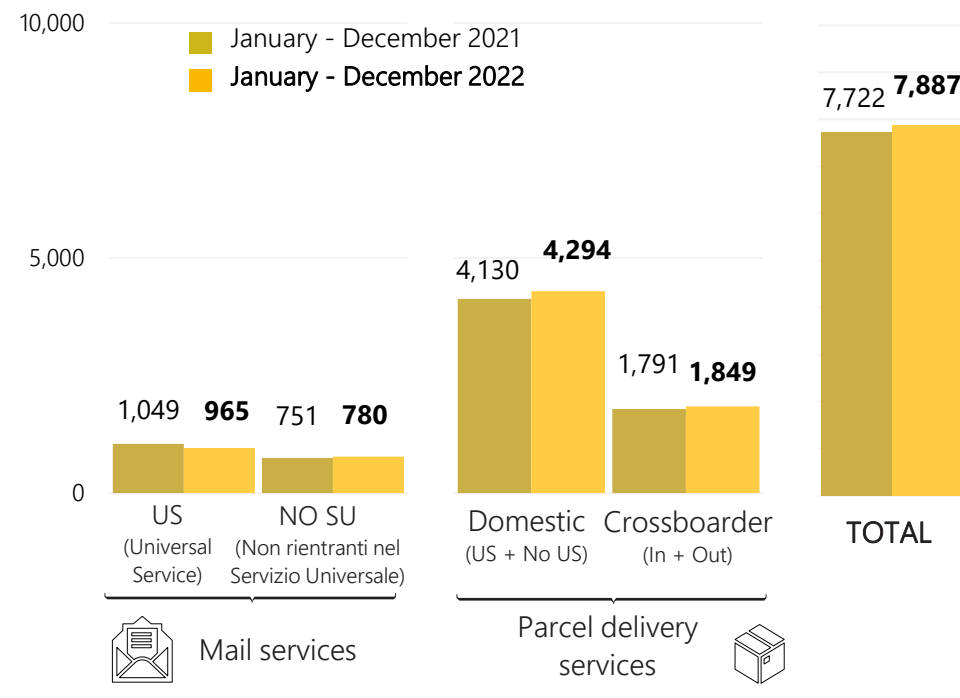
** MEF/Mediaset total hours are those relating to the component News Mediaset Sites due to an editorial choice which does not allow to separate the part of the paid services related to Mediaset Infinity. By considering the latter (with an amount of 66 mm of hours since the beginning of the year). MEF/Mediaset reach 145 mm total hours.

Source: Agcom elaboration on data from ComScore

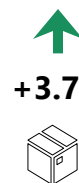
3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

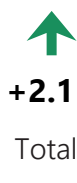
MILLIONS OF €



-3.1



+3.7

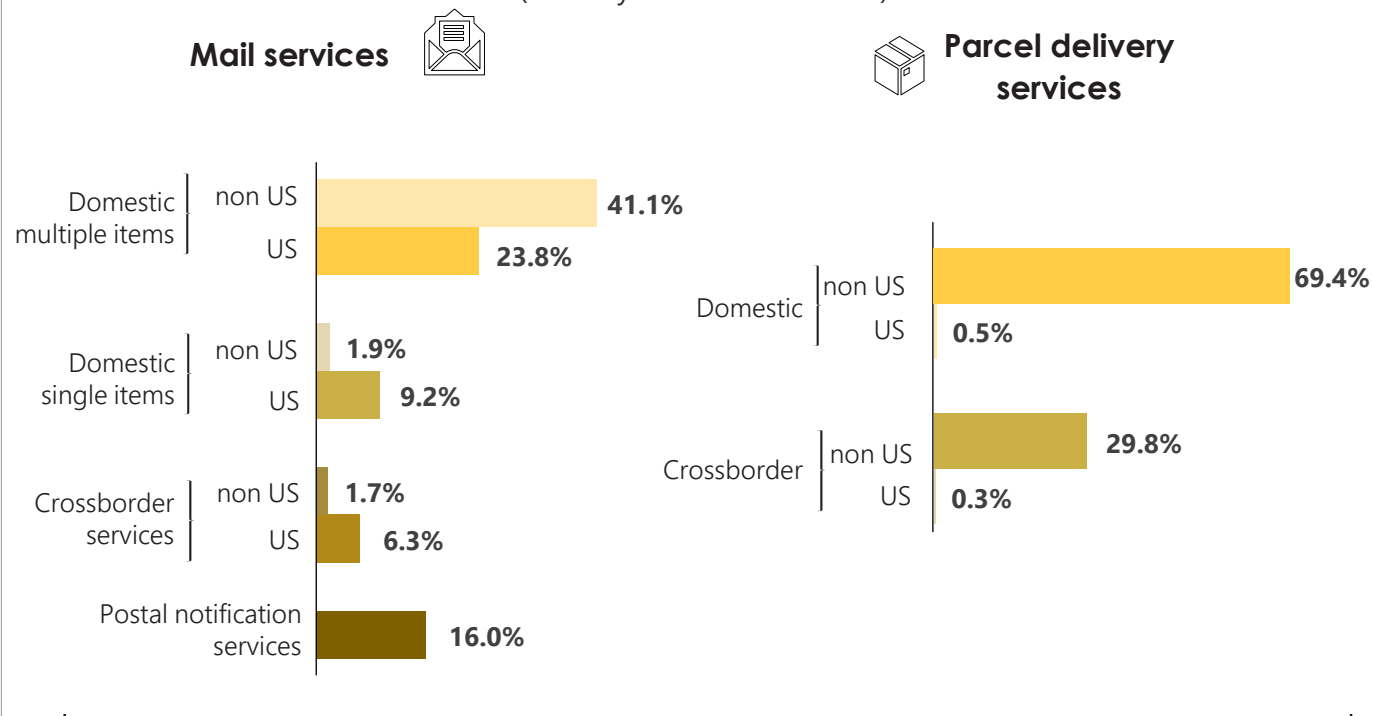


+2.1

Annual change in %
(Jan. - Dec. 2021) - (Jan. - Dec. 2022)

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

(January - December 2022)



Annual change in %
(Dec. 2021 - Dec. 2022)



-1.4



-12.3



-20.1



+8.7



+4.0



+3.2

Domestic multiple items

Domestic single items

Crossborder services

Postal notification services

Domestic

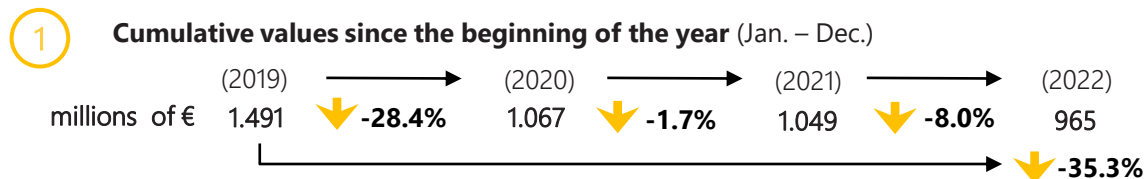
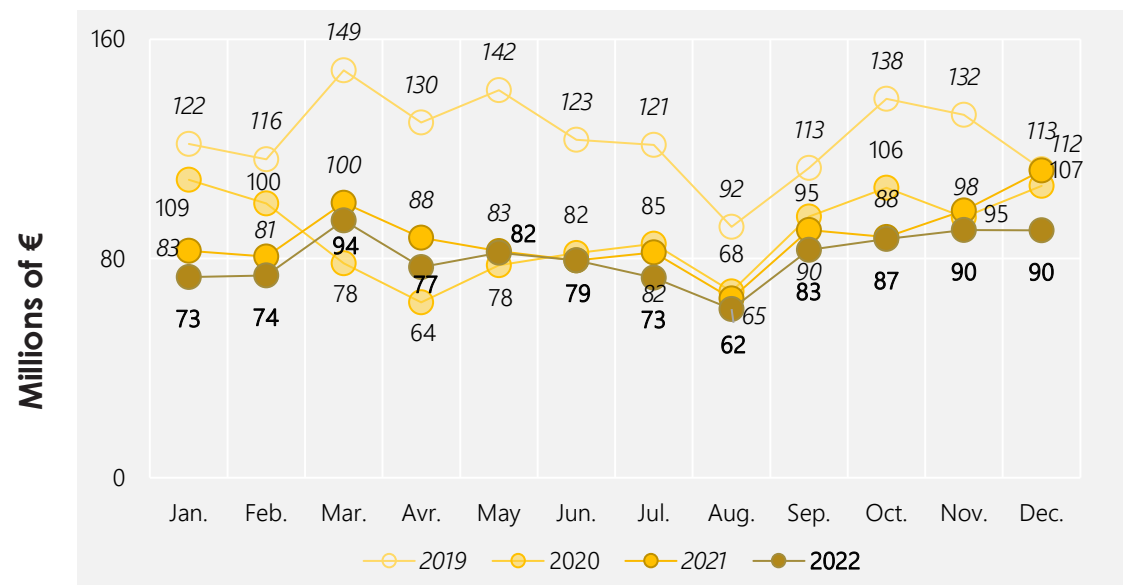
Crossborder

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)

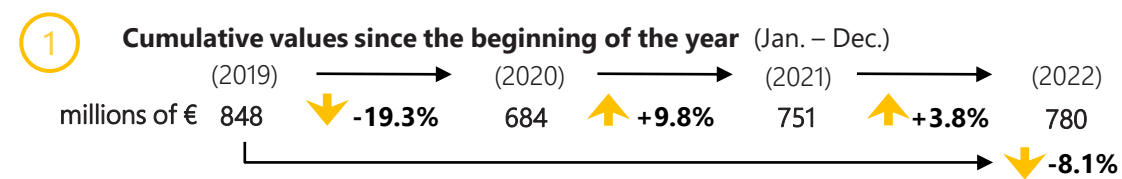
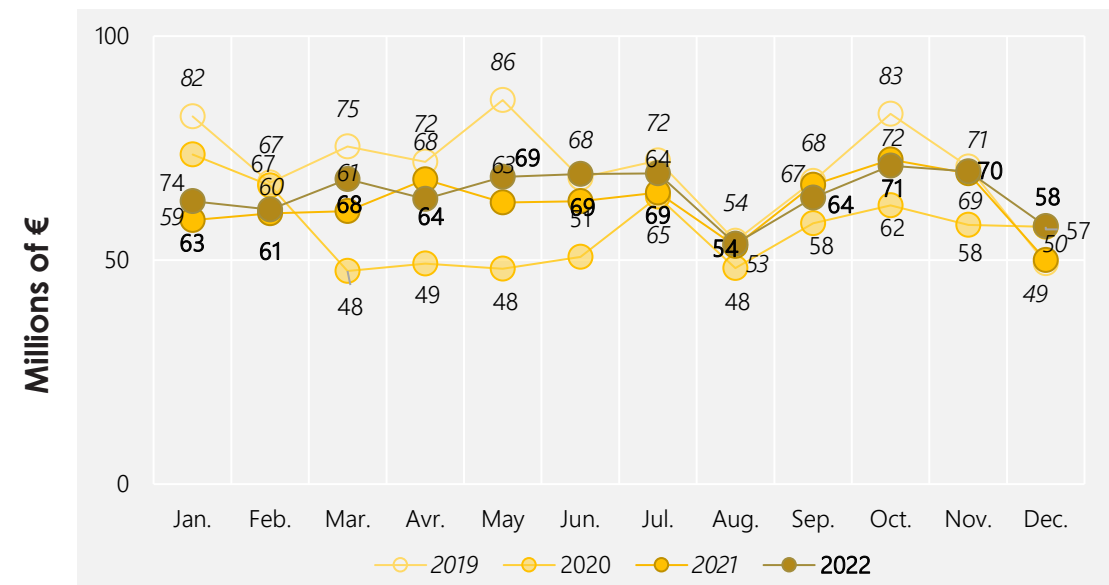
UNIVERSAL SERVICE (US)



② Quarterly comparison (change in %)

	YoY			Whole period 2019/2022
	2019/2020	2020/2021	2021/2022	
1 Q (Jan. - Mar.)	-25.8	-8.1	-8.7	-37.7
2 Q (Apr. - Jun.)	-43.3	+11.6	-4.5	-39.6
3 Q (Jul. - Sep.)	-23.7	-4.2	-8.6	-32.2
4 Q (Jul. - Sep.)	-19.8	-3.2	-10.0	-30.1

OTHER SERVICES (NON US)

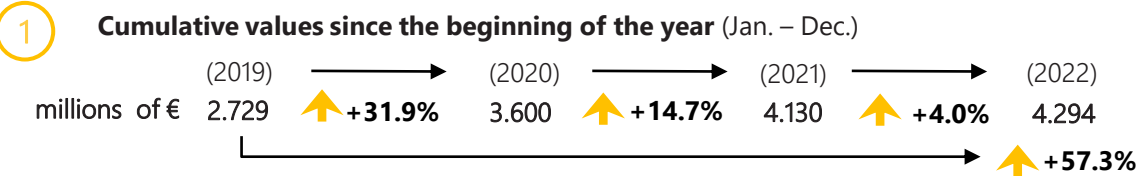
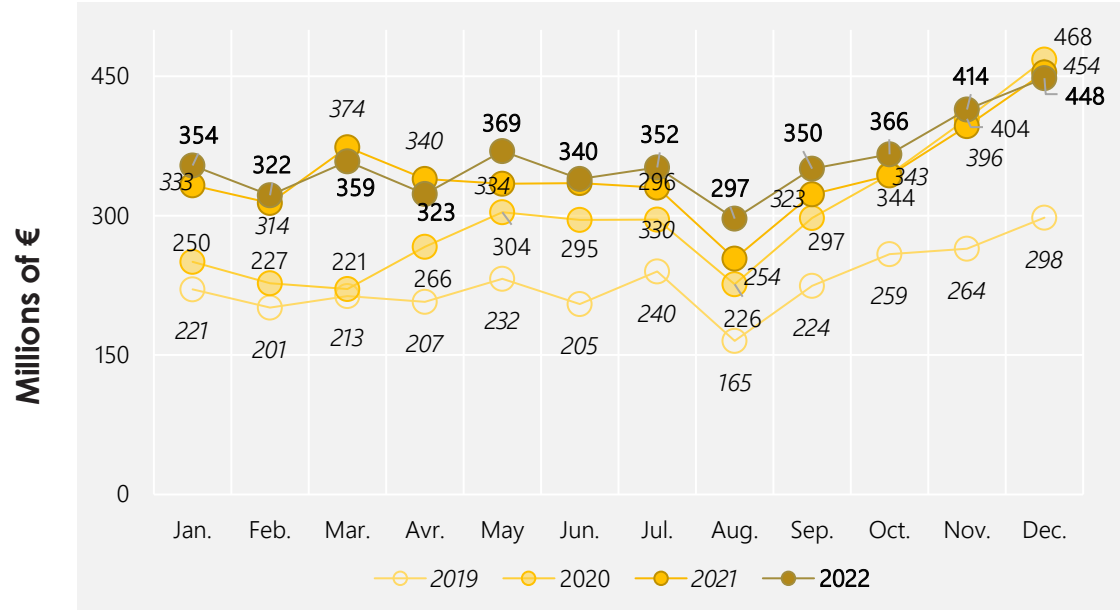


② Quarterly comparison (change in %)

	YoY			Whole period 2019/2022
	2019/2020	2020/2021	2021/2022	
1 Q (Jan. - Mar.)	-16.4	-4.0	+6.8	-14.3
2 Q (Apr. - Jun.)	-34.6	+31.1	+3.8	-10.9
3 Q (Jul. - Sep.)	-12.1	+8.4	+1.1	-3.7
4 Q (Jul. - Sep.)	-12.4	+8.0	+3.4	-2.1

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

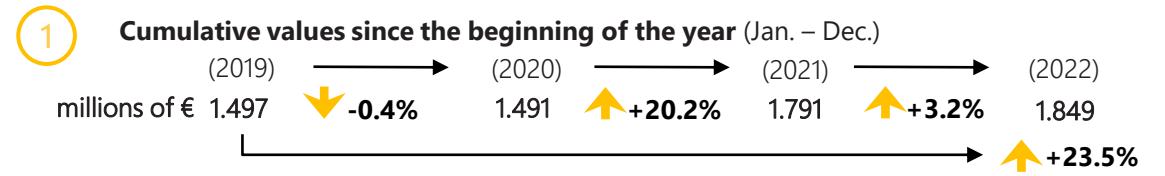
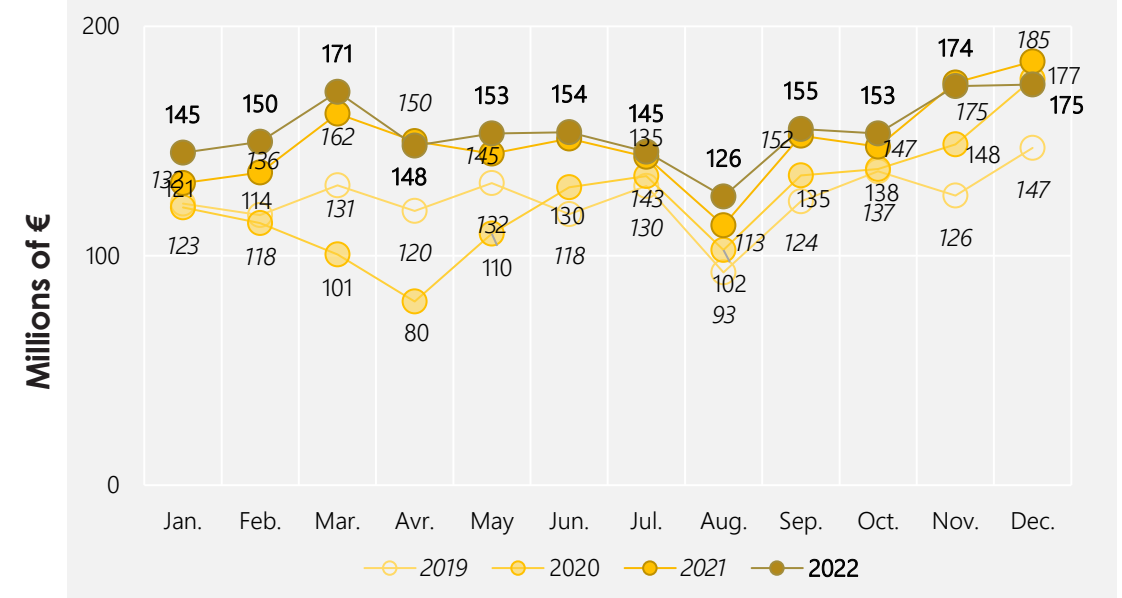
DOMESTIC



2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+10.0	+46.1	+1.4	+62.9
2 Q (Apr. - Jun.)	+34.3	+16.6	+2.3	+60.2
3 Q (Jul. - Sep.)	+30.2	+10.7	+10.2	+58.8
4 Q (Jul. - Sep.)	+48.2	-1.9	+2.4	+49.6

CROSSBORDER



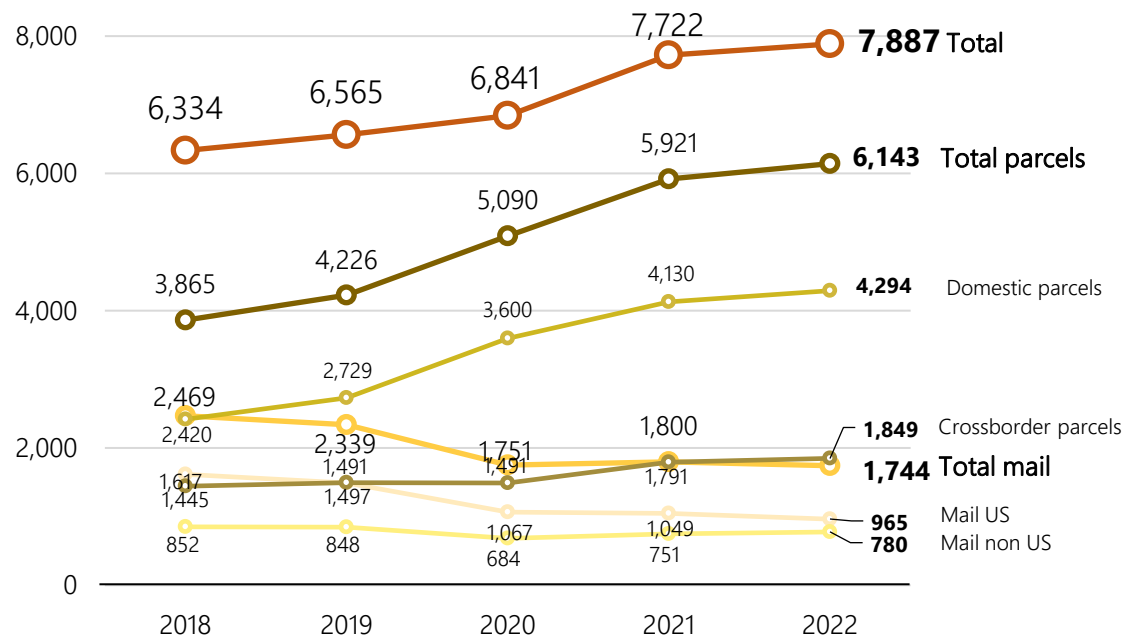
2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	-9.5	+28.0	+8.4	+25.6
2 Q (Apr. - Jun.)	-13.5	+39.4	+2.2	+23.2
3 Q (Jul. - Sep.)	+7.3	+9.8	+4.3	+23.0
4 Q (Jul. - Sep.)	+13.0	+9.6	-1.1	+22.4

3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

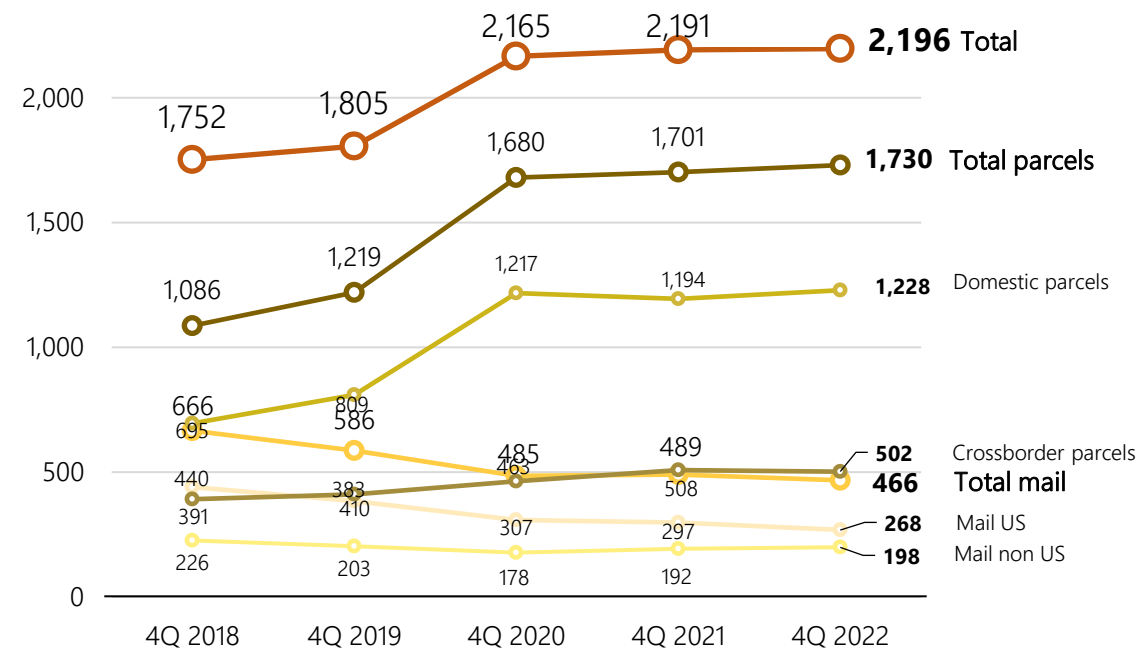
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €



Change in %

(2018 – 2022)

(2021 – 2022)

Total:	+24.5	↑	+2.1	↑
Mail services:	-29.4	↓	-3.1	↓
- Universal Service:	-40.3	↓	-8.0	↓
- No Universal Service:	-8.5	↓	+3.8	↑
Parcel delivery services:	+58.9	↑	+3.7	↑
- Domestic:	+77.4	↑	+4.0	↑
- Crossborder:	+28.0	↑	+3.2	↑

Change in %

(4Q 2018 – 4Q 2022)

(4Q 2021 – 4Q 2022)

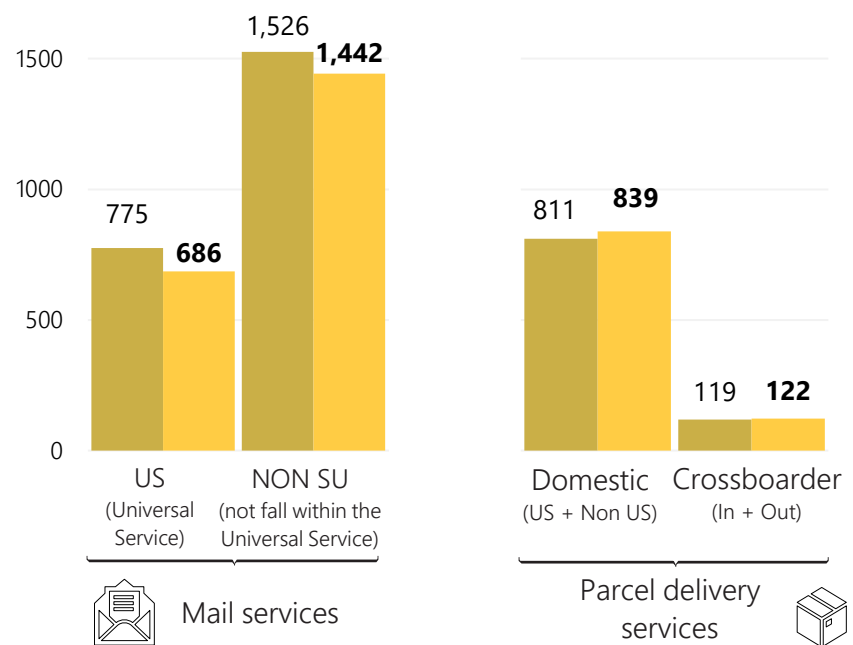
Total:	+25.4	↑	+0.3	↑
Mail services:	-29.9	↓	-4.7	↓
- Universal Service:	-39.1	↓	-10.0	↓
- No Universal Service:	-12.0	↓	+3.4	↑
Parcel delivery services:	+59.3	↑	+1.7	↑
- Domestic:	+76.7	↑	+2.9	↑
- Crossborder:	+28.3	↑	-1.1	↓

3.5: POSTAL SERVICES: VOLUMES

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS

■ January - December 2021
■ January - December 2022



-7.5



+3.5



Annual change in %
(Jan. - Dec. 2021) - (Jan. - Dec. 2022)

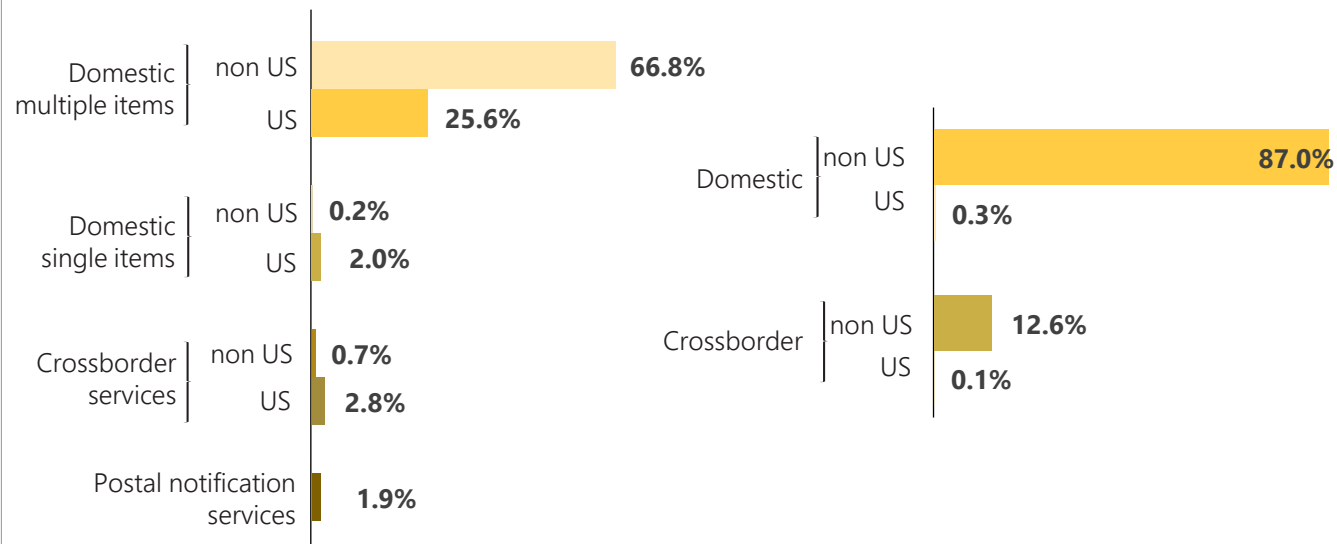
VOLUMES BY SOURCE TYPE (%)

(January - December 2022)

Mail services



Parcel delivery services



Annual change in %
(Dec. 2021 - Dec. 2022)



-7.2

Domestic multiple items



-14.4

Domestic single items



-17.1

Crossborder services



+9.6

Postal notification services



+3.5

Domestic

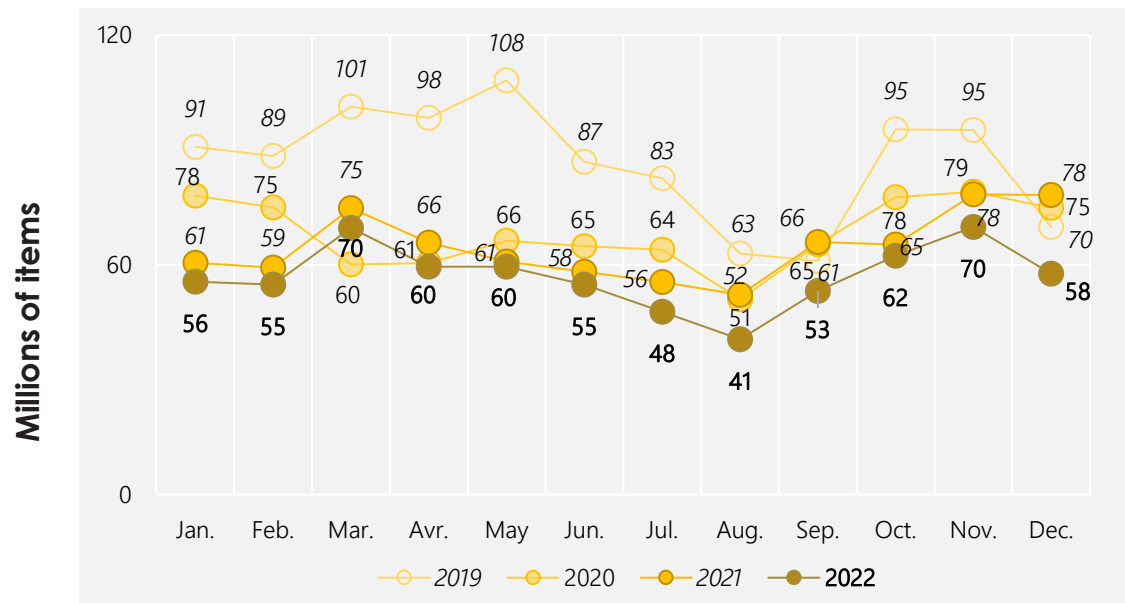


+2.9

Crossborder

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

UNIVERSAL SERVICE



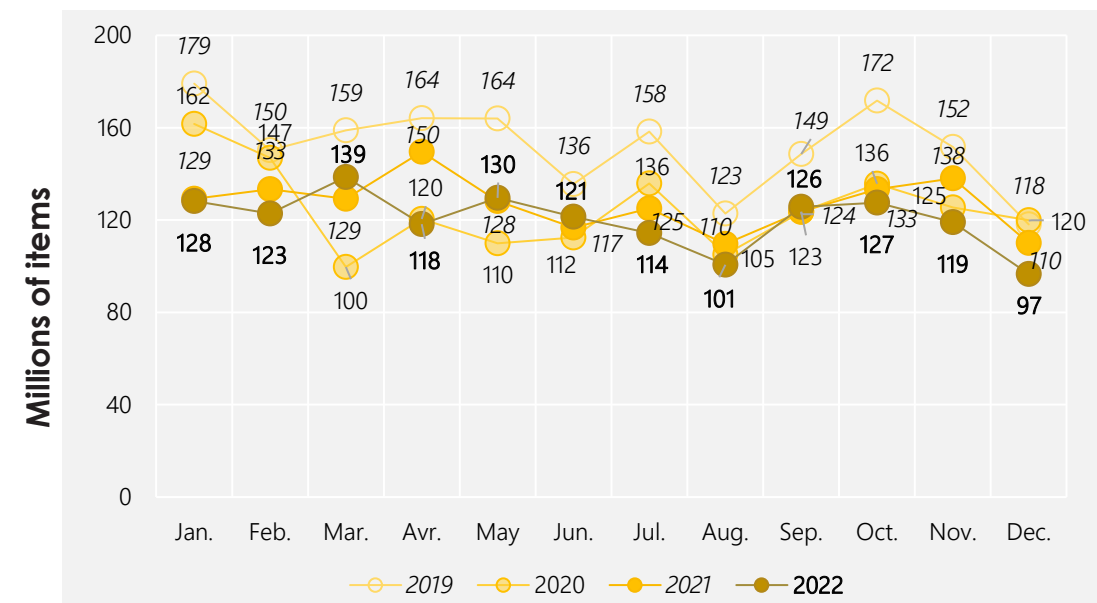
① Cumulative values since the beginning of the year (Jan. – Dec.)

	(2019)	(2020)	(2021)	(2022)
millions of items	1.042	817	775	686
		-21.5%	-5.1%	-11.6%
				-34.2%

② Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	-24.0	-8.7	-7.5	-35.8
2 Q (Apr. - Jun.)	-34.7	-3.6	-5.9	-40.7
3 Q (Jul. - Sep.)	-12.7	-3.7	-18.5	-31.5
4 Q (Oct. - Dec.)	-11.0	-4.2	-14.4	-27.1

OTHER SERVICES (NON US)



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

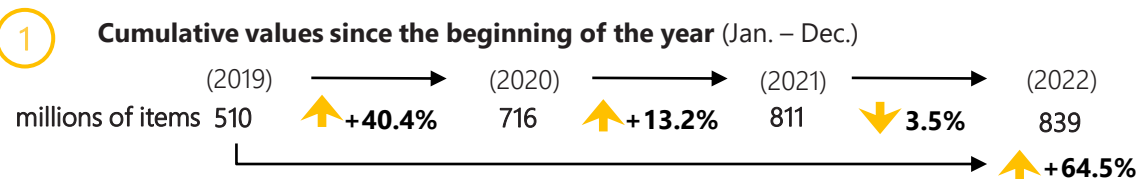
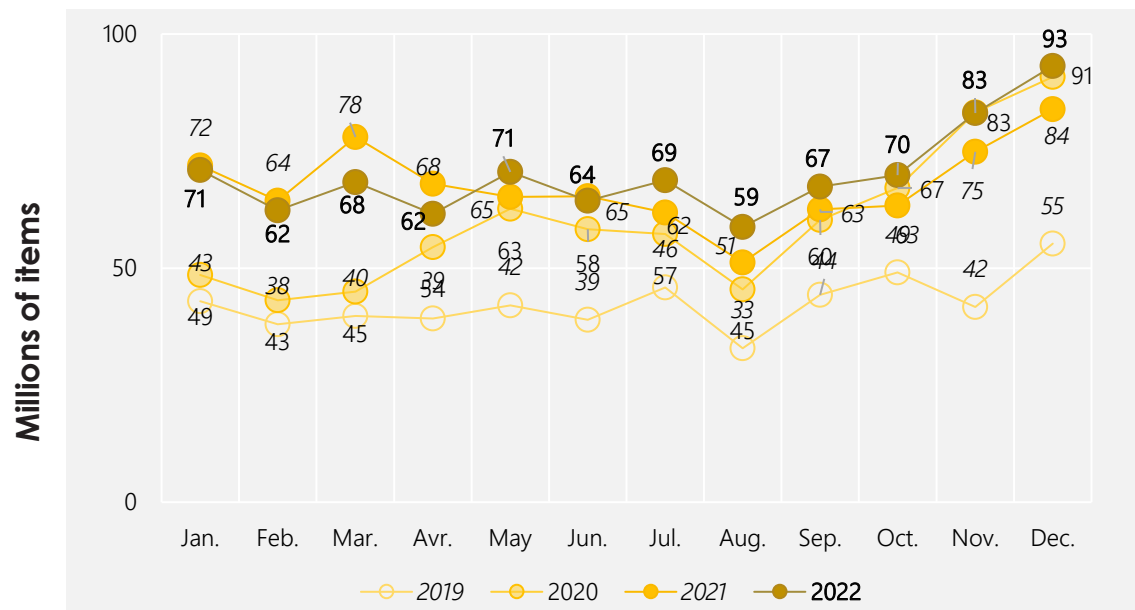
	(2019)	(2020)	(2021)	(2022)
millions of items	1.823	1.496	1.526	1.442
		-17.9%	+2.0%	-5.5%
				-20.9%

② Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	-16.4	-4.0	-0.6	-20.2
2 Q (Apr. - Jun.)	-26.1	+15.1	-6.4	-20.4
3 Q (Jul. - Sep.)	-15.2	-1.7	-4.9	-20.7
4 Q (Oct. - Dec.)	-13.7	+0.1	-10.0	-22.3

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

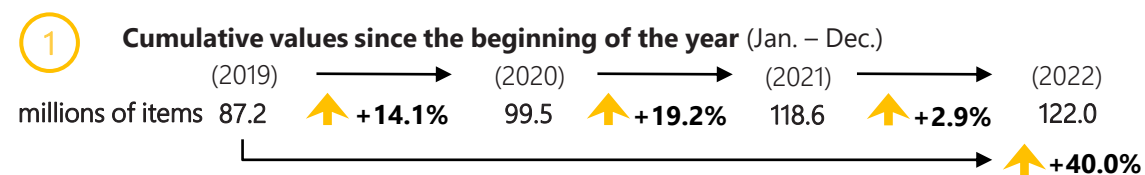
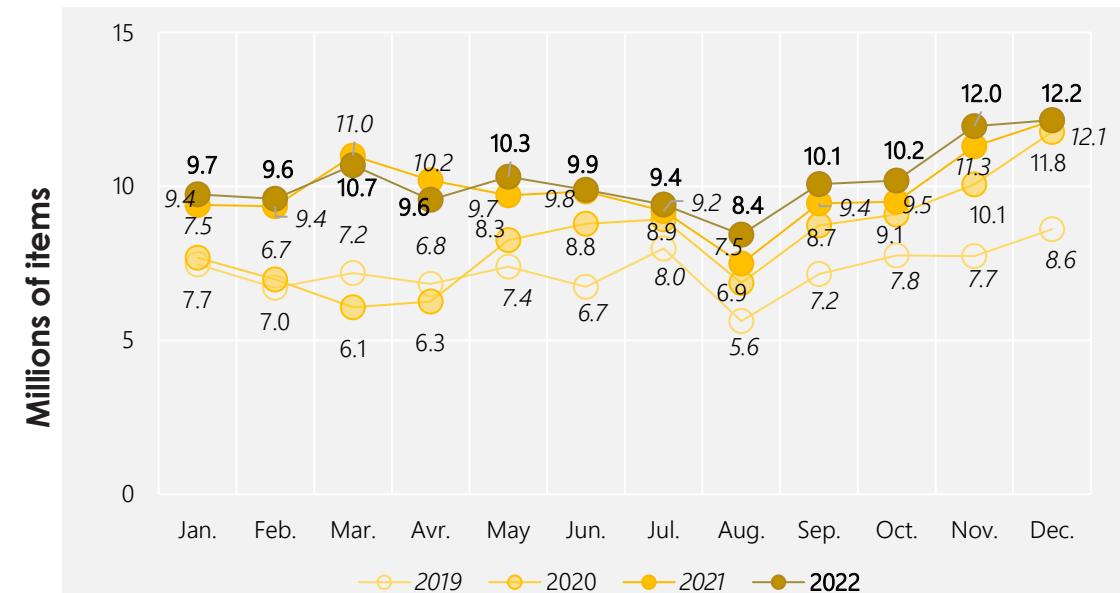
DOMESTIC



2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+13.2	+56.8	-5.9	+67.0
2 Q (Apr. - Jun.)	+45.9	+13.2	-1.0	+63.4
3 Q (Jul. - Sep.)	+32.4	+7.7	+11.0	+58.4
4 Q (Oct. - Dec.)	+65.2	-7.9	+10.8	+68.6

CROSSBORDER



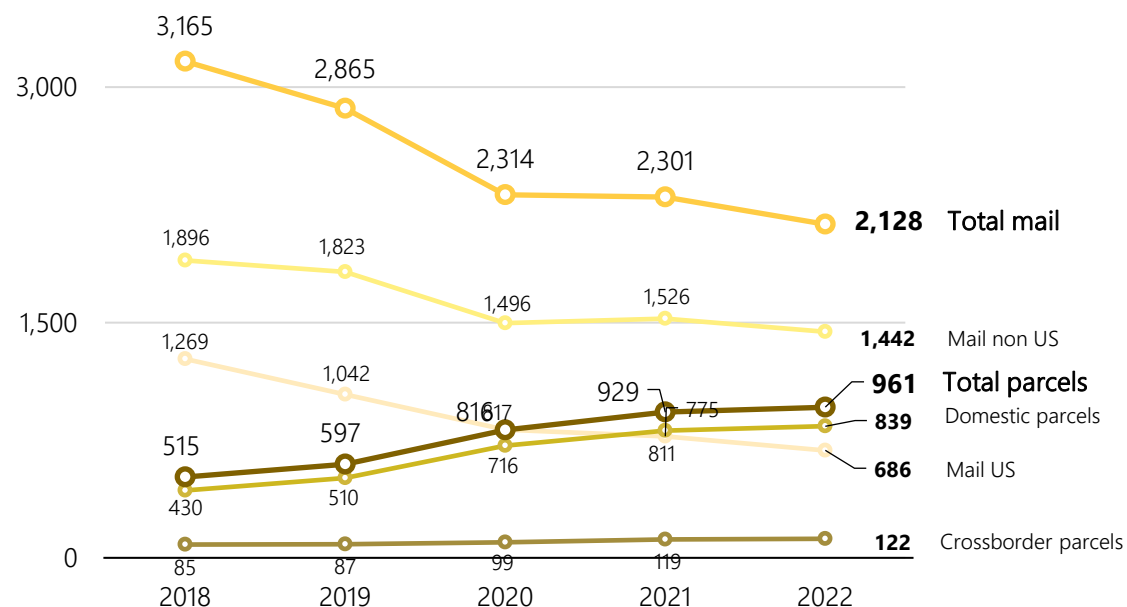
2 Quarterly comparison (change in %)

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	-3.0	+43.5	+0.9	+40.5
2 Q (Apr. - Jun.)	+11.2	+27.7	=	+42.0
3 Q (Jul. - Sep.)	+18.1	+6.6	+6.8	+34.4
4 Q (Oct. - Dec.)	+28.4	+6.5	+4.2	+42.4

3.8: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

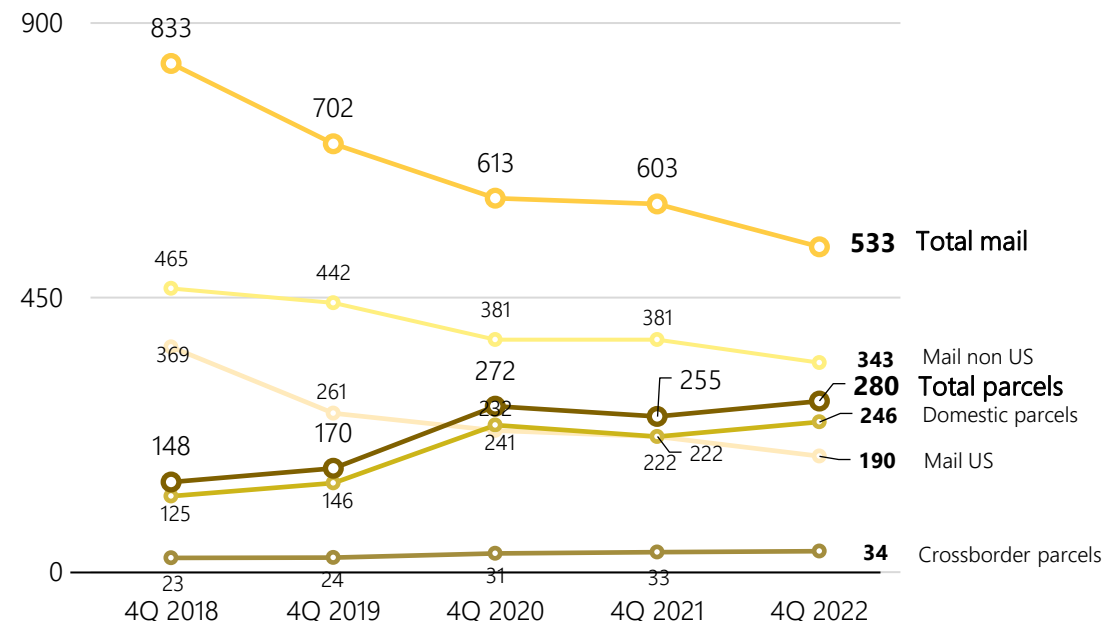
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS



Change in %

(2018 – 2022)

(2021 – 2022)

Mail services:	-32.8	↓	-7.5	↓
- Universal Service:	-46.0	↓	-11.6	↓
- Non Universal Service:	-23.9	↓	-5.5	↓
Parcel delivery services:	+86.6	↑	+3.5	↑
- Domestic:	+95.0	↑	+3.5	↑
- Crossborder:	+43.7	↑	+2.9	↑

Change in %

(4Q 2018 – 4Q 2022)

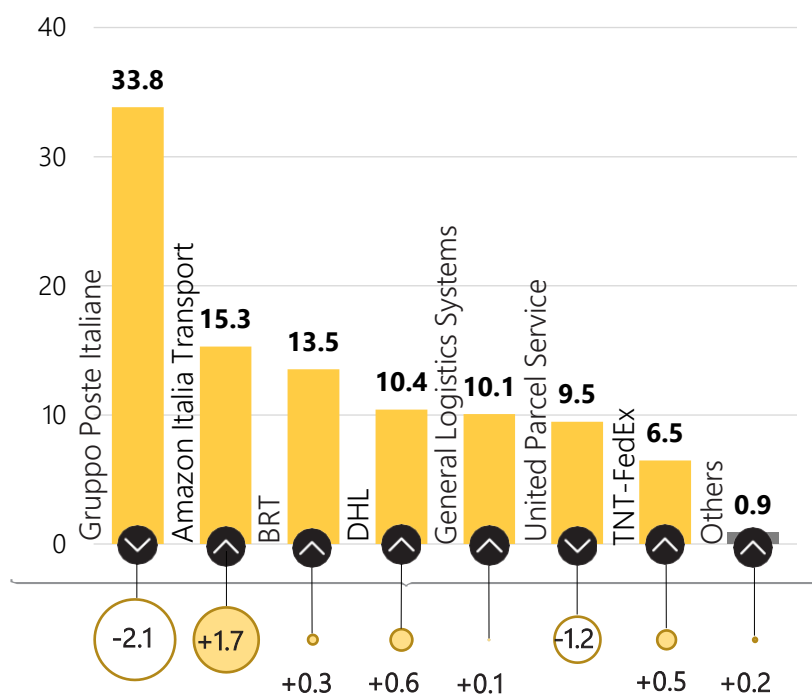
(4Q 2021 – 4Q 2022)

Mail services:	-36.0	↓	-11.6	↓
- Universal Service:	-48.5	↓	-14.4	↓
- Non Universal Service:	-26.2	↓	-10.0	↓
Parcel delivery services:	+89.7	↑	+9.9	↑
- Domestic:	+97.6	↑	+10.8	↑
- Crossborder:	+47.4	↑	+4.2	↑

3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

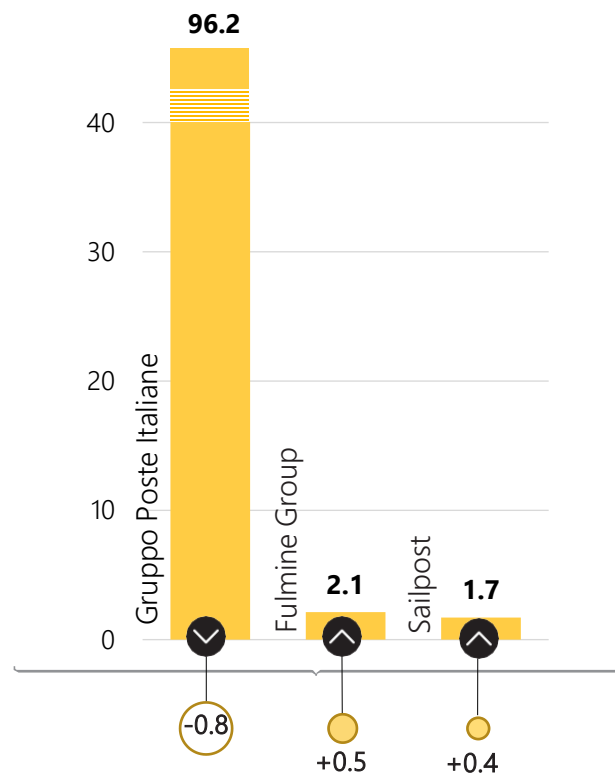
JANUARY - DECEMBER 2022 – IN % OF TOTALE REVENUES (Universal service + Non Universal service)

MAIL AND PARCEL DELIVERY SERVICES

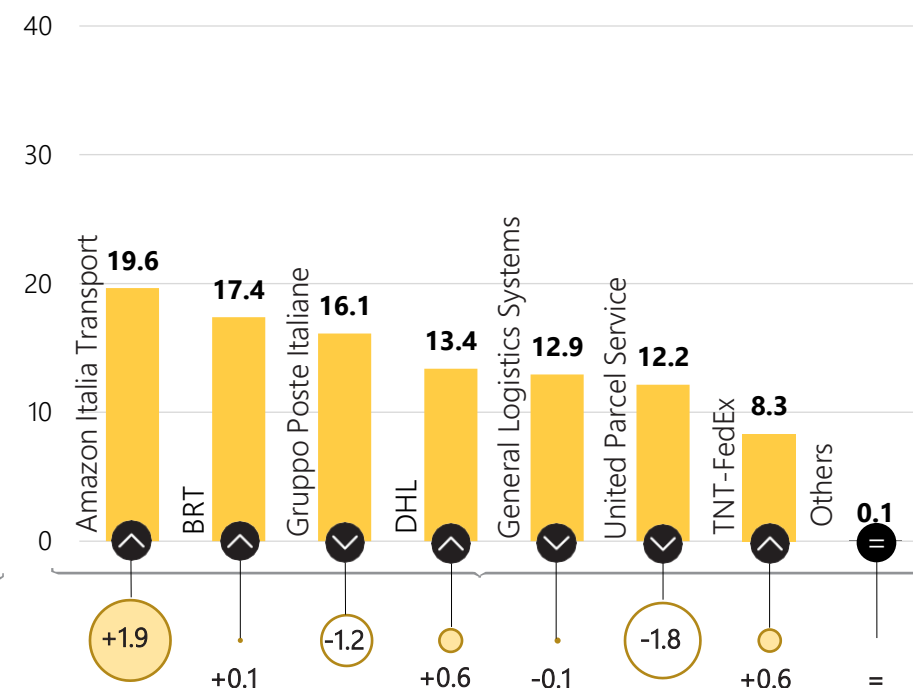


MAIL SERVICES

(single + multiple items)



PARCEL DELIVERY SERVICES COURIERS

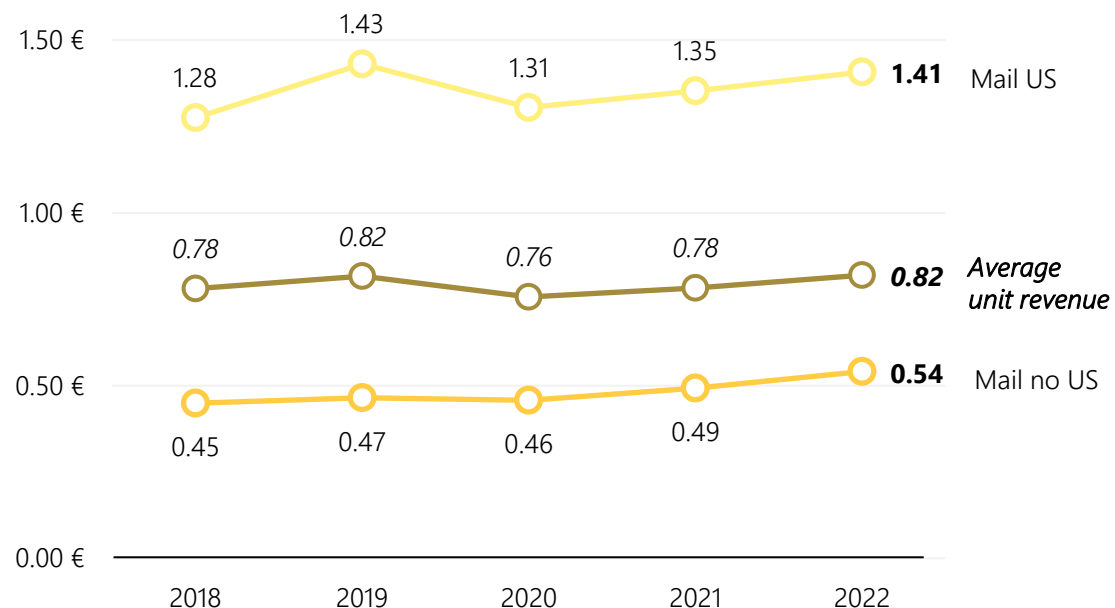


Differences vs. Jan. – Dec. 2021
(percentage points)

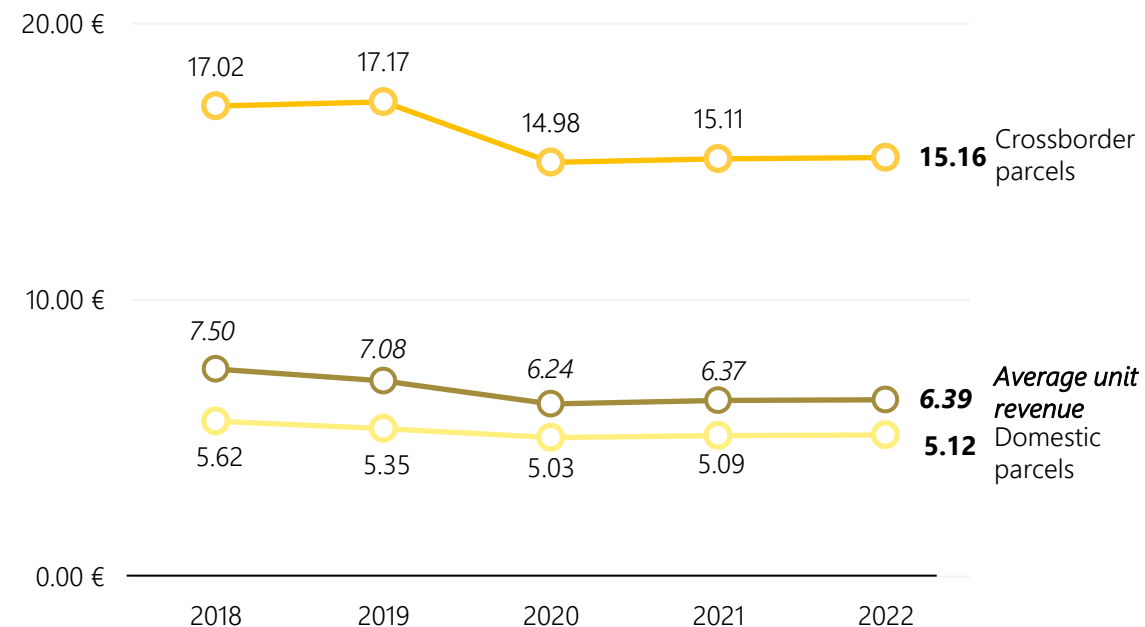
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group. Nexive Group S.r.l. and SDA Express Courier S.p.A.

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

MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

(2018 – 2022)

(2021 – 2022)

Average unit revenue:

+5.1



+4.8



- Mail US:

+10.4



+4.0



- Mail non US:

+20.3



+9.8



Change in %

(2018 – 2022)

(2021 – 2022)

Average unit revenue:

-14,8



+0.3



Crossborder parcels:

-11.0



+0.3



- US:

+6.2



+10.8



- Non US:

-10.9



+0.3



Domestic parcels:

-9,0



+0.4



- US:

+1.6



+3.6



- Non US:

-9,1

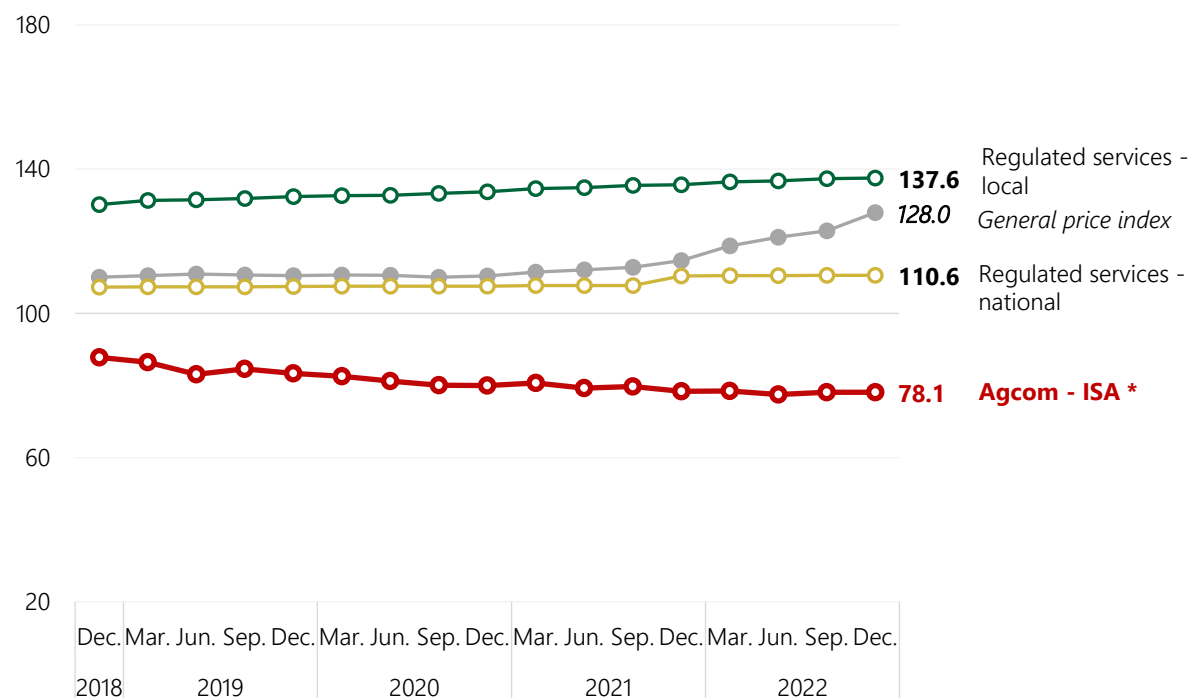


+0.4

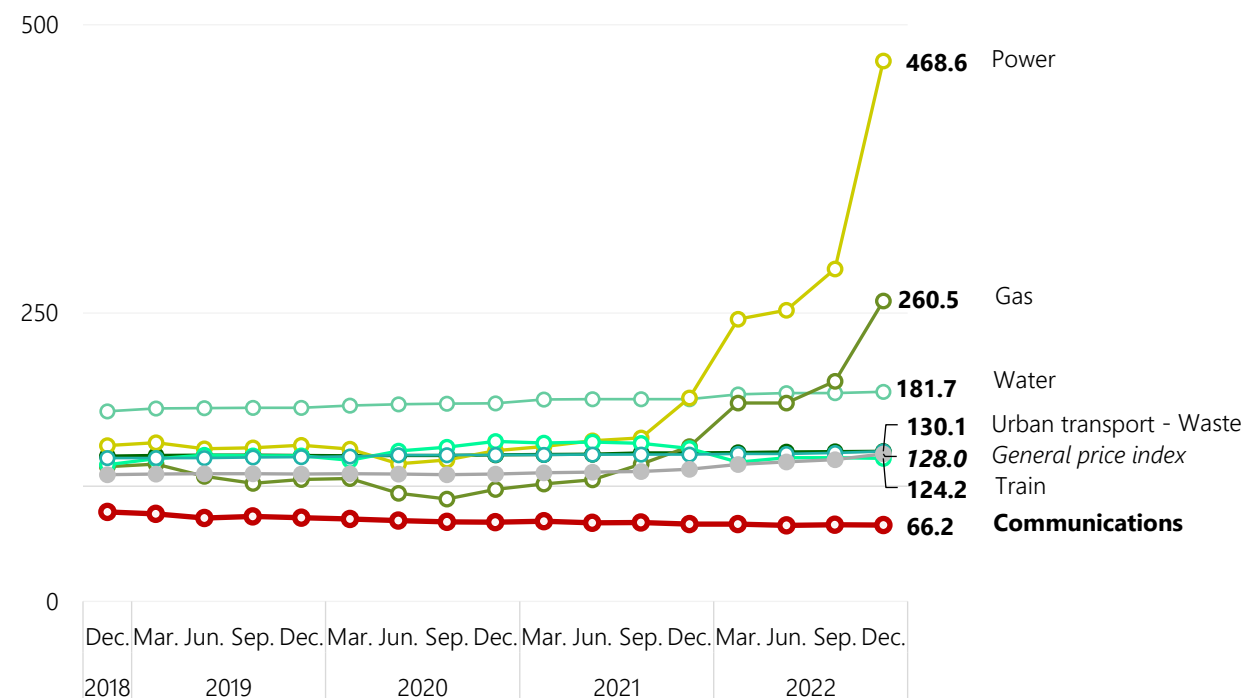


4.1 PRICE: HARMONISED CONSUMER PRICE INDEX AND OTHER UTILITIES PRICE INDICES (2010=100)

GENERAL PRICE INDEX



UTILITIES PRICE INDEX



Source: Agcom elaboration on data from Istat

	Change in %	
	4-Year	YoY
ISA (Agcom summary price index):	-11.0 ▼	-0.4 ▼
General price index:	+16.4 ▲	+11.6 ▲
Regulated services - local:	+5.7 ▲	+1.4 ▲
Regulated services - national:	+3.1 ▲	+0.2 ▲

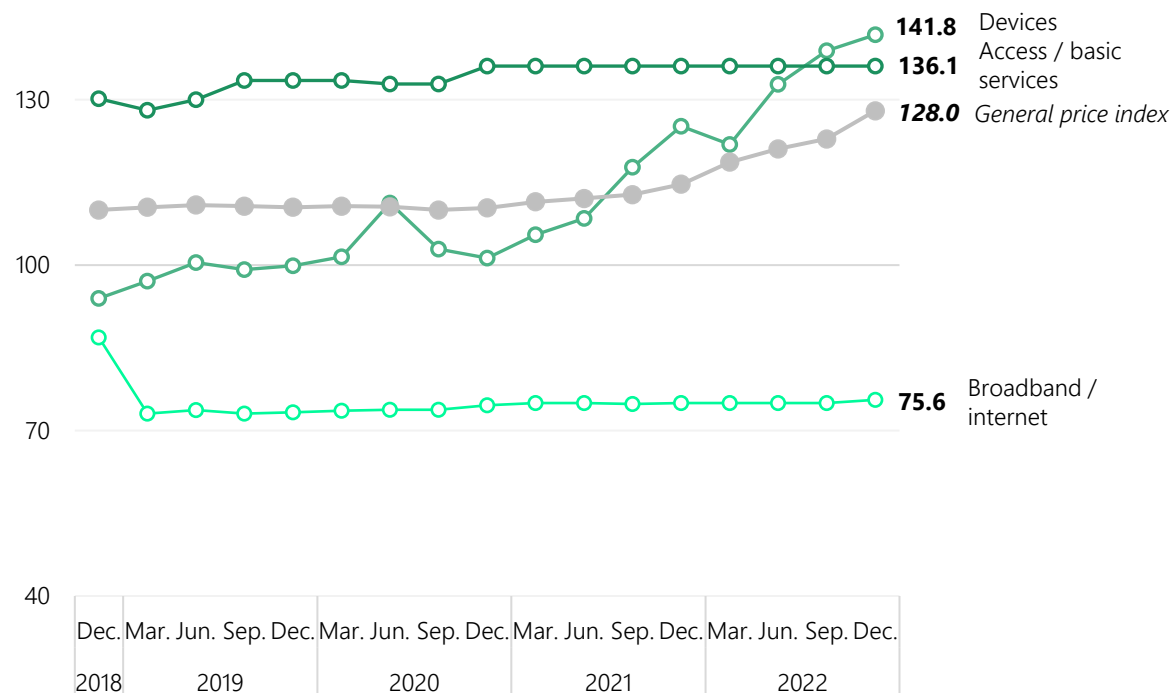
(*) **Note:** The ISA («Indice Sintetico Agcom») price index includes postal services, services and devices for fixed and mobile telephony, public TV license fee, pay TV, newspapers and magazines (for a total of 10 items).

	Change in %			Change in %	
	4-Year	YoY		4-Year	YoY
Water (04.4.1):	+10.3 ▲	+3.5 ▲	Train (07.3.1):	+4.7 ▲	-6.4 ▼
Waste (04.4.2):	+3.3 ▲	+0.9 ▲	Urban transport (07.3.2.1.1):	+4.7 ▲	+2.0 ▲
Power (04.5.1):	+246.6 ▲	+165.3 ▲	Communications (08):	-14.8 ▼	-1.2 ▼
Gas (04.5.2):	+123.0 ▲	+93.8 ▲			

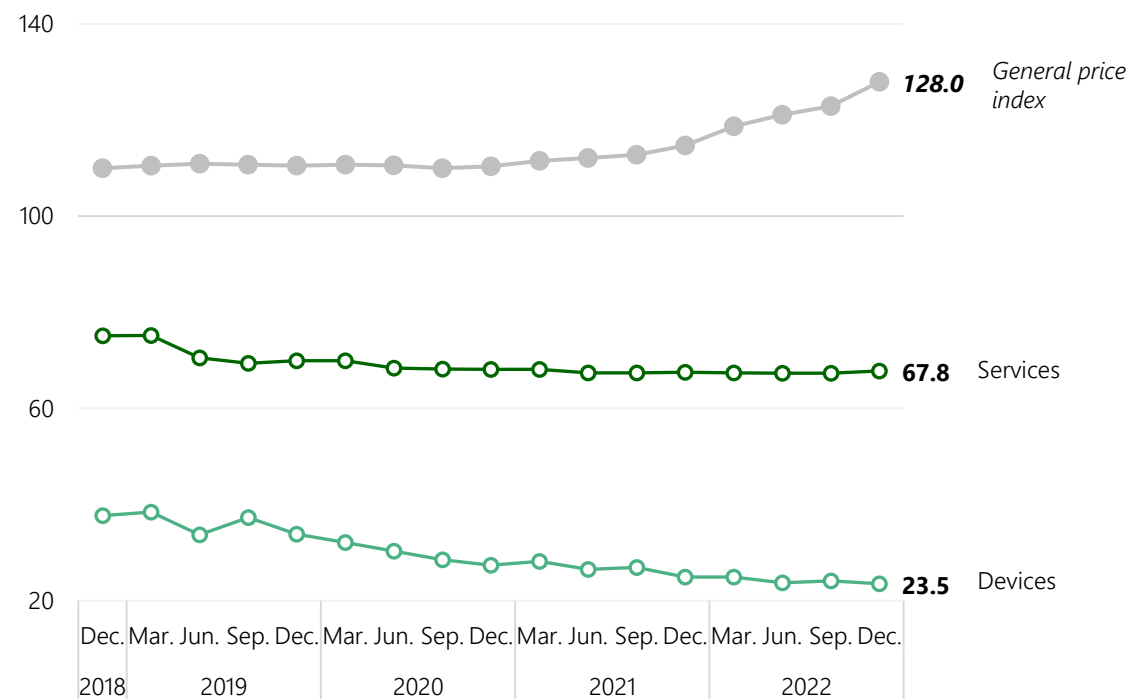
(COICOP - Classification of Individual Consumption by Purpose)

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

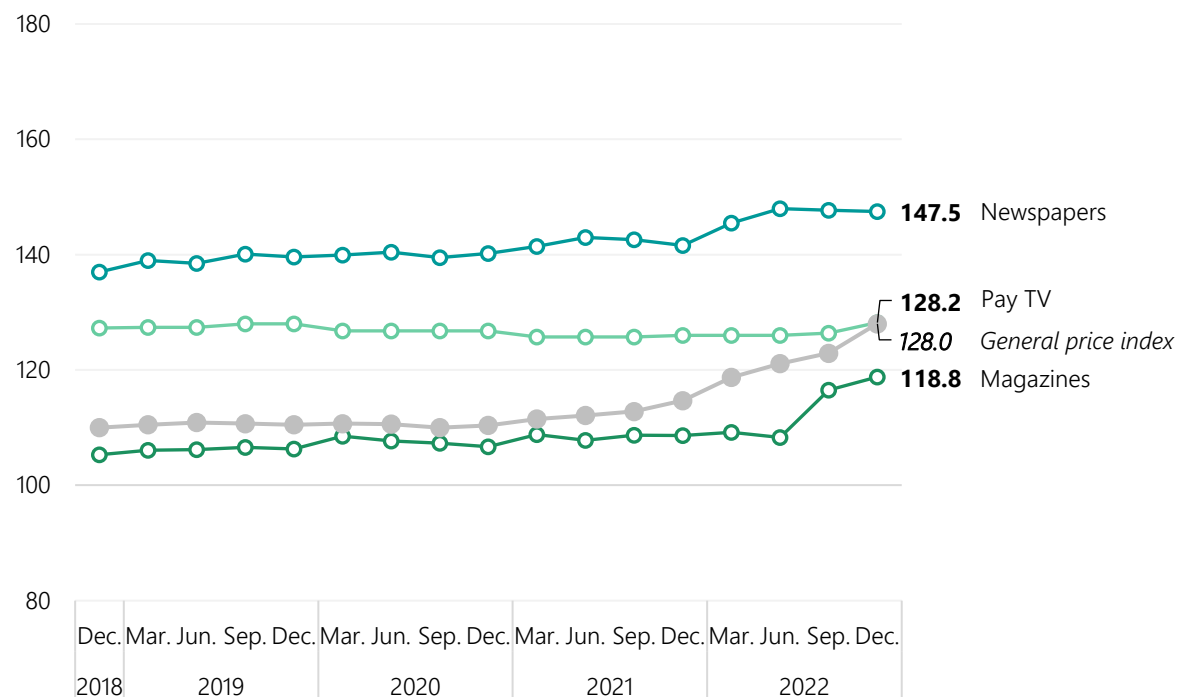
	Change in %		
	4-Year	YoY	
Access / basic services (08.3.0.1):	+4.5 ▲	=	
Devices (08.2.0.1):	+50.9 ▲	+13.3 ▲	
Broadband / internet (08.3.0.3.0.07):	-13.0 ▼	+0.8 ▲	

	Change in %		
	4-Year	YoY	
Servces (08.3.0.2):	-9.7 ▼	+0.4 ▲	
Devices (08.2.0.2):	-37.7 ▼	-5.6 ▼	

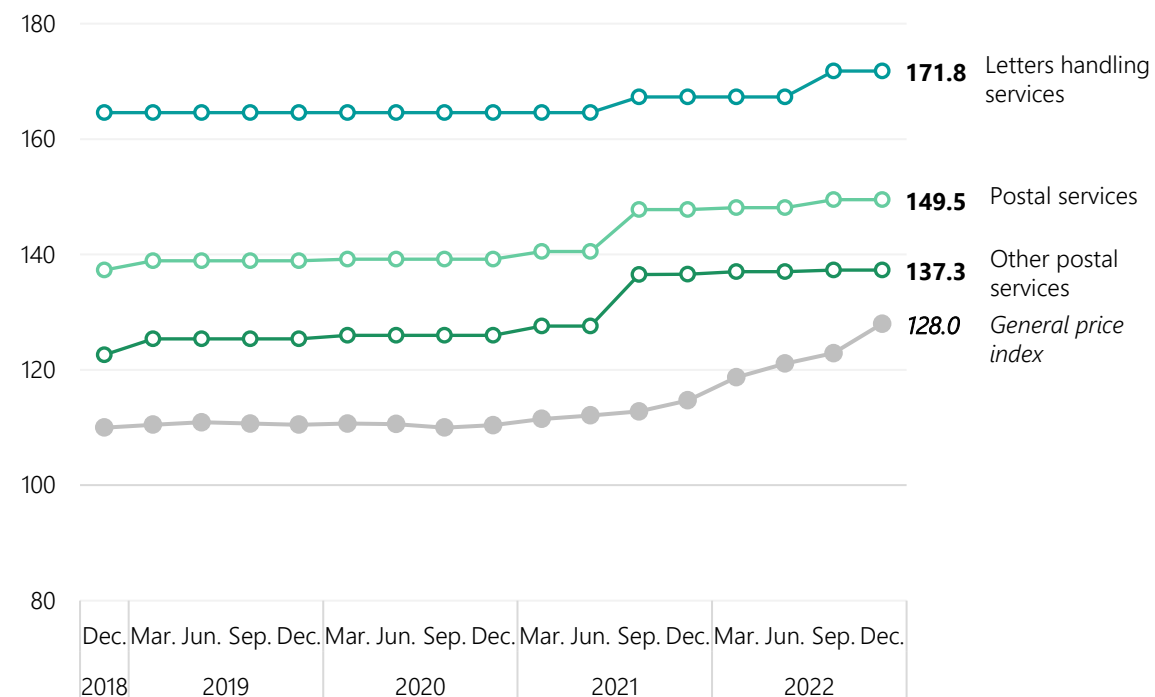
(COICOP - Classification of Individual Consumption by Purpose)

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):	+7.7	↑	-4.2	↑
Pay TV (09.4.2.3.0.02):	+0.7	↑	+1.7	↑
Magazines (09.5.2.2.0):	+12.8	↑	+9.4	↑

	Change in %			
	4-Year		YoY	
Postal services (08.1):	+4.4	↑	2.7	↑
Letters handling services (08.1.0.1.0.00):	+8.9	↑	+1.2	↑
Other postal services (08.1.0.9.0.00):	+12.0	↑	+0.5	↑

(COICOP codes - Classification of Individual Consumption by Purpose)

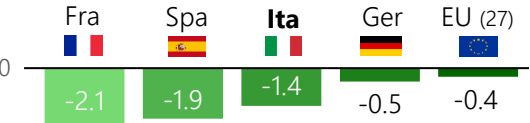
4.4 PRICE: INTERNATIONAL BENCHMARK



1-Year
change %

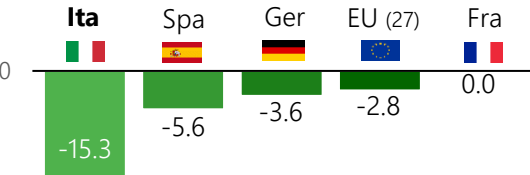
Dec. 2021
-
Dec. 2022

TLC – SERVICES AND EQUIPMENTS
(COICOP 08.2 - 08.3)



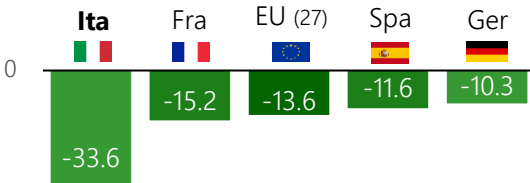
5-Year
change %

Dec. 2017
-
Dec. 2022

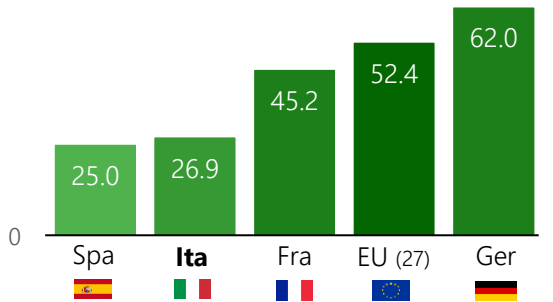
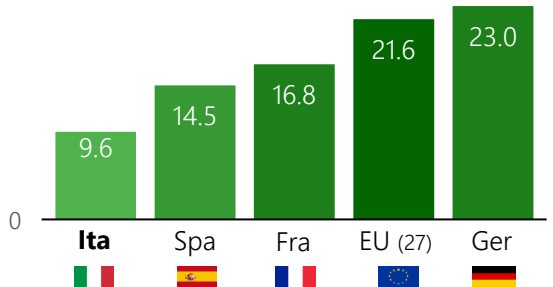
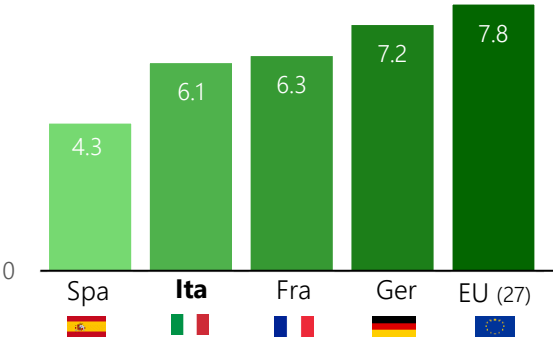


10-Year
change %

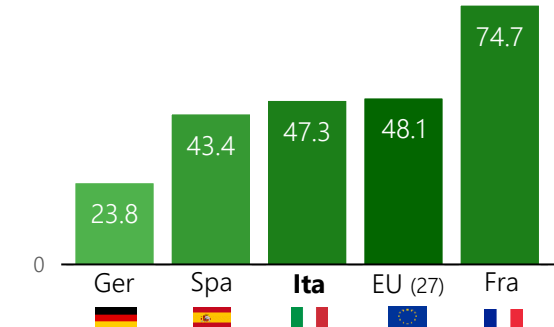
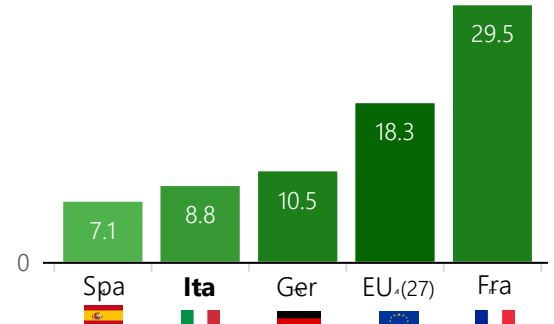
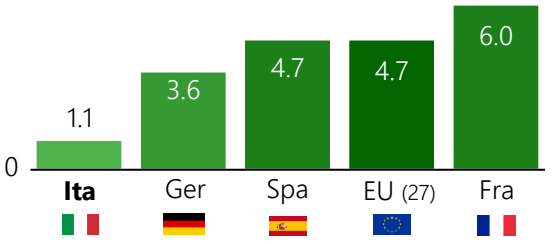
Dec. 2012
-
Dec. 2022



NEWSPAPERS AND MAGAZINES
(COICOP 09.5.2)



POSTAL SERVICES
(COICOP 08.1)





AUTORITÀ PER LE
GARANZIE NELLE
AGCOM COMUNICAZIONI

COMMUNICATION MARKETS MONITORING SYSTEM

no. 1/2023

For information: Direzione studi, ricerche e statistiche - segreteria.dsr@agcom.it

Roma

Via Isonzo 21/b -00198

Napoli

Centro Direzionale Isola B5 -80143