AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2022

INDEX

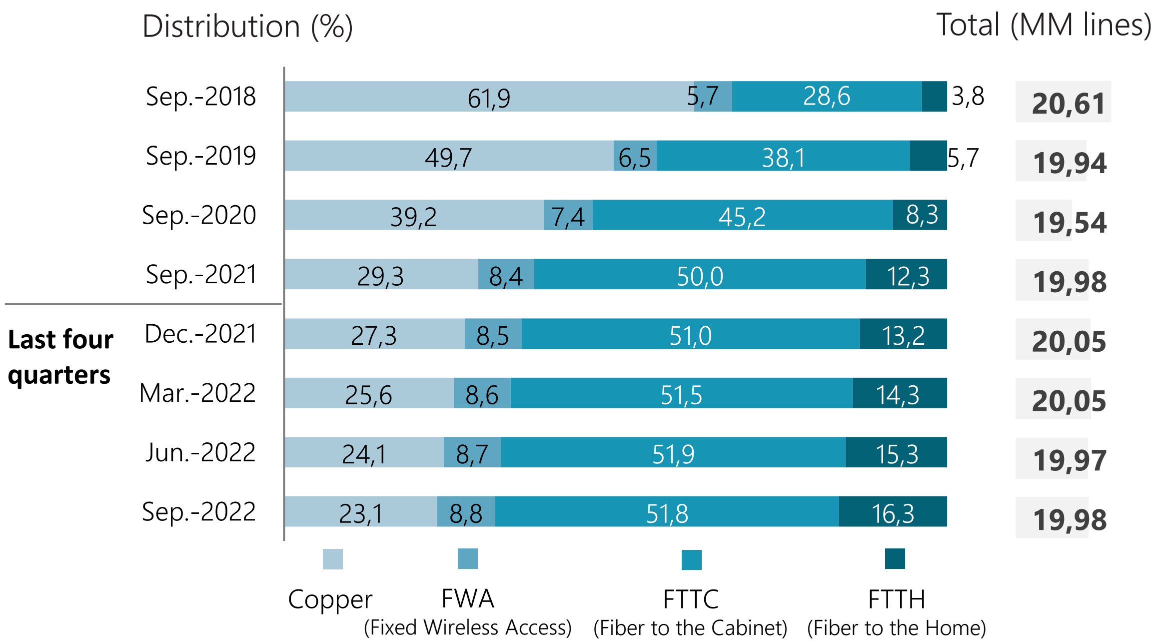
The **Communication Markets Monitoring System** is a quarterly pubblication edited by AGCOM.

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

The data collected for this edition are updated to September 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.

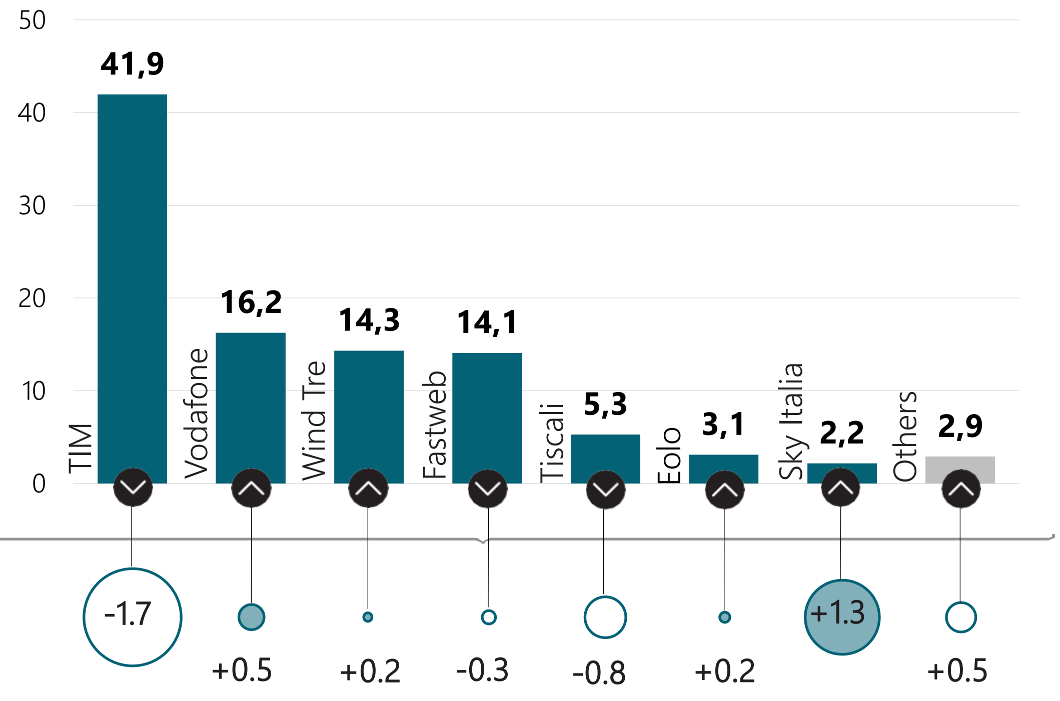
1.1 FIXED NETWORK: TOTAL LINES

AGCOM



MARKET SHARES (%)

SEPTEMBER 2022



Differences vs. September 2021
(percentage points)

Total lines	(no. of lines)	(Δ %)
Quarterly change (Jun. 2022 – Sep. 2022)	**+9 k** accesses	+0.04 ↑
Annual change (Sep. 2021 – Sep. 2022)	**0** accesses	=
4-Year change (Sep. 2018 – Sep. 2022)	**-624 k** accesses	-3.0 ↓

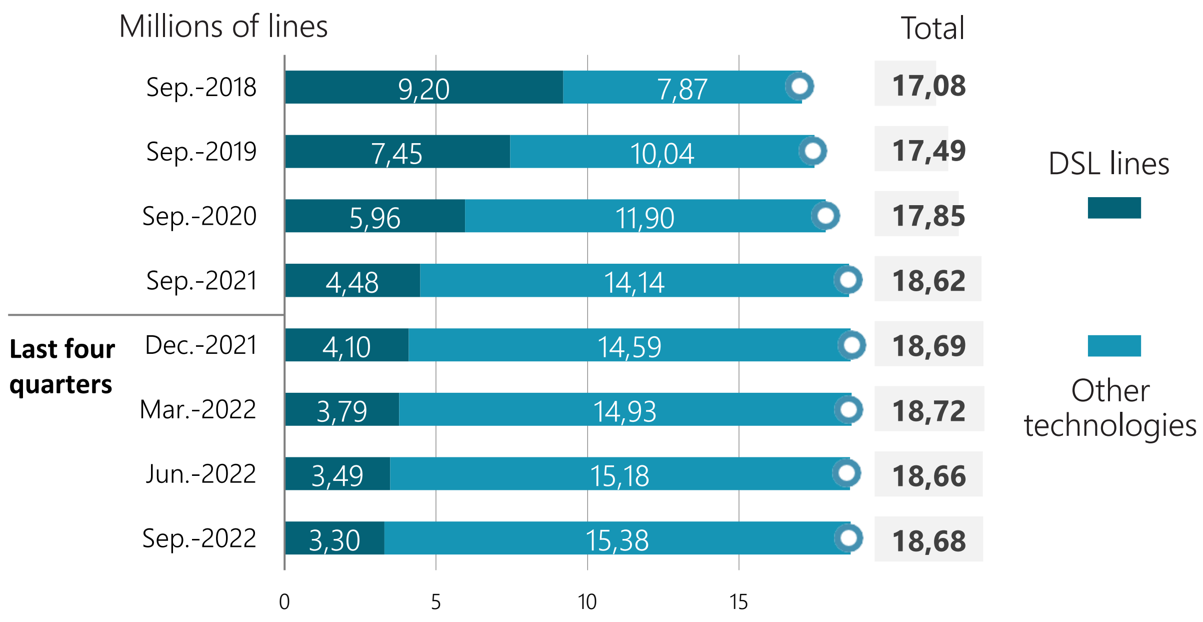
Distribution
(Δ 2021-2022)
percentage points

Copper:	-6.2	↓
FWA:	+0.4	↑
FTTC:	+1.8	↑
FTTH:	+4.1	↑

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

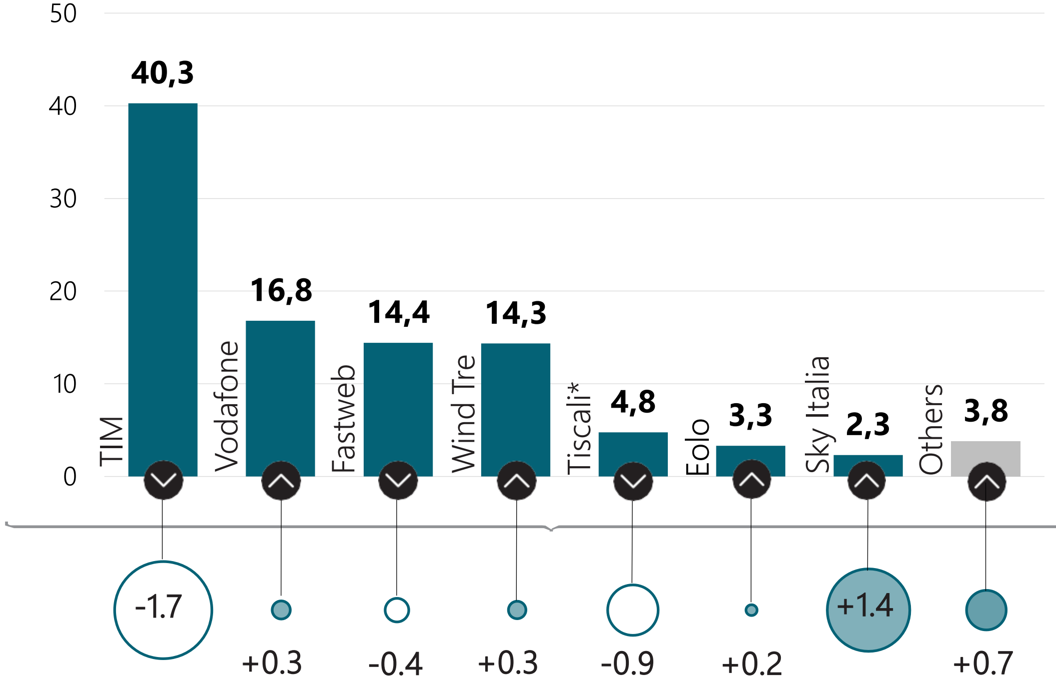
k = thousand
MM = million

Note: Due to changes in firms' accounting methods and methodological refinements introduced by the Authority, the total number of fixed lines is not directly comparable with previous versions



MARKET SHARES (%)

SEPTEMBER 2022



Differences vs. September 2021
(percentage points)

Quarterly change
(Jun. 2022 – Sep. 2022)

Total lines

+15 k
lines
(+0.1%)

Annual change
(Sep. 2021 – Sep. 2022)

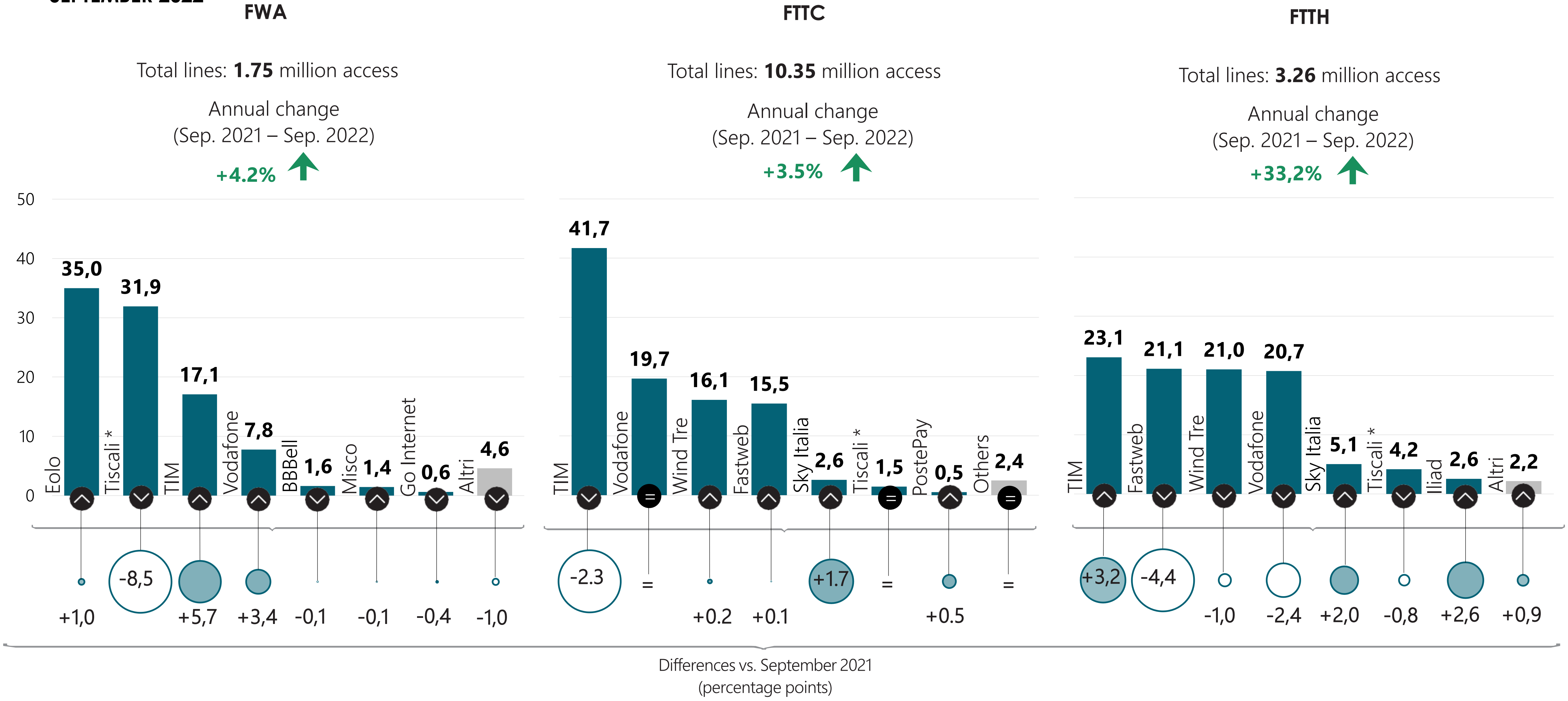
Total lines	DSL lines	Other technologies
+54 k lines (+0.3 %)	**-1,185 MM** lines (-26.4%)	**+1,239 MM** lines (+8.8%)

k = thousand
MM = million

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

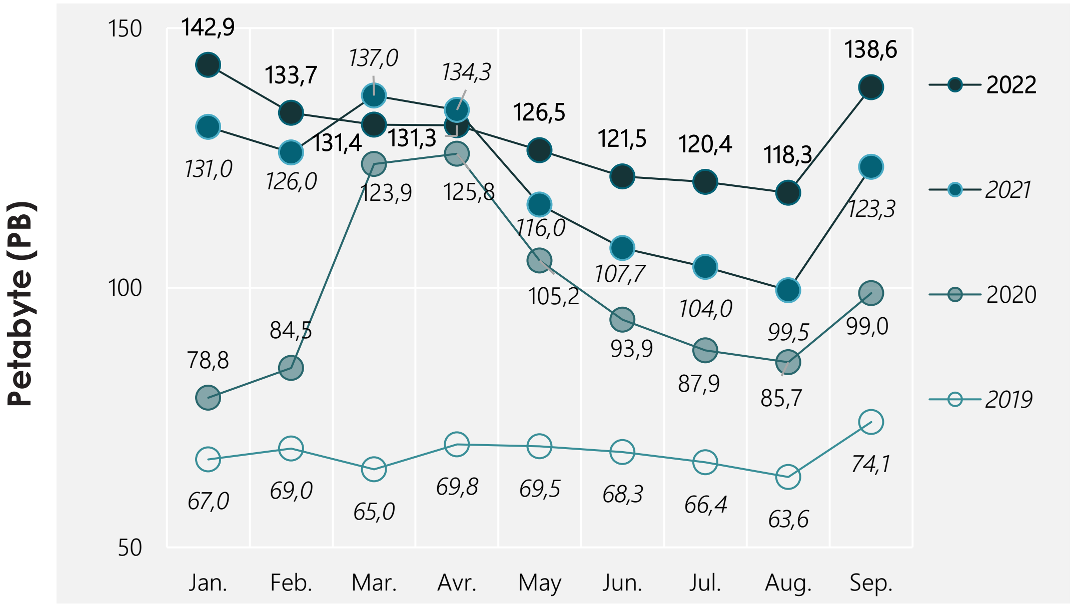
1.3 FIXED NETWORK: BROADBAND AND ULTRABROADBAND LINES BY TECHNOLOGY AND OPERATORS

SEPTEMBER 2022

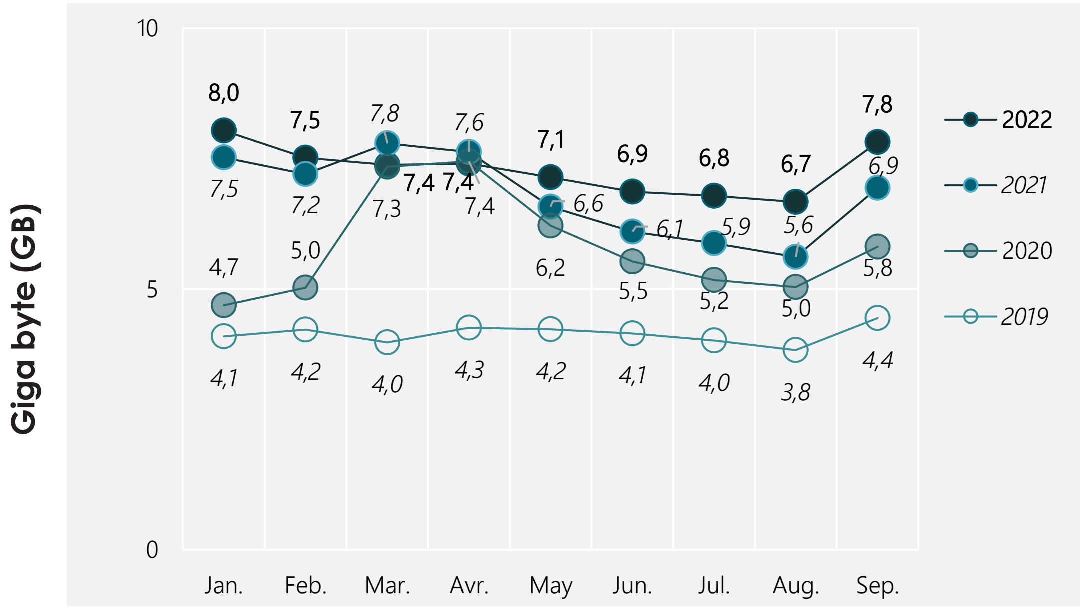


Note: elaborations based on data provided by companies in the context of the preparation of European reporting A few thousand lines allocated by the companies in the categories "Other non-NGA" and "Other NGA" are excluded from the analysis..

TOTAL TRAFFIC



PER BROADBAND LINE



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

Petabyte: (2019) 68.0 → (+44.5%) → (2020) 98.3 → (+21.8%) → (2021) 119.8 → (+8.0%) → (2022) 129.3

2019 → 2022: +90.1%

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	+103.9
2 Q (Avr. - Jun.)	+56.5	+10.2	+6.6	+82.7
3 Q (Jul. - Sep.)	+33.6	+19.9	+15.8	+84.9

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

Giga byte: (2019) 4.13 → (+40.5%) → (2020) 5.81 → (+17.0%) → (2021) 6.80 → (+6.8%) → (2022) 7.26

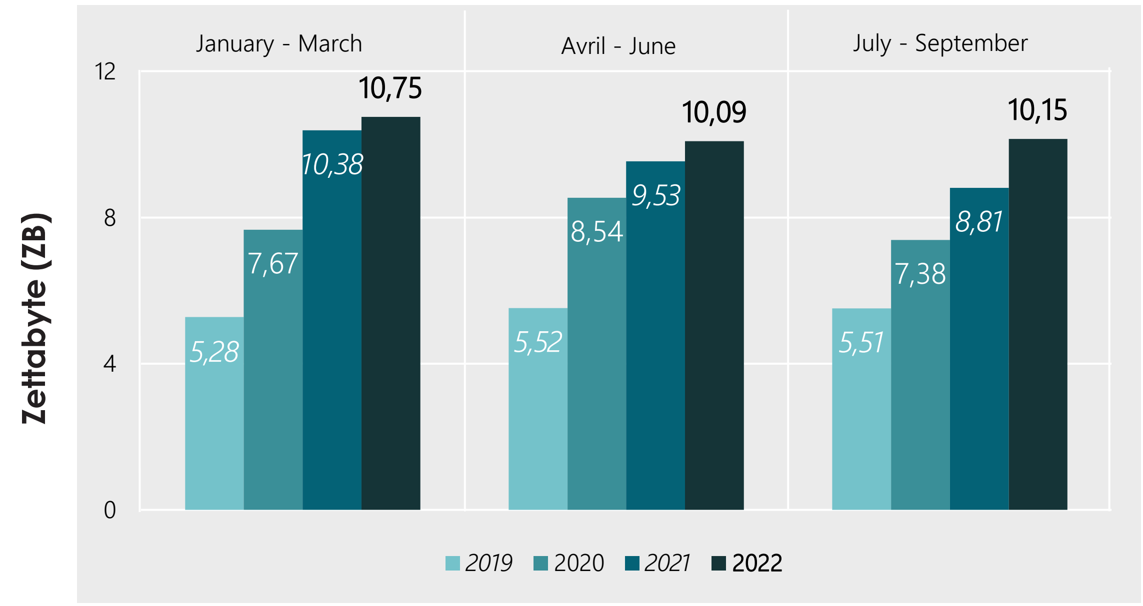
2019 → 2022: +75.6%

2 Quarterly comparison (change in %)

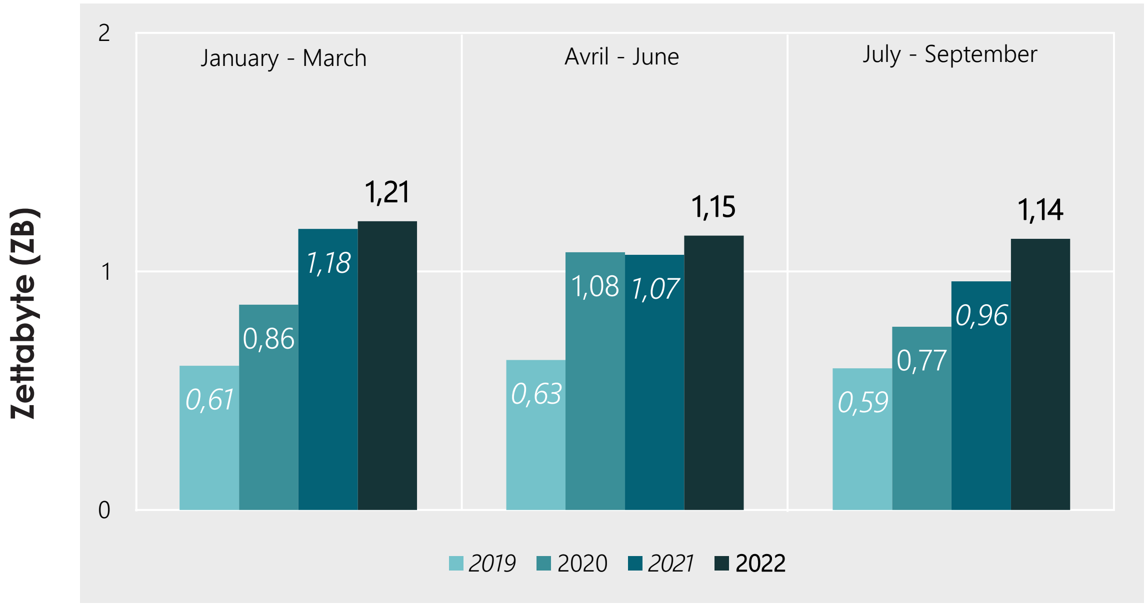
	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+39.3	+31.8	+1.5	+86.3
2 Q (Avr. - Jun.)	+51.8	+5.8	+4.9	+68.5
3 Q (Jul. - Sep.)	+30.4	+15.0	+15.0	+72.5

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

DOWNLOAD (cumulative quarterly data)



UPLOAD (cumulative quarterly data)



Download

1 **Cumulative data since the beginning of the year (1H)**

	(2019)		(2020)		(2021)		(2022)
Zettabyte	16.31	**(+44.7%)**	23,60	**(+21.8%)**	28.73	**(+7.9%)**	30.99

2019 → 2022: **+90.0%**

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

Upload

1 **Cumulative data since the beginning of the year (1H)**

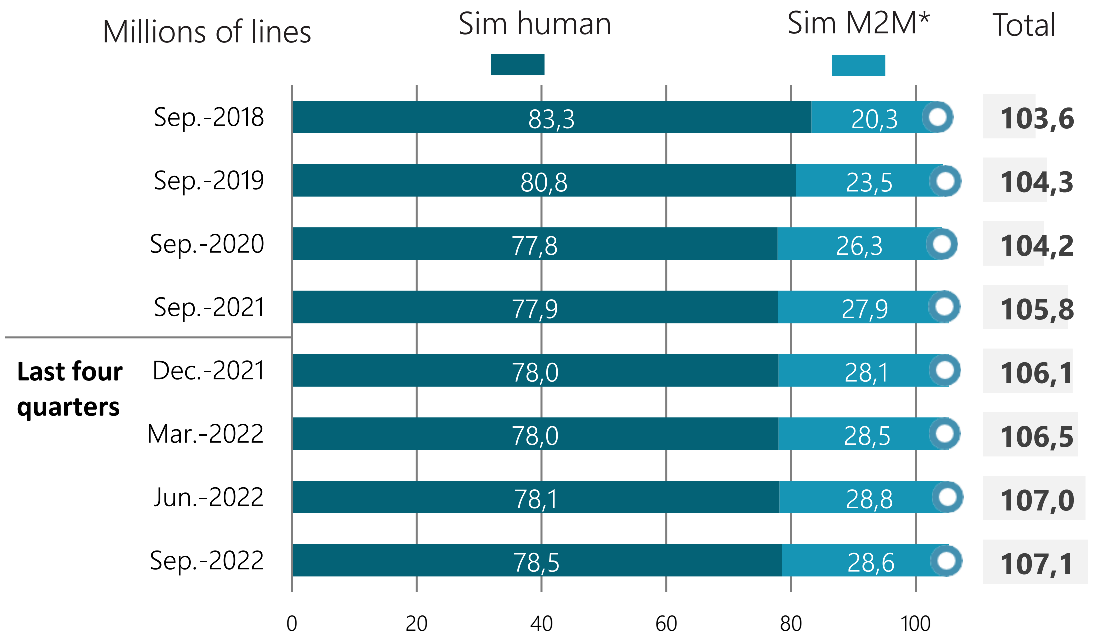
	(2019)		(2020)		(2021)		(2022)
Zettabyte	1.83	**(+48.2%)**	2.71	**(+18.2%)**	3.20	**(+9.2%)**	3.50

2019 → 2022: **+91.2%**

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

1.6 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

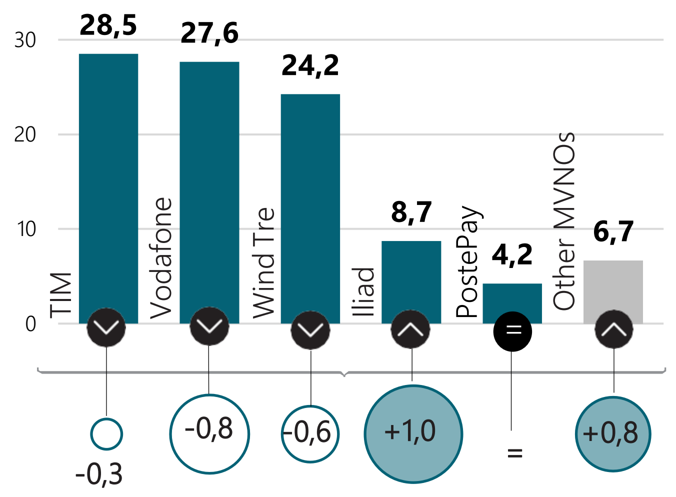
	Quarterly change (Jun. 2022 – Sep. 2022) (no of sim in thousand)		Quarterly change (Δ %)	Annual change (Sep. 2021 – Sep. 2022) (no of sim in thousand)		Annual change (Δ %)
Total sim cards:	+161	↑	+0.2	+1,365	↑	+1.3
Sim human:	+354	↑	+0.5	+588	↑	+0.8
Sim M2M:	-193	↓	-0.7	+776	↑	+2.8

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

MARKET SHARES (%)

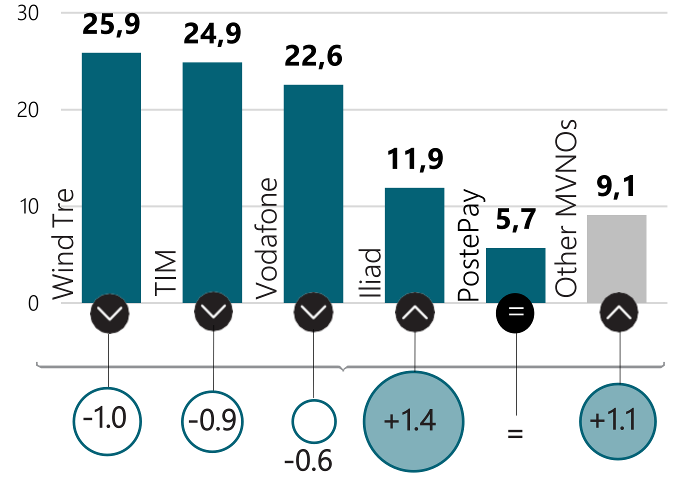
SEPTEMBER 2022

Sim: total



Differences vs. Sep. 2021 (percentage points)

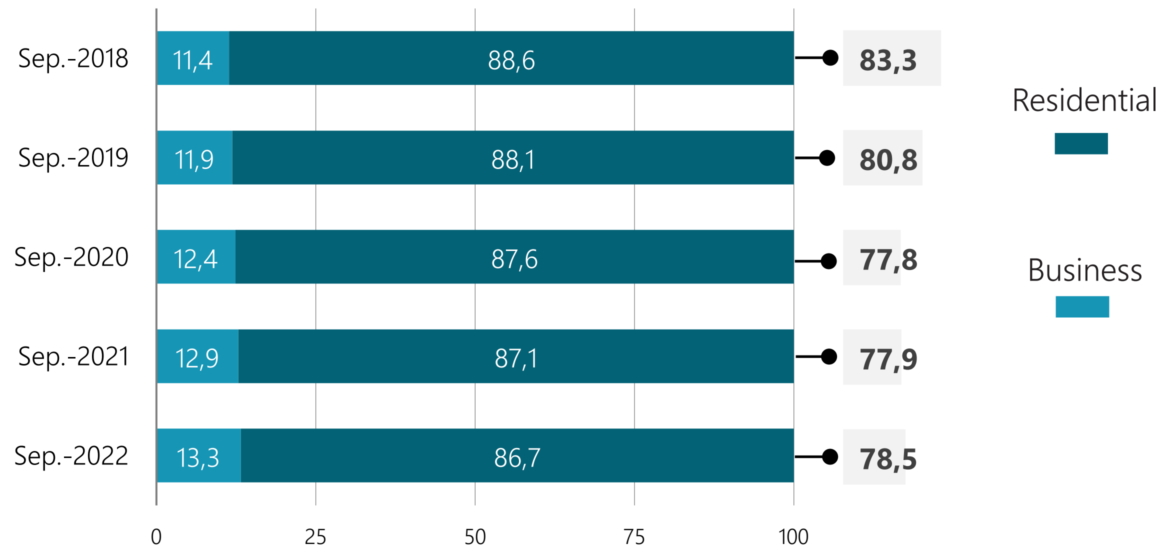
Sim: human*



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

Differences vs. Sep. 2021 (percentage points)

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

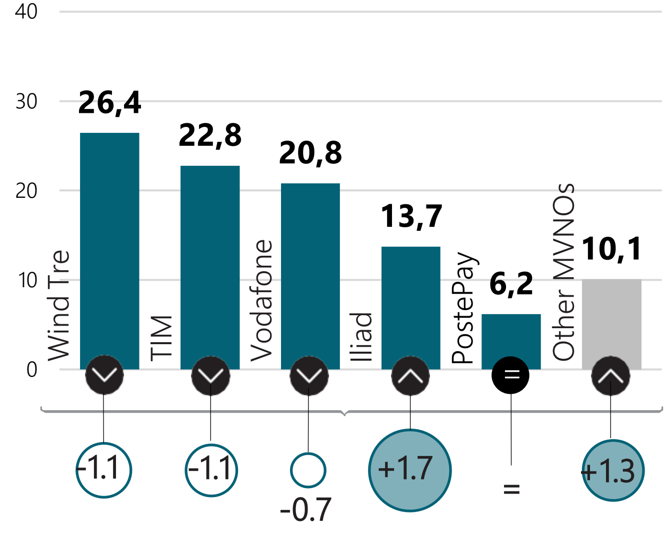


	Annual change (Sep. 2022 – Sep. 2022) (no of sim in thousand)		Annual change (Δ %)	4-Year change (Sep. 2018 – Sep. 2022) (no of sim in thousand)		4-Year change (Δ %)
Total human sim cards:	+588	↑	+0.8	-4,801	↓	-5.8
Residential sim card:	+195	↑	+0.3	-5,696	↓	-7.7
Business sim cards:	+393	↑	+3.9	+894	↑	+9.4

MARKET SHARES (%)

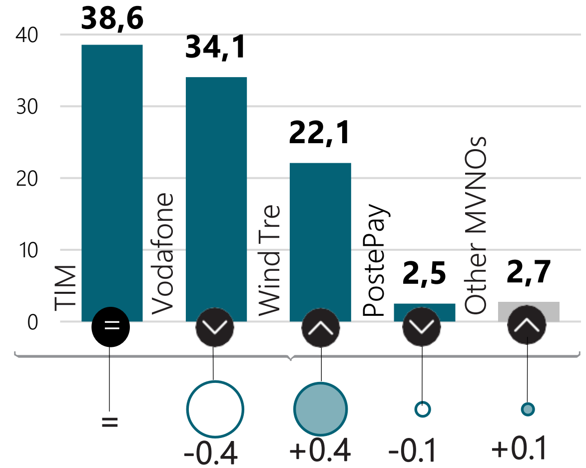
SEPTEMBER 2022

Residential



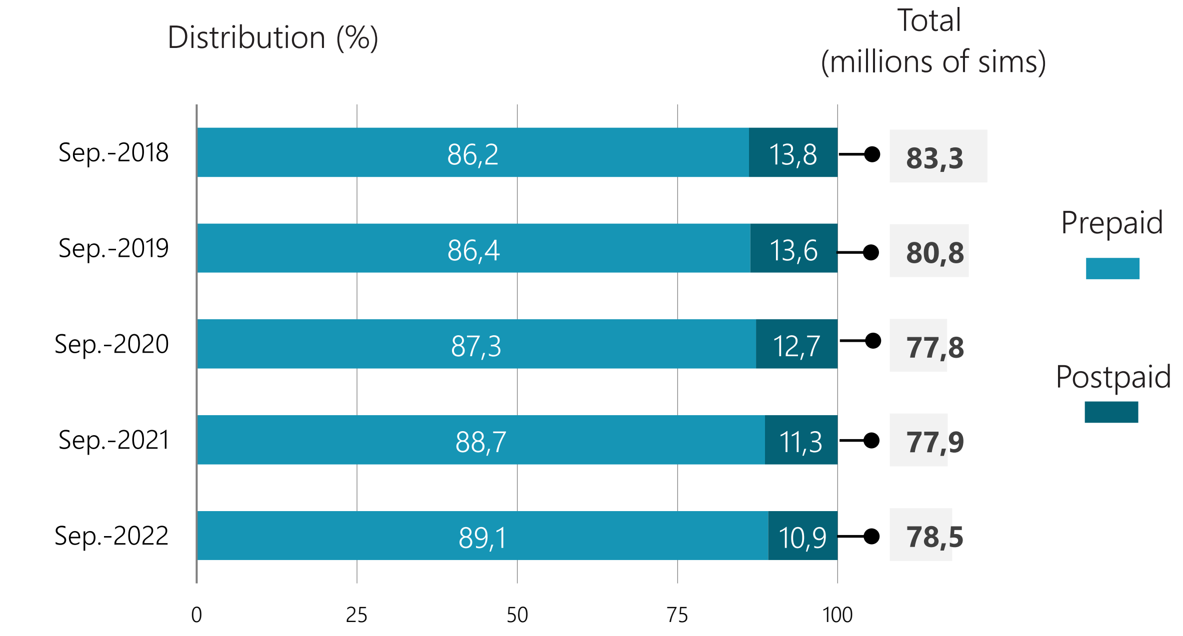
Differences vs. Sep. 2021 (percentage points)

Business



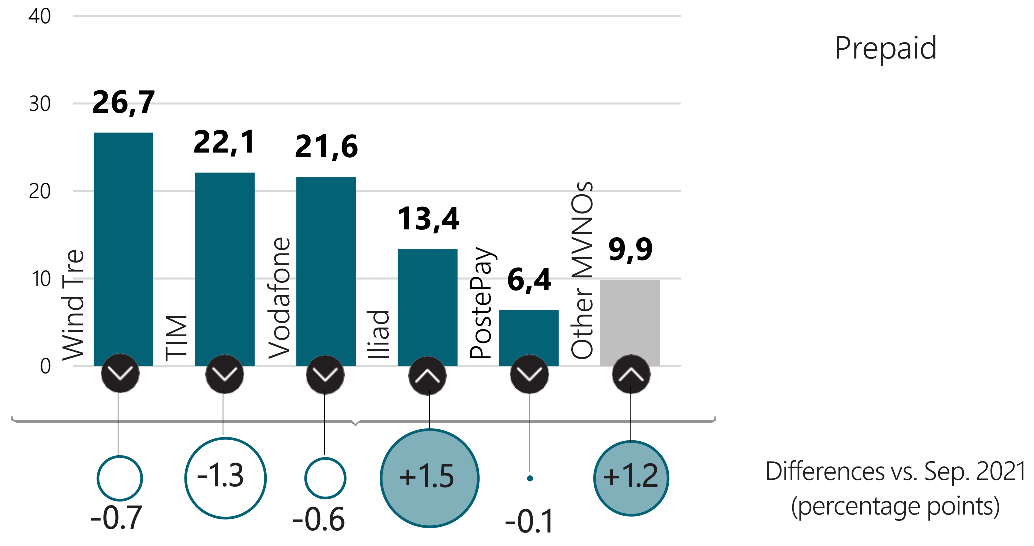
Differences vs. Sep. 2021 (percentage points)

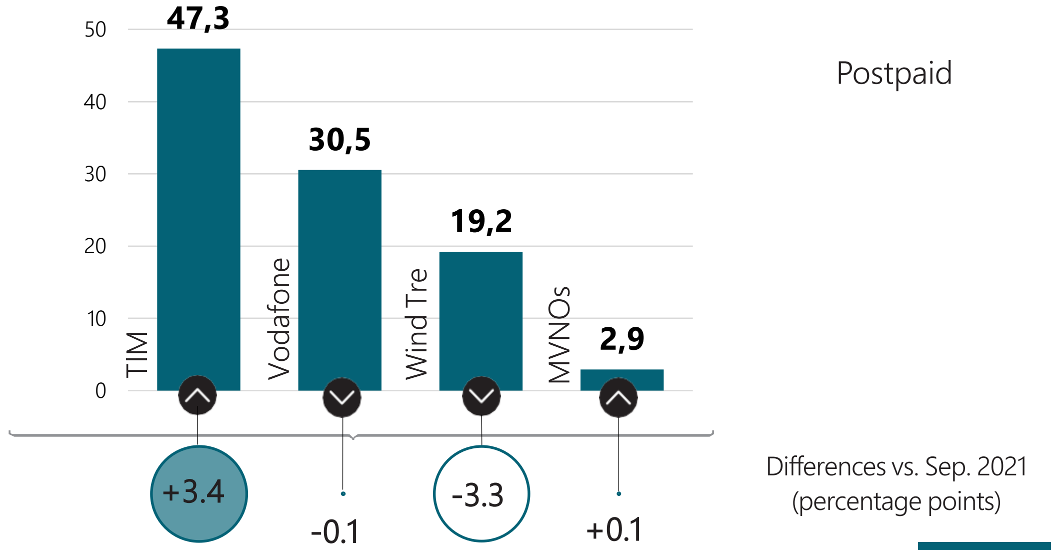
1.8 MOBILE NETWORK: SUBSCRIBERS BY TYPE OF CONTRACT



	Annual change (Sep. 2022 – Sep. 2022)		4-Year change (Sep. 2018 – Sep. 2022)	
	(no of sim in thousand)	(Δ %)	(no of sim in thousand)	(Δ %)
Total human sim cards:	+588 ↑	+0.8	-4,801 ↓	-5.8
Prepaid sim cards:	+894 ↑	+1.3	-1,821 ↓	-2.5
Postpaid sim cards:	-305 ↓	-3.5	-2,981 ↓	-25.0

MARKET SHARES (%)
SEPTEMBER 2022





1.9 MOBILE NETWORK: AVERAGE DAILY DATA TRAFFIC (download + upload) (1/2)

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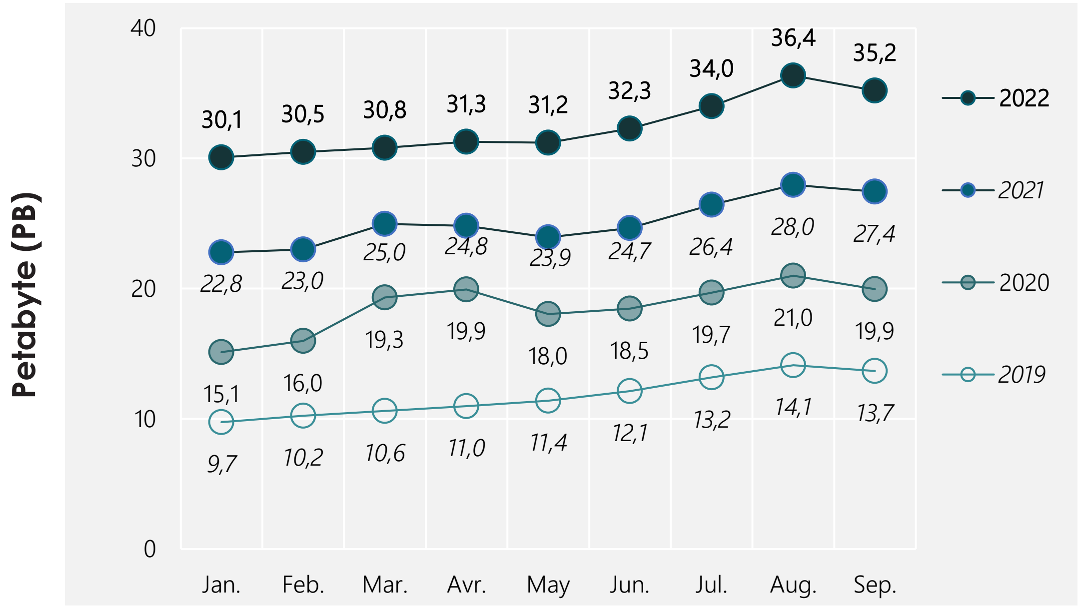
TOTAL TRAFFIC



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

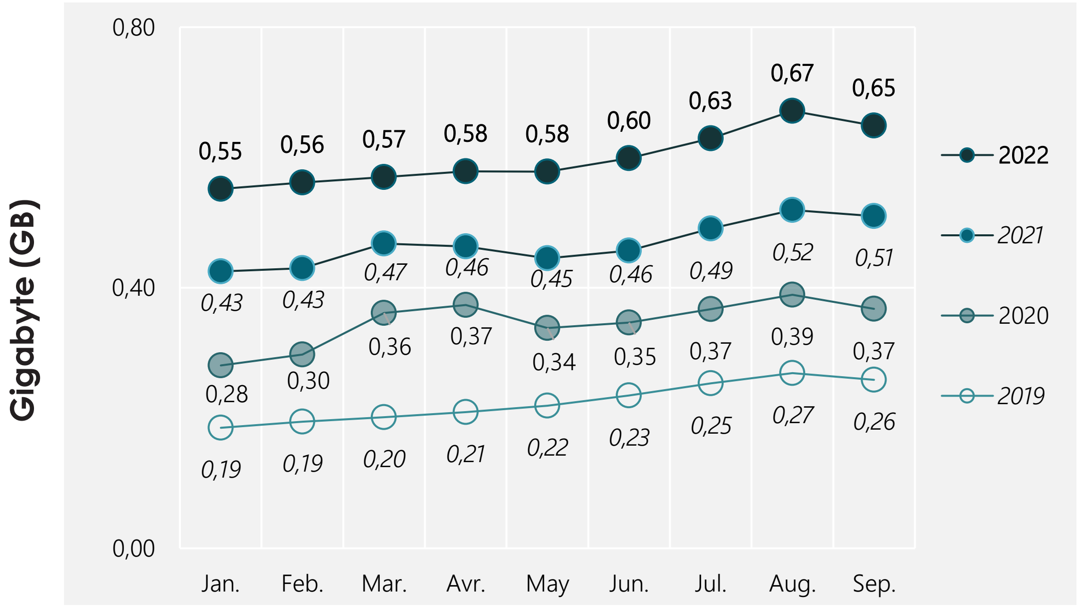
Petabyte (2019) 11.8 → (+57.9%) → (2020) 18.6 → (+35.0%) → (2021) 25.1 → (+29.0%) → (2022) 32.4

(2019 → 2022) +175.0%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+65.0	+40.3	+29.0	+198.8
2 Q (Avr. - Jun.)	+63.6	+30.1	+29.1	+174.9
3 Q (Jul. - Sep.)	+48.0	+35.0	+29.0	+157.6

PER SIM (SIM CARDS WITH VOICE & DATA SERVICES)



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

Giga byte (2019) 0.23 → (+54.1%) → (2020) 0.35 → (+34.8%) → (2021) 0.47 → (+28.0%) → (2022) 0.60

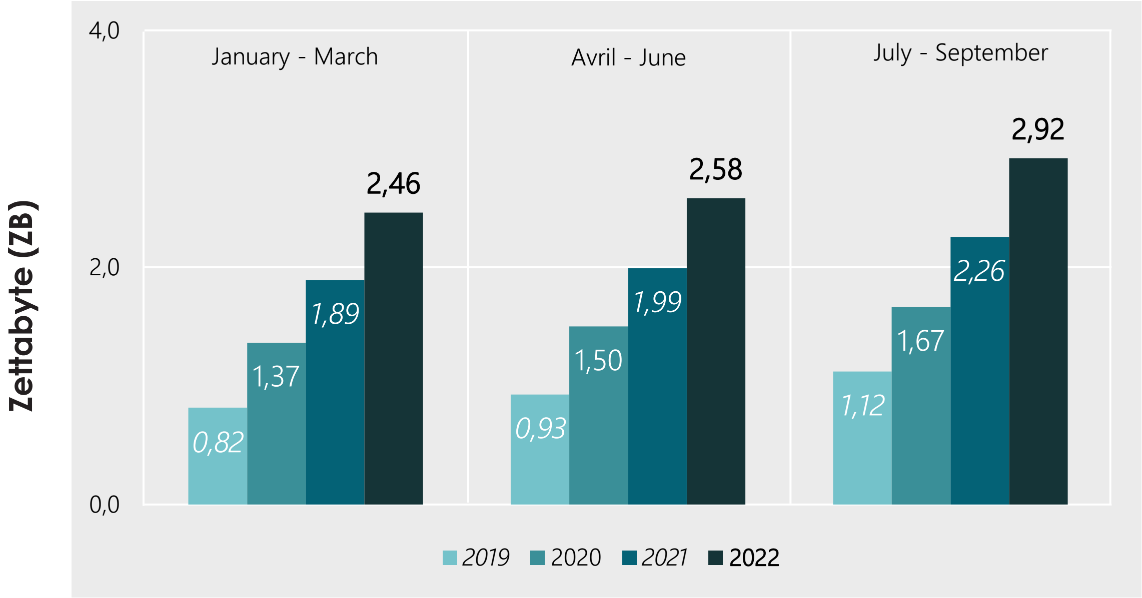
(2019 → 2022) +166.0%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+61.8	+40.8	+27.1	+189.7
2 Q (Avr. - Jun.)	+59.6	+29.0	+28.6	+164.9
3 Q (Jul. - Sep.)	+43.9	+35.2	+28.3	+149.6

1.10 MOBILE NETWORK: DATA TRAFFIC IN DOWNLOAD AND UPLOAD (2/2)

DOWNLOAD



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

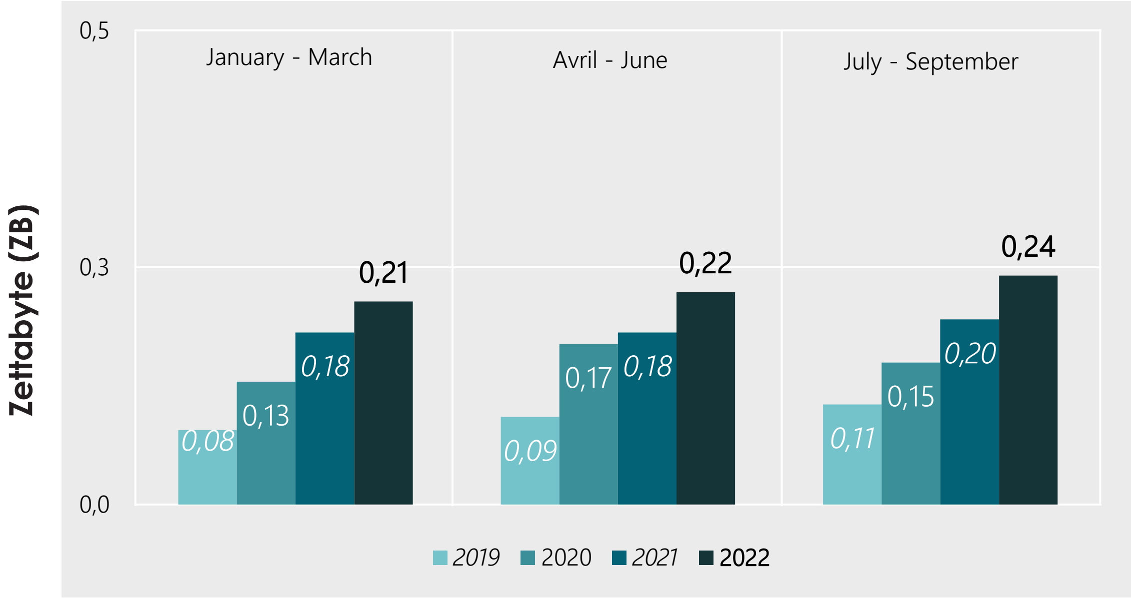
	(2019)		(2020)		(2021)		(2022)
Zettabyte	2.87	**(+58.1%)**	4.53	**(+35.5%)**	6.14	**(+29.7%)**	7.97

2019 → 2022: **+177.8%**

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

	YoY 2019/2020	YoY 2020/2021	YoY 2021/2022	Whole period 2019/2022
1 Q (Jan. - Mar.)	+67.1	+38.6	+30.1	+201.4
2 Q (Avr. - Jun.)	+61.7	+32.7	+29.6	+178.1
3 Q (Jul. - Sep.)	+48.6	+35.4	+29.4	+160.4

UPLOAD



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

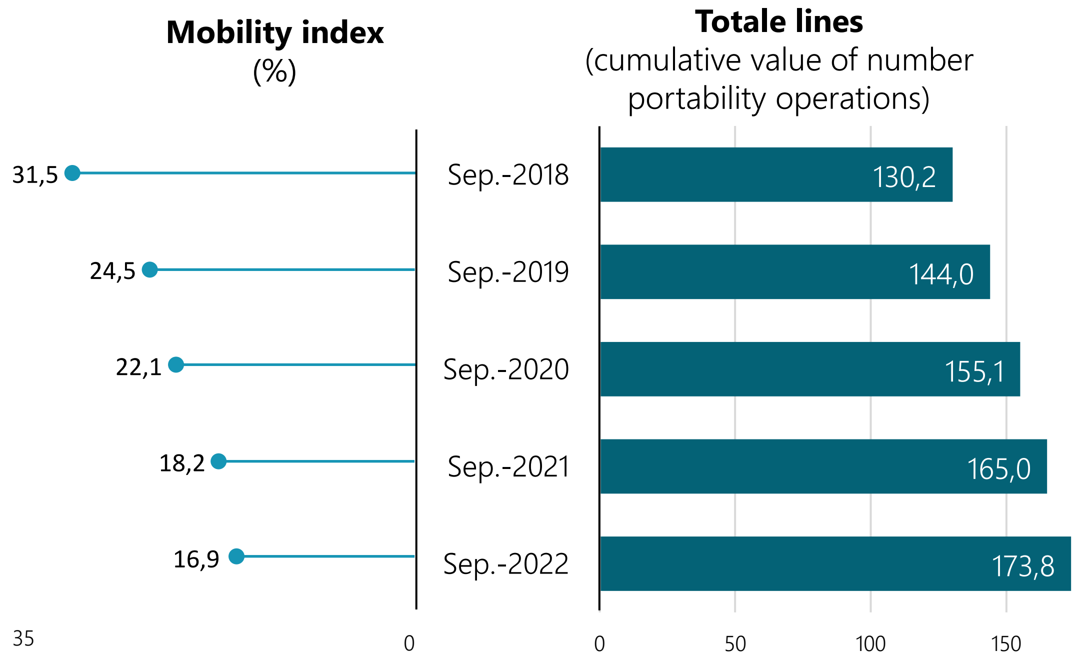
	(2019)		(2020)		(2021)		(2022)
Zettabyte	0.28	**(+62.1%)**	0.45	**(+24.5%)**	0.56	**(+21.7%)**	0.68

2019 → 2022: **+145.6%**

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

	YoY 2019/2020	YoY 2020/2021	YoY 2021/2022	Whole period 2019/2022
1 Q (Jan. - Mar.)	+64.6	+40.1	+17.9	+171.9
2 Q (Avr. - Jun.)	+83.3	+7.3	+23.4	+142.6
3 Q (Jul. - Sep.)	+41.7	+30.3	+23.7	+127.3

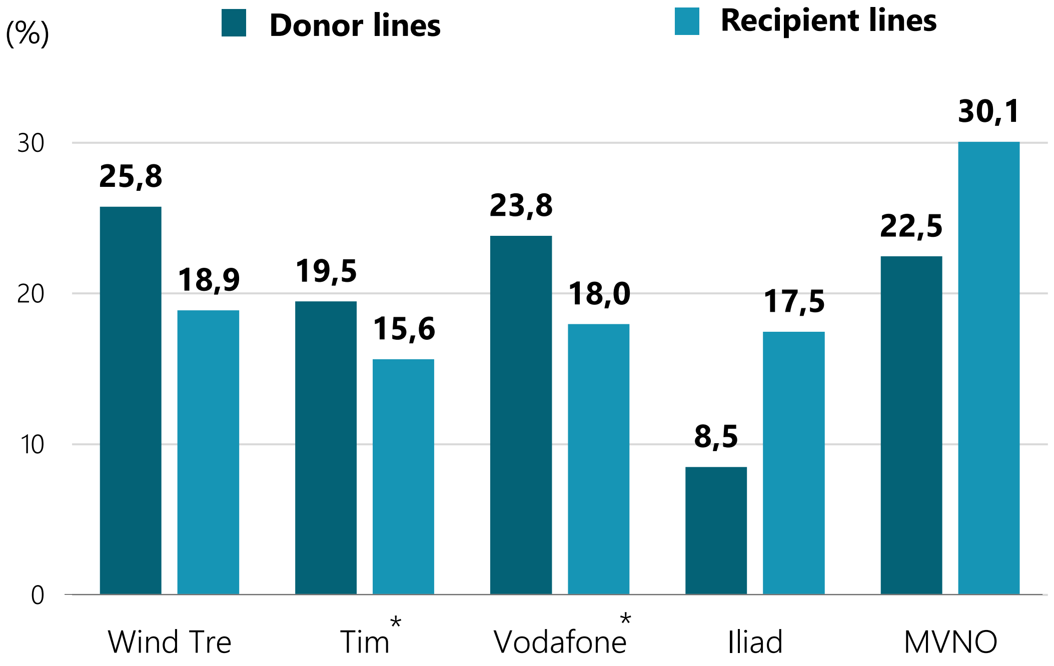
In one year (Sep. 2021 – Sep. 2022), there have been
8.8 million of Mobile Number Portability (MNP) operations



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

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

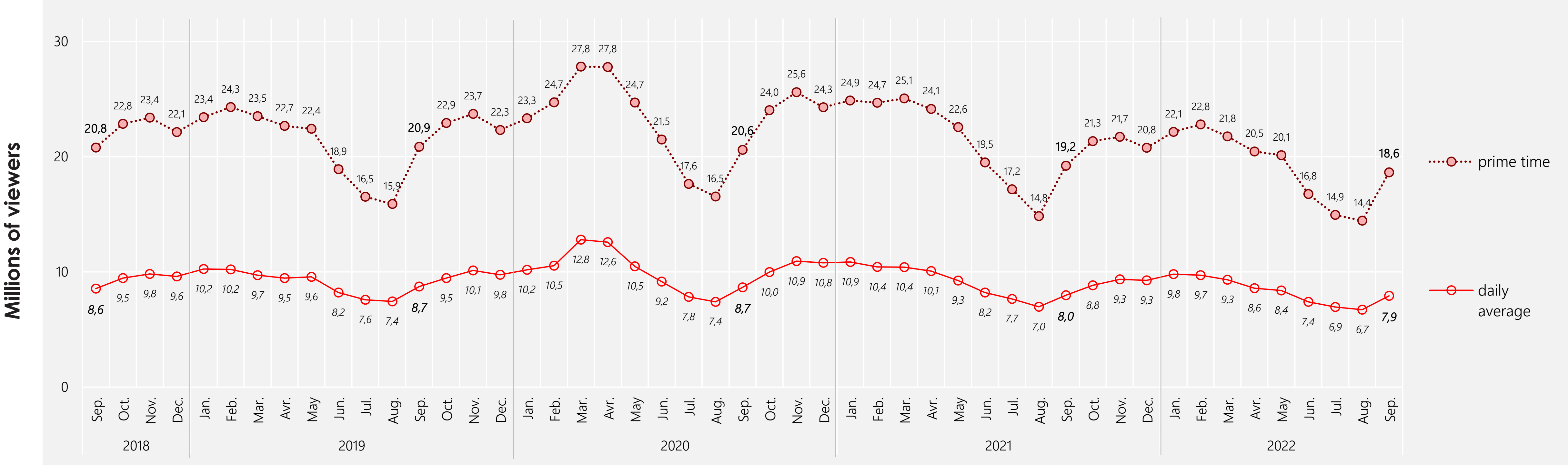
SEPTEMBER 2022



(*) 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

SEPTEMBER 2018 – SEPTEMBER 2022



Change in the number of viewers (average value Jan. – Sep. in millions)	(2018)		(2019)		(2020)		(2021)		(2022)
Prime time audience (Time slot: 20:30 – 22.30)	21.73	-3.6%	20.94	+8.5%	22.73	-6.1%	21.34	-10.4%	19.12
2018 → 2022									-12.0%
Average daily audience (Time slot: whole day)	9.26	-2.6%	9.01	+10.5%	9.96	-8.7%	9.09	-8.6%	8.31
2018 → 2022									-10.3%

Source: Agcom elaboration on data from Auditel

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PRIME TIME AUDIENCE

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

Broadcasters	2018	2019	2020	2021	2022	Change in % '18-'22	Change in % '21-'22
RAI	8.72	8.30	8.92	8.85	7.53	-13.7	-14.9
Mediaset	7.59	7.20	8.24	7.46	7.19	-5.3	-3.6
Comcast / Sky	1.68	1.78	1.68	1.56	1.36	-18.7	-12.8
Warner Bros. Discovery	1.25	1.38	1.53	1.43	1.29	+3.2	-9.9
Cairo Comm. / La 7	1.22	1.21	1.28	1.14	1.04	-14.7	-8.5
Others	1.28	1.07	1.09	0.90	0.71	-44.3	-21.0

Average share Jan. – Sep. (in %)

Broadcasters	2018	2019	2020	2021	2022	Change in p.p. '18-'22	Change in p.p. '21-'22
RAI	40.1	39.6	39.2	41.5	39.4	-0.7	-2,1
Mediaset	34.9	34.4	36.2	35.0	37.6	+2.7	+2.6
Comcast / Sky	7.7	8.5	7.4	7.3	7.1	-0.6	-0,2
Warner Bros. Discovery	5.7	6.6	6.7	6.7	6.7	+1.0	0.0
Cairo Comm. / La 7	5.6	5.8	5.6	5.3	5.4	-0.2	+0.1
Others	5.9	5.1	4.8	4.2	3.7	-2.2	-0.5

AVERAGE DAILY AUDIENCE

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

Broadcasters	2018	2019	2020	2021	2022	Change in % '18-'22	Change in % '21-'22
RAI	3.63	3.48	3.83	3.66	3.16	-12.9	-13.6
Mediaset	3.15	3.04	3.47	3.15	3.07	-2.3	-2.5
Warner Bros. Discovery	0.67	0.72	0.86	0.75	0.67	+0.9	-10.8
Comcast / Sky	0.69	0.71	0.72	0.63	0.61	-10.8	-2.0
Cairo Comm. / La 7	0.42	0.41	0.42	0.37	0.37	-12.8	-2.2
Others	0.71	0.65	0.66	0.53	0.42	-40.3	-19.7

Average share Jan. – Sep. (in %)

Broadcasters	2018	2019	2020	2021	2022	Change in p.p. '18-'22	Change in p.p. '21-'22
RAI	39.2	38.7	38.5	40.2	38.0	-1.1	-2.2
Mediaset	34.0	33.7	34.8	34.7	37.0	+3.0	+2.3
Warner Bros. Discovery	7.2	7.9	8.6	8.3	8.1	+0.9	-0.2
Comcast / Sky	7.4	7.9	7.2	6.9	7.4	0.0	+0.5
Cairo Comm. / La 7	4.5	4.6	4.3	4.1	4.4	-0.1	+0.3
Others	7.7	7.2	6.6	5.8	5.1	-2.6	-0.7

Source: Agcom elaboration on data from Auditel

2.3 TELEVISION (DVB-T E SAT): AVERAGE MONTHLY AUDIENCE OF THE MAIN NATIONAL TV CHANNELS

PRIME TIME AUDIENCE

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

Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in % '18-'22	Change in % '21-'22
RAI	Rai 1	4.49	4.18	4.68	4.59	4.07	-9.4	-11.4
	Rai 2	1.46	1.40	1.47	1.30	1.06	-27.5	-18.6
	Rai 3	1.30	1.29	1.23	1.49	1.24	-4.9	-16.8
Mediaset	Canale 5	3.66	3.34	3.63	3.25	3.05	-16.5	-5.9
	Italia 1	1.37	1.17	1.32	1.17	1.14	-16.2	-2.5
	Rete 4	0.94	1.03	1.19	1.09	0.95	+1.8	-12.6
Cairo Comm.	La7	1.13	1.12	1.19	1.06	1.14	+1.7	+8.3
Warner Bros. Discovery	TV8	0.54	0.56	0.52	0.48	0.43	-19.9	-9.2
Comcast / Sky	Nove	0.33	0.36	0.38	0.41	0.35	+6.7	-14.5

Average share Jan. – Sep. (in %)

Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in p.p. '18-'22	Change in p.p. '21-'22
RAI	Rai 1	20.7	20.0	20.6	21.5	21.3	+0,6	-0,2
	Rai 2	6.7	6.7	6.5	6.1	5.5	-1,2	-0,6
	Rai 3	6.0	6.1	5.4	7.0	6.5	+0,5	-0,5
Mediaset	Canale 5	16.8	16.0	16.0	15.2	16.0	-0,9	+0,8
	Italia 1	6.3	5.6	5.8	5.5	6.0	-0,3	+0,5
	Rete 4	4.3	4.9	5.2	5.1	5.0	+0,7	-0,1
Cairo Comm.	La7	5.2	5.4	5.2	5.0	6.0	+0,8	+1,0
Warner Bros. Discovery	TV8	2.5	2.7	2.3	2.2	2.3	-0,2	+0,0
Comcast / Sky	Nove	1.5	1.7	1.7	1.9	1.8	+0,3	-0,1

AVERAGE DAILY AUDIENCE

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

Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in % '18-'22	Change in % '21-'22
RAI	Rai 1	1.68	1.59	1.79	1.71	1.57	-7.1	-8.3
	Rai 2	0.58	0.55	0.54	0.54	0.43	-25.7	-20.0
	Rai 3	0.65	0.65	0.73	0.71	0.59	-9.2	-17.1
Mediaset	Canale 5	1.53	1.49	1.60	1.51	1.44	-6.0	-4.2
	Italia 1	0.52	0.46	0.52	0.44	0.40	-22.7	-9.7
	Rete 4	0.38	0.38	0.42	0.38	0.35	-8.0	-7.5
Cairo Comm.	La7	0.37	0.36	0.37	0.32	0.32	-11.5	-0.2
Warner Bros. Discovery	TV8	0.20	0.22	0.23	0.19	0.18	-6.6	-2.0
Comcast / Sky	Nove	0.14	0.15	0.18	0.18	0.16	+8.4	-11.3

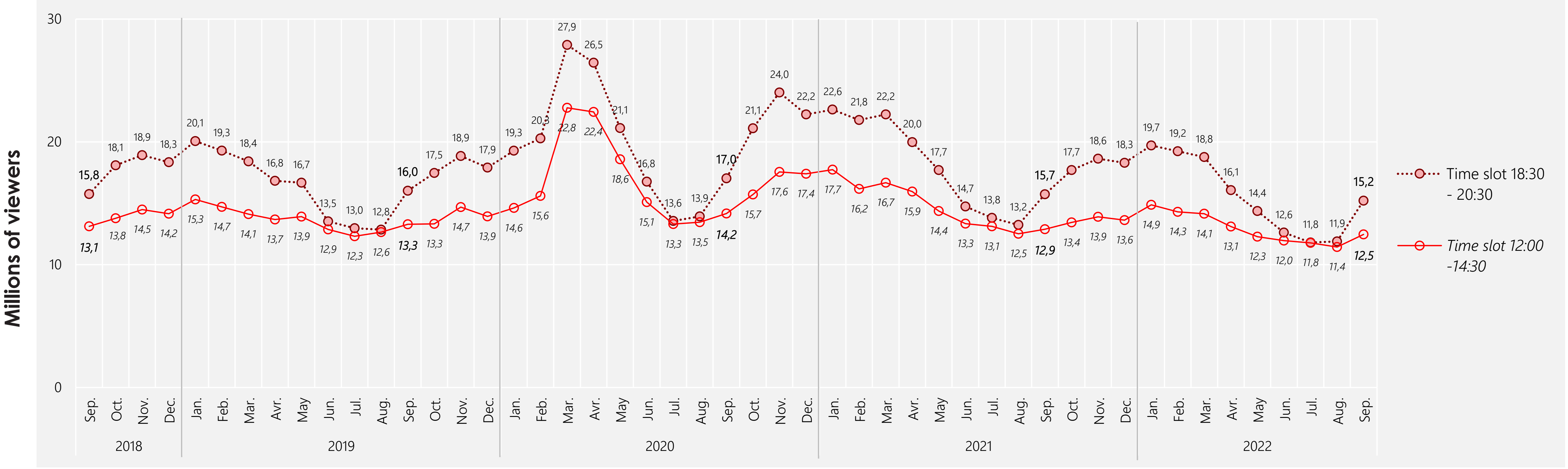
Average share Jan. – Sep. (in %)

Broadcasters	Canali TV	2018	2019	2020	2021	2022	Change in p.p. '18-'22	Change in p.p. '21-'22
RAI	Rai 1	18.2	17.6	18.0	18.8	18.8	+0.6	+0.1
	Rai 2	6.3	6.1	5.5	5.9	5.2	-1.1	-0.7
	Rai 3	7.0	7.2	7.3	7.8	7.1	+0.1	-0.7
Mediaset	Canale 5	16.6	16.6	16.1	16.6	17.4	+0.8	+0.8
	Italia 1	5.6	5.1	5.2	4.9	4.8	-0.8	-0.1
	Rete 4	4.1	4.2	4.2	4.2	4.3	+0.1	0.0
Cairo Comm.	La7	4.0	4.0	3.7	3.6	3.9	-0.1	+0.3
Warner Bros. Discovery	TV8	2.1	2.4	2.4	2.1	2.2	+0.1	+0.1
Comcast / Sky	Nove	1.6	1.7	1.8	1.9	1.9	+0.3	-0.1

Source: Agcom elaboration on data from Auditel

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

SEPTEMBER 2018 – SEPTEMBER 2022



Change in the number of viewers (average value Jan. – Sep. in millions)	(2018)		(2019)		(2020)		(2021)		(2022)	(2018) → (2022)
Time slot: 18:30 – 20.30	17.94	-2.0%	16.29	+20.2%	19.59	-8.2%	17.98	-13.7%	15,52	-6.7%
Time slot: 12:00 – 14:30	14.15	-3.5%	13.65	+22.1%	16.67	-11.5%	14.75	-12.4%	12.93	-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.

Source: Agcom elaboration on data from Auditel

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. – Sep.) 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)	3.95	3.28	4.00	3.72	3.40	-327	-556	-8.8	-14.1
	Tg 2 (13:00 edition)	2.01	2.01	2.33	2.01	1.74	-267	-276	-13.3	-13.7
	Tg 3 (12:00 edition)	1.10	0.90	1.11	0.96	0.78	-177	-316	-18.5	-28.9
	Tg 3 Regionale (14:00 edition)	2.31	2.34	3.03	2.76	2.24	-519	-71	-18.8	-3.1
Mediaset	Tg 5 (13:00 edition)	3.03	2.76	3.34	2.94	2.77	-173	-258	-5.9	-8.5
	Tg 4 (12:00 edition)	0.44	0.38	0.41	0.33	0.29	-48	-150	-14.3	-34.4
	Studio Aperto (12:25 edition)	1.17	1.36	1.76	1.45	1.17	-280	-2	-19.3	-0.2
La 7	Tg La 7 (13:30 edition)	0.81	0.62	0.68	0.58	0.54	-32	-267	-5.5	-33.0

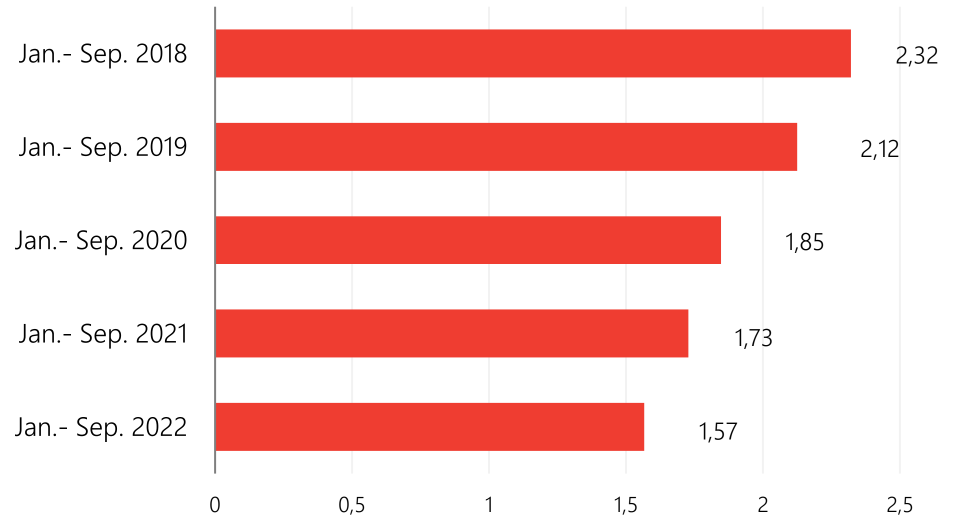
TIME SLOT: 18:30 – 20:30

		Average audience since the beginning of the year (Jan. – Sep.) 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)	4.87	4.60	5.47	5.14	4.61	-532	-258	-10.3	-5.3
	Tg 2 (20:30 edition)	1.76	1.59	1.83	1.63	1.25	-381	-508	-23.3	-28.9
	Tg 3 (19:00 edition)	1.68	1.68	2.16	2.05	1.70	-353	14	-17.2	0.8
	Tg 3 Regionale (19:30 edition)	2.20	2.21	2.99	2.75	2.19	-557	-3	-20.3	-0.1
Mediaset	Tg 5 (20:00 edition)	3.65	3.78	4.42	3.97	3.64	-337	-11	-8.5	-0.3
	Tg 4 (19:00 edition)	0.63	0.55	0.65	0.61	0.59	-26	-43	-4.2	-6.9
	Studio Aperto (18:30 edition)	0.71	0.70	0.88	0.71	0.54	-178	-176	-25.0	-24.7
La 7	Tg La 7 (20:00 edition)	1.13	1.17	1.18	1.11	1.00	-101	-123	-9.2	-10.9

Source: Agcom elaboration on data from Auditel

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

CUMULATIVE SALES
(copies sold in millions)

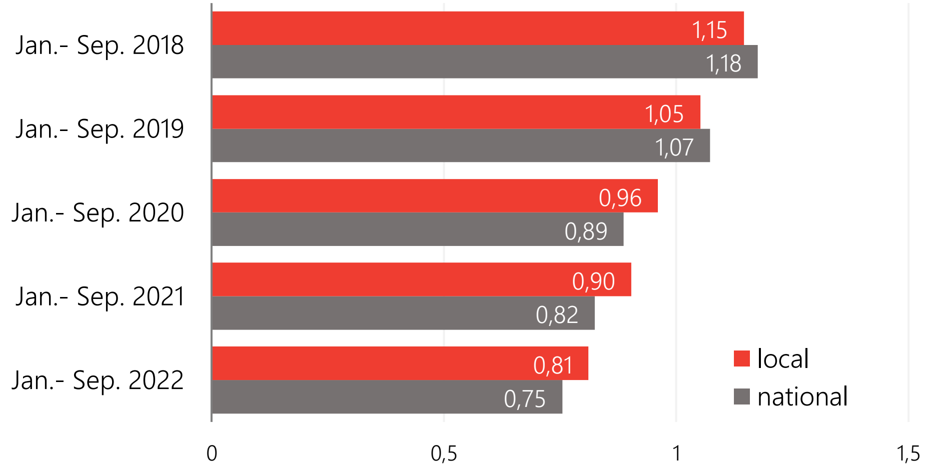


Change in %

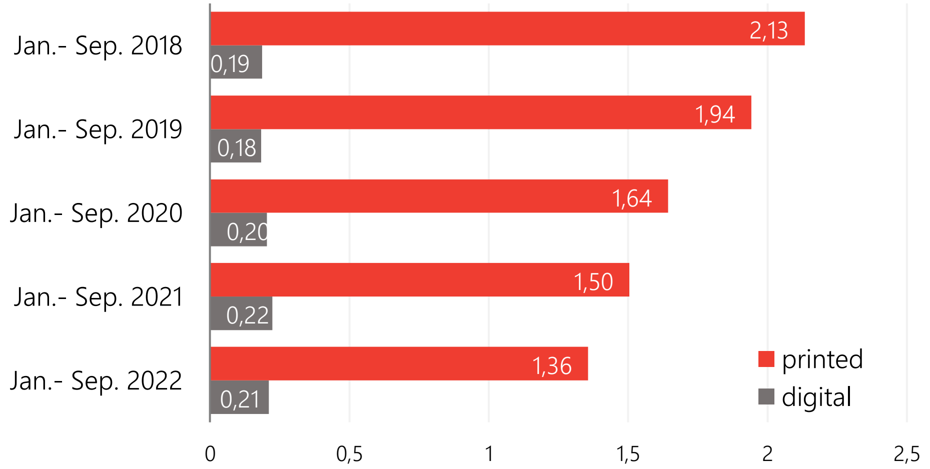
	Jan. – Sep. (2021 – 2022)	Jan. – Sep. (2018 – 2022)
Total copies:	**-9.4** ↓	**-32.5** ↓
Paper copies:	**-9.9** ↓	**-36.5** ↓
Digital copies:	**-5.7** ↓	**+12.5** ↑
National newspapers copies:	**-8.5** ↓	**-35.8** ↓
Local newspapers copies:	**-10.2** ↓	**-29.2** ↓

CUMULATIVE SALES BY TYPOLOGY
(copies sold in millions)

NATIONAL vs. LOCAL NEWSPAPERS COPIES



PAPER vs. DIGITAL COPIES



Source: Agcom elaboration on data from ADS

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

AGCOM

PAPER COPIES BY NEWSPAPER MACRO-CATEGORY
(copies sold in thousands)

	Jan. – Sep.	2018	2019	2020	2021	2022
National newspapers	General press - Top 5	671	617	533	480	428
	Other general press	152	138	134	122	111
	Business	94	81	69	59	52
	Sport	280	251	159	155	153
Local newspapers	Top 10	425	397	357	335	300
	Others	512	457	391	353	311

Change in %	Jan. – Sep.	('21 – '22)	('18 – '22)
National newspapers	General press Top 5	-10.9 ↓	-36.2 ↓
	Other general press	-9.2 ↓	-26.8 ↓
	Business	-12.0 ↓	-44.7 ↓
	Sports	-1.4 ↓	-45.3 ↓
Local newspapers	Top 10	-10.3 ↓	-29.4 ↓
	Others	-11.8 ↓	-39.2 ↓

DIGITAL COPIES BY NEWSPAPERS MACRO-CATEGORY
(copies sold in thousands)

	Jan. – Sep.	2018	2019	2020	2021	2022
National newspapers	General press - Top 5	74	75	82	95	88
	Other general press	15	17	25	31	30
	Business	47	40	37	29	28
	Sport	9	8	7	7	6
Local newspapers	Top 10	16	17	21	26	24
	Others	26	25	30	36	34

Change in %	Jan. – Sep.	('21 – '22)	('18 – '22)
Testate nazionali	General press Top 5	-7.2 ↓	+18.0 ↑
	Other general press	-3.7 ↓	+105.1 ↑
	Business	-2.1 ↓	-39.9 ↓
	Sports	-11.0 ↓	-33.3 ↓
Testate locali	Top 10	-6.2 ↓	+48.9 ↑
	Others	-5.4 ↓	+32.5 ↑

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

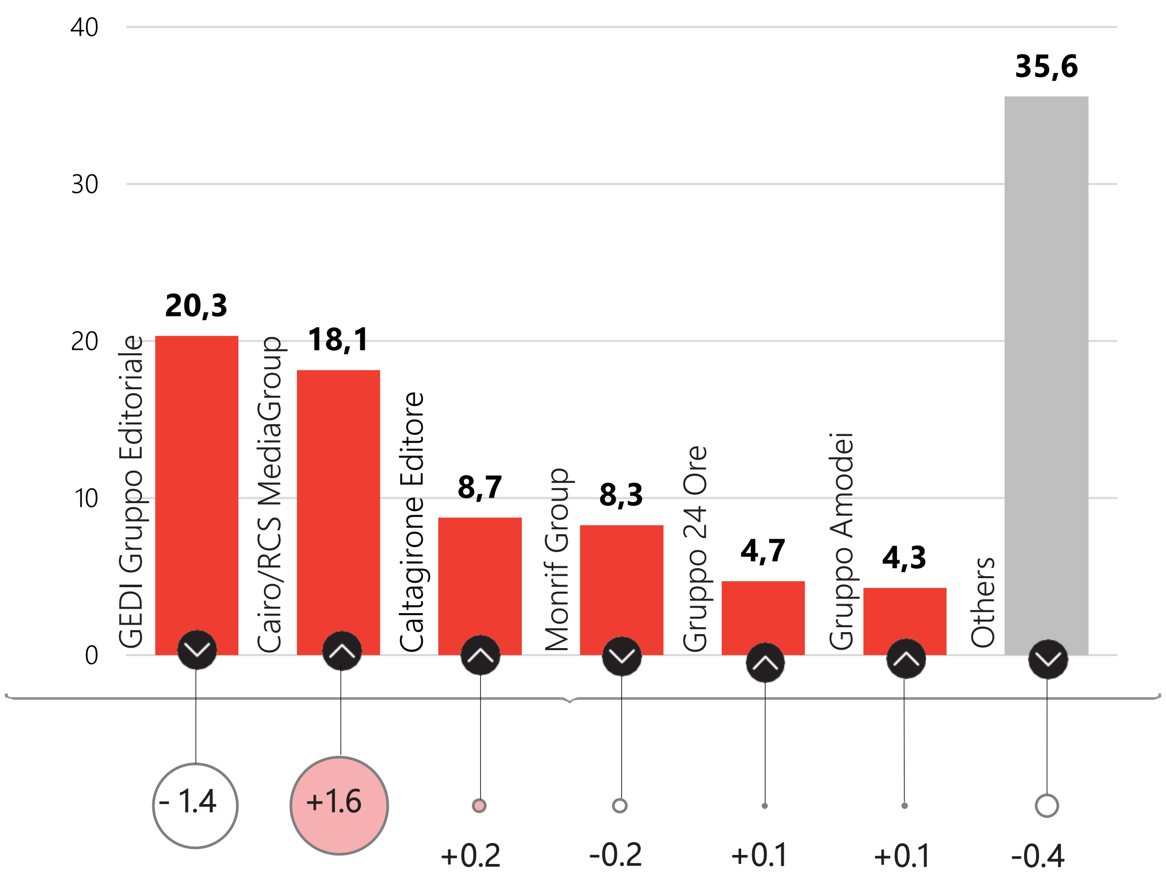
Source: Agcom elaboration on data from ADS

2.8 NEWSPAPERS: VOLUME SALES AND SHARES BY MAIN PUBLISHING GROUPS

AGCOM

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

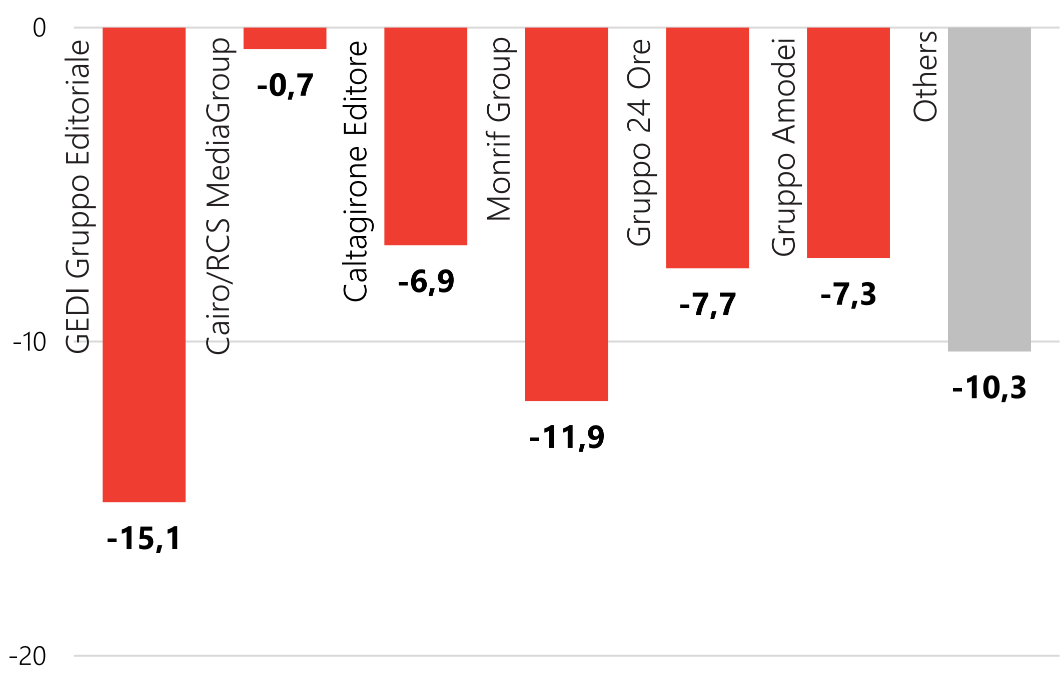
JAN. –SEP. 2022



Difference vs. Jan. – Sep. 2021
(punti percentuali)

CHANGE IN TOTAL COPIES SOLD (%)

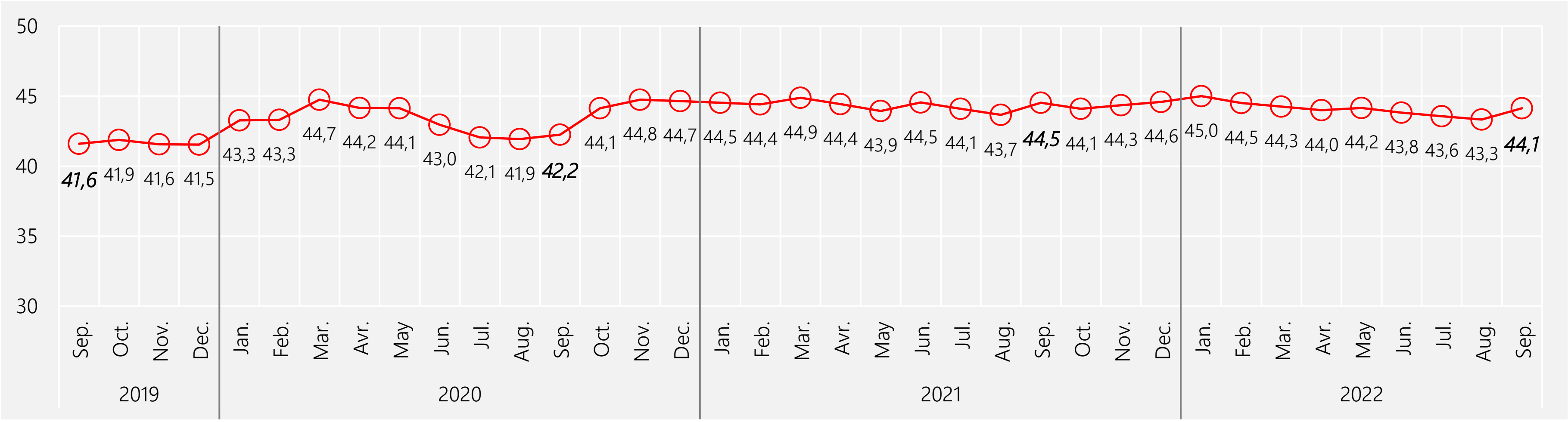
Difference vs. Jan. – Sep. 2021



Source: Agcom elaboration on data from ADS

2.9 PLATFORMS: MAIN WEBSITES/APP UNIQUE USERS

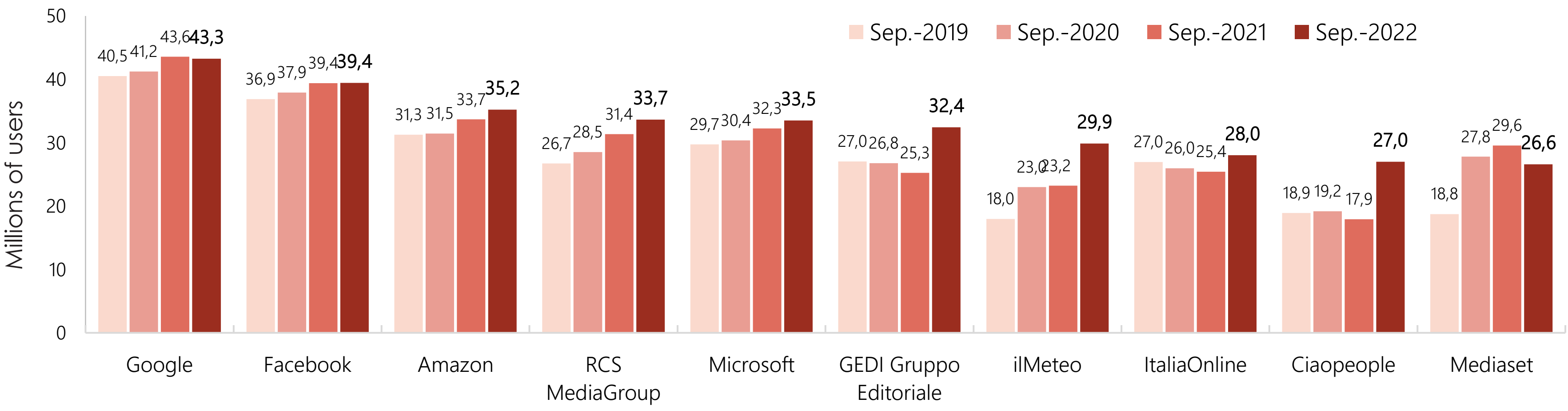
UNIQUE USERS IN MILLIONS (September 2019 – September 2022)



43.1 million unique users logged on to the internet in September 2021 (**-387** thousand compared to September 2021)

Approximately **65** total hours spent, on average, by each user surfing the Internet in September 2022

UNIQUE USERS OF THE MAIN OPERATORS (Parent*)



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

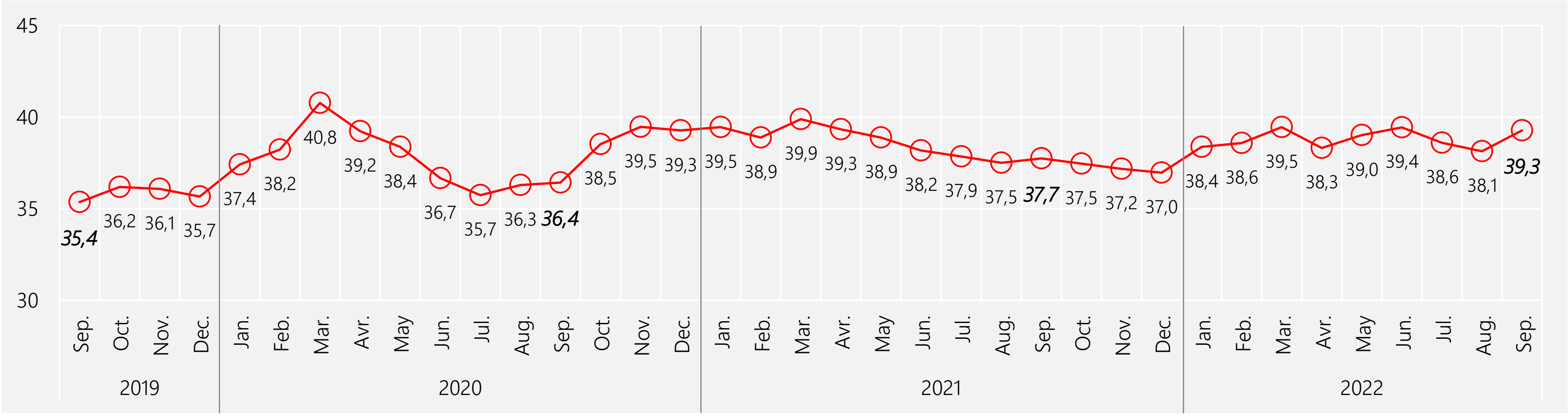
* **Parent** is defined as a group of domains and URLs that are owned by a specific company, its subsidiaries or business units. In addition, a Parent may also be represented by an organisation, government agency, private group, corporation or other institution, which has controlling interests in each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

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

Source: Agcom elaboration on data from Audiweb

2.10 PLATFORMS: GENERAL PRESS WEBSITES/APP UNIQUE USERS

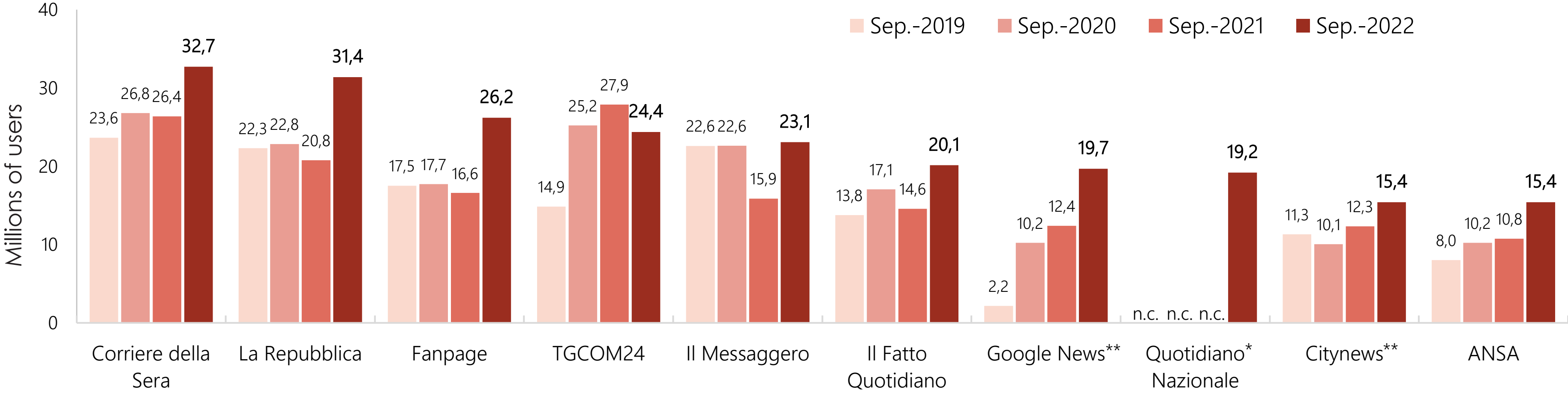
UNIQUE USERS IN MILLIONS (September 2019 – September 2022)



39.3 million unique users logged on to the generalist news sites/APPs in September 2022 (**+1.5** million users compared to September 2021)

About **1 hour and 15 minute** spent, on average, by each user browsing general news websites/APPs in September 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.

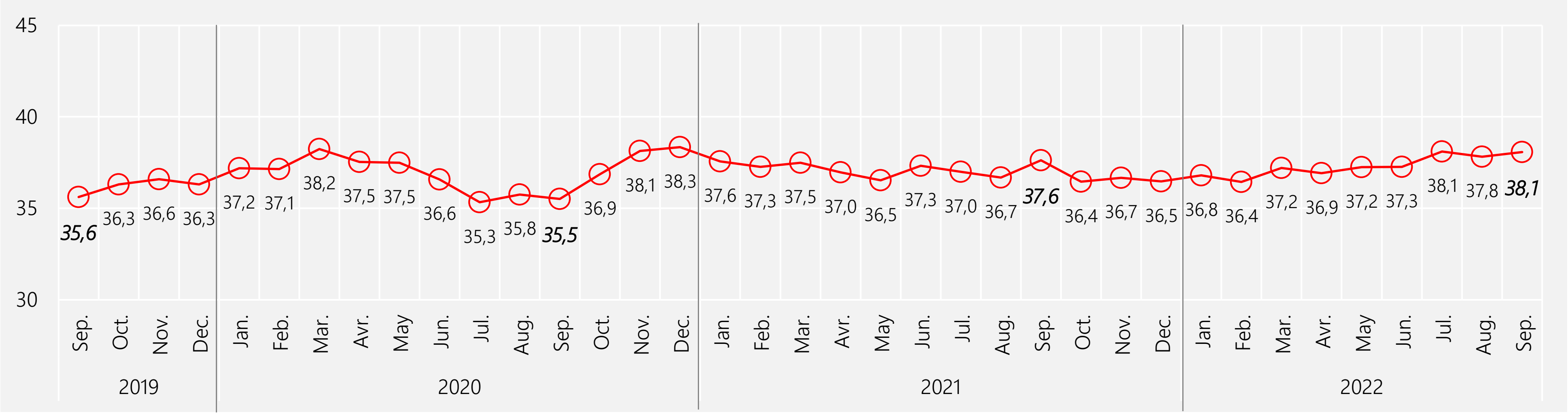
* *n.c.*: not comparable. Starting from April 2022, the Monrif group entered in the Audiweb survey system. This has led to a change in the classification perimeter and the detection method which - in addition to the *Audiweb Panel* - now also uses the census component, *Audiweb Census*. For this reason,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

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

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

2.11 PLATFORMS: E-COMMERCE WEBSITES/APP UNIQUE USERS

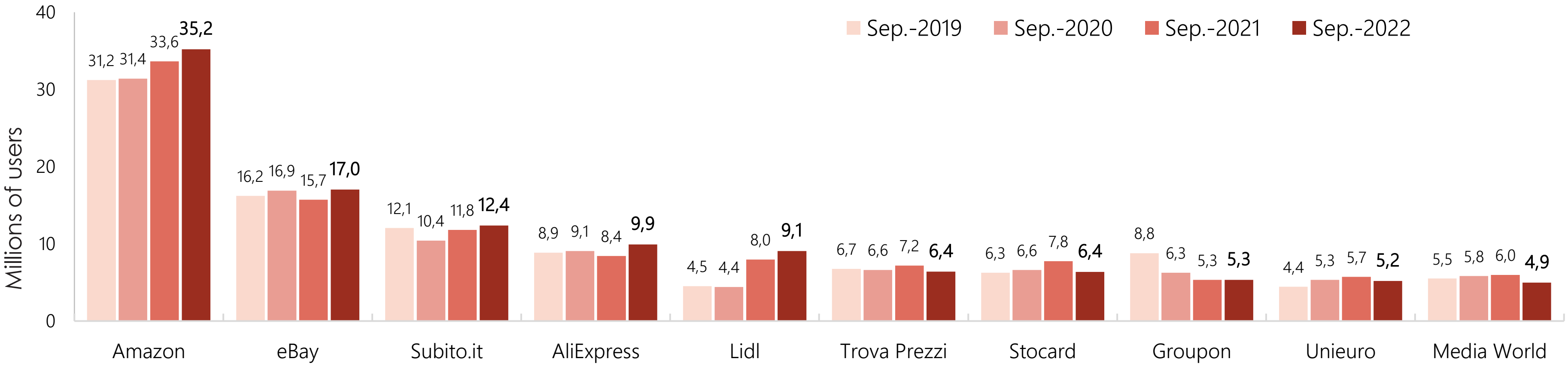
UNIQUE USERS IN MILLIONS (September 2019 – September 2022)



38.6 million unique users logged on to e-commerce sites/APPs in September 2022 (**+448** thousand users compared to September 2021)

2 hour and 27 minute spent, on average, by each user browsing e-commerce websites/APPs in September 2022

UNIQUE USERS OF THE MAIN WEBSITES*



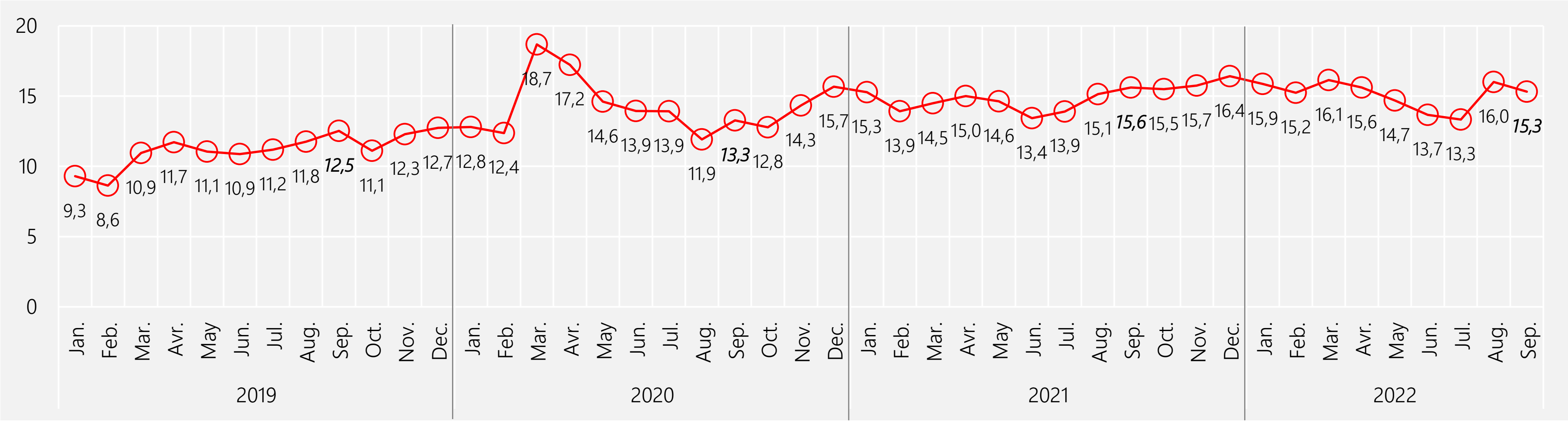
Unique users: number of different users/people who visited any content of a website, category, channel or application during the reporting period.

Source: Agcom elaboration on data from Audiweb
(Averages values referring to the category: «Multi-category Commerce»)

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

2.12 PLATFORMS: PAY VIDEO ON DEMAND PLATFORMS UNIQUE USERS

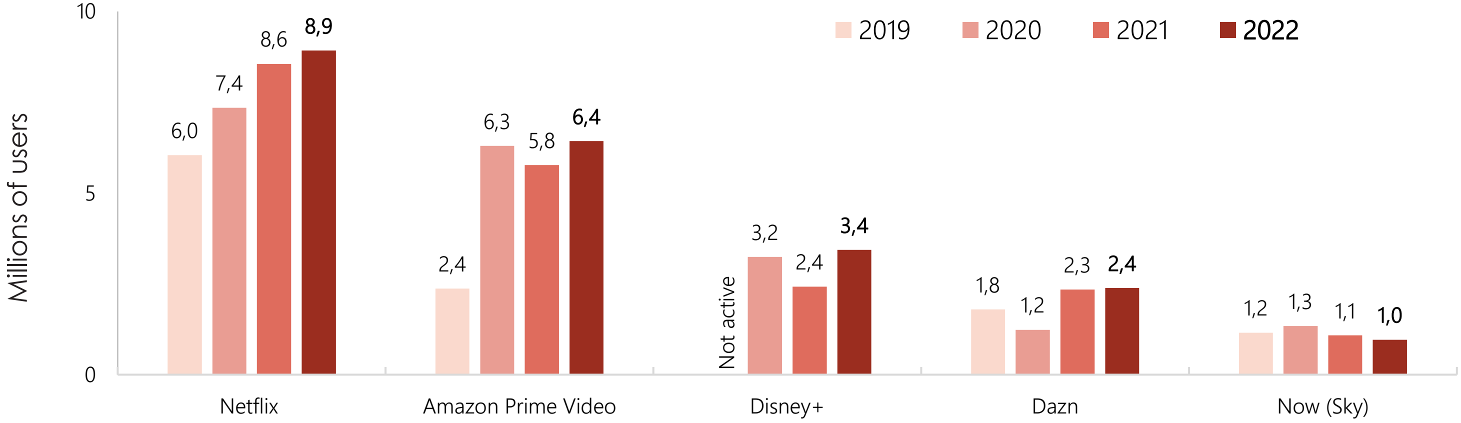
UNIQUE USERS IN MILLIONS (January 2019 – September 2022)



15.2 million unique users logged on to video-on-demand sites/APPs in September 2022 (**-287** thousand compared to September 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. – Sep.)



* Note: platforms with an average time spent by users more than 2 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)

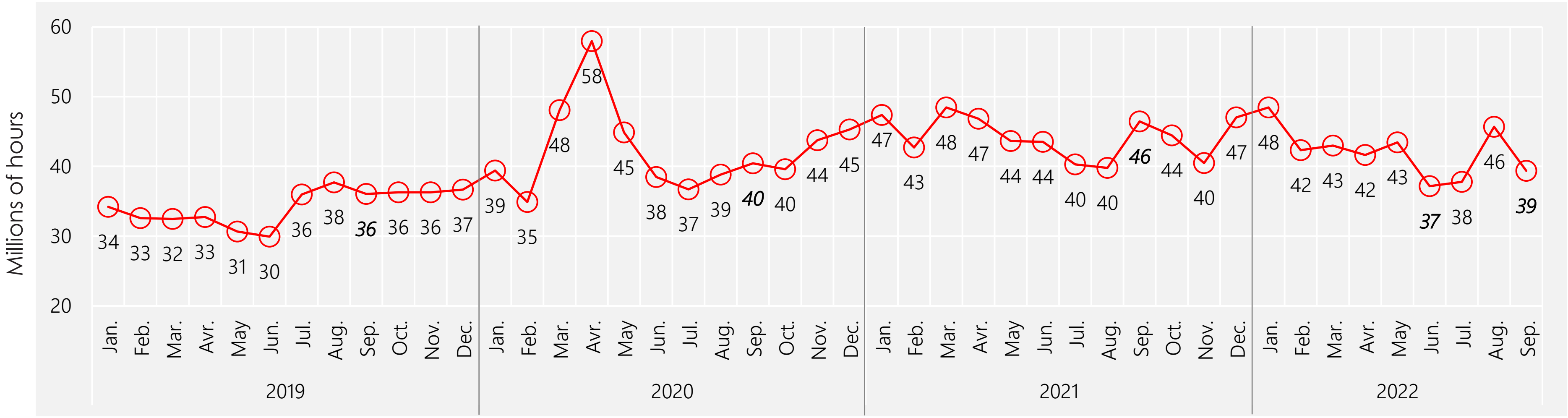
Mediaset Infinity data are not considered due to an editorial choice which does not allow to separate the part of the paid services from the free one.

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

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

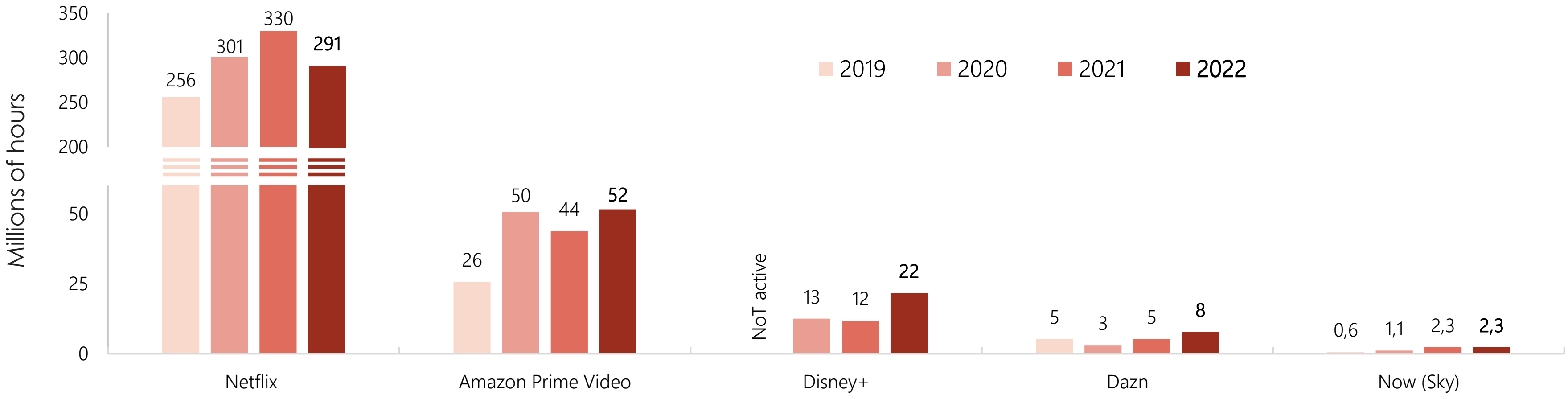
2.13 PLATFORMS: TIME SPENT ON PAY VIDEO ON DEMAND PLATFORMS

TOTAL HOURS SPENT (January 2019 – September 2022)



The average time spent per month by each visitor on pay video on demand platforms is **2 hour and 34 minute** in September 2022

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



Source: Agcom elaboration on data from ComScore

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

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

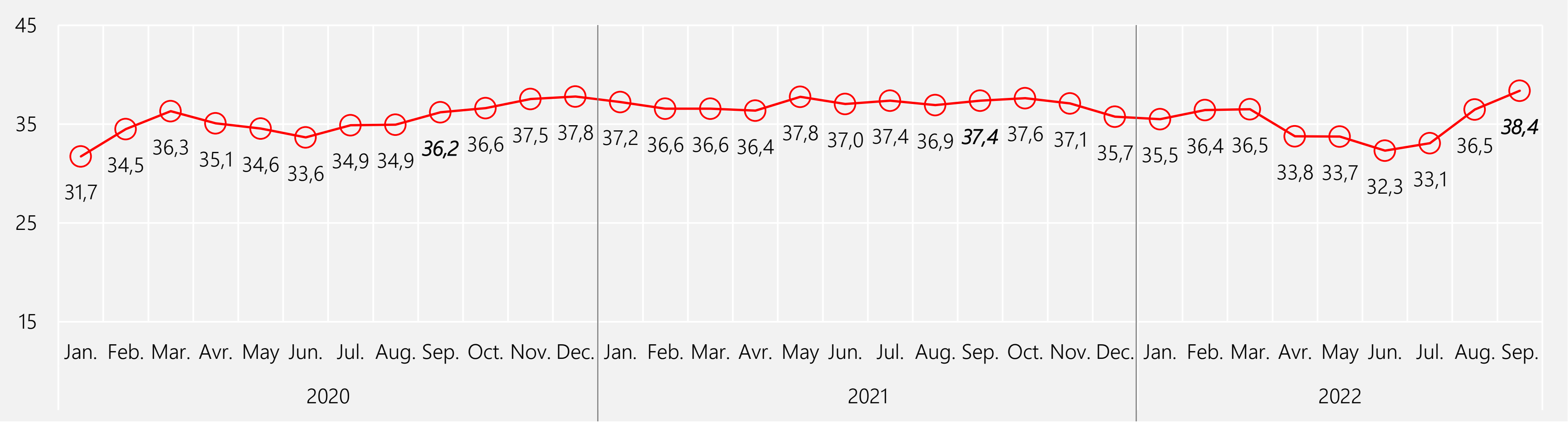
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV

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

Source: Agcom elaboration on data from Comscore

2.14 PLATFORMS: FREE VIDEO ON DEMAND PLATFORMS UNIQUE USERS

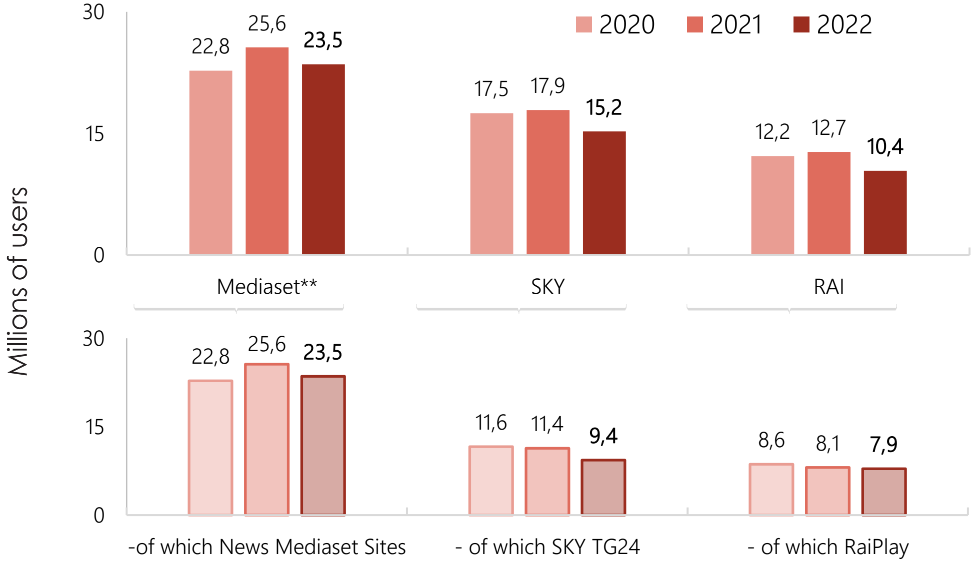
UNIQUE USERS IN MILLIONS (January 2020 – September 2022)



38.4 million unique users logged on to free video-on-demand sites/APPs in September 2022 (**+1** million compared to September 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)



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

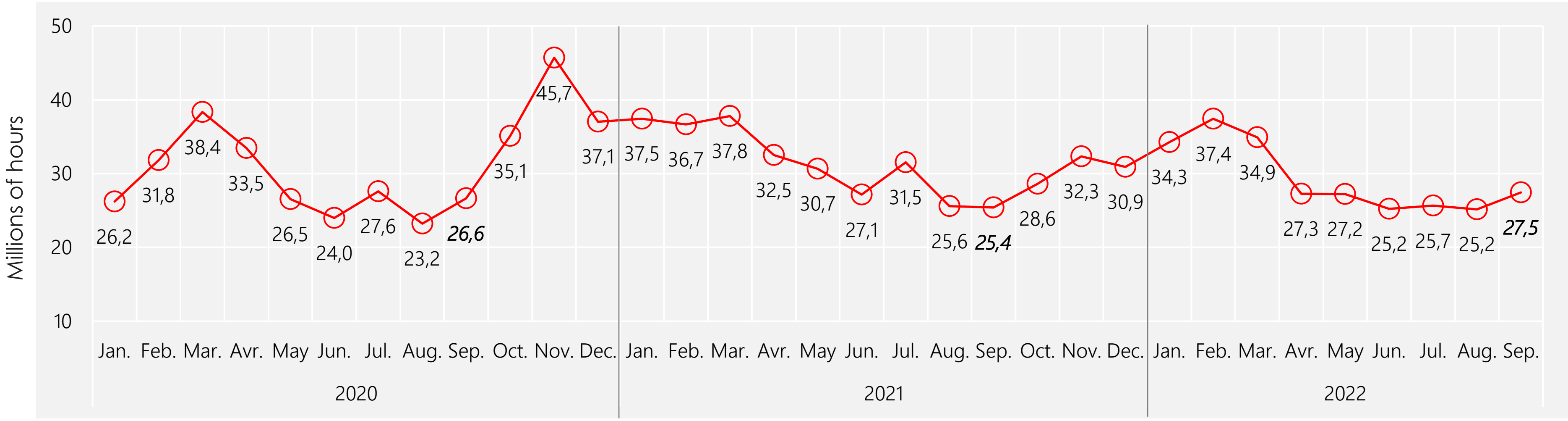
** Mediaset unique users are those relating to the component *News Mediaset Sites* due to an editorial choice which does not allow to separate the part of the paid services related to *Mediaset Infinity*. By considering the latter (that since the beginning of the year has an average of more than 10 mm of unique users) Mediaset monthly average results, in 2022, in 27 mm of unique users.

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

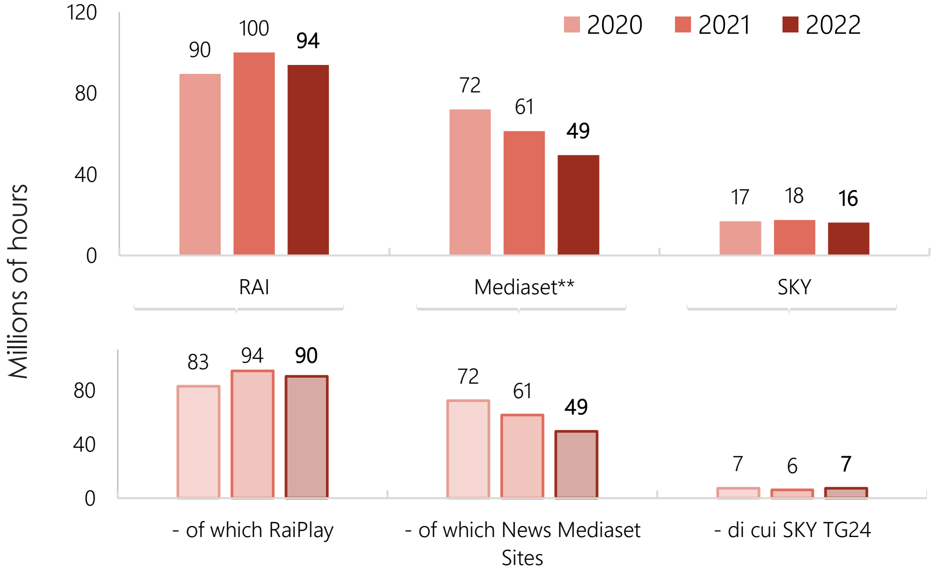
The data are related to the traffic from Desktop Computers and Mobile Devices; excluding that originating from Connected TV.

Source: Agcom elaboration on data from ComScore

TOTAL HOURS SPENT (in millions of hours) (January 2020 – June 2022)



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



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

** 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 46 mm of hours since the beginning of the year), Mediaset reach 107 mm total hours.

The average time spent per month by each visitor on free video on demand platforms is **43 minute** in September 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 TGCOM 24 Sites Jan.19 - Spr.22; Mediaset.it Sites since May 22), Rai (RaiPlay; Rai News, Rai Sport), Discovery (Discovery Inc), Sky (Cielotv.it, TV8 Sites, Sky.it Sprt HD, Sky.it TG24 HD, Sky.it Uno HD gen.19-apr.19; Sky Free ToAir; Sky sport; Sky TG24, Sky Entertainment mag.19 - giu.22), Cairo/La 7 (La7), Paramount/Viacom (Nickelodeon Kids and Family; MTV Italy), Rakuten (VIKI.COM), Warner (TBS Entertainment Digital), De Agostini (DEABYDAY.TV; DEAKIDS.IT), VVVVID.IT; A+E Networks Digital; SPORTITALIA.COM; TV2000.IT; POPCORNTV.IT; WITTYTV.IT.

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

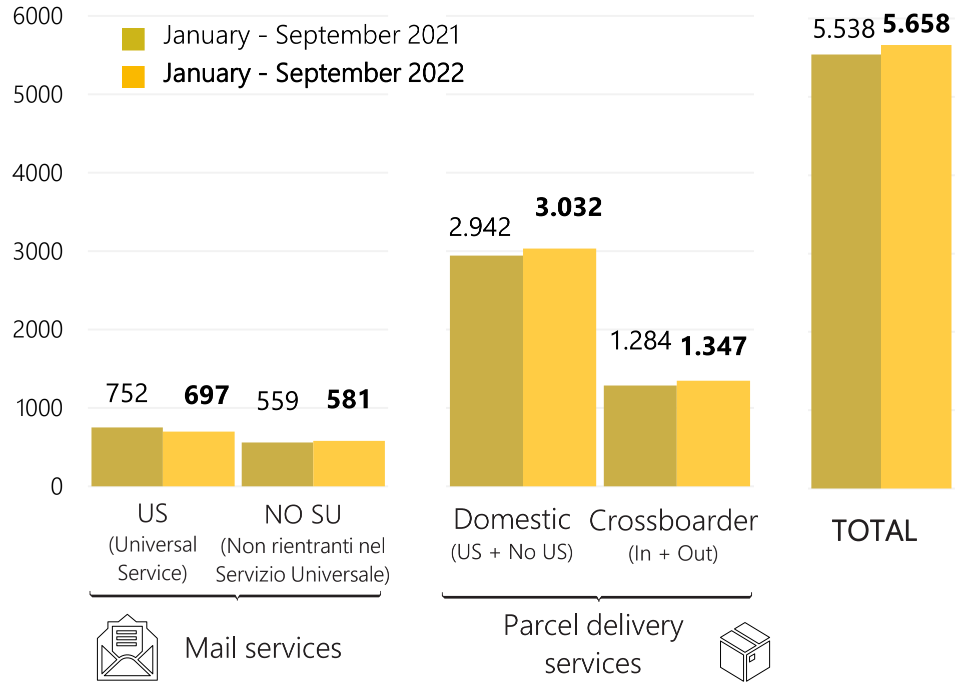
Source: Agcom elaboration on data from ComScore

Source: Agcom elaboration on data from Comscore

3.1: POSTAL SERVICES: REVENUES

REVENUES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF €



-2.5

+3.6

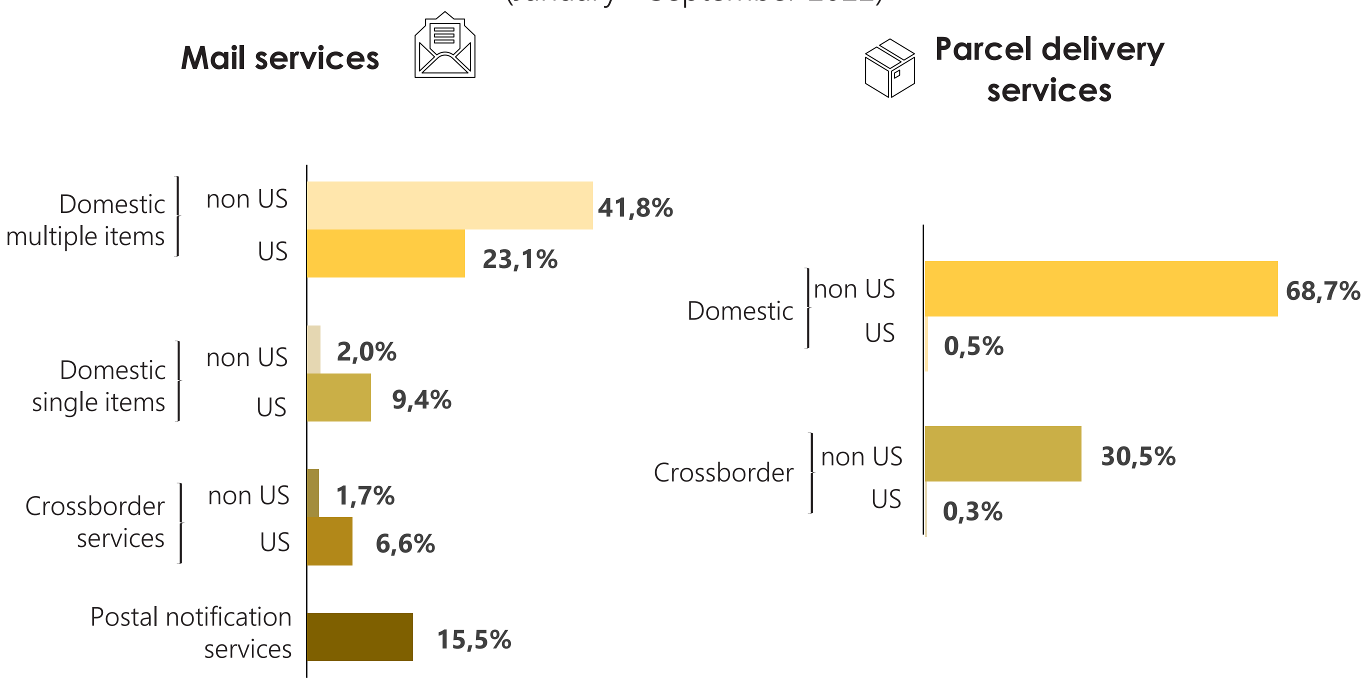
+2.2

Total

Annual change in %
(Jan, - Sep. 2021) – (Jan. – Sep. 2022)

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

(January - September 2022)



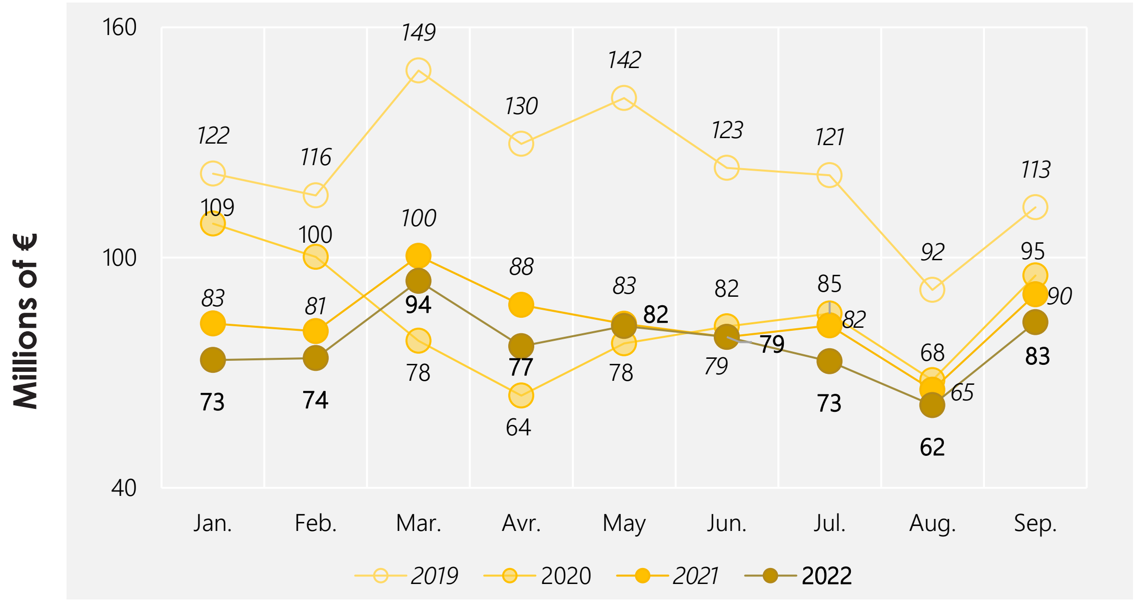
Annual change in %
(Sep. 2021 – Sep. 2022)

-0.8	-12.9	-20.4	+12.8	+3.1	+4.9
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.

UNIVERSAL SERVICE (US)



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

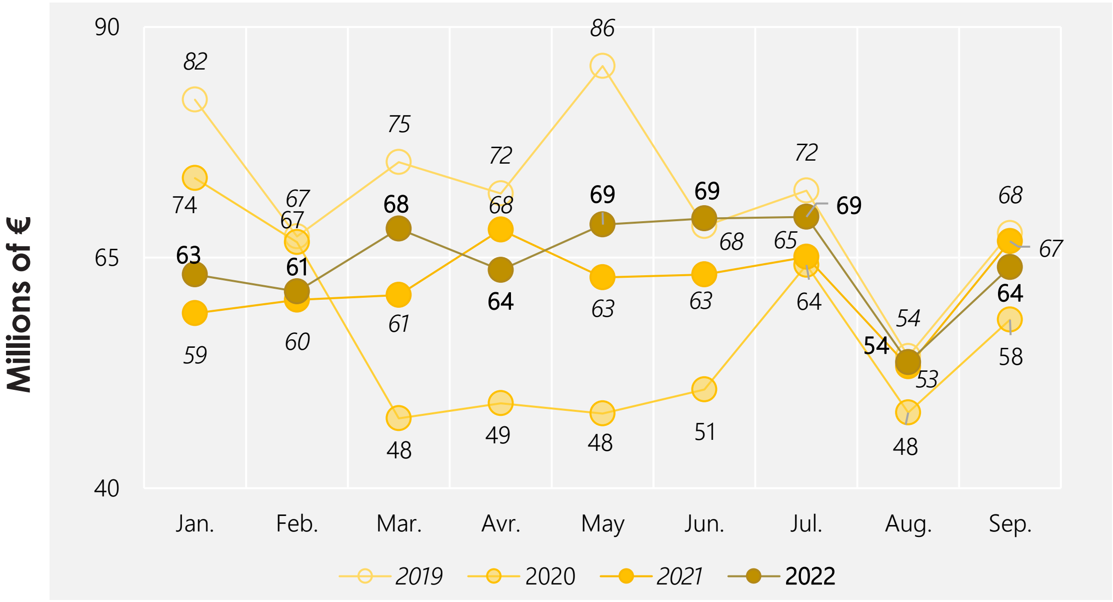
	(2019)		(2020)		(2021)		(2022)
millions of €	1,107	-31.4%	759	-1,0%	752	-7.3%	697

2019 → 2022: -37.1%

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

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

OTHER SERVICES (NON US)



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

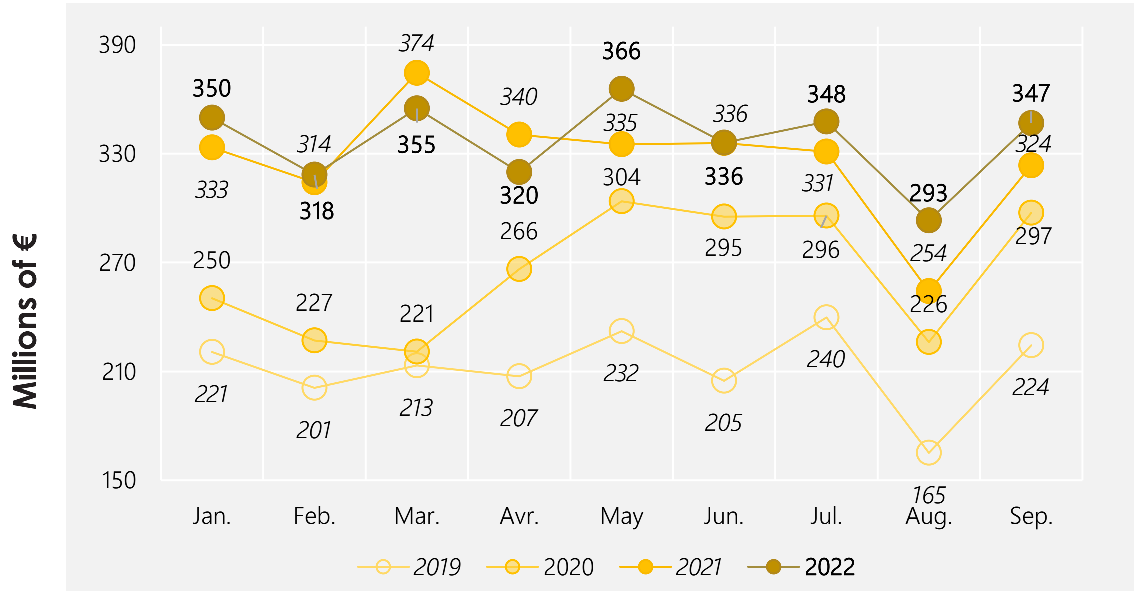
	(2019)		(2020)		(2021)		(2022)
millions of €	645	-21.5%	506	+10.5	559	+3.9%	581

2019 → 2022: -9.9%

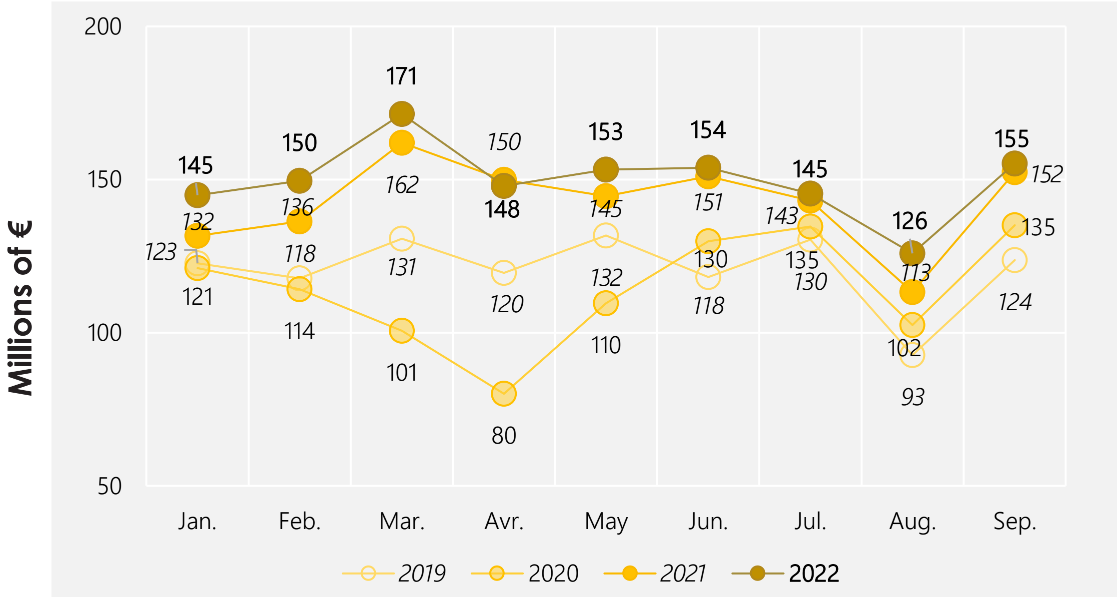
2 **Quarterly comparison (change in %)**

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

DOMESTIC



CROSSBORDER



Domestic

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

	(2019)		(2020)		(2021)		(2022)
millions of €	1,908	+24.9%	2,383	+23.5%	2,942	+3.1%	3,032

2019 → 2022: +58.9%

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

	YoY 2019/2020	YoY 2020/2021	YoY 2021/2022	Whole period 2019/2022
1 Q (Jan. - Mar.)	+10.0	+46.4	+0.1	+61.2
2 Q (Avr. - Jun.)	+34.3	+16.9	+1.0	+58.5
3 Q (Jul. - Sep.)	+30.2	+10.9	+8.7	+57.0

Crossborder

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

	(2019)		(2020)		(2021)		(2022)
millions of €	1,087	-5.5%	1,027	+25.0%	1,284	+4.9%	1,347

2019 → 2022: +23.9%

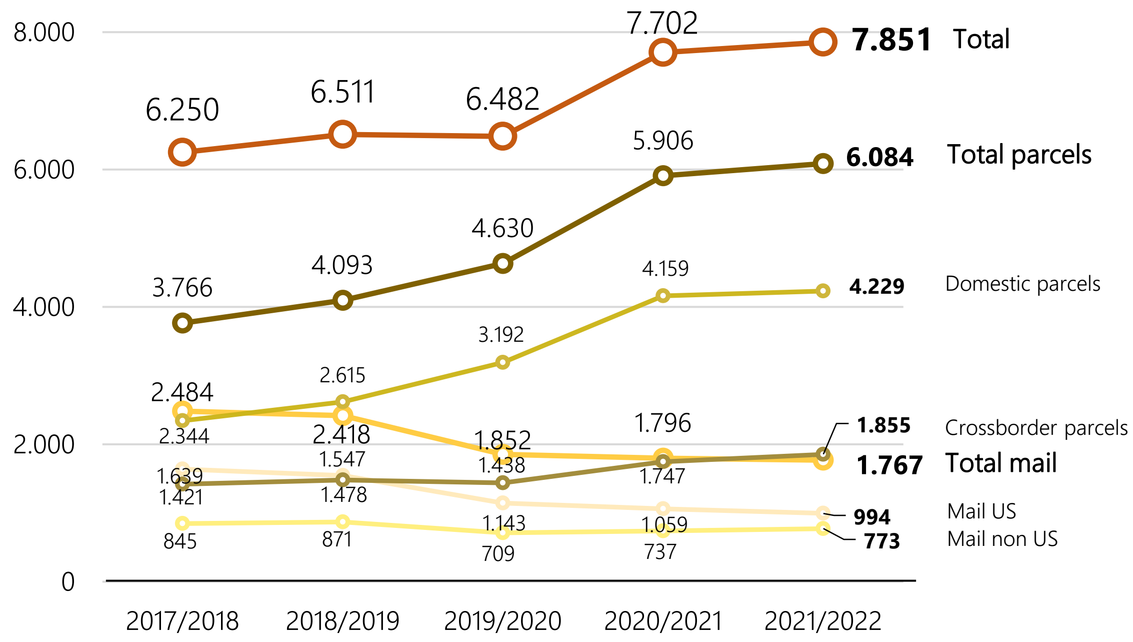
2 **Quarterly comparison (change in %)**

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

3.4: POSTAL SERVICES: REVENUES HISTORICAL TRENDS

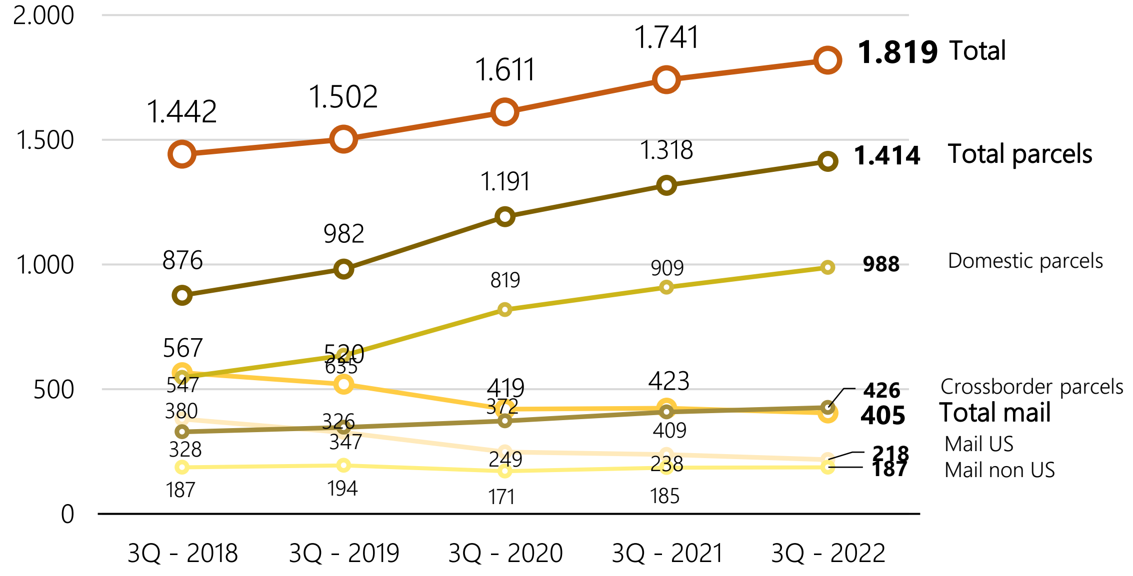
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF €



ON A QUARTERLY BASIS

MILLIONS OF €

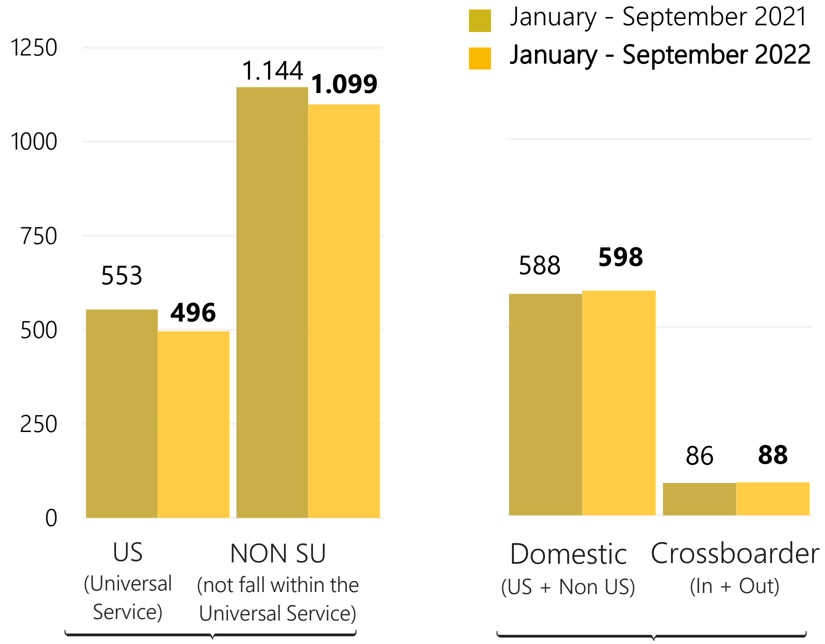


	Change in % (2017/2018 – 2021/2022)		Change in % (2020/2021 – 2021/2022)	
Total:	**+25.6**	↑	**+1.9**	↑
Mail services:	**-28.9**	↓	**-1.6**	↓
- Universal Service:	-39.3	↓	-6.1	↓
- No Universal Service:	-8.6	↓	+4.9	↑
Parcel delivery services:	**+61.6**	↑	**+3.0**	↑
- Domestic:	+80.4	↑	+1.7	↑
- Crossborder:	+30.5	↑	+6.1	↑

	Change in % (2Q 2018 – 2Q 2022)		Change in % (2Q 2021 – 2Q 2022)	
Total:	**+26.1**	↑	**+4.5**	↑
Mail services:	**-28.6**	↓	**-4.4**	↓
- Universal Service:	-42.7	↓	-8.6	↓
- No Universal Service:	+0.3	↑	+1.1	↑
Parcel delivery services:	**+61.5**	↑	**+7.3**	↑
- Domestic:	+80.5	↑	+8.7	↑
- Crossborder:	+29.8	↑	+4.3	↑

VOLUMES SINCE THE BEGINNING OF THE YEAR

MILLIONS OF UNITS



Mail services

Parcel delivery services

-6.1

-2.4

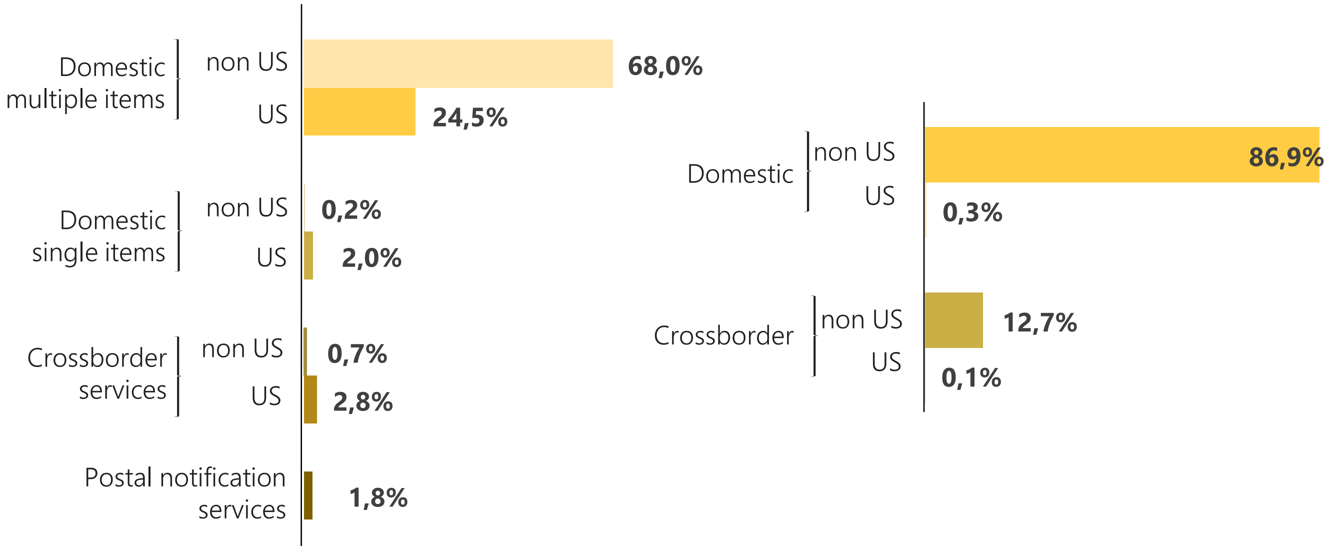
Annual change in %
(Jan, - Sep. 2021) – (Jan. – Sep. 2022)

VOLUMES BY SOURCE TYPE (%)

(January - September 2022)

Mail services

Parcel delivery services

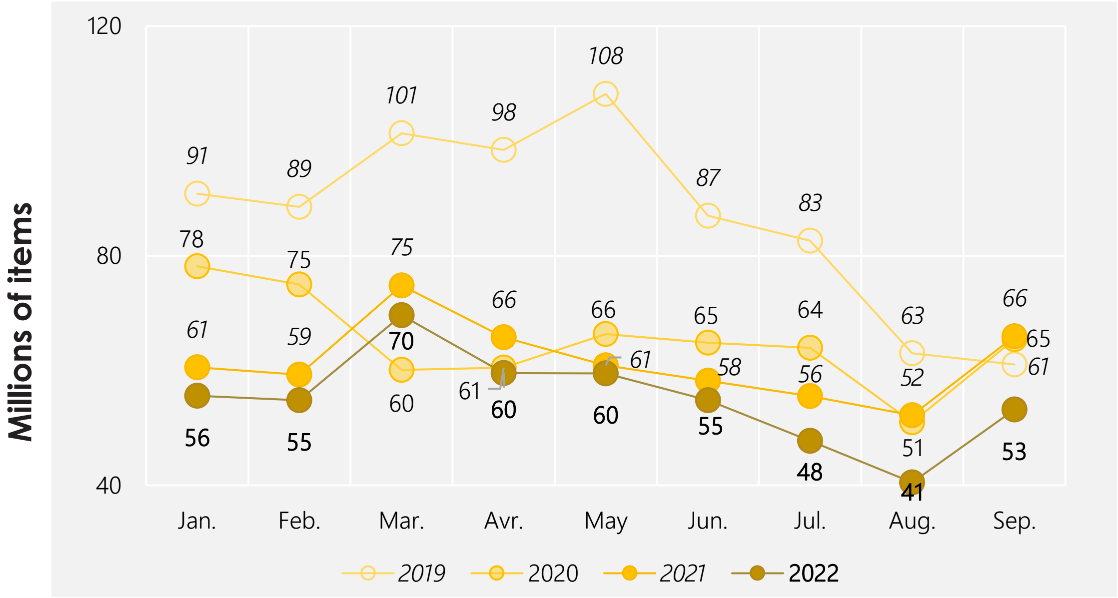


Annual change in %
(Sep. 2021 – Sep. 2022)

-5.7	-13.7	-17.4	+15.5	+1.5	+2.4
Domestic multiple items	Domestic single items	Crossborder services	Postal notification services	Domestic	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. – Sep.)

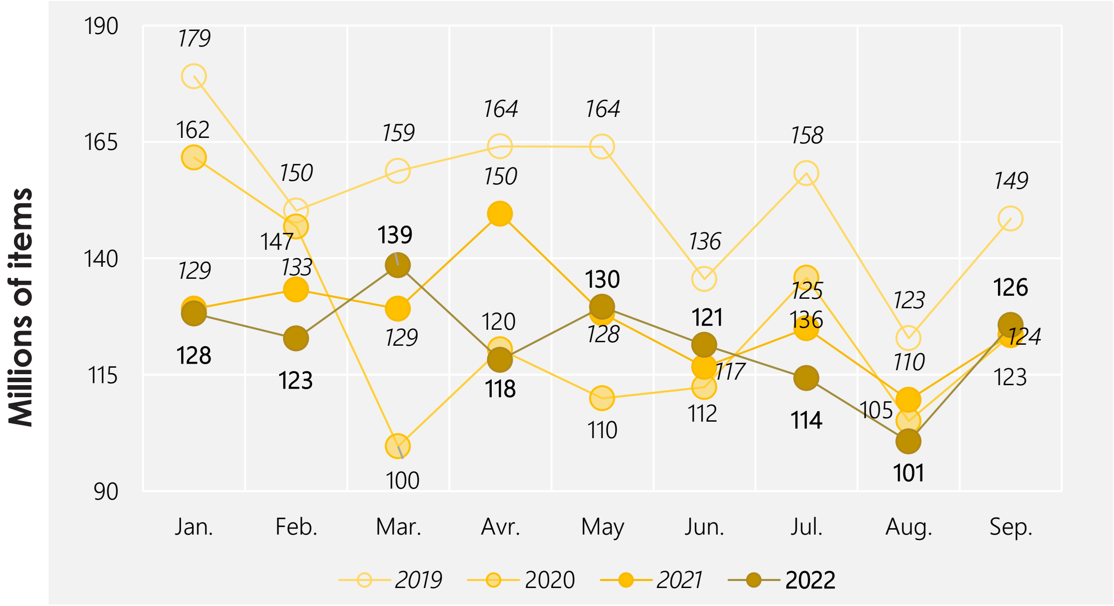
	(2019)		(2020)		(2021)		(2022)
millions of items	781	-25.0%	585	-5.5%	553	-10.4%	496

2019 → 2022: **-36.5%**

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 (Avr. - Jun.)	-34.7	-3.6	-5.9	-40,7
3 Q (Jul. - Sep.)	-12.7	-3.7	-18.5	-31,5

OTHER SERVICES (NON US)



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

	(2019)		(2020)		(2021)		(2022)
millions of items	1,381	-19.3%	751	+2.6%	1,144	-3.9%	1,099

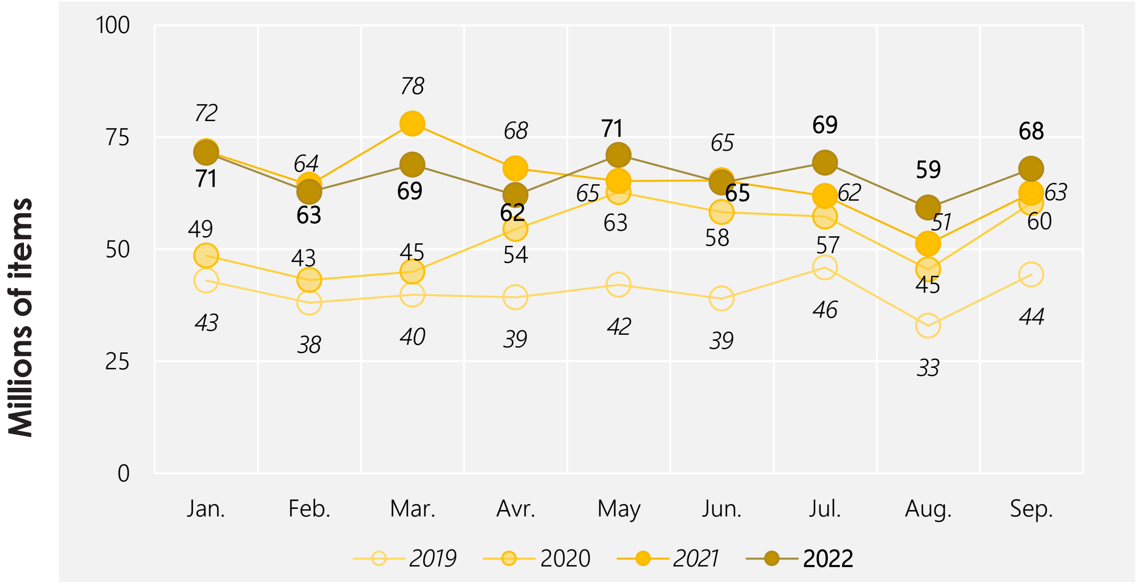
2019 → 2022: **-20.4%**

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

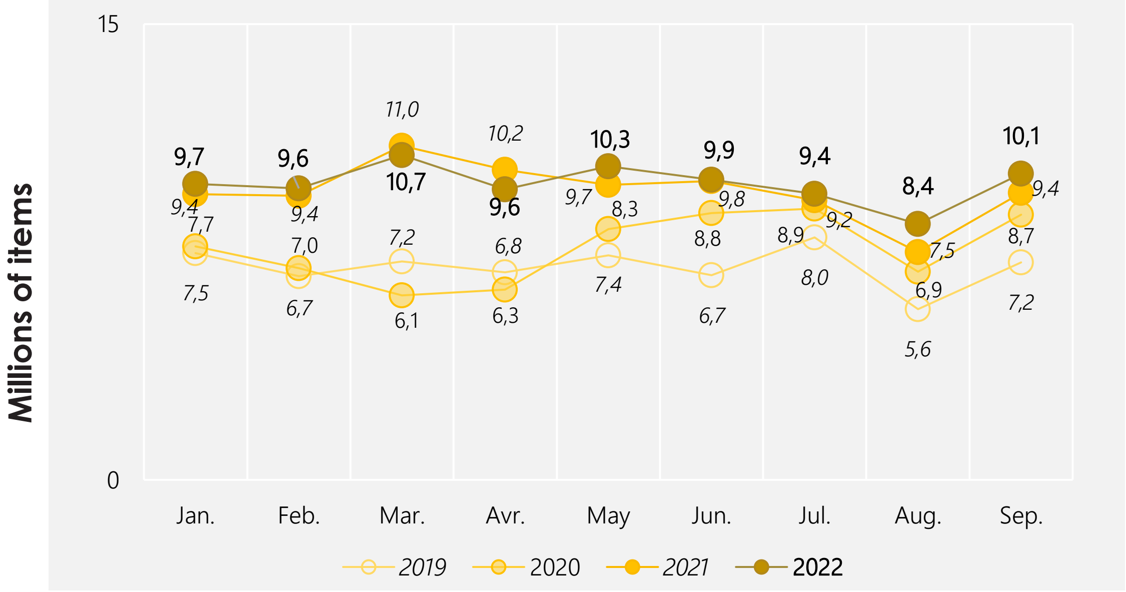
	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	-16,4	-4.0	-0.6	-20.2
2 Q (Avr. - Jun.)	-26.1	+15.1	-6.4	-20.4
3 Q (Jul. - Sep.)	-15.2	-1.7	-4.9	-20.7

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

DOMESTIC



CROSSBORDER



Domestic

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

	(2019)		(2020)		(2021)		(2022)
millions of items	364	+30.5%	475	+23.8%	588	1.5%	598

2019 → 2022: +64.1%

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

	YoY			Whole period
	2019/2020	2020/2021	2021/2022	2019/2022
1 Q (Jan. - Mar.)	+13.2	+56.8	-5.2	+68.2
2 Q (Avr. - Jun.)	+45.9	+13.2	-0.3	+64.6
3 Q (Jul. - Sep.)	+32.4	+7.7	+11.9	+59.6

Crossborder

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

	(2019)		(2020)		(2021)		(2022)
millions of items	63.1	+8.7%	68.6	+24.9%	85.6	+2.4%	87.7

2019 → 2022: +39.0%

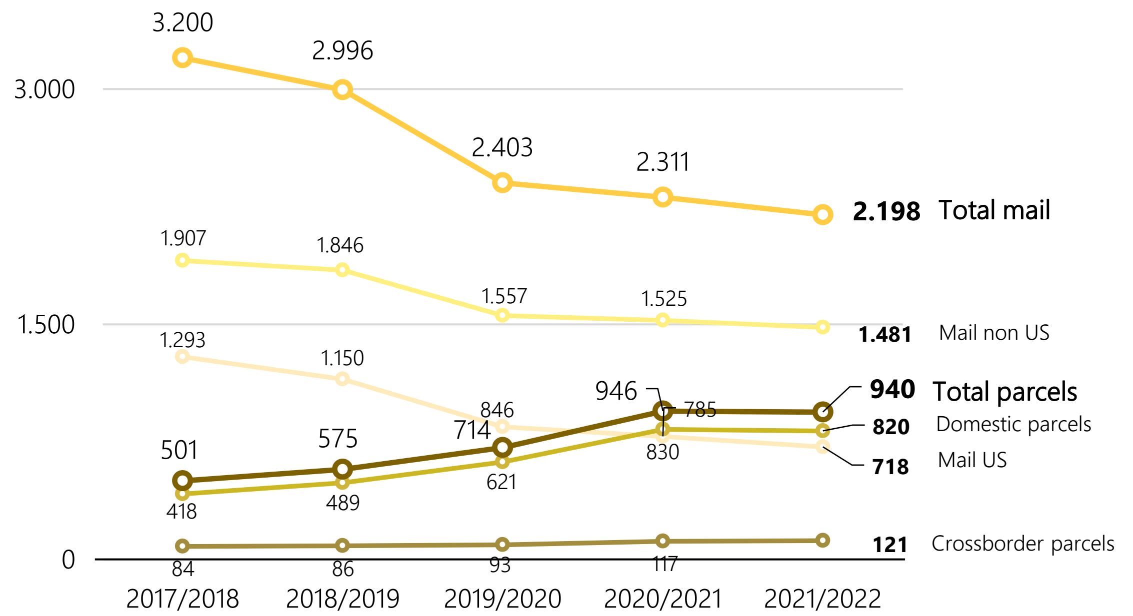
2 **Quarterly comparison (change in %)**

	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 (Avr. - Jun.)	+11.2	+27.7	=	+42.0
3 Q (Jul. - Sep.)	+18.1	+6.6	+6.8	+34.4

3.8: POSTAL SERVICES: VOLUMES HISTORICAL TRENDS

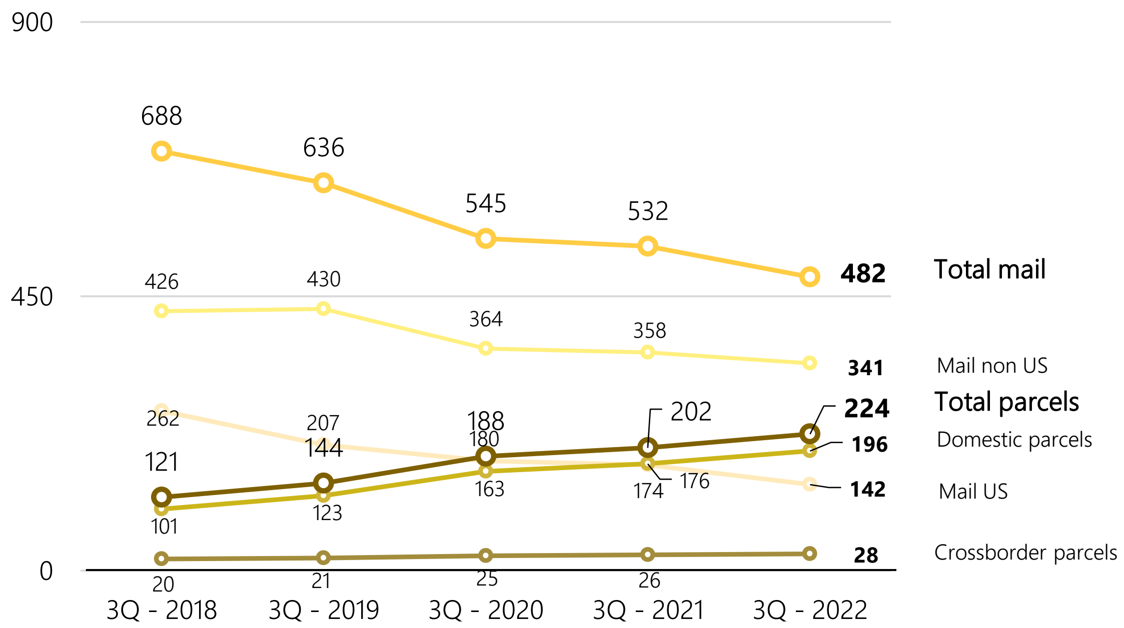
ON A YEARLY BASIS (12 months cumulative sum)

MILLIONS OF UNITS



ON A QUARTERLY BASIS

MILLIONS OF UNITS

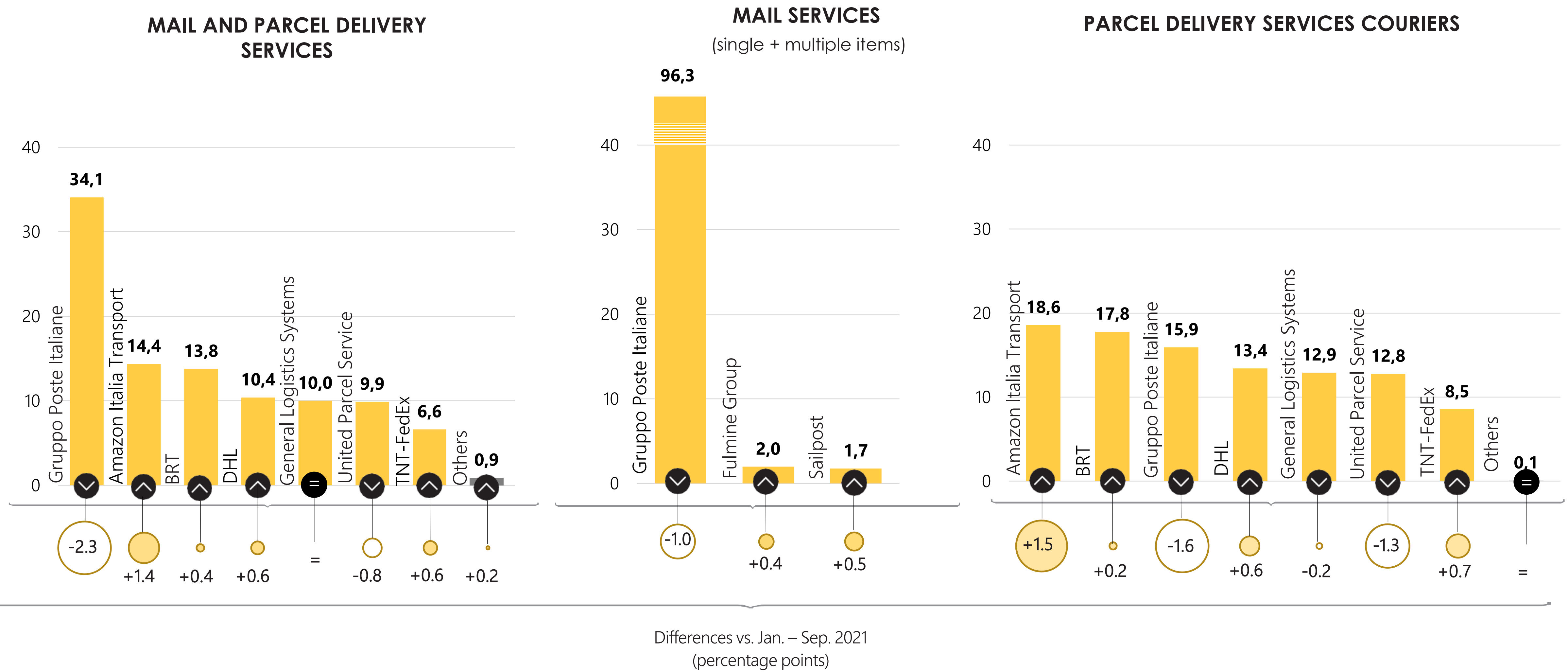


	Change in % (2017/2018 – 2021/2022)		Change in % (2020/2021 – 2021/2022)	
Mail services:	**-31.3**	↓	**-4.9**	↓
- Universal Service:	-44.5	↓	-8.6	↓
- Non Universal Service:	-22.4	↓	-2.9	↓
Parcel delivery services:	**+87.6**	↑	**-0.6**	↓
- Domestic:	+96.2	↑	-1.2	↓
- Crossborder:	+44.5	↑	+3.5	↑

	Change in % (3Q 2018 – 3Q 2022)		Change in % (3Q 2021 – 3Q 2022)	
Mail services:	**-29.9**	↓	**-9.4**	↓
- Universal Service:	-46.1	↓	-18.5	↓
- Non Universal Service:	-20.0	↓	-4.9	↓
Parcel delivery services:	**+85.9**	↑	**+11.2**	↑
- Domestic:	+94.5	↑	+11.9	↑
- Crossborder:	+42.1	↑	+6.8	↑

3.9: POSTAL SERVICES: COMPETITIVE LANDSCAPE

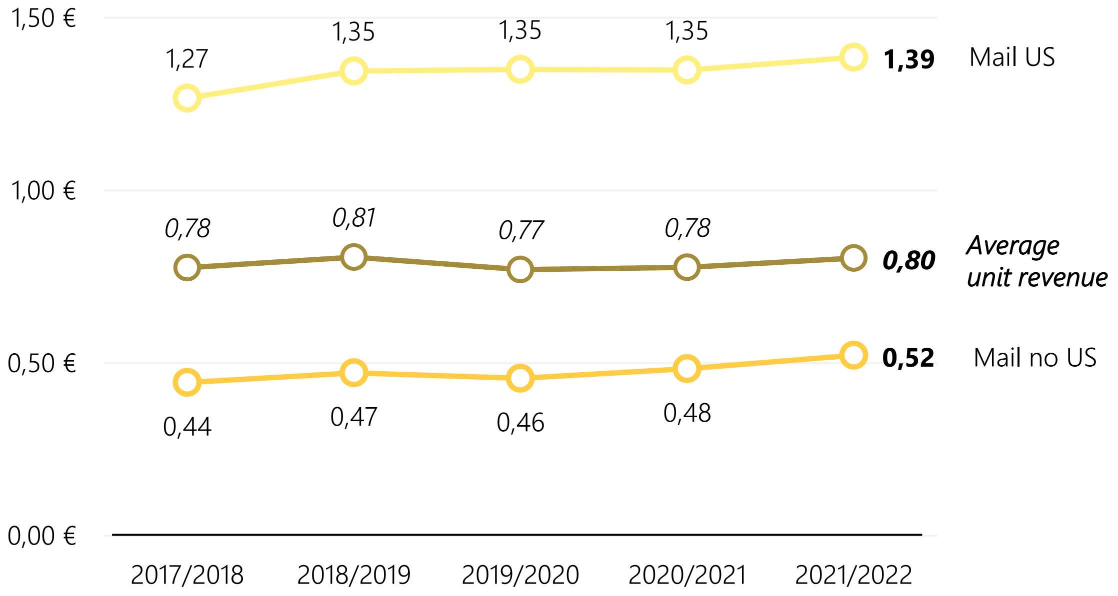
JANUARY - SEPTEMBER 2022 – IN % OF TOTALE REVENUES (Universal service + Non Universal service)



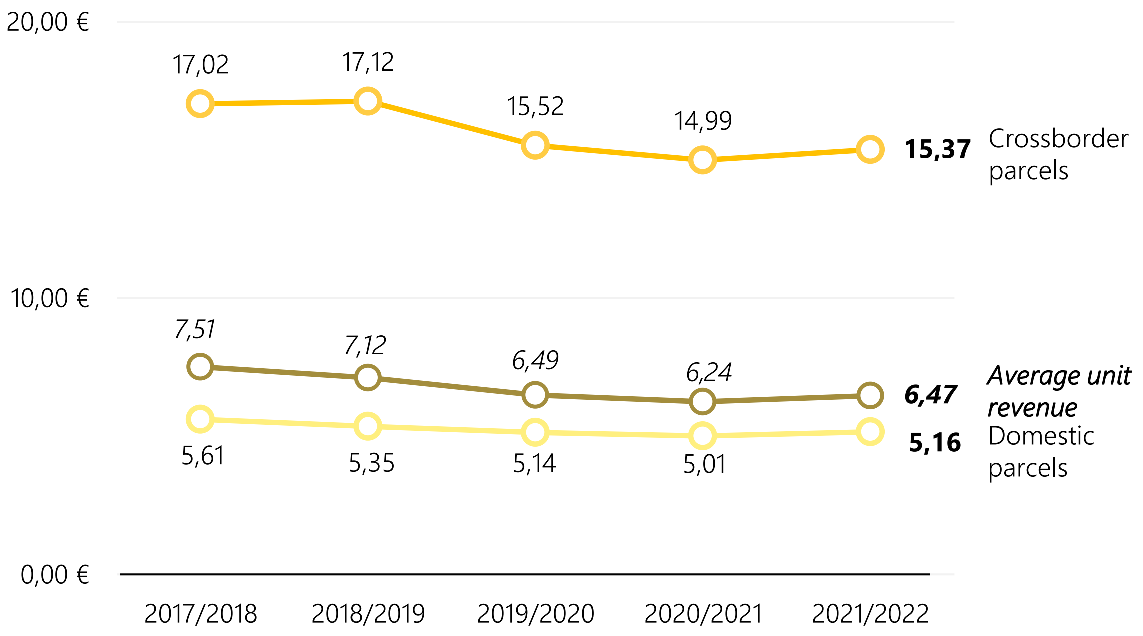
Nota: Poste Italiane Group data include those of Poste Italiane S.p.a and the companies belonging to the group, Nexive Group S.r.l. and SDA Express Courier S.p.A.

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

MAIL SERVICES



PARCELS DELIVERY SERVICES



Change in %

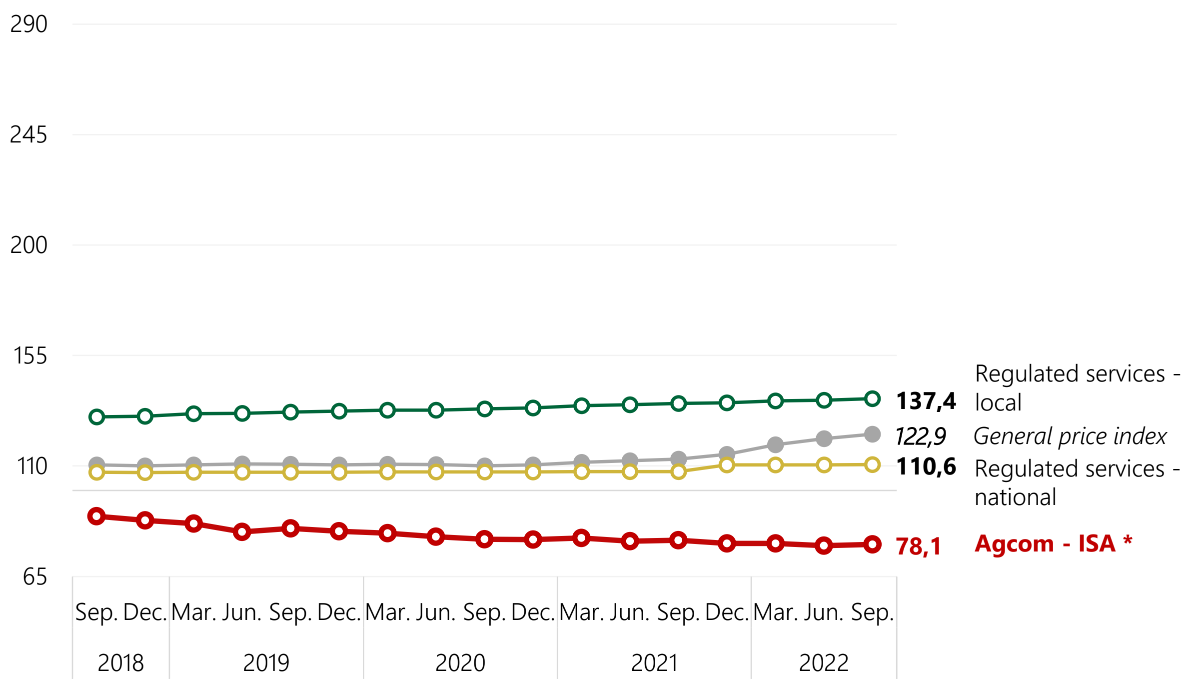
	(2017/2018 – 2021/2022)	(2020/2021 – 2021/2022)
Average unit revenue:	**+3.6** ↑	**+3.4** ↑
- Mail US:	+9.4 ↑	+2.8 ↑
- Mail non US:	+17.8 ↑	+8.1 ↑

Change in %

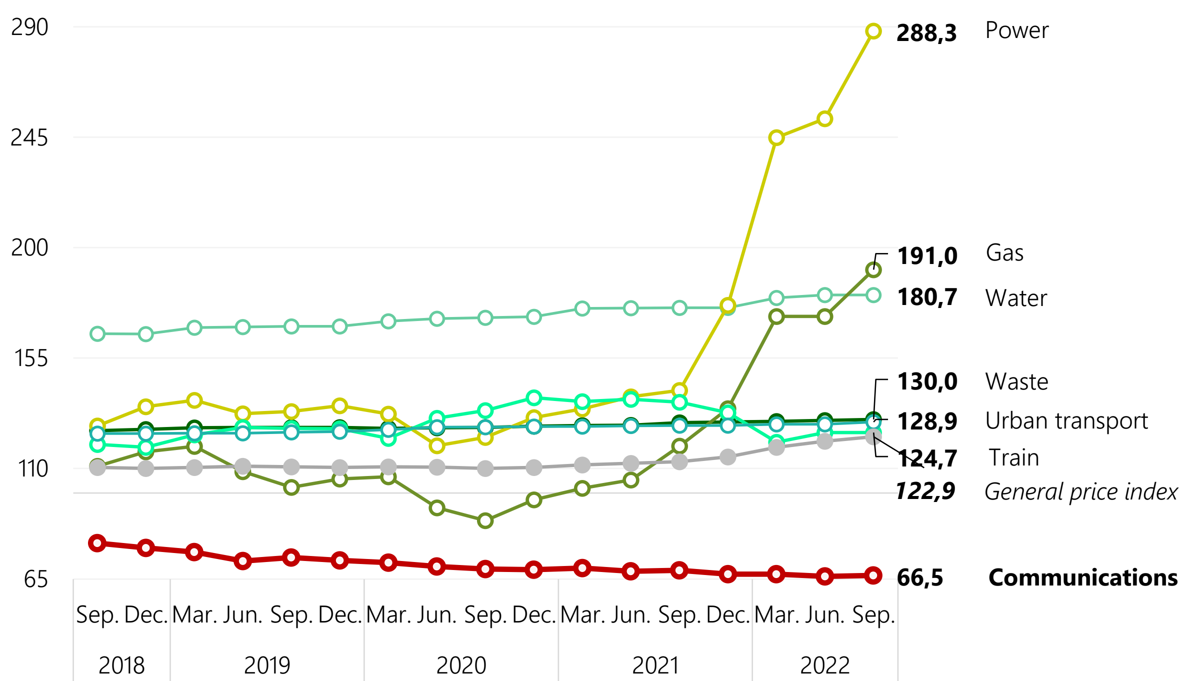
	(2017/2018 – 2021/2022)	(2020/2021 – 2021/2022)
Average unit revenue:	**-13.9** ↓	**+3.6** ↑
Crossborder parcels:	-9.7 ↓	+2.6 ↑
- US:	*+2.8* ↑	*+12.2* ↑
- Non US:	*-9.6* ↓	*+2.6* ↑
Domestic parcels:	-8.0 ↓	+2.9 ↑
- US:	*+0.8* ↑	*+0.8* ↑
- Non US:	*-8.1* ↓	*+3.0* ↑

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

GENERAL PRICE INDEX



UTILITIES PRICE INDEX



Source: Agcom elaboration on data from Istat

	Change in % 4-Year	Change in % YoY
ISA (Agcom summary price index):	-12.7 ↓	-2.0 ↓
General price index:	+11.3 ↑	+9.0 ↑
Regulated services - local:	+5.7 ↑	+1.4 ↑
Regulated services - national:	+3.0 ↑	+2.7 ↑

(*) 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).

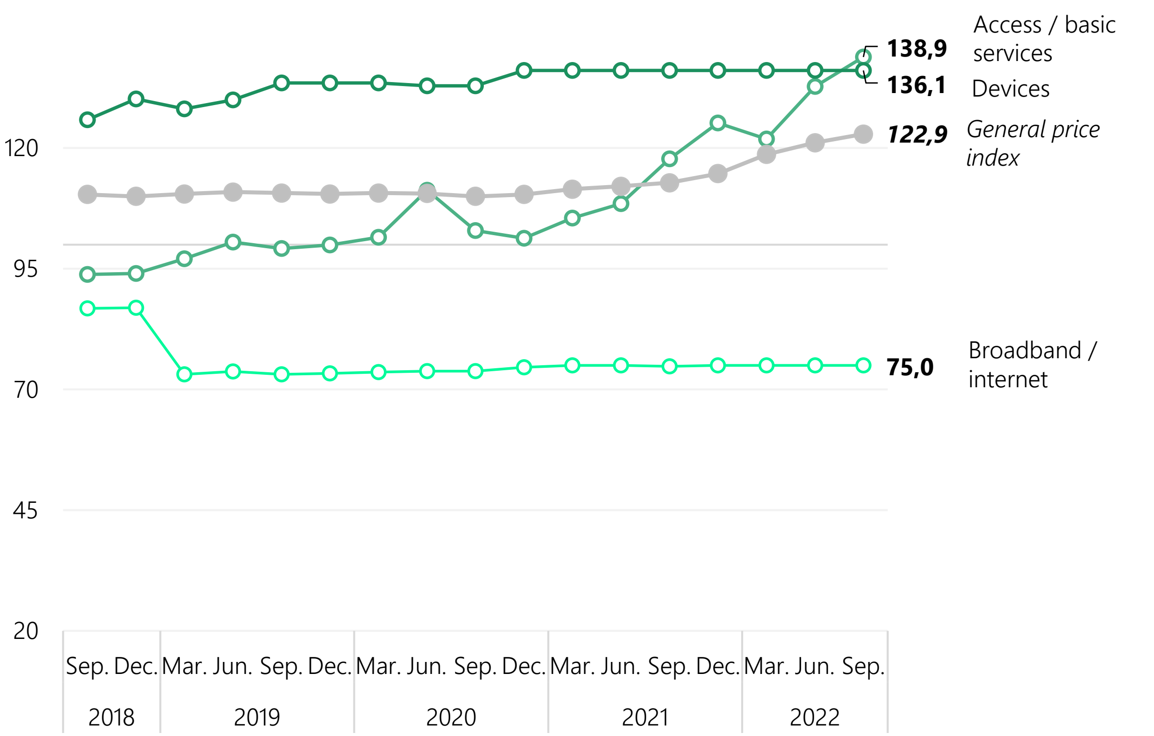
	Change in % 4-Year	Change in % YoY
Water *(04.4.1)*:	+9.5 ↑	+3.0 ↑
Waste *(04.4.2)*:	+3.6 ↑	+1.0 ↑
Power *(04.5.1)*:	+126.3 ↑	+103.3 ↑
Gas *(04.5.2)*:	+72.2 ↑	+60.2 ↑

	Change in % 4-Year	Change in % YoY
Train *(07.3.1)*:	+4.1 ↑	-9.0 ↓
Urban transport *(07.3.2.1.1)*:	+3.7 ↑	+1.1 ↑
Communications *(08)*:	-16.5 ↓	-2.9 ↓

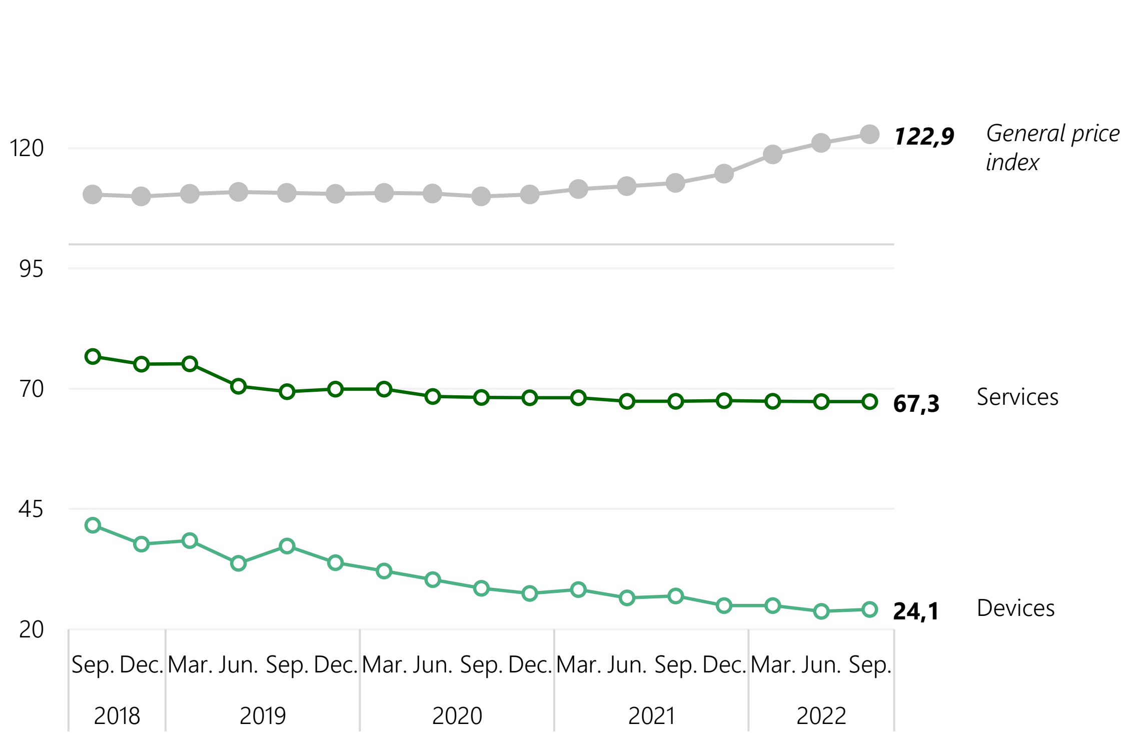
(COICOP - Classification of Individual Consumption by Purpose)

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

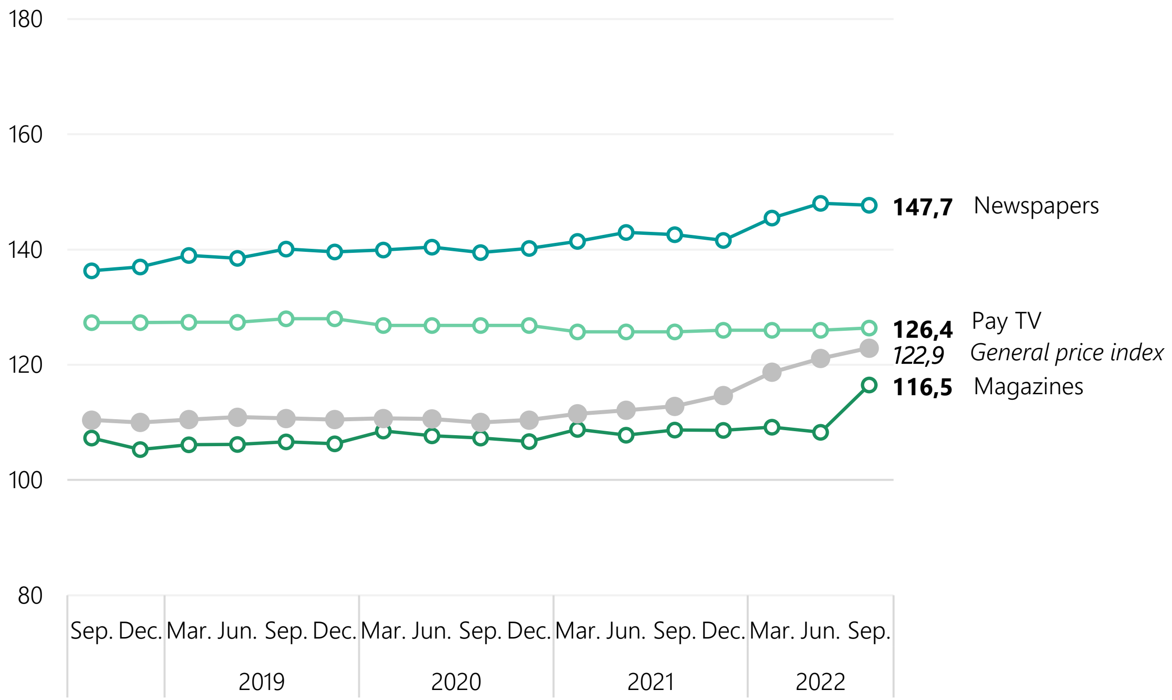
	Change in % 4-Year	Change in % YoY
Access / basic services *(08.3.0.1)*:	**+8.1**	=
Devices *(08.2.0.1)*:	**+48.1**	**+17.9**
Broadband / internet *(08.3.0.3.0.01)*:	**-13.6**	**+0.3**

	Change in % 4-Year	Change in % YoY
Servces *(08.3.0.2)*:	**-12.3**	**-0.1**
Devices *(08.2.0.2)*:	**-42.1**	**-10.4**

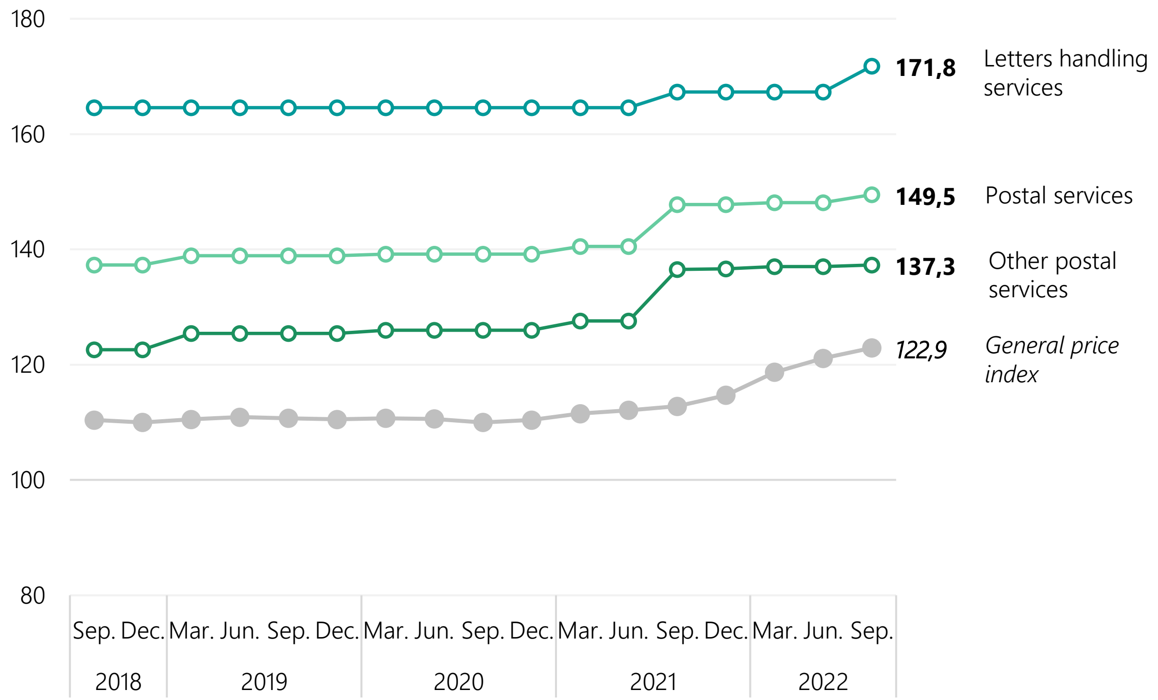
(COICOP - Classification of Individual Consumption by Purpose)

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	Change in % YoY
Newspapers *(09.5.2.1.0)*:	+8.4 ↑	+3.6 ↑
Pay TV *(09.4.2.3.0.02)*:	-0.7 ↓	+0.6 ↑
Magazines *(09.5.2.2.0)*:	+8.6 ↑	+7.2 ↑

	Change in % 4-Year	Change in % 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 ↑	+0.6 ↑

(COICOP codes - Classification of Individual Consumption by Purpose)

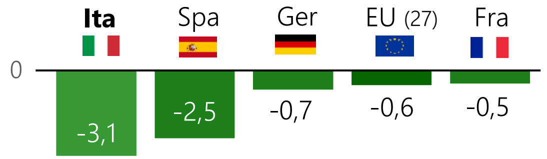
4.4 PRICE: INTERNATIONAL BENCHMARK

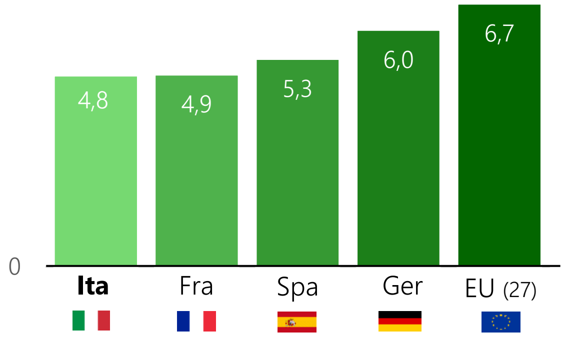
Source: Agcom elaboration on data from Eurostat

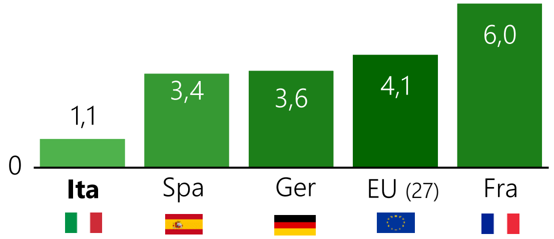
	TLC – SERVICES AND EQUIPMENTS (COICOP 08.2 - 08.3)	NEWSPAPERS AND MAGAZINES (COICOP 09.5.2)	POSTAL SERVICES (COICOP 08.1)

1-Year change %

Sep. 2021 - Sep. 2022

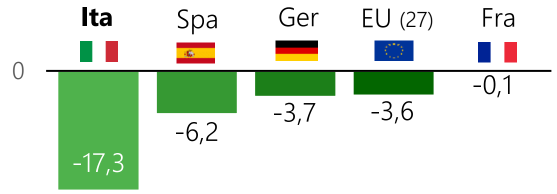


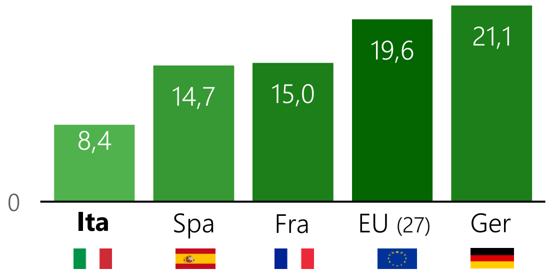


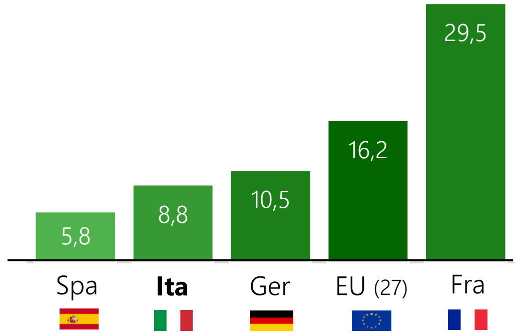


5-Year change %

Sep. 2017 - Sep. 2022

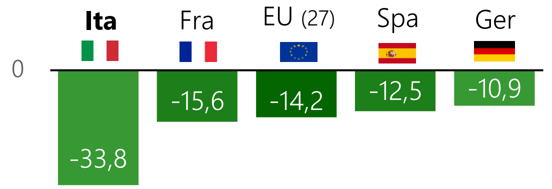


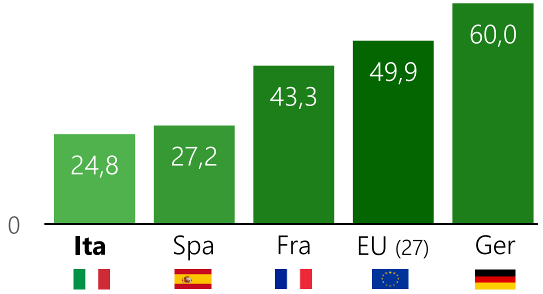


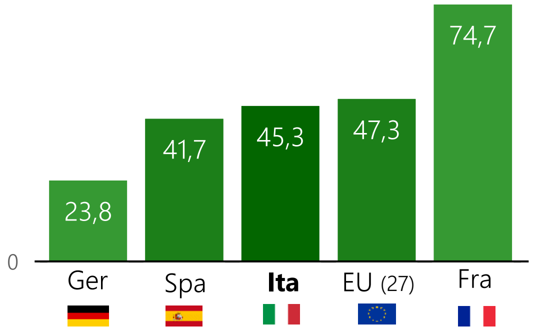


10-Year change %

Sep. 2012 - Sep. 2022







AUTORITÀ PER LE GARANZIE NELLE COMUNICAZIONI
AGCOM

COMMUNICATION MARKETS MONITORING SYSTEM

no. 4/2022

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