DIGITAL 2023

ITALY

THE ESSENTIAL GUIDE TO THE LATEST CONNECTED BEHAVIOURS

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GLOBAL OVERVIEW	BOTSWANA	DJIBOUTI	GUINEA	LESOTHO	NEPAL	ST. KITTS & NEVIS	TAJIKISTAN
DIGITAL YEARBOOK	BRAZIL	DOMINICA	GUINEA-BISSAU	LIBERIA	NETHERLANDS	ST. LUCIA	TANZANIA
ABKHAZIA	BRITISH VIRGIN IS.	DOMINICAN REP.	GUYANA	LIBYA	NEW CALEDONIA	ST. MARTIN	THAILAND
AFGHANISTAN	BRUNEI	ECUADOR	HAITI	LIECHTENSTEIN	NEW ZEALAND	ST. PIERRE & MIQUELON	TIMOR-LESTE
ÅLAND IS.	BULGARIA	EGYPT	HONDURAS	LITHUANIA	NICARAGUA	ST. VINCENT & THE GRENADINES	TOGO
ALBANIA	BURKINA FASO	EL SALVADOR	HONG KONG	LUXEMBOURG	NIGER	SAMOA	TOKELAU
ALGERIA	BURUNDI	EQUATORIAL GUINEA	HUNGARY	MACAU	NIGERIA	SAN MARINO	TONGA
AMERICAN SAMOA	CABO VERDE	ERITREA	ICELAND	NORTH MACEDONIA	NIUE	SÃO TOMÉ & PRÍNCIPE	TRANSNISTRIA
ANDORRA	CAMBODIA	ESTONIA	INDIA	MADAGASCAR	NORFOLK IS.	SAUDI ARABIA	TRINIDAD & TOBAGO
ANGOLA	CAMEROON	ESWATINI	INDONESIA	MALAWI	NORTHERN MARIANA IS.	SENEGAL	TUNISIA
ANGUILLA	CANADA	ETHIOPIA	IRAN	MALAYSIA	NORWAY	SERBIA	TURKEY
ANTIGUA & BARBUDA	CAYMAN IS.	FALKLAND IS.	IRAQ	MALDIVES	OMAN	SEYCHELLES	TURKMENISTAN
ARGENTINA	CENTRAL AFRICAN REP.	FAROE IS.	IRELAND	MALI	PAKISTAN	SIERRA LEONE	TURKS & CAICOS IS.
ARMENIA	CHAD	FIJI	ISLE OF MAN	MALTA	PALAU	SINGAPORE	TUVALU
ARUBA	CHILE	FINLAND	ISRAEL	MARSHALL IS.	PALESTINE	ST. MAARTEN	UGANDA
AUSTRALIA	CHINA	FRANCE	ITALY	MARTINIQUE	PANAMA	SLOVAKIA	UKRAINE
AUSTRIA	CHRISTMAS IS.	FRENCH GUIANA	JAMAICA	MAURITANIA	PAPUA NEW GUINEA	SLOVENIA	U.A.E.
AZERBAIJAN	COCOS (KEELING) IS.	FRENCH POLYNESIA	JAPAN	MAURITIUS	PARAGUAY	SOLOMON IS.	U.K.
BAHAMAS	COLOMBIA	GABON	JERSEY	MAYOTTE	PERU	SOMALIA	U.S.A.
BAHRAIN	COMOROS	GAMBIA	JORDAN	MEXICO	PHILIPPINES	SOUTH AFRICA	U.S. VIRGIN IS.
BANGLADESH	DEM. REP. OF CONGO	GEORGIA	KAZAKHSTAN	MICRONESIA	PITCAIRN IS.	SOUTH SUDAN	URUGUAY
BARBADOS	REP. OF CONGO	GERMANY	KENYA	MOLDOVA	POLAND	SPAIN	UZBEKISTAN
BELARUS	COOK IS.	GHANA	KIRIBATI	MONACO	PORTUGAL	SRI LANKA	VANUATU
BELGIUM	COSTA RICA	GIBRALTAR	NORTH KOREA	MONGOLIA	PUERTO RICO	SUDAN	VATICAN
BELIZE	CÔTE D'IVOIRE	GREECE	SOUTH KOREA	MONTENEGRO	QATAR	SURINAME	VENEZUELA
BENIN	CROATIA	GREENLAND	KOSOVO	MONTSERRAT	RÉUNION	SVALBARD & JAN MAYEN	VIETNAM
BERMUDA	CUBA	GRENADA	KUWAIT	MOROCCO	ROMANIA	SWAZILAND	WALLIS & FUTUNA
BHUTAN	CURAÇAO	GUADELOUPE	KYRGYZSTAN	MOZAMBIQUE	RUSSIAN FEDERATION	SWEDEN	WESTERN SAHARA
BOLIVIA	CYPRUS	GUAM	LAOS	MYANMAR	RWANDA	SWITZERLAND	YEMEN
BONAIRE, ST. EUSTATIUS & SABA	CZECHIA	GUATEMALA	LATVIA	NAMIBIA	ST. BARTHÉLEMY	SYRIA	ZAMBIA
BOSNIA & HERZEGOVINA	DENMARK	GUERNSEY	LEBANON	NAURU	ST. HELENA	TAIWAN	ZIMBABWE

IMPORTANT NOTES ON COMPARING DATA

The findings published in this report use the latest data available at the time of production. This may include revised figures for historical data points that were not available when we produced previous reports in the Global Digital Reports series. From time to time, we may also change the data sources that we use to inform specific data points, and we may also change how we calculate certain values. Similarly, our data partners may change the ways in which they source, calculate, or report the data that they share with us. As a result, findings published in this report **may not correlate** with findings published in our previous reports, especially where such findings represent change over time (e.g. annual growth). Where we report figures for change over time, such figures will use the latest available data, so we recommend using the **values published in this report**, rather than trying to recalculate such values using data from previous reports. Wherever we're aware of the potential for historical mismatches, we've included a note on comparability in the footnotes of each relevant slide. Please read these advisories carefully to understand how data sources or calculations have changed since previous reports, and beware of making any comparisons with historical data. Where we report values for change over time as "[N/A]", the most recent data **do not correlate** with the equivalent data point(s) published in our previous reports, so we **strongly advise readers not to compare** the associated current figures with the equivalents published in previous reports. In particular, the social media platforms featured in this report regularly revise the figures that they report for advertising reach, and this may result in the latest numbers appearing to be lower than the values for the same data points published in previous reports in this series. However, these source data revisions **do not** necessarily imply any change in the overall active use of these platforms, and should not be interpreted as such. Furthermore, in addition to changes in data sources and calculations, please note that social media user numbers **may not** represent unique individuals. This is because some individuals may manage multiple social media accounts, and because some social media accounts may represent 'non-human' entities (e.g. businesses, animals, music bands, etc.). As a result, the figures we publish for social media users may **exceed** the figures that we publish for total population or for internet users. This may seem counter-intuitive, but such differences do not represent mistakes. For more information, please read our notes on data variance, mismatches, and curiosities: https://datareportal.com/notes-on-data.

GLOBAL HEADLINES

JAN 2023

GLOBAL DIGITAL HEADLINES

OVERVIEW OF THE ADOPTION AND USE OF CONNECTED DEVICES AND SERVICES

NOTE: SIGNIFICANT REVISIONS TO SOURCE DATA MEAN THAT FIGURES SHOWN HERE ARE **NOT COMPARABLE** WITH PREVIOUS REPORTS. SEE THE IMPORTANT NOTES AT THE START OF THIS REPORT FOR DETAILS.

TOTAL POPULATION	CELLULAR MOBILE CONNECTIONS	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS
8.01 BILLION	**8.46 BILLION**	**5.16 BILLION**	**4.76 BILLION**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+0.8%	**+2.2%**	**+1.9%**	**+3.0%**
+67 MILLION	**+180 MILLION**	**+98 MILLION**	**+137 MILLION**
URBANISATION	TOTAL vs. POPULATION	TOTAL vs. POPULATION	TOTAL vs. POPULATION
57.2%	**105.6%**	**64.4%**	**59.4%**

SOURCES: UNITED NATIONS; GOVERNMENT BODIES; GSMA INTELLIGENCE; ITU; WORLD BANK; EUROSTAT; CNNIC; APJII; IAMAI & KANTAR; CIA WORLD FACTBOOK; COMPANY ADVERTISING RESOURCES AND EARNINGS REPORTS; OCDH; BETA RESEARCH CENTER; KEPIOS ANALYSIS. **ADVISORY:** SOCIAL MEDIA USERS MAY **NOT** REPRESENT UNIQUE INDIVIDUALS. **COMPARABILITY:** SIGNIFICANT REVISIONS TO SOURCE DATA ACROSS ALL METRICS, INCLUDING IMPORTANT REVISIONS TO UNDERLYING POPULATION DATA. FIGURES ARE **NOT COMPARABLE** WITH PREVIOUS REPORTS. WHERE YEAR-ON-YEAR CHANGE IS SHOWN AS "[N/A]", COMPARISONS WITH HISTORICAL DATA WILL PRODUCE **INACCURATE RESULTS**. PLEASE READ OUR COMPREHENSIVE NOTES ON DATA FOR FURTHER DETAILS.

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INTERNET ADOPTION

INTERNET USERS AS A PERCENTAGE OF TOTAL POPULATION

GLOBAL OVERVIEW

SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; WORLD BANK; GOOGLE'S ADVERTISING RESOURCES; CIA WORLD FACTBOOK; CNNIC; APJII; KANTAR & IAMAI; LOCAL GOVERNMENT AUTHORITIES; UNITED NATIONS. NOTE: REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. COMPARABILITY: SOURCE AND BASE CHANGES. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCE DATA MAY NOT HAVE BEEN UPDATED IN THE PAST YEAR. SEE NOTES ON DATA FOR DETAILS.

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SHARE OF GLOBAL INTERNET USERS

INTERNET USERS AS A PERCENTAGE OF TOTAL GLOBAL INTERNET USERS

GLOBAL OVERVIEW

SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; WORLD BANK; GOOGLE'S ADVERTISING RESOURCES; CIA WORLD FACTBOOK; CNNIC; APJII; KANTAR & IAMAI; LOCAL GOVERNMENT AUTHORITIES; UNITED NATIONS. NOTES: FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING. REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. COMPARABILITY: SOURCE AND BASE CHANGES. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCE DATA MAY NOT HAVE BEEN UPDATED IN THE PAST YEAR. SEE NOTES ON DATA FOR DETAILS.

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SOCIAL MEDIA USERS vs. TOTAL POPULATION

ACTIVE SOCIAL MEDIA USERS AS A PERCENTAGE OF THE TOTAL POPULATION [NOTE: USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS]

GLOBAL OVERVIEW

SOURCES: KEPIOS ANALYSIS; COMPANY ADVERTISING RESOURCES AND ANNOUNCEMENTS; CNNIC; BETA RESEARCH CENTER; OCDH. ADVISORY: SOCIAL MEDIA USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS. NOTES: DOES NOT INCLUDE DATA FOR SUDAN OR SYRIA. REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. COMPARABILITY: SOURCE, BASE, AND METHODOLOGY CHANGES, INCLUDING SIGNIFICANT SOURCE DATA REVISIONS AND CHANGES IN REPORTING APPROACHES. VALUES ARE NOT COMPARABLE WITH THOSE PUBLISHED IN PREVIOUS REPORTS. FIGURES FOR LOCAL AND REGIONAL SOCIAL MEDIA USE RELY ON DIFFERENT DATASETS TO GLOBAL FIGURES. SEE NOTES ON DATA FOR FURTHER DETAILS.

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SHARE OF GLOBAL SOCIAL MEDIA USERS

ACTIVE SOCIAL MEDIA USERS IN EACH REGION AS A PERCENTAGE OF TOTAL GLOBAL ACTIVE SOCIAL MEDIA USERS

GLOBAL OVERVIEW

SOURCES: KEPIOS ANALYSIS; COMPANY ADVERTISING RESOURCES AND ANNOUNCEMENTS; CNNIC; BETA RESEARCH CENTER; OCDH. **ADVISORY:** SOCIAL MEDIA USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS. **NOTES:** FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING. DOES NOT INCLUDE DATA FOR SUDAN OR SYRIA. REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. **COMPARABILITY:** SOURCE, BASE, AND METHODOLOGY CHANGES, INCLUDING SIGNIFICANT SOURCE DATA REVISIONS AND CHANGES IN REPORTING APPROACHES. VALUES ARE NOT COMPARABLE WITH THOSE PUBLISHED IN PREVIOUS REPORTS. FIGURES FOR LOCAL AND REGIONAL SOCIAL MEDIA USE RELY ON DIFFERENT DATASETS TO GLOBAL FIGURES. SEE NOTES ON DATA FOR FURTHER DETAILS.

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MOBILE CONNECTIVITY

CELLULAR MOBILE CONNECTIONS COMPARED WITH TOTAL POPULATION

GLOBAL OVERVIEW

SOURCES: GSMA INTELLIGENCE; UNITED NATIONS. NOTE: FIGURES MAY EXCEED 100% BECAUSE SOME INDIVIDUALS MAY USE MORE THAN ONE CELLULAR CONNECTION. REGIONS BASED ON THE UNITED NATIONS GEOSCHEME. COMPARABILITY: BASE CHANGES.

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DIG DEEPER INTO THE DATA IN OUR DIGITAL 2023 GLOBAL REPORTS

CLICK HERE TO READ OUR FLAGSHIP DIGITAL 2023 GLOBAL OVERVIEW REPORT, PACKED WITH ALL THE NUMBERS YOU NEED TO MAKE SENSE OF THE CURRENT STATE OF DIGITAL

CLICK HERE TO READ OUR DIGITAL 2023 LOCAL COUNTRY HEADLINES REPORT, WITH ESSENTIAL STATS FOR DIGITAL ADOPTION IN EVERY COUNTRY AROUND THE WORLD

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THINK FORWARD 2023

FRAGMENTED FUTURES

Last year, we emerged from the pandemic into a new online landscape. IRL and URL life were already impossibly entangled, and much was on the horizon: metaverses in which to while away our days, NFTs to deck the walls of digital houses, crypto wallets for paying for goods and services in virtual malls. But this year, what was cracked has now shattered into many segmented realities. An accurate vision of the future is now less like looking through a telescope, more like looking through a kaleidoscope: it's coming through as several diverse fragments, not one single perspective.

In this fragmented space, online factions are carving out their own customs, niches, and territories – their own marginal worlds that have the power to become the mainstream.

On a social level, gone are the days of feeds clustered around friends and family – here are the days of For You Pages guided by individual interests. On a cultural level, gone is the universal watercooler chat dictated by shared popular culture – today's agenda is set by ever-more niche and transient corners of the internet. And on a personal level, identities are more layered and fluid than ever before, more like an 'avatar du jour' than a static understanding of self.

In the eighth issue of our annual report ***Think Forward***, we unpick the complex and ever-changing web of digital culture and behaviour, and explore the role brands can play in reflecting and shaping it.

FIND OUT MORE IN THINK FORWARD 2023 >

THE TRENDS

1. TEXTURED DISCOVERY
PEOPLE WANT SOCIAL TO BE LESS PRECISE AND MORE EXPLORATORY

2. COLLAPSING NARRATIVES
STORYTELLING IS NO LONGER LINEAR NOR FOLLOWING ESTABLISHED STRUCTURES

3. MARGIN-CHASERS
ON SOCIAL, EXTREME BEHAVIOUR IS SEEN AS MORE AUTHENTIC, GAINING TRACTION AND CUTTING THROUGH

4. NEW COOPERATIVES
THE CULT OF THE INDIVIDUAL HAS GIVEN WAY TO LESS EGO-DRIVEN COMMUNITIES

5. EXPANDING IDENTITIES
VIRTUAL WORLDS ARE MAKING ONLINE IDENTITY MORE FLEXIBLE AND EXPANSIVE

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Meltwater Insights

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Global Overview

Our **2023 Marketing Trends** guide provides a glimpse at what the next generation of digital marketing has to offer.

Short-Form Video's Heyday

Short-form video is here to stay. And though what qualifies as "short" varies, easily digestible video content remains a priority for social platforms.

Marketers: Now is the time to embrace short-form video and experiment with length and new platform features, especially as social commerce gains even more traction in 2023.

Goodbye Third-Party Cookies

The death of third-party cookies is imminent. Until then, marketers need to spend 2023 overhauling their performance metrics.

Expect widespread shifts to gathering first-party data and using contextual marketing. Understanding who your audience is, where they are active online, and how they interact with your brand across the web is going to be an important part of strategy building in 2023 and beyond.

Accessibility Visibility

Thanks in part to Gen-Z's love of subtitles, closed-captions are now a regular sight in short-form video content across the internet.

Social platforms are continuing to invest in those and other accessibility features, but there's still a long way to go. A 2022 Business Disability Forum survey of disabled consumers found that 42% of respondents couldn't complete an online purchase because of inaccessible websites or apps.

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ESSENTIAL DIGITAL HEADLINES

OVERVIEW OF THE ADOPTION AND USE OF CONNECTED DEVICES AND SERVICES

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

ITALY

TOTAL POPULATION	CELLULAR MOBILE CONNECTIONS	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS
58.96 MILLION	78.19 MILLION	50.78 MILLION	43.90 MILLION
URBANISATION	vs. POPULATION	vs. POPULATION	vs. POPULATION
71.8%	132.6%	86.1%	74.5%

SOURCES: UNITED NATIONS; GOVERNMENT BODIES; GSMA INTELLIGENCE; ITU; WORLD BANK; EUROSTAT; CNNIC; APJII; IAMAI & KANTAR; CIA WORLD FACTBOOK; COMPANY ADVERTISING RESOURCES AND EARNINGS REPORTS; OCDH; BETA RESEARCH CENTER; KEPIOS ANALYSIS. **ADVISORY:** SOCIAL MEDIA USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS. **COMPARABILITY:** SIGNIFICANT REVISIONS TO SOURCE DATA, INCLUDING COMPREHENSIVE REVISIONS TO POPULATION DATA. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCE DATA MAY NOT HAVE BEEN UPDATED IN THE PAST YEAR. SEE NOTES ON DATA FOR FULL DETAILS.

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DIGITAL GROWTH

CHANGE IN THE USE OF CONNECTED DEVICES AND SERVICES OVER TIME

ITALY

TOTAL POPULATION	CELLULAR MOBILE CONNECTIONS	INTERNET USERS	ACTIVE SOCIAL MEDIA USERS
-0.3%	+0.3%	-0.3%	[N/A]
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
-164 THOUSAND	+200 THOUSAND	-141 THOUSAND	[BASE REVISIONS]

Meltwater Insights

Spotlight on Digital Culture

The people, topics, and trends driving conversation in Italy

Top Metaverse Fashion Keyword

"Community"

Meltwater, 2022

Top Influencer Campaign Platform

Instagram

Kleor, 2021

Top 2023 Marketing Trend

TikTok for Business

Meltwater, 2022

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Discover how to **unlock insights relevant to your organization** with Meltwater.

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THE NEW ERA OF INFLUENCE MARKETING

FROM AMPLIFICATION TO INTERPRETATION

THE ROLE OF CREATIVITY IN AN INFLUENCER MARKETING CAMPAIGN

Influencer marketing cannot escape the social struggle, and must constantly discover new ways to make branded content culturally relevant and successful.

The most successful influencer marketing campaigns during 2022 involved the brand behaving as an influencer. This means that three elements were crucial during the content ideation process:

- **Building the campaign on strong audience insights**
- **Creativity at the centre – the only real proxy for being connected with the audience.**
- **Selecting influencers with strong creative ambitions.**

THE TRUTH LIVES BEHIND THE LABELS Part 1

Micro, Mid, Macro... it doesn't matter!

For brands that wants to collaborate with an influencer, the scouting process has become a crucial step that has brought so-called 'soft criteria' like authenticity, cultural relevance, and creative ambition to the forefront and set aside 'hard criteria' such as influencer fame or community size.

While reaching large and heterogeneous audiences with messages that risk being irrelevant to a large proportion of them often leads to no benefit, building content that is valuable to a strong community, even if smaller, guarantees greater ad recall and memorability.

THE TRUTH LIVES BEHIND THE LABELS Part 2

Celebrity, Talent, Creator, Publisher... it doesn't matter!

Imagine a brand that is working on its recognisability. It has probably selected an influencer for their skills as a creator and ability to craft relevant content for their community. Couldn't the same influencer also star in a campaign with a different goal - where they are not asked to create something, but instead lend their voice to convey a message?

We can no longer categorise an influencer according to a specific skill (e.g., celebrity, talent, creator, publisher, etc.) because nowadays, an influencer is rather a cross-cutting figure capable of multiple things. In an influence marketing campaign, the role of the influencer is determined by the idea that lives behind the content.

POPULATION ESSENTIALS

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POPULATION ESSENTIALS

DEMOGRAPHICS AND OTHER KEY INDICATORS

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TOTAL POPULATION	FEMALE POPULATION	MALE POPULATION	YEAR-ON-YEAR CHANGE IN TOTAL POPULATION	MEDIAN AGE OF THE POPULATION
58.96 MILLION	51.2%	48.8%	-0.3% -164 THOUSAND	47.6

URBAN POPULATION	POPULATION DENSITY (PEOPLE PER KM²)	OVERALL LITERACY (ADULTS AGED 15+)	FEMALE LITERACY (ADULTS AGED 15+)	MALE LITERACY (ADULTS AGED 15+)
71.8%	199.0	99.3%	99.2%	99.5%

SOURCES: UNITED NATIONS; LOCAL GOVERNMENT AUTHORITIES; WORLD BANK; UNESCO; CIA WORLD FACTBOOK; OUR WORLD IN DATA; INDEXMUNDI; KNOEMA; KEPIOS ANALYSIS.

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POPULATION OVER TIME

TOTAL POPULATION AND YEAR-ON-YEAR CHANGE

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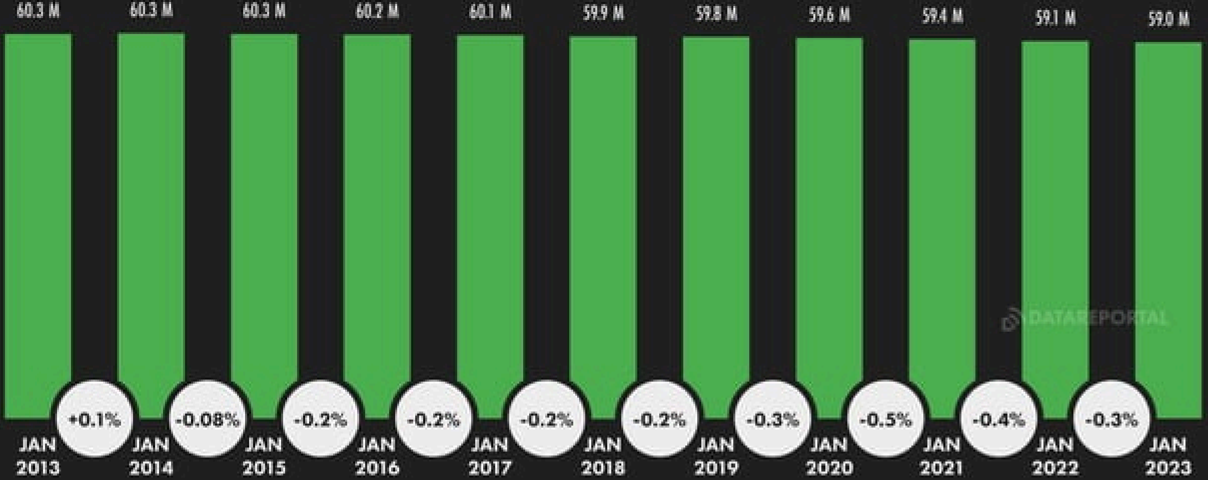

SOURCES: UNITED NATIONS; U.S. CENSUS BUREAU; LOCAL GOVERNMENT AUTHORITIES; KEPIOS ANALYSIS. **NOTE:** WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. **COMPARABILITY:** SOURCE CHANGES AND BASE REVISIONS. FIGURES MAY NOT CORRELATE WITH VALUES PUBLISHED IN OUR PREVIOUS REPORTS.

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POPULATION BY AGE

SHARE OF THE TOTAL POPULATION BY AGE GROUP

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TOTAL POPULATION	POPULATION AGED 0-4	POPULATION AGED 5-12	POPULATION AGED 13-17	POPULATION AGED 18-24
	0-4	5-12	13-17	18-24
58.96 MILLION	3.5%	6.9%	4.8%	6.9%

POPULATION AGED 25-34	POPULATION AGED 35-44	POPULATION AGED 45-54	POPULATION AGED 55-64	POPULATION AGED 65+
25-34	35-44	45-54	55-64	65+
10.6%	12.1%	15.7%	15.2%	24.3%

SOURCES: UNITED NATIONS; U.S. CENSUS BUREAU; LOCAL GOVERNMENT AUTHORITIES

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DEVICE OWNERSHIP

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO OWN EACH KIND OF DEVICE

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ANY KIND OF MOBILE PHONE	SMART PHONE	FEATURE PHONE	LAPTOP OR DESKTOP COMPUTER	TABLET DEVICE
97.5%	97.5%	1.8%	67.2%	51.2%
YEAR-ON-YEAR CHANGE +0.2% (+20 BPS)	YEAR-ON-YEAR CHANGE +0.2% (+20 BPS)	YEAR-ON-YEAR CHANGE +12.5% (+20 BPS)	YEAR-ON-YEAR CHANGE -10.9% (-820 BPS)	YEAR-ON-YEAR CHANGE -3.4% (-180 BPS)

GAMES CONSOLE	SMART WATCH OR SMART WRISTBAND	TV STREAMING DEVICE	SMART HOME DEVICE	VIRTUAL REALITY DEVICE
35.9%	33.2%	22.6%	20.5%	4.5%
YEAR-ON-YEAR CHANGE -2.4% (-90 BPS)	YEAR-ON-YEAR CHANGE +18.1% (+510 BPS)	YEAR-ON-YEAR CHANGE +15.3% (+300 BPS)	YEAR-ON-YEAR CHANGE +17.8% (+310 BPS)	YEAR-ON-YEAR CHANGE +60.7% (+170 BPS)

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTES: PERCENTAGE CHANGE VALUES REPRESENT RELATIVE YEAR-ON-YEAR CHANGE I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%. "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE THE ABSOLUTE CHANGE.

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DAILY TIME SPENT WITH MEDIA

THE AVERAGE AMOUNT OF TIME EACH DAY THAT INTERNET USERS AGED 16 TO 64 SPEND WITH DIFFERENT KINDS OF MEDIA AND DEVICES

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TIME SPENT USING THE INTERNET	TIME SPENT WATCHING TELEVISION (BROADCAST AND STREAMING)	TIME SPENT USING SOCIAL MEDIA	TIME SPENT READING PRESS MEDIA (ONLINE AND PHYSICAL PRINT)
5H 55M	3H 13M	1H 48M	1H 22M
YEAR-ON-YEAR CHANGE -4.1% (-15 MINS)	YEAR-ON-YEAR CHANGE +0.5% (+1 MIN)	YEAR-ON-YEAR CHANGE +0.9% (+1 MIN)	YEAR-ON-YEAR CHANGE +1.2% (+1 MIN)

TIME SPENT LISTENING TO MUSIC STREAMING SERVICES	TIME SPENT LISTENING TO BROADCAST RADIO	TIME SPENT LISTENING TO PODCASTS	TIME SPENT USING A GAMES CONSOLE
1H 05M	1H 10M	0H 32M	0H 48M
YEAR-ON-YEAR CHANGE [UNCHANGED]	YEAR-ON-YEAR CHANGE +1.4% (+1 MIN)	YEAR-ON-YEAR CHANGE +10.3% (+3 MINS)	YEAR-ON-YEAR CHANGE -2.0% (-1 MIN)

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTES: CONSUMPTION OF DIFFERENT MEDIA MAY OCCUR CONCURRENTLY. TELEVISION INCLUDES BOTH LINEAR BROADCAST AND CABLE TELEVISION AND CONTENT DELIVERED VIA STREAMING AND VIDEO-ON-DEMAND SERVICES. PRESS INCLUDES BOTH ONLINE AND PHYSICAL PRINT MEDIA. BROADCAST RADIO DOES NOT INCLUDE INTERNET RADIO.

INTERNET

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OVERVIEW OF INTERNET USE

ESSENTIAL INDICATORS OF INTERNET ADOPTION AND USE

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TOTAL INTERNET USERS	INTERNET USERS AS A PERCENTAGE OF TOTAL POPULATION	YEAR-ON-YEAR CHANGE IN THE NUMBER OF INTERNET USERS	AVERAGE DAILY TIME SPENT USING THE INTERNET BY EACH INTERNET USER	PERCENTAGE OF USERS ACCESSING THE INTERNET VIA MOBILE PHONES
50.78	86.1%	-0.3%	5H 55M	94.0%
MILLION	[UNCHANGED]	-141 THOUSAND	-4.1% (-15 MINS)	+1.2% (+110 BPS)

GWI.

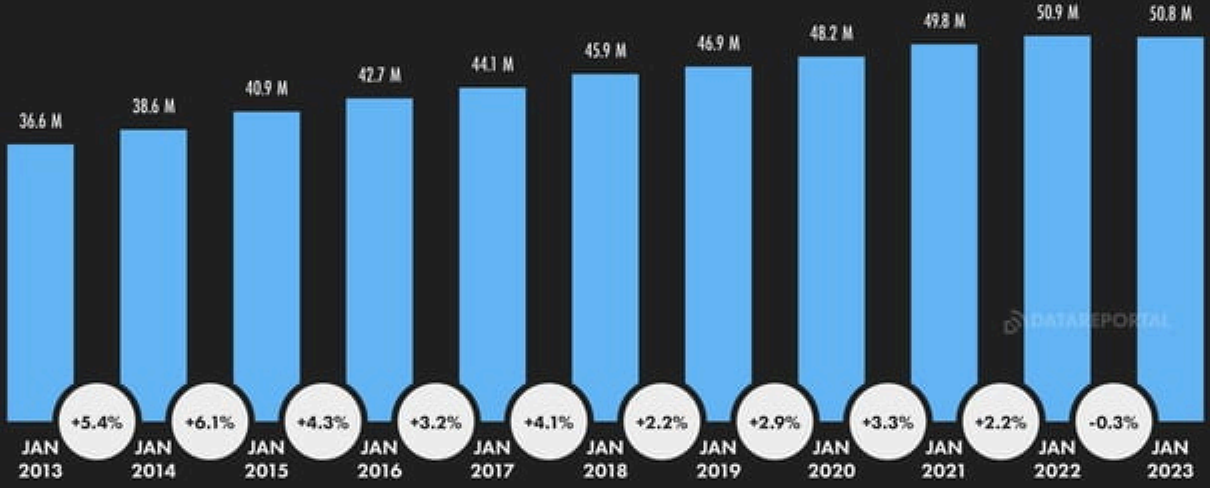
SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; WORLD BANK; GOOGLE'S ADVERTISING RESOURCES; CIA WORLD FACTBOOK; CNNIC; APJII; KANTAR & IAMAI; LOCAL GOVERNMENT AUTHORITIES; UNITED NATIONS. TIME SPENT AND MOBILE SHARE DATA FROM GWI (Q3 2022). SEE GWI.COM FOR MORE DETAILS. PERCENTAGE CHANGE FIGURES SHOW RELATIVE YEAR-ON-YEAR CHANGE. "BPS" FIGURES REPRESENT BASIS POINTS, AND SHOW ABSOLUTE YEAR-ON-YEAR CHANGE. **COMPARABILITY:** SOURCE AND BASE CHANGES. ALL FIGURES USE THE LATEST AVAILABLE DATA, BUT SOME SOURCE DATA MAY NOT HAVE BEEN UPDATED IN THE PAST YEAR. FIGURES FOR INTERNET USER GROWTH MAY UNDER-REPRESENT ACTUAL TRENDS. SEE NOTES ON DATA FOR DETAILS.

JAN
2023

INTERNET USERS OVER TIME

NUMBER OF INTERNET USERS AND YEAR-ON-YEAR CHANGE

ITALY



SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; GWI; CIA WORLD FACTBOOK; CNNIC; APJII; LOCAL GOVERNMENT AUTHORITIES. NOTE: WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. ADVISORY: DUE TO COVID-19-RELATED DELAYS IN RESEARCH AND REPORTING, FIGURES FOR INTERNET USER GROWTH AFTER 2020 MAY UNDER-REPRESENT ACTUAL TRENDS. SEE NOTES ON DATA FOR MORE DETAIL. COMPARABILITY: SOURCE AND BASE CHANGES. FIGURES MAY NOT MATCH OR CORRELATE WITH FIGURES PUBLISHED IN PREVIOUS REPORTS.

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INTERNET USER PERSPECTIVES

INTERNET USER NUMBERS PUBLISHED BY DIFFERENT SOURCES

ITALY

INTERNET USERS: ITU	INTERNET USERS: CIA WORLD FACTBOOK	INTERNET USERS: INTERNETWORLDSTATS
44.16 MILLION	41.61 MILLION	54.80 MILLION
vs. POPULATION 74.9%	vs. POPULATION 70.6%	vs. POPULATION 92.9%

SOURCES: AS STATED ABOVE EACH ICON. **NOTES:** WHERE SOURCES PUBLISH INTERNET ADOPTION AS A PERCENTAGE (I.E. PENETRATION), VALUES SHOWN HERE COMPARE THE LATEST PUBLISHED ADOPTION RATES IN EACH COUNTRY WITH THE LATEST FIGURES FOR POPULATION TO DERIVE ABSOLUTE USER NUMBERS. WHERE SOURCES PUBLISH ABSOLUTE USER NUMBERS, VALUES SHOWN HERE COMPARE THESE ABSOLUTE USER FIGURES WITH THE LATEST FIGURES FOR POPULATION TO DERIVE VALUES FOR "vs. POPULATION". **COMPARABILITY:** POTENTIAL MISMATCHES. INTERNET USER FIGURES QUOTED ELSEWHERE IN THIS REPORT USE DATA FROM MULTIPLE SOURCES, INCLUDING SOURCES NOT FEATURED ON THIS SLIDE.

JAN 2023

INTERNET ACCESS IN PERSPECTIVE

ACCESS TO THE INTERNET IN THE CONTEXT OF ACCESS TO OTHER LIFE ESSENTIALS, AS A PERCENTAGE OF TOTAL POPULATION

ITALY

USES THE INTERNET	HAS ACCESS TO ELECTRICITY	HAS ACCESS TO BASIC DRINKING WATER	HAS ACCESS TO BASIC SANITATION	EARNS LESS THAN USD $3.65 PER DAY
86.1%	100.0%	99.9%	99.9%	2.1%

SOURCES: KEPIOS ANALYSIS; ITU; GSMA INTELLIGENCE; EUROSTAT; GWI; CIA WORLD FACTBOOK; CNNIC; APJII; LOCAL GOVERNMENT AUTHORITIES; WORLD BANK; UNITED NATIONS.

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DAILY TIME SPENT USING THE INTERNET

AMOUNT OF TIME THAT INTERNET USERS AGED 16 TO 64 SPEND USING THE INTERNET EACH DAY

ITALY

DAILY TIME SPENT USING THE INTERNET ACROSS ALL DEVICES	TIME SPENT USING THE INTERNET ON MOBILE PHONES	TIME SPENT USING THE INTERNET ON COMPUTERS AND TABLETS	MOBILE'S SHARE OF TOTAL DAILY INTERNET TIME
5H 55M	2H 56M	2H 59M	49.6%

GWI.

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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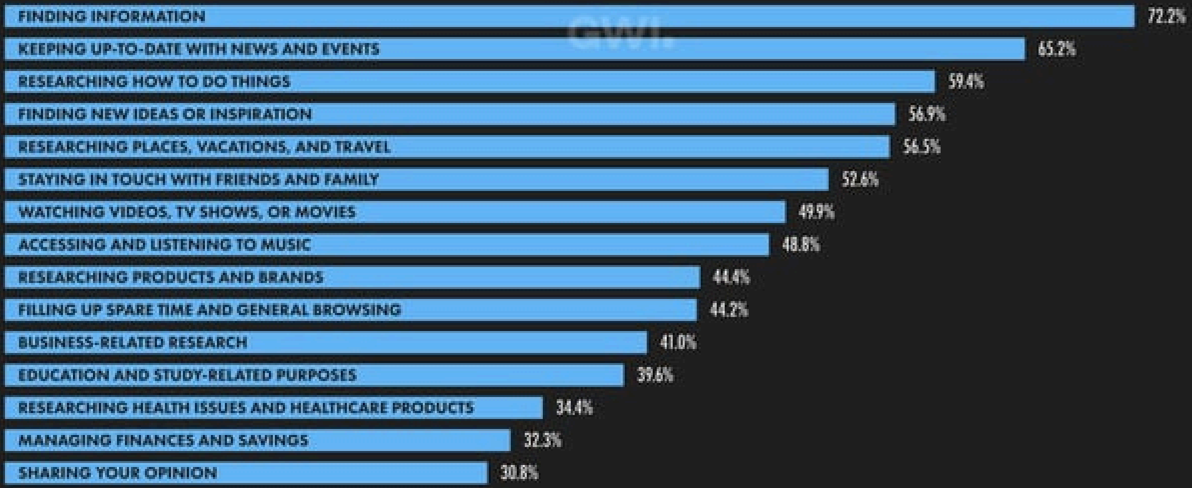
MAIN REASONS FOR USING THE INTERNET

PRIMARY REASONS WHY INTERNET USERS AGED 16 TO 64 USE THE INTERNET

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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DEVICES USED TO ACCESS THE INTERNET

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO USE EACH KIND OF DEVICE TO ACCESS THE INTERNET

ITALY

Device	Share	Year-on-year change
MOBILE PHONE (ANY)	94.0%	+1.2% (+110 BPS)
LAPTOP OR DESKTOP (ANY)	77.3%	-9.8% (-840 BPS)
SMART PHONE	93.4%	+1.0% (+90 BPS)
FEATURE PHONE	1.4%	+16.7% (+20 BPS)
TABLET DEVICE	41.2%	-6.4% (-280 BPS)
PERSONAL LAPTOP OR DESKTOP	71.8%	-9.7% (-770 BPS)
WORK LAPTOP OR DESKTOP	28.3%	-11.6% (-370 BPS)
CONNECTED TELEVISION	38.9%	+5.7% (+210 BPS)
SMART HOME DEVICE	20.4%	+1.5% (+30 BPS)
GAMES CONSOLE	17.0%	-11.5% (-220 BPS)

GWI.

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. **NOTES:** "MOBILE PHONE (ANY)" INCLUDES USERS WHO ACCESS VIA A SMARTPHONE OR A FEATURE PHONE. "LAPTOP OR DESKTOP (ANY)" INCLUDES USERS WHO ACCESS VIA THEIR OWN COMPUTER OR A COMPUTER PROVIDED BY THEIR EMPLOYER. PERCENTAGE CHANGE VALUES REFLECT RELATIVE CHANGE. "BPS" VALUES SHOW THE CHANGE IN BASIS POINTS, AND REFLECT ABSOLUTE CHANGE.

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INTERNET CONNECTION SPEEDS

MEDIAN DOWNLOAD SPEEDS (IN MEGABITS PER SECOND) OF MOBILE AND FIXED INTERNET CONNECTIONS

ITALY

MEDIAN DOWNLOAD SPEED OF CELLULAR MOBILE INTERNET CONNECTIONS	YEAR-ON-YEAR CHANGE IN MEDIAN CELLULAR MOBILE INTERNET CONNECTION SPEED	MEDIAN DOWNLOAD SPEED OF FIXED INTERNET CONNECTIONS	YEAR-ON-YEAR CHANGE IN MEDIAN FIXED INTERNET CONNECTION SPEED
39.25 MBPS	+13.7%	60.12 MBPS	+20.7%

SOURCE: OOKLA. NOTE: FIGURES REPRESENT MEDIAN DOWNLOAD SPEEDS IN MEGABITS PER SECOND (MBPS) IN NOVEMBER 2022. COMPARABILITY: THE VALUES FOR INTERNET CONNECTION SPEEDS THAT WE FEATURED IN PREVIOUS REPORTS REFLECTED MEAN CONNECTION SPEEDS, WHEREAS WE NOW FEATURE MEDIAN CONNECTION SPEEDS, WHICH OFFER A MORE REPRESENTATIVE INDICATION OF THE CONNECTION SPEEDS THAT "TYPICAL" USERS CAN EXPECT. AS A RESULT, VALUES SHOWN HERE ARE NOT COMPARABLE WITH THE VALUES PUBLISHED IN OUR PREVIOUS REPORTS.

JAN 2023

SHARE OF WEB TRAFFIC BY DEVICE

PERCENTAGE OF TOTAL WEB PAGES SERVED TO WEB BROWSERS RUNNING ON EACH KIND OF DEVICE

ITALY

MOBILE PHONES	LAPTOP AND DESKTOP COMPUTERS	TABLET DEVICES	OTHER DEVICES
52.00%	46.08%	1.89%	0.04%
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+9.8% (+463 BPS)	-8.7% (-441 BPS)	-10.4% (-22 BPS)	[UNCHANGED]

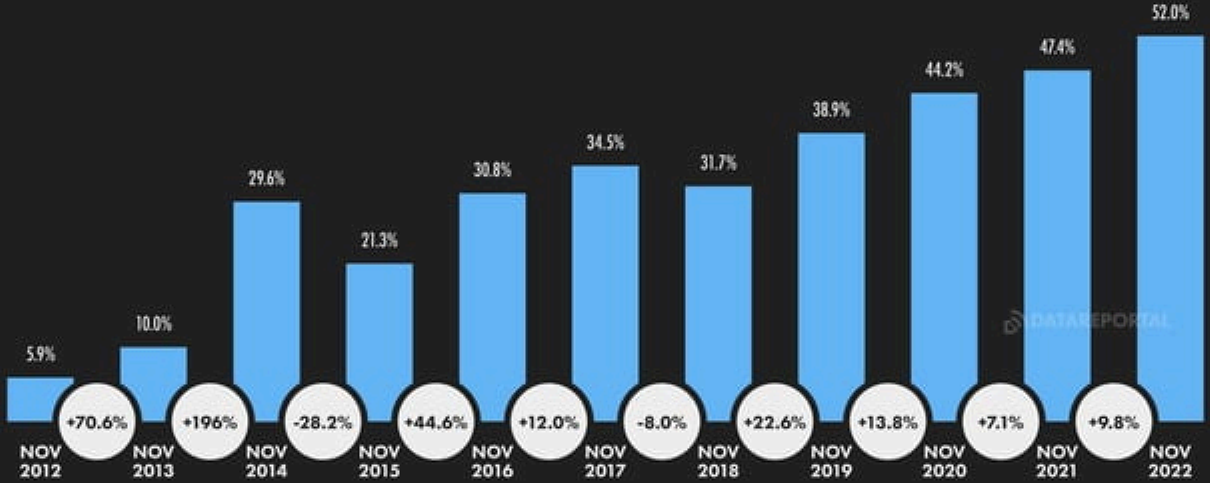
SOURCE: STATCOUNTER. NOTES: FIGURES REPRESENT THE NUMBER OF WEB PAGES SERVED TO BROWSERS RUNNING ON EACH TYPE OF DEVICE COMPARED WITH THE TOTAL NUMBER OF WEB PAGES SERVED TO BROWSERS RUNNING ON ANY DEVICE IN NOVEMBER 2022. PERCENTAGE CHANGE VALUES REPRESENT RELATIVE CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE THE ABSOLUTE CHANGE. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

JAN 2023

MOBILE'S SHARE OF WEB TRAFFIC

PERCENTAGE OF TOTAL WEB PAGES SERVED TO WEB BROWSERS RUNNING ON MOBILE PHONES

ITALY



SOURCE: STATCOUNTER. NOTES: FIGURES REPRESENT THE NUMBER OF WEB PAGES SERVED TO WEB BROWSERS RUNNING ON MOBILE PHONES COMPARED WITH THE TOTAL NUMBER OF WEB PAGES SERVED TO WEB BROWSERS RUNNING ON ANY DEVICE. PERCENTAGE CHANGE VALUES IN THE WHITE CIRCLES REPRESENT RELATIVE CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%)

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SHARE OF WEB TRAFFIC BY BROWSER

PERCENTAGE OF TOTAL WEB PAGES SERVED TO EACH BRAND OF WEB BROWSER RUNNING ON ANY DEVICE

ITALY

CHROME
65.45%
YEAR-ON-YEAR CHANGE
-1.9% (-129 BPS)

SAFARI
19.97%
YEAR-ON-YEAR CHANGE
+7.9% (+147 BPS)

MICROSOFT EDGE
4.32%
YEAR-ON-YEAR CHANGE
+8.3% (+33 BPS)

FIREFOX
4.61%
YEAR-ON-YEAR CHANGE
-4.2% (-20 BPS)

SAMSUNG INTERNET
3.20%
YEAR-ON-YEAR CHANGE
-2.4% (-8 BPS)

OPERA
1.52%
YEAR-ON-YEAR CHANGE
+6.3% (+9 BPS)

ANDROID
0.22%
YEAR-ON-YEAR CHANGE
-8.3% (-2 BPS)

OTHER
0.71%
YEAR-ON-YEAR CHANGE
-29.7% (-30 BPS)

SOURCE: STATCOUNTER. **NOTES:** FIGURES REPRESENT THE NUMBER OF PAGE VIEWS SERVED TO EACH BROWSER AS A PERCENTAGE OF TOTAL PAGE VIEWS SERVED TO WEB BROWSERS RUNNING ON ANY KIND OF DEVICE IN NOVEMBER 2022. PERCENTAGE CHANGE VALUES REPRESENT RELATIVE YEAR-ON-YEAR CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 30% WOULD EQUAL 36%, NOT 50%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE THE ABSOLUTE CHANGE. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

JAN 2023

TOP WEBSITES: SEMRUSH RANKING

SEMRUSH'S RANKING OF THE MOST VISITED WEBSITES, BASED ON WEBSITE TRAFFIC BETWEEN 01 SEPTEMBER AND 30 NOVEMBER 2022

ITALY

#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
01	GOOGLE.COM	1.95 B	148 M	22M 58S	3.5
02	YOUTUBE.COM	937 M	92.2 M	30M 57S	5.5
03	PORNHUB.COM	290 M	51.8 M	9M 36S	6.9
04	FACEBOOK.COM	272 M	58.6 M	20M 49S	2.9
05	WIKIPEDIA.ORG	238 M	54.8 M	11M 17S	2.1
06	AMAZON.IT	171 M	51.2 M	13M 16S	4.9
07	REPUBBLICA.IT	166 M	24.0 M	16M 50S	2.8
08	GOOGLE.IT	158 M	24.1 M	19M 16S	3.9
09	CORRIERE.IT	152 M	21.0 M	19M 54S	3.3
10	GAZZETTA.IT	147 M	13.9 M	22M 49S	3.1

#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
11	ANSA.IT	143 M	18.5 M	14M 09S	2.2
12	XVIDEOS.COM	123 M	29.1 M	11M 40S	7.1
13	ANIMEWORLD.TV	116 M	9.85 M	18M 25S	2.5
14	INSTAGRAM.COM	99.2 M	34.5 M	16M 53S	2.2
15	ILFATTOQUOTIDIANO.IT	95.5 M	12.3 M	17M 21S	2.4
16	TWITTER.COM	93.1 M	31.4 M	21M 47S	1.7
17	MEDIASET.IT	91.1 M	16.1 M	17M 12S	2.9
18	XNXX.COM	79.0 M	20.8 M	10M 13S	7.3
19	XHAMSTER.COM	69.8 M	18.6 M	14M 29S	6.2
20	SUBITO.IT	60.4 M	15.9 M	15M 31S	4.7

SOURCE: SEMRUSH. FIGURES REPRESENT TRAFFIC VALUES FOR THE PERIOD BETWEEN 01 SEPTEMBER AND 30 NOVEMBER 2022. NOTE: VALUES IN THE "UNIQUE VISITORS" COLUMN REPRESENT THE NUMBER OF DISTINCT "IDENTITIES" ACCESSING EACH SITE, BUT MAY NOT REPRESENT UNIQUE INDIVIDUALS, AS SOME PEOPLE MAY USE MULTIPLE DEVICES OR BROWSERS. FIGURES ENDING IN "B" REPRESENT BILLIONS; FIGURES ENDING IN "M" REPRESENT MILLIONS. TIME SHOWN IN MINUTES AND SECONDS. ADVISORY: SOME WEBSITES FEATURED IN THIS RANKING MAY CONTAIN ADULT CONTENT. PLEASE USE CAUTION WHEN VISITING UNKNOWN DOMAINS. COMPARABILITY: SOURCE METHODOLOGY CHANGES. VALUES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

TOP WEBSITES: SIMILARWEB RANKING

SIMILARWEB'S RANKING OF THE MOST VISITED WEBSITES, BASED ON WEBSITE TRAFFIC BETWEEN DECEMBER 2021 AND NOVEMBER 2022

ITALY

#	WEBSITE	TOTAL VISITS (MONTHLY AVE.)	UNIQUE VISITORS (MONTHLY AVE.)	AVERAGE TIME PER VISIT	AVERAGE PAGES PER VISIT
01	GOOGLE.COM	2.05 B	65.2 M	10M 40S	9.0
02	FACEBOOK.COM	593 M	46.3 M	8M 19S	7.1
03	YOUTUBE.COM	544 M	39.5 M	18M 41S	11.4
04	AMAZON.IT	175 M	31.4 M	7M 23S	9.4
05	INSTAGRAM.COM	144 M	24.8 M	7M 33S	10.5
06	REPUBBLICA.IT	133 M	19.7 M	7M 35S	3.6
07	CORRIERE.IT	97.5 M	20.1 M	14M 40S	14.8
08	ANSA.IT	90.2 M	15.4 M	5M 50S	2.7
09	MEDIASET.IT	88.3 M	17.7 M	8M 41S	4.2
10	WHATSAPP.COM	81.5 M	10.1 M	3M 35S	1.6
11	DIRETTA.IT	79.3 M	4.54 M	5M 37S	2.7
12	TWITTER.COM	72.2 M	13.8 M	9M 19S	9.3
13	ILMETEO.IT	69.0 M	14.3 M	5M 30S	3.3
14	SUBITO.IT	61.5 M	11.4 M	2M 46S	3.5
15	SKY.IT	59.6 M	17.8 M	7M 54S	9.4
16	GAZZETTA.IT	58.6 M	9.48 M	8M 32S	3.2
17	POSTE.IT	55.8 M	15.2 M	6M 52S	6.7
18	LIBEROQUOTIDIANO.IT	54.6 M	9.89 M	5M 07S	7.1
19	3BMETEO.COM	53.3 M	9.24 M	1M 43S	2.7
10	XVIDEOS.COM	52.1 M	7.23 M	5M 03S	4.0

SOURCE: SIMILARWEB. RANKING AND VALUES BASED ON TRAFFIC BETWEEN DECEMBER 2021 AND NOVEMBER 2022. NOTES: VALUES IN THE "UNIQUE VISITORS" COLUMN REPRESENT THE NUMBER OF DISTINCT 'IDENTITIES' ACCESSING EACH SITE, BUT MAY NOT REPRESENT UNIQUE INDIVIDUALS, AS SOME PEOPLE MAY USE MULTIPLE DEVICES OR BROWSERS. VALUES FOR "TOTAL VISITS" AND "UNIQUE VISITORS" REPRESENT MONTHLY AVERAGES. FIGURES ENDING IN "B" REPRESENT BILLIONS; FIGURES ENDING IN "M" REPRESENT MILLIONS. TIME SHOWN IN MINUTES AND SECONDS. ADVISORY: SOME WEBSITES FEATURED IN THIS RANKING MAY CONTAIN ADULT CONTENT. PLEASE USE CAUTION WHEN VISITING UNKNOWN DOMAINS.

JAN 2023

SHARE OF SEARCH ENGINE REFERRALS

PERCENTAGE OF TOTAL WEB TRAFFIC REFERRED BY SEARCH ENGINES THAT ORIGINATED FROM EACH SEARCH SERVICE

ITALY

GOOGLE	BING	YAHOO!	YANDEX
94.47%	3.63%	1.14%	0.13%
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
-0.2% (-20 BPS)	+9.0% (+30 BPS)	-8.8% (-11 BPS)	+116.7% (+7 BPS)

BAIDU	DUCKDUCKGO	NAVER	OTHER
0.01%	0.35%	0%	0.27%
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
[UNCHANGED]	-2.8% (-1 BP)	[N/A]	-15.6% (-5 BPS)

SOURCE: STATCOUNTER. **NOTES:** FIGURES REPRESENT THE NUMBER OF PAGE VIEW REFERRALS ORIGINATING FROM EACH SERVICE AS A PERCENTAGE OF TOTAL PAGE VIEW REFERRALS ORIGINATING FROM SEARCH ENGINES IN NOVEMBER 2022. PERCENTAGE CHANGE VALUES REPRESENT RELATIVE YEAR-ON-YEAR CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 30% WOULD EQUAL 36%, NOT 50%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE THE ABSOLUTE CHANGE. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

JAN 2023

TOP GOOGLE SEARCHES

QUERIES WITH THE GREATEST VOLUME OF GOOGLE SEARCH ACTIVITY BETWEEN 01 JANUARY 2022 AND 31 DECEMBER 2022

ITALY

#	SEARCH QUERY	INDEX vs. TOP QUERY
01	METEO	100
02	TRADUTTORE	37
03	GOOGLE	33
04	SERIE A	33
05	FACEBOOK	29
06	AMAZON	28
07	YOUTUBE	23
08	NAPOLI	22
09	DIRETTA	20
10	LIBERO	18
11	NEWS	18
12	TRADUZIONE	18
13	WHATSAPP	16
14	REPUBBLICA	15
15	CORRIERE	15
16	SPORT	14
17	INSTAGRAM	14
18	MILAN	13
19	LIBERO MAIL	13
20	INTER	13

SOURCE: GOOGLE TRENDS, BASED ON SEARCHES CONDUCTED BETWEEN 01 JANUARY 2022 AND 31 DECEMBER 2022. NOTES: ANY SPELLING ERRORS OR LANGUAGE INCONSISTENCIES IN SEARCH QUERIES ARE AS PUBLISHED BY GOOGLE TRENDS, AND ARE SHOWN "AS IS", TO ENABLE READERS TO IDENTIFY POTENTIAL CHANGES IN HOW PEOPLE USE LANGUAGE IN DIGITAL ENVIRONMENTS. GOOGLE DOES NOT PUBLISH ABSOLUTE SEARCH VOLUMES, BUT THE "INDEX vs. TOP QUERY" COLUMN SHOWS RELATIVE SEARCH VOLUMES FOR EACH QUERY COMPARED WITH THE SEARCH VOLUME OF THE TOP QUERY. ADVISORY: GOOGLE TRENDS USES DYNAMIC SAMPLING, SO RANK ORDER AND INDEX VALUES MAY VARY DEPENDING ON WHEN THE TOOL IS ACCESSED, EVEN FOR THE SAME TIME PERIOD.

JAN 2023

ACCESSING ONLINE INFORMATION

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO ENGAGE IN EACH KIND OF ONLINE ACTIVITY

ITALY

USE VOICE ASSISTANTS (E.G. SIRI, GOOGLE ASSISTANT) TO FIND INFORMATION EACH WEEK

22.3%

YEAR-ON-YEAR CHANGE

+0.9% (+20 BPS)

VISIT SOCIAL NETWORKS TO LOOK FOR INFORMATION ABOUT BRANDS AND PRODUCTS

32.3%

YEAR-ON-YEAR CHANGE

+4.2% (+130 BPS)

USE IMAGE RECOGNITION TOOLS (E.G. GOOGLE LENS, PINTEREST LENS) ON MOBILE EACH MONTH

24.5%

YEAR-ON-YEAR CHANGE

+3.8% (+90 BPS)

USE ONLINE TOOLS TO TRANSLATE TEXT INTO DIFFERENT LANGUAGES EACH WEEK

28.8%

YEAR-ON-YEAR CHANGE

-0.7% (-20 BPS)

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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WATCHING ONLINE VIDEO CONTENT

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO WATCH EACH KIND OF VIDEO CONTENT VIA THE INTERNET EACH WEEK

ITALY

KIND OF VIDEO	PERCENTAGE	YEAR-ON-YEAR CHANGE
ANY KIND OF VIDEO	91.1%	+2.7% (+240 BPS)
MUSIC VIDEO	45.1%	-3.0% (-140 BPS)
COMEDY, MEME, OR VIRAL VIDEO	34.9%	+1.7% (+60 BPS)
TUTORIAL OR HOW-TO VIDEO	37.2%	-0.5% (-20 BPS)
VIDEO LIVESTREAM	22.0%	-12.0% (-300 BPS)
EDUCATIONAL VIDEO	16.0%	-6.4% (-110 BPS)
PRODUCT REVIEW VIDEO	24.2%	-8.7% (-230 BPS)
SPORTS CLIP OR HIGHLIGHTS VIDEO	16.8%	-24.0% (-530 BPS)
GAMING VIDEO	13.3%	-10.7% (-160 BPS)
INFLUENCER VIDEOS AND VLOGS	16.7%	+5.0% (+80 BPS)

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTES: "YOY" PERCENTAGE VALUES REPRESENT THE RELATIVE YEAR-ON-YEAR CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT THE ABSOLUTE CHANGE IN BASIS POINTS.

JAN 2023

STREAMING TV CONTENT VIA THE INTERNET

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO WATCH TV CONTENT VIA STREAMING SERVICES (E.G. NETFLIX) EACH MONTH

ITALY

PERCENTAGE OF INTERNET USERS WHO STREAM TV CONTENT OVER THE INTERNET	INTERNET USERS WHO STREAM TV CONTENT vs. INTERNET USERS WHO WATCH ANY KIND OF TV	AVERAGE DAILY TIME THAT INTERNET USERS SPEND WATCHING STREAMING TV	TIME SPENT WATCHING STREAMING TV AS A PERCENTAGE OF TOTAL TIME SPENT WATCHING TV
90.7%	92.1%	1H 05M	33.7%

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

LISTENING TO ONLINE AUDIO CONTENT

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO LISTEN TO EACH KIND OF AUDIO CONTENT VIA THE INTERNET EACH WEEK

ITALY

LISTEN TO MUSIC STREAMING SERVICES	LISTEN TO ONLINE RADIO SHOWS OR STATIONS	LISTEN TO PODCASTS	LISTEN TO AUDIO BOOKS
43.6%	**22.4%**	**14.8%**	**9.4%**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
[UNCHANGED]	**+6.7% (+140 BPS)**	**+5.0% (+70 BPS)**	**+3.3% (+30 BPS)**

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. **NOTES:** "YOY" PERCENTAGE VALUES REPRESENT THE **RELATIVE** YEAR-ON-YEAR CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT THE ABSOLUTE CHANGE IN BASIS POINTS.

JAN 2023

DEVICES USED TO PLAY VIDEO GAMES

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO PLAY VIDEO GAMES ON EACH KIND OF DEVICE

ITALY

ANY DEVICE

80.6%

YEAR-ON-YEAR CHANGE

-1.5% (-120 BPS)

SMARTPHONE

60.3%

YEAR-ON-YEAR CHANGE

-2.4% (-150 BPS)

LAPTOP OR DESKTOP

31.1%

YEAR-ON-YEAR CHANGE

-10.9% (-380 BPS)

GAMES CONSOLE

34.9%

YEAR-ON-YEAR CHANGE

-6.9% (-260 BPS)

TABLET

20.8%

YEAR-ON-YEAR CHANGE

-12.2% (-290 BPS)

HAND-HELD GAMING DEVICE

6.0%

YEAR-ON-YEAR CHANGE

-17.8% (-130 BPS)

MEDIA STREAMING DEVICE

4.6%

YEAR-ON-YEAR CHANGE

-17.9% (-100 BPS)

VIRTUAL REALITY HEADSET

4.3%

YEAR-ON-YEAR CHANGE

+2.4% (+10 BPS)

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTES: "YOY" PERCENTAGE VALUES REPRESENT THE RELATIVE YEAR-ON-YEAR CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT THE ABSOLUTE CHANGE IN BASIS POINTS.

SMART HOME MARKET OVERVIEW

VALUE OF THE MARKET FOR SMART HOME DEVICES (U.S. DOLLARS)

ITALY

NUMBER OF HOMES WITH SMART HOME DEVICES	TOTAL ANNUAL VALUE OF THE SMART HOME DEVICES MARKET	VALUE OF SMART HOME APPLIANCES MARKET	VALUE OF SMART HOME CONTROL & CONNECTIVITY DEVICE MARKET
3.29 MILLION	**$972.3 MILLION**	**$378.5 MILLION**	**$183.7 MILLION**
YEAR-ON-YEAR CHANGE +19.3% (+533 THOUSAND)	YEAR-ON-YEAR CHANGE +7.8% (+$70 MILLION)	YEAR-ON-YEAR CHANGE +8.2% (+$29 MILLION)	YEAR-ON-YEAR CHANGE +11.7% (+$19 MILLION)

VALUE OF SMART HOME SECURITY DEVICE MARKET	VALUE OF SMART HOME ENTERTAINMENT DEVICE MARKET	VALUE OF SMART HOME COMFORT & LIGHTING MARKET	VALUE OF SMART HOME ENERGY MANAGEMENT MARKET
$115.8 MILLION	**$92.94 MILLION**	**$107.2 MILLION**	**$94.18 MILLION**
YEAR-ON-YEAR CHANGE +7.0% (+$7.6 MILLION)	YEAR-ON-YEAR CHANGE -4.4% (-$4.3 MILLION)	YEAR-ON-YEAR CHANGE +14.1% (+$13 MILLION)	YEAR-ON-YEAR CHANGE +6.6% (+$5.8 MILLION)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** "SMART HOME DEVICES" INCLUDE DIGITALLY CONNECTED AND CONTROLLED HOME DEVICES THAT CAN BE REMOTELY CONTROLLED, SENSORS, ACTUATORS AND CLOUD SERVICES THAT ENABLE HOME AUTOMATION, CONTROL HUBS THAT CONNECT SENSORS AND ACTUATORS TO REMOTE CONTROLS AND TO EACH OTHER, AND SMART HOME-RELATED SOFTWARE SALES (INCLUDING SUBSCRIPTION FEES). DOES NOT INCLUDE SMART TVS, OR B2B OR C2C SALES. FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUES FOR 2022 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. **COMPARABILITY:** BASE CHANGES.

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2023

AVERAGE ANNUAL REVENUE PER SMART HOME

AVERAGE ANNUAL SPEND ON SMART HOME DEVICES PER SMART HOME (U.S. DOLLARS)

ITALY

PENETRATION OF SMART HOME DEVICES	ARPU: SPEND ON ALL SMART HOME DEVICES	ARPU: SMART HOME APPLIANCES	ARPU: SMART HOME CONTROL & CONNECTIVITY DEVICES
12.4%	$295	$329	$139
YEAR-ON-YEAR CHANGE +18.8% (+196 BPS)	YEAR-ON-YEAR CHANGE -9.6% (-$31.50)	YEAR-ON-YEAR CHANGE -11.6% (-$43.20)	YEAR-ON-YEAR CHANGE -11.6% (-$18.20)
ARPU: SMART HOME SECURITY DEVICES	ARPU: SMART HOME ENTERTAINMENT DEVICES	ARPU: SMART HOME COMFORT & LIGHTING	ARPU: SMART HOME ENERGY MANAGEMENT
$88.75	$114	$79.66	$82.08
YEAR-ON-YEAR CHANGE -12.5% (-$12.65)	YEAR-ON-YEAR CHANGE -19.5% (-$27.50)	YEAR-ON-YEAR CHANGE -7.0% (-$5.96)	YEAR-ON-YEAR CHANGE -15.9% (-$15.48)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** "SMART HOME DEVICES" INCLUDE DIGITALLY CONNECTED AND CONTROLLED HOME DEVICES THAT CAN BE REMOTELY CONTROLLED, SENSORS, ACTUATORS AND CLOUD SERVICES THAT ENABLE HOME AUTOMATION, CONTROL HUBS THAT CONNECT SENSORS AND ACTUATORS TO REMOTE CONTROLS AND TO EACH OTHER, AND SMART HOME-RELATED SOFTWARE SALES (INCLUDING SUBSCRIPTION FEES). DOES NOT INCLUDE SMART TVS, OR B2B OR C2C SALES. FIGURES REPRESENT ESTIMATES OF FULL-YEAR SPEND PER SMART HOME FOR 2022 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. **COMPARABILITY:** BASE CHANGES.

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USE OF ONLINE FINANCIAL SERVICES

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO OWN OR USE EACH KIND OF DIGITAL FINANCIAL SERVICE

ITALY

USE A BANKING, INVESTMENT, OR INSURANCE WEBSITE OR MOBILE APP EACH MONTH	USE A MOBILE PAYMENT SERVICE (E.G. APPLE PAY, SAMSUNG PAY) EACH MONTH	OWN ANY FORM OF CRYPTOCURRENCY (E.G. BITCOIN, ETHER)
31.3%	16.5%	6.8%

GWI.

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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ONLINE PRIVACY AND SECURITY

PERSPECTIVES AND ACTIVITIES OF ONLINE ADULTS RELATING TO THEIR ONLINE DATA PRIVACY AND SECURITY

ITALY

COMFORTABLE WITH APPS TRACKING THEIR REAL-WORLD ACTIVITY (E.G. STEPS, SLEEP)	PREFER TO REMAIN ANONYMOUS WHEN USING ONLINE SERVICES	WORRY ABOUT HOW COMPANIES MIGHT USE THEIR ONLINE DATA	DECLINE COOKIES ON WEBSITES AT LEAST SOME OF THE TIME	EXPRESS CONCERN ABOUT WHAT IS REAL vs. WHAT IS FAKE ON THE INTERNET
30.5%	23.2%	33.6%	48.7%	52.4%

GWI. GWI.

SOURCES: DATA FOR "CONCERNS ABOUT WHAT IS REAL vs WHAT IS FAKE ON THE INTERNET" VIA REUTERS INSTITUTE FOR THE STUDY OF JOURNALISM'S "DIGITAL NEWS REPORT 2021". FIGURES REPRESENT THE FINDINGS OF A GLOBAL STUDY OF ONLINE NEWS CONSUMERS AGED 18+ (SEE DIGITALNEWSREPORT.ORG FOR MORE DETAILS). DATA FOR ALL OTHER DATA POINTS VIA GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

SOCIAL MEDIA

CORRECTIONS IN SOCIAL MEDIA USER NUMBERS

Over recent months, the data sources that we use to calculate social media user numbers in each country have made **significant revisions** to their underlying numbers. As a result, we are currently unable to provide data for the change in social media users over time. Because of these changes, readers **should not compare** social media user numbers published in this report with similar figures published in previous reports in the Global Digital Reports series, because any such comparisons will deliver **inaccurate data** and **misleading trends**. Furthermore, please note that the social media user numbers published in this report may appear to be significantly *lower* than the figures published in previous reports in this series. However, any such differences are the result of "corrections" in source data published by social media platforms, and our analysis of various data sources confirms that there has been **no discernible drop** in social media use in any of the countries that we track. As a result, readers should **not** interpret any negative differences between the numbers published in this report versus previous reports as a decline in social media use, because these differences are due to corrections in source methodologies and data reporting approaches, and **do not** represent a change in actual user numbers. Please read our comprehensive notes on data for more details: https://datareportal.com/notes-on-data

JAN 2023

OVERVIEW OF SOCIAL MEDIA USE

HEADLINES FOR SOCIAL MEDIA ADOPTION AND USE (NOTE: USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS)

ITALY

NUMBER OF SOCIAL MEDIA USERS	SOCIAL MEDIA USERS vs. TOTAL POPULATION	SOCIAL MEDIA USERS AGE 18+ vs. TOTAL POPULATION AGE 18+	SOCIAL MEDIA USERS vs. TOTAL INTERNET USERS
43.90 MILLION	74.5%	78.2%	86.4%

AVERAGE TIME SPENT USING SOCIAL MEDIA EACH DAY	AVERAGE NUMBER OF SOCIAL PLATFORMS USED EACH MONTH	FEMALE SOCIAL MEDIA USERS vs. TOTAL SOCIAL MEDIA USERS	MALE SOCIAL MEDIA USERS vs. TOTAL SOCIAL MEDIA USERS
1H 48M	5.9	49.9%	50.1%

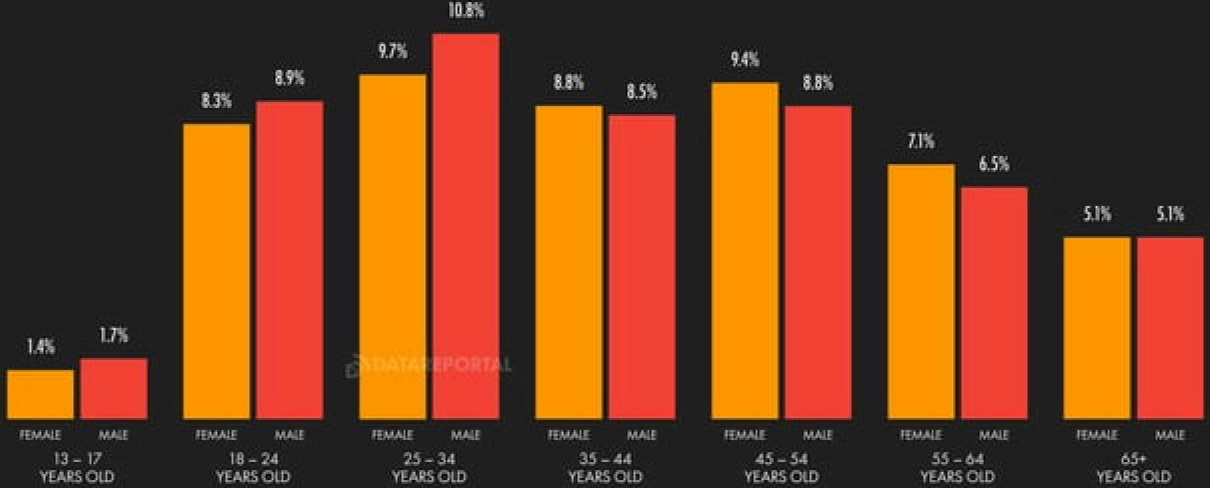
SOURCES: KEPIOS ANALYSIS; COMPANY ADVERTISING RESOURCES AND ANNOUNCEMENTS; CNNIC; BETA RESEARCH CENTER; OCDH; U.N.; U.S. CENSUS BUREAU. ADVISORY: SOCIAL MEDIA USERS MAY NOT REPRESENT UNIQUE INDIVIDUALS. FIGURES FOR REACH vs. POPULATION AND REACH vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, USER AGE MISSTATEMENTS, DELAYS IN DATA REPORTING, AND DIFFERENCES BETWEEN CENSUS COUNTS AND RESIDENT POPULATIONS. SEE NOTES ON DATA FOR FURTHER DETAILS.

JAN 2023

DEMOGRAPHIC PROFILE OF META'S AD AUDIENCE

SHARE OF COMBINED, DEDUPLICATED POTENTIAL ADVERTISING REACH ACROSS FACEBOOK, INSTAGRAM, AND MESSENGER, BY AGE AND GENDER

ITALY



SOURCES: KEPIOS ANALYSIS; META'S ADVERTISING RESOURCES. **NOTE:** META ONLY PERMITS PEOPLE AGED 13 AND ABOVE TO USE ITS PLATFORMS, SO WHILE THERE MAY BE USERS BELOW THE AGE OF 13, THEY DO NOT FEATURE IN THE AVAILABLE DATA. META'S ADVERTISING RESOURCES ONLY PUBLISH GENDER DATA FOR "FEMALE" AND "MALE". **COMPARABILITY:** IMPORTANT BASE DATA REVISIONS AND SOURCE REPORTING CHANGES. VALUES ARE NOT COMPARABLE WITH VALUES PUBLISHED IN OUR PREVIOUS REPORTS.

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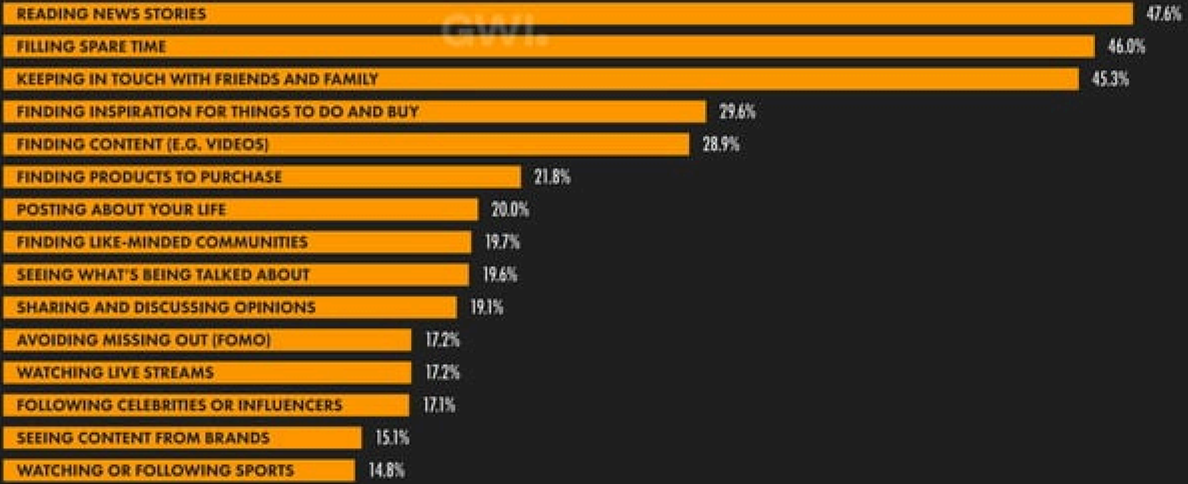
MAIN REASONS FOR USING SOCIAL MEDIA

PRIMARY REASONS WHY SOCIAL MEDIA USERS AGED 16 TO 64 USE SOCIAL MEDIA PLATFORMS

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTE: FIGURES REPRESENT THE SHARE OF INTERNET USERS AGED 16 TO 64 WHO REPORT USING AT LEAST ONE SOCIAL MEDIA OR MESSENGER PLATFORM IN THE PAST MONTH.

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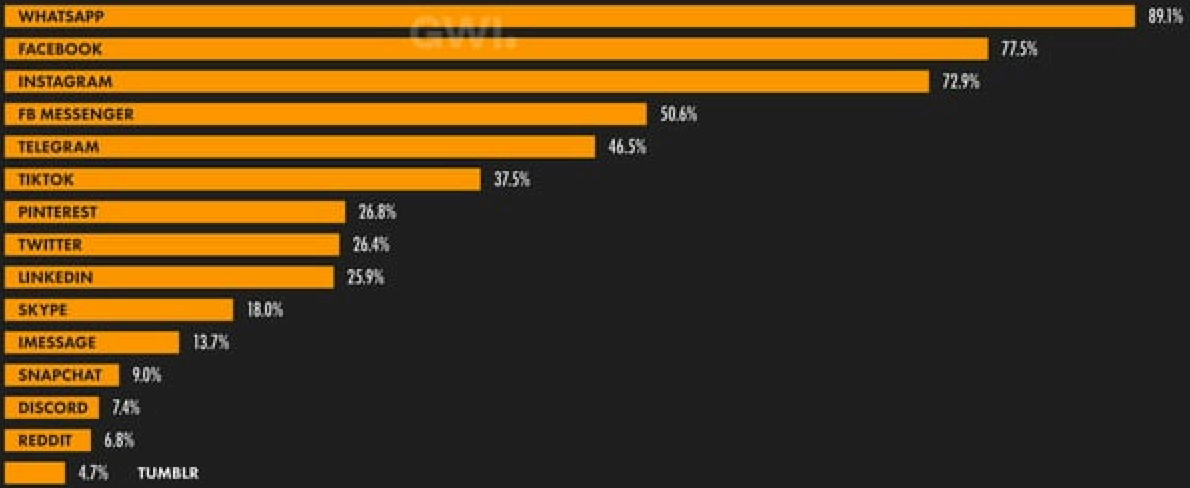
MOST USED SOCIAL MEDIA PLATFORMS

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO USE EACH PLATFORM EACH MONTH

NOTE: YOUTUBE IS NOT OFFERED AS AN ANSWER OPTION FOR THIS QUESTION IN GWI'S SURVEY, SO IT WILL NOT APPEAR IN THIS RANKING

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTE: YOUTUBE IS NOT OFFERED AS AN ANSWER OPTION FOR THIS QUESTION IN GWI'S SURVEY. COMPARABILITY: A VERSION OF THIS CHART THAT APPEARED IN OUR PREVIOUS REPORTS WAS BASED ON A PREVIOUS QUESTION IN GWI'S SURVEY THAT INCLUDED YOUTUBE AS AN ANSWER OPTION. GWI'S CURRENT SURVEY FEATURES A REVISED VERSION OF THIS QUESTION THAT DOES NOT INCLUDE YOUTUBE AS AN ANSWER OPTION, WHILE OTHER CHANGES TO THE QUESTION'S WORDING MAY MEAN THAT THE VALUES AND RANK ORDER SHOWN HERE ARE NOT DIRECTLY COMPARABLE WITH THOSE SHOWN ON A SIMILAR CHART IN PREVIOUS REPORTS.

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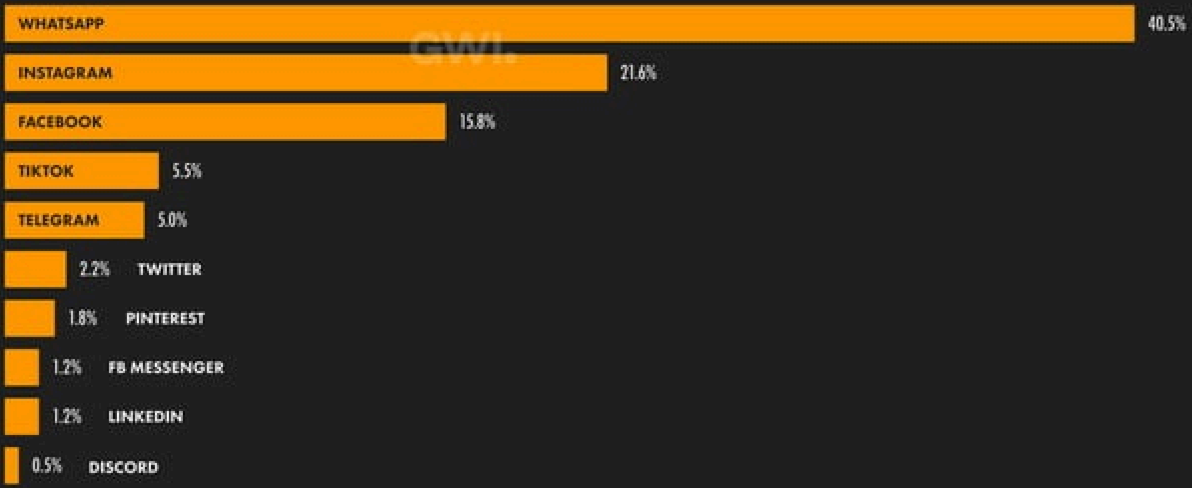
FAVOURITE SOCIAL MEDIA PLATFORMS

PERCENTAGE OF ACTIVE SOCIAL MEDIA USERS AGED 16 TO 64 WHO SAY THAT EACH OPTION IS THEIR "FAVOURITE" SOCIAL MEDIA PLATFORM

NOTE: YOUTUBE IS NOT OFFERED AS AN ANSWER OPTION FOR THIS QUESTION IN GWI'S SURVEY, SO IT WILL NOT APPEAR IN THIS RANKING

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTE: YOUTUBE IS NOT OFFERED AS AN ANSWER OPTION FOR THIS QUESTION IN GWI'S SURVEY.

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USE OF SOCIAL MEDIA FOR BRAND RESEARCH

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO USE EACH SOCIAL MEDIA CHANNEL TO FIND INFORMATION ABOUT BRANDS AND PRODUCTS

ITALY

ANY KIND OF SOCIAL MEDIA PLATFORM	SOCIAL NETWORKS	QUESTION & ANSWER SITES (E.G. QUORA)	FORUMS AND MESSAGE BOARDS
58.7%	32.3%	17.1%	12.0%
YEAR-ON-YEAR CHANGE +0.7% (+40 BPS)	YEAR-ON-YEAR CHANGE +4.2% (+130 BPS)	YEAR-ON-YEAR CHANGE -5.5% (-100 BPS)	YEAR-ON-YEAR CHANGE -13.0% (-180 BPS)

MESSAGING AND LIVE CHAT SERVICES	MICRO-BLOGS (E.G. TWITTER)	VLOGS (BLOGS IN A VIDEO FORMAT)	ONLINE PINBOARDS (E.G. PINTEREST)
7.2%	4.7%	5.7%	4.6%
YEAR-ON-YEAR CHANGE +2.9% (+20 BPS)	YEAR-ON-YEAR CHANGE -7.8% (-40 BPS)	YEAR-ON-YEAR CHANGE -9.5% (-60 BPS)	YEAR-ON-YEAR CHANGE +4.5% (+20 BPS)

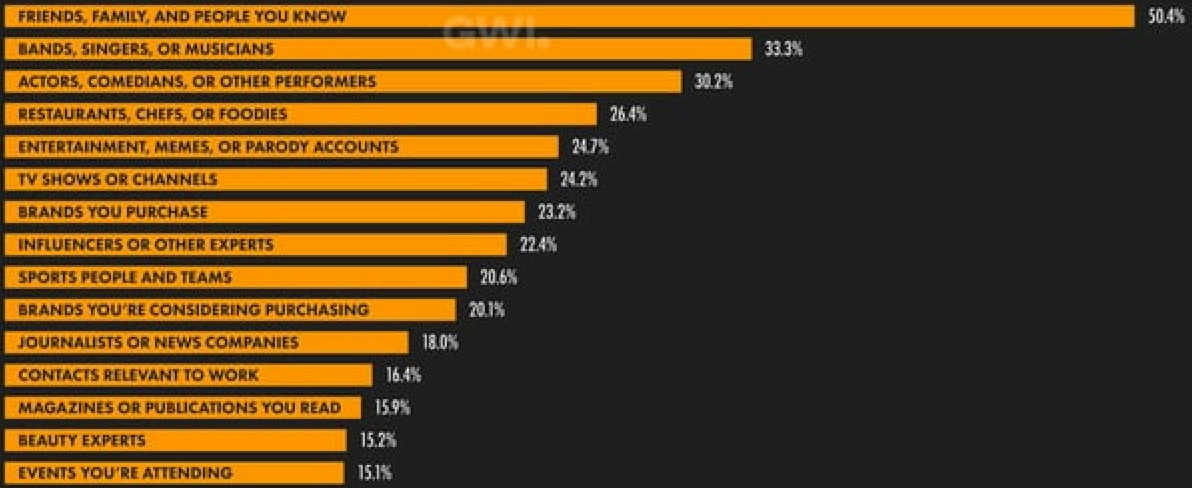
SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTE: VALUES FOR "ANY KIND OF SOCIAL MEDIA PLATFORM" INCLUDE AT LEAST ONE OF: SOCIAL NETWORKS; QUESTION AND ANSWER SITES (E.G. QUORA); FORUMS AND MESSAGE BOARDS; MESSAGING AND LIVE CHAT SERVICES; MICRO-BLOGS (E.G. TWITTER); BLOGS ON PRODUCTS / BRANDS (NOT SHOWN AS AN INDIVIDUAL VALUE ON THIS CHART); VLOGS (I.E. BLOGS RECORDED IN A VIDEO FORMAT); AND ONLINE PINBOARDS (E.G. PINTEREST).

JAN 2023

TYPES OF SOCIAL MEDIA ACCOUNTS FOLLOWED

PERCENTAGE OF ACTIVE SOCIAL MEDIA USERS AGED 16 TO 64 WHO FOLLOW EACH TYPE OF ACCOUNT ON SOCIAL MEDIA

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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WEB TRAFFIC REFERRALS FROM SOCIAL MEDIA

SHARE OF WEB TRAFFIC ARRIVING ON THIRD-PARTY WEBSITES VIA CLICKS OR TAPS ON LINKS PUBLISHED IN SOCIAL MEDIA PLATFORMS (ANY DEVICE)

ITALY

FACEBOOK	TWITTER	INSTAGRAM	PINTEREST	YOUTUBE
71.14%	**3.72%**	**16.59%**	**4.68%**	**1.70%**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
-3.9% (-287 BPS)	-6.3% (-25 BPS)	+192.6% (+1,092 BPS)	-18.8% (-108 BPS)	-80.6% (-708 BPS)

REDDIT	TUMBLR	LINKEDIN	VKONTAKTE	OTHER
0.72%	**0.74%**	**0.56%**	**0.11%**	**0.04%**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+30.9% (+17 BPS)	+23.3% (+14 BPS)	+33.3% (+14 BPS)	-47.6% (-10 BPS)	+33.3% (+1 BP)

SOURCE: STATCOUNTER. **NOTES:** SHARE DOES NOT INCLUDE TRAFFIC FROM MESSENGER PLATFORMS. DATA ARE ONLY AVAILABLE FOR A SELECTION OF PLATFORMS, AND PERCENTAGES REFLECT SHARE OF AVAILABLE PLATFORMS ONLY. FIGURES REPRESENT THE SHARE OF WEB TRAFFIC ARRIVING ON THIRD-PARTY WEBSITES VIA CLICKS OR TAPS ON LINKS PUBLISHED ON EACH PLATFORM AS A PERCENTAGE OF TOTAL WEB TRAFFIC ARRIVING FROM THE AVAILABLE SELECTION OF SOCIAL PLATFORMS IN NOVEMBER 2022. PERCENTAGE CHANGE VALUES REPRESENT RELATIVE YEAR-ON-YEAR CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE THE ABSOLUTE CHANGE. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

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SOCIAL MEDIA PLATFORMS

JAN 2023

FACEBOOK: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON FACEBOOK

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

ITALY

TOTAL POTENTIAL REACH OF ADS ON FACEBOOK

27.95
MILLION

FACEBOOK AD REACH vs. TOTAL POPULATION

47.4%

QUARTER-ON-QUARTER CHANGE IN REPORTED FACEBOOK AD REACH

90

-0.5%
-150 THOUSAND

YEAR-ON-YEAR CHANGE IN REPORTED FACEBOOK AD REACH

365

-2.1%
-600 THOUSAND

FACEBOOK AD REACH vs. TOTAL INTERNET USERS

55.0%

FACEBOOK AD REACH vs. POPULATION AGED 13+

52.9%

FEMALE FACEBOOK AD REACH vs. TOTAL FACEBOOK AD REACH

50.5%

MALE FACEBOOK AD REACH vs. TOTAL FACEBOOK AD REACH

49.5%

SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINT OF PUBLISHED RANGES. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES FOR REACH vs. POPULATION AND REACH vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES MAY NOT BE COMPARABLE WITH PREVIOUS REPORTS. SEE NOTES ON DATA FOR FURTHER DETAILS.

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JAN 2023

SHARE OF FACEBOOK PAGE POSTS BY POST TYPE

POSTS OF EACH TYPE AS A PERCENTAGE OF ALL POSTS MADE BY FACEBOOK PAGES

ITALY

AVERAGE NUMBER OF PAGE POSTS PER DAY	PHOTO POSTS' SHARE OF TOTAL PAGE POSTS	VIDEO POSTS' SHARE OF TOTAL PAGE POSTS	LINK POSTS' SHARE OF TOTAL PAGE POSTS	STATUS POSTS' SHARE OF TOTAL PAGE POSTS
0.80	60.00%	8.97%	30.78%	0.25%

SOURCE: LOCOWISE. FIGURES REPRESENT AVERAGES BETWEEN 01 SEPTEMBER 2022 AND 30 NOVEMBER 2022. NOTES: FIGURES ARE AVERAGES BASED ON A WIDE VARIETY OF DIFFERENT KINDS OF PAGE, WITH DIFFERENT AUDIENCE SIZES, IN VARIOUS COUNTRIES AROUND THE WORLD. VALUES MAY NOT SUM TO 100% DUE TO ROUNDING.

JAN 2023

FACEBOOK POST ENGAGEMENT BENCHMARKS

FACEBOOK PAGE POST ENGAGEMENTS (REACTIONS, COMMENTS, AND SHARES) AS A PERCENTAGE OF TOTAL PAGE FANS

ITALY

AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: ALL POST TYPES	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: PHOTO POSTS	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: VIDEO POSTS	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: LINK POSTS	AVERAGE FACEBOOK PAGE POST ENGAGEMENTS vs. PAGE FANS: STATUS POSTS
0.13%	0.15%	0.09%	0.11%	0.005%

SOURCE: LOCOWISE. FIGURES REPRESENT AVERAGES BETWEEN 01 SEPTEMBER 2022 AND 30 NOVEMBER 2022. NOTES: PERCENTAGES COMPARE THE COMBINED TOTAL OF REACTIONS, COMMENTS, AND SHARES WITH THE TOTAL NUMBER OF PAGE FANS. FIGURES ARE AVERAGES BASED ON A WIDE VARIETY OF DIFFERENT KINDS OF PAGE, WITH DIFFERENT AUDIENCE SIZES, IN VARIOUS COUNTRIES AROUND THE WORLD. VALUES MAY NOT SUM TO 100% DUE TO ROUNDING.

JAN 2023

YOUTUBE: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON YOUTUBE

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

ITALY

POTENTIAL REACH OF ADS ON YOUTUBE	YOUTUBE AD REACH vs. TOTAL POPULATION	YOUTUBE AD REACH vs. TOTAL INTERNET USERS	YEAR-ON-YEAR CHANGE IN REPORTED YOUTUBE AD REACH
43.90 MILLION	74.5%	86.4%	+1.6% +700 THOUSAND

YOUTUBE'S ADVERTISING REACH: USERS AGED 18+	YOUTUBE'S AD REACH AGE 18+ vs. TOTAL POPULATION AGE 18+	FEMALE YOUTUBE AD REACH AGE 18+ vs. TOTAL YOUTUBE AD REACH AGE 18+	MALE YOUTUBE AD REACH AGE 18+ vs. TOTAL YOUTUBE AD REACH AGE 18+
39.10 MILLION	78.2%	50.4%	49.6%

SOURCES: GOOGLE'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** DATA ARE NOT AVAILABLE FOR ALL LOCATIONS. FIGURES BASED ON AVAILABLE DATA ONLY. AGE AND GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE" USERS AGED 18+. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES vs. POPULATION AND vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, USER AGE MISSTATEMENTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES NOT COMPARABLE WITH PREVIOUS REPORTS. SEE NOTES ON DATA FOR DETAILS.

JAN 2023

TOP YOUTUBE SEARCHES

QUERIES WITH THE GREATEST VOLUME OF YOUTUBE SEARCH ACTIVITY BETWEEN 01 JANUARY 2022 AND 31 DECEMBER 2022

ITALY

#	SEARCH QUERY	INDEX
01	CANZONI	100
02	CANZONE	75
03	MUSICA	49
04	LYON	42
05	ME CONTRO TE	41
06	FILM COMPLETO	32
07	ASMR	32
08	KARAOKE	27
09	TIKTOK	27
10	MINECRAFT	25

#	SEARCH QUERY	INDEX
11	MILAN	24
12	NAPOLI	23
13	INTER	22
14	FORTNITE	22
15	ULTIMO	19
16	ROBLOX	18
17	MANESKIN	16
18	NIKO PANDETTA	16
19	ELISA	16
20	PAKY	15

SOURCE: GOOGLE TRENDS. BASED ON SEARCHES CONDUCTED ON YOUTUBE BETWEEN 01 JANUARY 2022 AND 31 DECEMBER 2022. **NOTES:** ANY SPELLING ERRORS OR LANGUAGE INCONSISTENCIES IN SEARCH QUERIES ARE AS PUBLISHED BY GOOGLE TRENDS, AND ARE SHOWN "AS IS" TO ENABLE READERS TO IDENTIFY POTENTIAL CHANGES IN HOW PEOPLE USE LANGUAGE IN DIGITAL ENVIRONMENTS. GOOGLE DOES NOT PUBLISH ABSOLUTE SEARCH VOLUMES, BUT THE "INDEX vs. TOP QUERY" COLUMN SHOWS RELATIVE SEARCH VOLUMES FOR EACH QUERY COMPARED WITH THE SEARCH VOLUME OF THE TOP QUERY. **ADVISORY:** GOOGLE TRENDS USES DYNAMIC SAMPLING, SO RANK ORDER AND INDEX VALUES MAY VARY DEPENDING ON WHEN THE TOOL IS ACCESSED, EVEN FOR THE SAME TIME PERIOD.

JAN 2023

INSTAGRAM: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON INSTAGRAM

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS.

ITALY

TOTAL POTENTIAL REACH OF ADS ON INSTAGRAM	INSTAGRAM AD REACH vs. TOTAL POPULATION	QUARTER-ON-QUARTER CHANGE IN REPORTED INSTAGRAM AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED INSTAGRAM AD REACH
26.20 MILLION	**44.4%**	**-3.0%** -800 THOUSAND	**-4.7%** -1.3 MILLION

INSTAGRAM AD REACH vs. TOTAL INTERNET USERS	INSTAGRAM AD REACH vs. POPULATION AGED 13+	FEMALE INSTAGRAM AD REACH vs. TOTAL INSTAGRAM AD REACH	MALE INSTAGRAM AD REACH vs. TOTAL INSTAGRAM AD REACH
51.6%	**49.6%**	**51.0%**	**49.0%**

SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINT OF PUBLISHED RANGES. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES FOR REACH vs. POPULATION AND REACH vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES MAY NOT BE COMPARABLE WITH PREVIOUS REPORTS. SEE NOTES ON DATA FOR FURTHER DETAILS.

JAN 2023

TIKTOK: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE AGED 18+ THAT MARKETERS CAN REACH WITH ADS ON TIKTOK

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS.

ITALY

POTENTIAL REACH OF ADS ON TIKTOK (AGE 18+ ONLY)

17.15 MILLION

TIKTOK AD REACH AGE 18+ vs. TOTAL POPULATION

29.1%

QUARTER-ON-QUARTER CHANGE IN REPORTED TIKTOK AD REACH

+4.1%

+677 THOUSAND

YEAR-ON-YEAR CHANGE IN REPORTED TIKTOK AD REACH

+29.0%

+3.9 MILLION

TIKTOK AD REACH AGE 18+ vs. TOTAL INTERNET USERS

33.8%

TIKTOK AD REACH AGE 18+ vs. POPULATION AGE 18+

34.3%

FEMALE TIKTOK AD REACH vs. TOTAL TIKTOK AD REACH

52.8%

MALE TIKTOK AD REACH vs. TOTAL TIKTOK AD REACH

47.2%

SOURCES: TIKTOK'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** DOES NOT INCLUDE DOUYIN. REACH DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE" USERS. AGED 18+ DATA ARE NOT AVAILABLE FOR ALL LOCATIONS; FIGURES BASED ON MIDPOINTS OF AVAILABLE DATA ONLY. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES vs. POPULATION AND vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, USER AGE MISSTATEMENTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES MAY NOT BE COMPARABLE WITH PREVIOUS REPORTS.

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MESSENGER: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON FACEBOOK MESSENGER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

ITALY

TOTAL POTENTIAL REACH OF ADS ON MESSENGER	MESSENGER AD REACH vs. TOTAL POPULATION	QUARTER-ON-QUARTER CHANGE IN REPORTED MESSENGER AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED MESSENGER AD REACH
17.55 MILLION	29.8%	-1.1% -200 THOUSAND	+0.3% +50 THOUSAND

MESSENGER AD REACH vs. TOTAL INTERNET USERS	MESSENGER AD REACH vs. POPULATION AGED 13+	FEMALE MESSENGER AD REACH vs. TOTAL MESSENGER AD REACH	MALE MESSENGER AD REACH vs. TOTAL MESSENGER AD REACH
34.6%	33.2%	52.1%	47.9%

SOURCES: META'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINT OF PUBLISHED RANGES. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES FOR REACH vs. POPULATION AND REACH vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES MAY NOT BE COMPARABLE WITH PREVIOUS REPORTS. SEE NOTES ON DATA FOR FURTHER DETAILS.

JAN 2023

LINKEDIN: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON LINKEDIN

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS.

ITALY

TOTAL POTENTIAL REACH OF ADS ON LINKEDIN	LINKEDIN AD REACH vs. TOTAL POPULATION	QUARTER-ON-QUARTER CHANGE IN REPORTED LINKEDIN AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED LINKEDIN AD REACH
17.00 MILLION	28.8%	0% [UNCHANGED]	+6.3% +1.0 MILLION

LINKEDIN AD REACH vs. TOTAL INTERNET USERS	LINKEDIN AD REACH vs. POPULATION AGED 18+	FEMALE LINKEDIN AD REACH vs. TOTAL LINKEDIN AD REACH	MALE LINKEDIN AD REACH vs. TOTAL LINKEDIN AD REACH
33.5%	34.0%	48.8%	51.2%

SOURCES: LINKEDIN'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES ARE BASED ON TOTAL REGISTERED MEMBERS, SO ARE NOT COMPARABLE WITH OTHER PLATFORMS IN THIS REPORT. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS, OR MATCH THE TOTAL ACTIVE USER OR REGISTERED MEMBER BASE. VALUES FOR REACH vs. POPULATION AND REACH vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES MAY NOT BE COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

SNAPCHAT: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON SNAPCHAT

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS

ITALY

TOTAL POTENTIAL REACH OF ADS ON SNAPCHAT	SNAPCHAT AD REACH vs. TOTAL POPULATION	QUARTER-ON-QUARTER CHANGE IN REPORTED SNAPCHAT AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED SNAPCHAT AD REACH
3.70 MILLION	6.3%	-9.8% -400 THOUSAND	+15.6% +500 THOUSAND

SNAPCHAT AD REACH vs. TOTAL INTERNET USERS	SNAPCHAT AD REACH vs. POPULATION AGED 13+	FEMALE SNAPCHAT AD REACH vs. TOTAL SNAPCHAT AD REACH*	MALE SNAPCHAT AD REACH vs. TOTAL SNAPCHAT AD REACH*
7.3%	7.0%	64.0%	35.5%

SOURCES: SNAP'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** DATA ARE NOT AVAILABLE FOR ALL LOCATIONS. FIGURES BASED ON MIDPOINTS OF AVAILABLE DATA ONLY. (*) GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE", BUT GENDER VALUES DO NOT SUM TO TOTAL. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES vs. POPULATION AND vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES NOT COMPARABLE WITH PREVIOUS REPORTS. SEE NOTES ON DATA FOR FURTHER DETAILS.

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TWITTER: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON TWITTER

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS.

ITALY

TOTAL POTENTIAL REACH OF ADS ON TWITTER	TWITTER AD REACH vs. TOTAL POPULATION	QUARTER-ON-QUARTER CHANGE IN REPORTED TWITTER AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED TWITTER AD REACH
5.45 MILLION	9.2%	-10.7% -650 THOUSAND	+45.3% +1.7 MILLION

TWITTER AD REACH vs. TOTAL INTERNET USERS	TWITTER AD REACH vs. POPULATION AGED 13+	FEMALE TWITTER AD REACH vs. TOTAL TWITTER AD REACH	MALE TWITTER AD REACH vs. TOTAL TWITTER AD REACH
10.7%	10.3%	35.5%	64.5%

SOURCES: TWITTER'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** VALUES USE MIDPOINT OF PUBLISHED RANGES. GENDER DATA ARE ONLY AVAILABLE FOR "FEMALE" AND "MALE". **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES vs. POPULATION AND vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, ACCOUNTS THAT DO NOT REPRESENT HUMAN INDIVIDUALS (E.G. BUSINESSES, MUSIC BANDS, ETC.), DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES MAY NOT BE COMPARABLE WITH PREVIOUS REPORTS. SEE NOTES ON DATA FOR DETAILS.

JAN 2023

PINTEREST: ADVERTISING AUDIENCE OVERVIEW

THE POTENTIAL AUDIENCE THAT MARKETERS CAN REACH WITH ADS ON PINTEREST

NOTE: PLEASE READ THE IMPORTANT NOTES ON COMPARING DATA AT THE START OF THIS REPORT BEFORE COMPARING DATA ON THIS CHART WITH PREVIOUS REPORTS.

ITALY

TOTAL POTENTIAL REACH OF ADS ON PINTEREST	PINTEREST AD REACH vs. TOTAL POPULATION	QUARTER-ON-QUARTER CHANGE IN REPORTED PINTEREST AD REACH	YEAR-ON-YEAR CHANGE IN REPORTED PINTEREST AD REACH
8.08 MILLION	13.7%	-16.2% -1.6 MILLION	-5.6% -480 THOUSAND

PINTEREST AD REACH vs. TOTAL INTERNET USERS	PINTEREST AD REACH vs. POPULATION AGED 13+	FEMALE PINTEREST AD REACH vs. TOTAL PINTEREST AD REACH	MALE PINTEREST AD REACH vs. TOTAL PINTEREST AD REACH
15.9%	15.3%	76.3%	19.2%

SOURCES: PINTEREST'S ADVERTISING RESOURCES; KEPIOS ANALYSIS. **NOTES:** DATA ARE NOT AVAILABLE FOR ALL LOCATIONS. VALUES BASED ON MIDPOINTS OF AVAILABLE DATA ONLY. GENDER DATA ARE ALSO AVAILABLE FOR "UNSPECIFIED", SO VALUES FOR "FEMALE" AND "MALE" MAY NOT SUM TO 100%. **ADVISORY:** REACH FIGURES MAY NOT REPRESENT UNIQUE INDIVIDUALS OR MATCH THE TOTAL ACTIVE USER BASE. VALUES FOR REACH vs. POPULATION AND REACH vs. INTERNET USERS MAY EXCEED 100% DUE TO DUPLICATE AND FAKE ACCOUNTS, DIFFERENT RESEARCH DATES, AND DIFFERENCES IN CENSUS DATA vs. RESIDENT POPULATIONS. SOURCE DATA REVISIONS MAY DISTORT VALUES FOR CHANGE OVER TIME. **COMPARABILITY:** SOURCE DATA REVISIONS. VALUES MAY NOT BE COMPARABLE WITH PREVIOUS REPORTS.

MOBILE

JAN 2023

MOBILE CONNECTIVITY

USE OF MOBILE PHONES AND DEVICES THAT CONNECT TO CELLULAR NETWORKS

ITALY

NUMBER OF CELLULAR MOBILE CONNECTIONS (EXCLUDING IOT)	NUMBER OF CELLULAR MOBILE CONNECTIONS COMPARED WITH TOTAL POPULATION	YEAR-ON-YEAR CHANGE IN THE NUMBER OF CELLULAR MOBILE CONNECTIONS	SHARE OF CELLULAR MOBILE CONNECTIONS THAT ARE BROADBAND (3G, 4G, 5G)
78.19 MILLION	**132.6%**	**+0.3%** +200 THOUSAND	**88.4%**

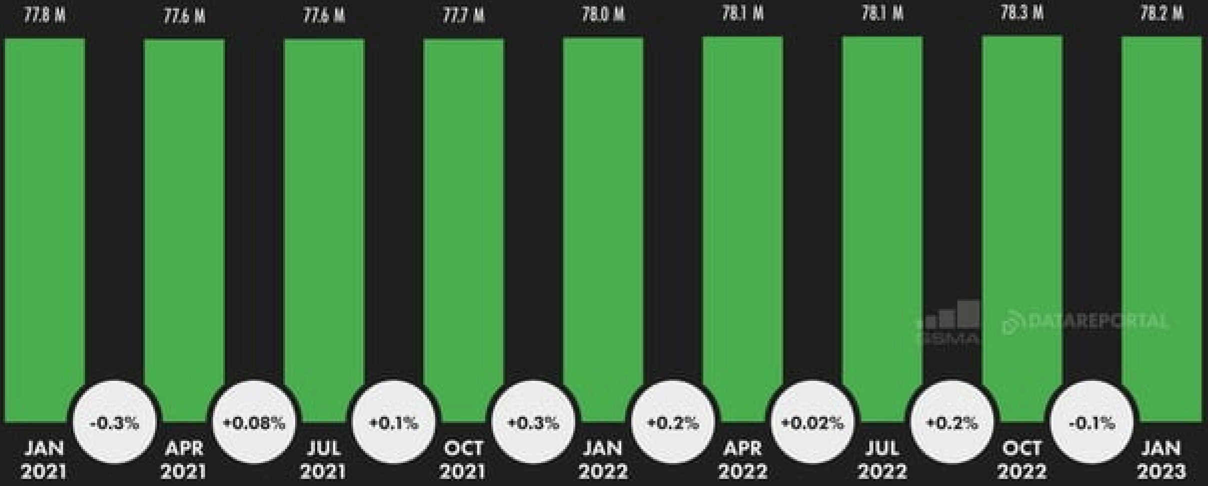
SOURCE: GSMA INTELLIGENCE. **NOTES:** TOTAL CELLULAR CONNECTIONS INCLUDE DEVICES OTHER THAN MOBILE PHONES, BUT EXCLUDE CELLULAR IOT CONNECTIONS. FIGURES MAY SIGNIFICANTLY EXCEED FIGURES FOR POPULATION DUE TO MULTIPLE CONNECTIONS AND CONNECTED DEVICES PER PERSON. **COMPARABILITY:** BASE CHANGES. VERSIONS OF THIS CHART PUBLISHED IN SOME OF OUR PREVIOUS REPORTS FEATURED CELLULAR CONNECTION FIGURES THAT INCLUDED CELLULAR IOT CONNECTIONS. FIGURES SHOWN HERE DO **NOT** INCLUDE CELLULAR IOT CONNECTIONS.

JAN 2023

CELLULAR MOBILE CONNECTIONS OVER TIME

NUMBER OF CELLULAR MOBILE CONNECTIONS AND YEAR-ON-YEAR CHANGE

ITALY



SOURCE: GSMA INTELLIGENCE. NOTE: WHERE LETTERS ARE SHOWN NEXT TO FIGURES ABOVE BARS, "K" DENOTES THOUSANDS (E.G. "123 K" = 123,000), "M" DENOTES MILLIONS (E.G. "1.23 M" = 1,230,000), AND "B" DENOTES BILLIONS (E.G. "1.23 B" = 1,230,000,000). WHERE NO LETTER IS PRESENT, VALUES ARE SHOWN AS IS. COMPARABILITY: BASE REVISIONS. NUMBERS MAY NOT CORRELATE WITH VALUES PUBLISHED IN OUR PREVIOUS REPORTS.

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JAN 2023

AFFORDABILITY OF MOBILE INTERNET ACCESS

THE COST OF BUYING A SMARTPHONE HANDSET AND 1GB OF CELLULAR MOBILE DATA, AND COMPARISONS WITH AVERAGE MONTHLY INCOME

ITALY

PRICE OF THE CHEAPEST SMARTPHONE HANDSET (IN USD)	PRICE OF THE CHEAPEST SMARTPHONE HANDSET vs. AVERAGE INCOME	AVERAGE PRICE OF 1GB OF CELLULAR MOBILE DATA (IN USD)	AVERAGE PRICE OF 1GB OF CELLULAR MOBILE DATA vs. AVERAGE INCOME
$112	3.94%	$0.12	0.004%

SOURCES: HANDSET PRICES: ALLIANCE FOR AFFORDABLE INTERNET. ACCESS THE FULL DATASET AT A4AI.ORG. MOBILE DATA PRICES: CABLE.CO.UK; WORLD BANK. COMPARABILITY: VALUE FOR HANDSET PRICES vs. MONTHLY INCOME AS PUBLISHED BY A4AI, AND MAY USE A DIFFERENT VALUE FOR AVERAGE MONTHLY INCOME COMPARED WITH THE DATA USED TO CALCULATE THE PRICE OF 1GB OF MOBILE DATA vs. MONTHLY INCOME. AS A RESULT, VALUES MAY NOT CORRELATE ACROSS DATA POINTS.

JAN 2023

SHARE OF MOBILE WEB TRAFFIC BY MOBILE OS

PERCENTAGE OF WEB PAGE REQUESTS ORIGINATING FROM MOBILE HANDSETS RUNNING EACH MOBILE OPERATING SYSTEM IN NOVEMBER 2022

ITALY

SHARE OF MOBILE WEB TRAFFIC ORIGINATING FROM ANDROID DEVICES	SHARE OF MOBILE WEB TRAFFIC ORIGINATING FROM APPLE IOS DEVICES	SHARE OF MOBILE WEB TRAFFIC ORIGINATING FROM SAMSUNG OS DEVICES	SHARE OF MOBILE WEB TRAFFIC ORIGINATING FROM KAI OS DEVICES	SHARE OF MOBILE WEB TRAFFIC ORIGINATING FROM OTHER OS DEVICES
68.11%	31.46%	0.40%	0%	0.03%
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
-2.3% (-163 BPS)	+5.5% (+165 BPS)	-4.8% (-2 BPS)	[N/A]	[UNCHANGED]

SOURCE: STATCOUNTER. NOTES: FIGURES REPRESENT THE NUMBER OF WEB PAGES SERVED TO BROWSERS ON MOBILE PHONES RUNNING EACH OPERATING SYSTEM COMPARED WITH THE TOTAL NUMBER OF WEB PAGES SERVED TO MOBILE BROWSERS IN NOVEMBER 2022. FIGURES FOR SAMSUNG OS REFER ONLY TO THOSE DEVICES RUNNING OPERATING SYSTEMS DEVELOPED BY SAMSUNG (E.G. BADA AND TIZEN), AND DO NOT INCLUDE SAMSUNG DEVICES RUNNING ANDROID. PERCENTAGE CHANGE VALUES REPRESENT RELATIVE CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE THE ABSOLUTE CHANGE. FIGURES MAY NOT SUM TO 100% DUE TO ROUNDING.

JAN 2023

MOBILE APP MARKET OVERVIEW

HEADLINES FOR MOBILE APP DOWNLOADS AND CONSUMER SPEND (IN U.S. DOLLARS) BETWEEN JANUARY AND DECEMBER 2022

ITALY

TOTAL NUMBER OF MOBILE APP DOWNLOADS	YEAR-ON-YEAR CHANGE IN THE TOTAL NUMBER OF MOBILE APP DOWNLOADS	ANNUAL CONSUMER SPEND ON MOBILE APPS AND IN-APP PURCHASES (USD)	YEAR-ON-YEAR CHANGE IN CONSUMER SPEND ON MOBILE APPS AND IN-APP PURCHASES
1.64 BILLION	0% [UNCHANGED]	$1.08 BILLION	-4.3% -$49 MILLION

SOURCE: DATA.AI INTELLIGENCE. SEE DATA.AI FOR MORE DETAILS. NOTES: FIGURES REPRESENT COMBINED CONSUMER ACTIVITY ACROSS THE GOOGLE PLAY STORE, APPLE IOS APP STORE, AND THIRD-PARTY ANDROID APP STORES BETWEEN JANUARY AND DECEMBER 2022. FINANCIAL VALUES ARE IN U.S. DOLLARS. "CONSUMER SPEND" ONLY INCLUDES SPEND ON APPS AND IN-APP PURCHASES VIA APP STORES, AND DOES NOT INCLUDE REVENUES FROM ECOMMERCE OR MOBILE ADVERTISING.

JAN 2023

APP RANKING: MONTHLY ACTIVE USERS

MOBILE APPS AND GAMES RANKED BY AVERAGE MONTHLY ACTIVE USERS BETWEEN JANUARY AND DECEMBER 2022

ITALY

#	MOBILE APP	COMPANY
01	WHATSAPP	META
02	FACEBOOK	META
03	INSTAGRAM	META
04	FACEBOOK MESSENGER	META
05	AMAZON	AMAZON
06	TELEGRAM	TELEGRAM
07	TIKTOK	BYTEDANCE
08	SPOTIFY	SPOTIFY
09	IO L'APP DEI SERVIZI PUBBLICI	PAGOPA
10	POSTEID	POSTE ITALIANE

#	MOBILE GAME	COMPANY
01	ROBLOX	ROBLOX
02	BRAWL STARS	TENCENT
03	CLASH ROYALE	TENCENT
04	CANDY CRUSH SAGA	ACTIVISION BLIZZARD
05	HAY DAY	TENCENT
06	SUBWAY SURFERS	SYBO
07	STUMBLE GUYS	KITKA GAMES
08	CLASH OF CLANS	TENCENT
09	HOMESCAPES	PLAYRIX
10	GEOMETRY DASH	ROBTOP

SOURCE: DATA.AI INTELLIGENCE. SEE DATA.AI FOR MORE DETAILS. NOTES: RANKINGS BASED ON COMBINED MONTHLY ACTIVE USERS ACROSS IPHONES AND ANDROID PHONES BETWEEN JANUARY AND DECEMBER 2022. EXCLUDING PRE-INSTALLED APPS (E.G. YOUTUBE ON ANDROID PHONES, IMESSAGE ON IPHONES).

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JAN 2023

APP RANKING: DOWNLOADS

RANKING OF MOBILE APPS AND MOBILE GAMES BY TOTAL NUMBER OF DOWNLOADS BETWEEN JANUARY AND DECEMBER 2022

ITALY

#	MOBILE APP	COMPANY
01	TIKTOK	BYTEDANCE
02	POSTEID	POSTE ITALIANE
03	SHEIN	SHEIN
04	TELEGRAM	TELEGRAM
05	VINTED	VINTED
06	WHATSAPP	META
07	INSTAGRAM	META
08	AMAZON	AMAZON
09	BEREAL	BEREAL
10	CAPCUT	BYTEDANCE

#	MOBILE GAME	COMPANY
01	STUMBLE GUYS	KITKA GAMES
02	HAY DAY	TENCENT
03	SUBWAY SURFERS	SYBO
04	FISHDOM: DEEP DIVE	PLAYRIX
05	ROBLOX	ROBLOX
06	COUNT MASTERS	AIBY
07	FILL THE FRIDGE	TAKE TWO INTERACTIVE
08	RACE MASTER	SAYGAMES
09	BLOCKUDOKU	EMBRACER GROUP
10	AIRPORT SECURITY	KWALEE

SOURCE: DATA.AI INTELLIGENCE. SEE DATA.AI FOR MORE DETAILS. NOTES: RANKINGS BASED ON COMBINED USER ACTIVITY ACROSS THE GOOGLE PLAY STORE AND APPLE IOS APP STORE BETWEEN JANUARY AND DECEMBER 2022. VALUES FOR CHINA ONLY INCLUDE ACTIVITY ON THE APPLE IOS APP STORE.

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APP RANKING: CONSUMER SPEND

RANKING OF MOBILE APPS AND MOBILE GAMES BY TOTAL CONSUMER SPEND BETWEEN JANUARY AND DECEMBER 2022

ITALY

#	MOBILE APP	COMPANY
01	DAZN	DAZN GROUP
02	DISNEY+	DISNEY
03	TIKTOK	BYTEDANCE
04	GOOGLE ONE	GOOGLE
05	TINDER	MATCH GROUP
06	EVENING COURIER	RCS MEDIAGROUP
07	NETFLIX	NETFLIX
08	TWITCH	AMAZON
09	YOUTUBE	GOOGLE
10	LINKEDIN	MICROSOFT

#	MOBILE GAME	COMPANY
01	COIN MASTER	MOON ACTIVE
02	CANDY CRUSH SAGA	ACTIVISION BLIZZARD
03	EMPIRES & PUZZLES	TAKE TWO INTERACTIVE
04	HOMESCAPES	PLAYRIX
05	GARDENSCAPES - NEW ACRES	PLAYRIX
06	ROBLOX	ROBLOX
07	BRAWL STARS	TENCENT
08	STUMBLE GUYS	KITKA GAMES
09	FISHDOM: DEEP DIVE	PLAYRIX
10	CLASH OF CLANS	TENCENT

SOURCE: DATA.AI INTELLIGENCE. SEE DATA.AI FOR MORE DETAILS. NOTES: RANKINGS BASED ON COMBINED USER ACTIVITY ACROSS THE GOOGLE PLAY STORE AND APPLE IOS APP STORE BETWEEN JANUARY AND DECEMBER 2022. VALUES FOR CHINA ONLY INCLUDE ACTIVITY ON THE APPLE IOS APP STORE. "CONSUMER SPEND" ONLY INCLUDES SPEND ON APPS AND IN-APP PURCHASES VIA APP STORES, AND DOES NOT INCLUDE REVENUES FROM ECOMMERCE OR MOBILE ADVERTISING.

ECOMMERCE

JAN 2023

FINANCIAL INCLUSION FACTORS

PERCENTAGE OF THE TOTAL POPULATION AGED 15+ THAT OWNS OR USES EACH PRODUCT OR SERVICE

ITALY

ACCOUNT WITH A FINANCIAL INSTITUTION	CREDIT CARD OWNERSHIP	DEBIT CARD OWNERSHIP	MOBILE MONEY ACCOUNT (E.G. MPESA, GCASH)
97.3%	57.9%	82.3%	[N/A]
FEMALE 97.1% / MALE 97.5%	FEMALE 59.7% / MALE 56.2%	FEMALE 80.8% / MALE 83.7%	FEMALE [N/A] / MALE [N/A]
MADE A DIGITAL PAYMENT (PAST YEAR)	MADE A PURCHASE USING A MOBILE PHONE OR THE INTERNET (PAST YEAR)	USED A MOBILE PHONE OR THE INTERNET TO SEND MONEY (PAST YEAR)	USED A MOBILE PHONE OR THE INTERNET TO PAY BILLS (PAST YEAR)
93.0%	55.8%	25.6%	32.9%
FEMALE 91.2% / MALE 94.7%	FEMALE 55.7% / MALE 56.0%	FEMALE 21.3% / MALE 29.6%	FEMALE 32.8% / MALE 32.9%

SOURCE: WORLD BANK. NOTES: SOME FIGURES HAVE NOT BEEN UPDATED IN THE PAST YEAR, SO MAY BE LESS REPRESENTATIVE OF CURRENT BEHAVIOURS. PERCENTAGES ARE OF ADULTS AGED 15 AND ABOVE, NOT OF TOTAL POPULATION. MOBILE MONEY ACCOUNTS ONLY REFER TO SERVICES THAT STORE FUNDS IN AN ELECTRONIC WALLET LINKED DIRECTLY TO A PHONE NUMBER, SUCH AS MPESA, GCASH, AND TIGO PESA. FIGURES FOR MOBILE MONEY ACCOUNTS DO NOT INCLUDE PEOPLE WHO USE "OVER-THE-TOP" MOBILE PAYMENT SERVICES SUCH AS APPLE PAY, GOOGLE PAY, OR SAMSUNG PAY.

JAN 2023

WEEKLY ONLINE SHOPPING ACTIVITIES

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO ENGAGE IN SELECTED ECOMMERCE ACTIVITIES EACH WEEK

ITALY

PURCHASED A PRODUCT OR SERVICE ONLINE	ORDERED GROCERIES VIA AN ONLINE STORE	BOUGHT A SECOND-HAND ITEM VIA AN ONLINE STORE	USED AN ONLINE PRICE COMPARISON SERVICE	USED A BUY NOW, PAY LATER SERVICE
47.1%	12.1%	9.4%	29.2%	6.9%
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
-1.1% (-50 BPS)	+1.7% (+20 BPS)	+13.3% (+110 BPS)	-3.3% (-100 BPS)	+60.5% (+260 BPS)

GWI.

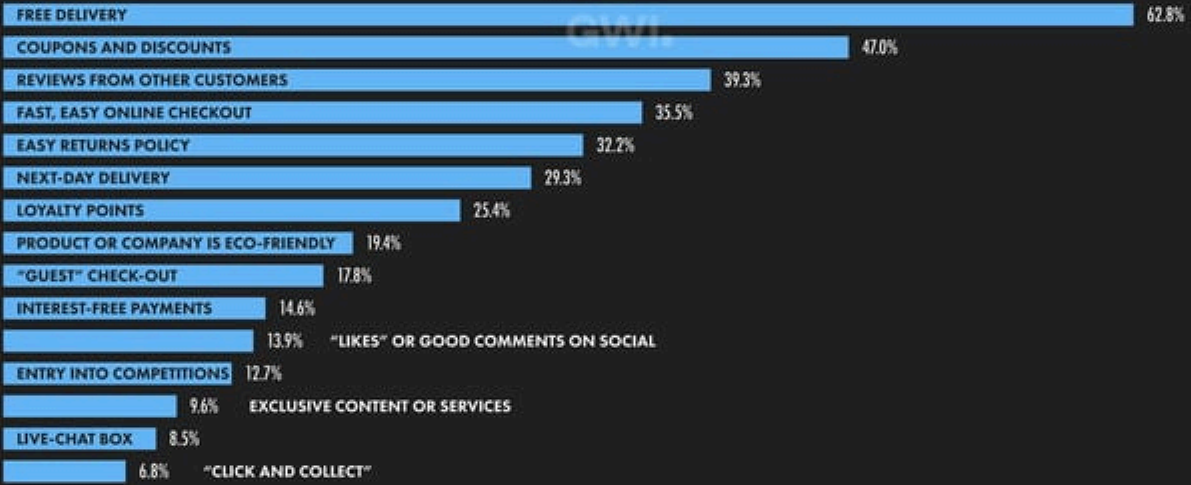
SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS. NOTES: "YOY" PERCENTAGE VALUES REPRESENT THE RELATIVE YEAR-ON-YEAR CHANGE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT THE ABSOLUTE CHANGE IN BASIS POINTS.

JAN 2023

ONLINE PURCHASE DRIVERS

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO SAY EACH FACTOR WOULD ENCOURAGE THEM TO COMPLETE AN ONLINE PURCHASE

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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OVERVIEW OF CONSUMER GOODS ECOMMERCE

HEADLINES FOR THE ADOPTION AND USE OF CONSUMER GOODS ECOMMERCE (B2C ONLY)

ITALY

NUMBER OF PEOPLE PURCHASING CONSUMER GOODS VIA THE INTERNET	ESTIMATED TOTAL ANNUAL SPEND ON ONLINE CONSUMER GOODS PURCHASES (USD, 2022)	AVERAGE ANNUAL REVENUE PER CONSUMER GOODS ECOMMERCE USER (USD, 2022)	SHARE OF 2022 CONSUMER GOODS ECOMMERCE SPEND ATTRIBUTABLE TO PURCHASES MADE VIA MOBILE PHONES
37.30 MILLION	**$45.19 BILLION**	**$1,212**	**39.4%**
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+4.7% (+1.7 MILLION)	-4.6% (-$2.2 BILLION)	-8.9% (-$118)	+2.8% (+106 BPS)

statista

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** "CONSUMER GOODS" INCLUDE: ELECTRONICS, FASHION, FURNITURE, TOYS, HOBBY, DIY, BEAUTY, CONSUMER HEALTHCARE, PERSONAL CARE, HOUSEHOLD CARE, FOOD, BEVERAGES, AND PHYSICAL MEDIA. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

ECOMMERCE: CONSUMER GOODS CATEGORIES

ESTIMATED ANNUAL SPEND IN EACH CONSUMER GOODS ECOMMERCE CATEGORY (B2C ONLY, U.S. DOLLARS, FULL-YEAR 2022)

ITALY

		YEAR-ON-YEAR CHANGE
FASHION	$16.51 BILLION	+4.6% (+$730 MILLION)
ELECTRONICS	$9.98 BILLION	-14.9% (-$1.7 BILLION)
TOYS, HOBBY, DIY	$4.41 BILLION	-4.4% (-$202 MILLION)
FURNITURE	$2.91 BILLION	-14.1% (-$478 MILLION)
PERSONAL & HOUSEHOLD CARE	$5.94 BILLION	-0.6% (-$38 MILLION)
FOOD	$2.82 BILLION	-7.6% (-$231 MILLION)
BEVERAGES	$937.1 MILLION	-8.1% (-$83 MILLION)
PHYSICAL MEDIA	$1.68 BILLION	-7.4% (-$134 MILLION)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUES FOR 2022 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. THE "PERSONAL & HOUSEHOLD CARE" CATEGORY INCLUDES BEAUTY AND CONSUMER HEALTHCARE. THE "PHYSICAL MEDIA" CATEGORY DOES NOT INCLUDE DIGITAL DOWNLOADS OR STREAMING. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

TOP GOOGLE SHOPPING SEARCHES

SHOPPING QUERIES WITH THE GREATEST VOLUME OF GOOGLE SEARCH ACTIVITY BETWEEN 01 JANUARY 2022 AND 31 DECEMBER 2022

ITALY

#	SEARCH QUERY	INDEX vs. TOP QUERY
01	AMAZON	100
02	SCARPE	74
03	NIKE	59
04	IPHONE	37
05	JORDAN	36
06	SAMSUNG	29
07	IKEA	24
08	ADIDAS	19
09	EBAY	14
10	AIR FORCE	12

#	SEARCH QUERY	INDEX vs. TOP QUERY
11	PS4	11
12	ZALANDO	11
13	POKEMON	10
14	METEO	10
15	IPHONE 13	10
16	APPLE	10
17	JORDAN 1	9
18	DECATHLON	9
19	TRADUTTORE	9
20	LEROY MERLIN	9

SOURCE: GOOGLE TRENDS, BASED ON SHOPPING SEARCHES CONDUCTED ON GOOGLE SEARCH BETWEEN 01 JANUARY 2022 AND 31 DECEMBER 2022. NOTES: ANY LANGUAGE ANOMALIES OR SPELLING ERRORS IN QUERIES ARE AS PUBLISHED BY GOOGLE TRENDS, AND ARE SHOWN "AS IS" TO ENABLE READERS TO IDENTIFY POTENTIAL CHANGES IN HOW PEOPLE USE LANGUAGE IN THEIR SEARCH ACTIVITIES. GOOGLE DOES NOT PUBLISH ABSOLUTE SEARCH VOLUMES, BUT THE "INDEX vs. TOP QUERY" COLUMN SHOWS RELATIVE SEARCH VOLUMES FOR EACH QUERY COMPARED WITH THE SEARCH VOLUME OF THE TOP QUERY. ADVISORY: GOOGLE TRENDS USES DYNAMIC SAMPLING, SO RANK ORDER AND INDEX VALUES MAY VARY DEPENDING ON WHEN THE TOOL IS ACCESSED, EVEN FOR THE SAME TIME PERIOD.

JAN 2023

PAYMENT METHODS USED FOR ECOMMERCE

PERCENTAGE OF ALL B2C ECOMMERCE TRANSACTIONS IN 2021 COMPLETED USING EACH TYPE OF PAYMENT METHOD

ITALY

SHARE OF B2C ECOMMERCE TRANSACTION VOLUME ATTRIBUTABLE TO DIGITAL AND MOBILE WALLETS	SHARE OF B2C ECOMMERCE TRANSACTION VOLUME ATTRIBUTABLE TO DEBIT AND CREDIT CARDS	SHARE OF B2C ECOMMERCE TRANSACTION VOLUME ATTRIBUTABLE TO BANK TRANSFERS	SHARE OF B2C ECOMMERCE TRANSACTION VOLUME ATTRIBUTABLE TO CASH-ON-DELIVERY	SHARE OF B2C ECOMMERCE TRANSACTION VOLUME ATTRIBUTABLE TO OTHER PAYMENT METHODS
34%	32%	11%	4%	19%

SOURCE: PPRO. NOTE: FIGURES REPRESENT SHARE OF THE TOTAL NUMBER OF B2C ECOMMERCE TRANSACTIONS IN 2021

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JAN 2023

ONLINE TRAVEL AND TOURISM

ANNUAL ONLINE SPEND ON TRAVEL AND TOURISM SERVICES (U.S. DOLLARS, FULL-YEAR 2022)

ITALY

FLIGHTS	TRAINS	CAR RENTALS	LONG-DISTANCE BUSES
$5.29 BILLION	$627.5 MILLION	$389.0 MILLION	$185.8 MILLION
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+83.5% (+$2.4 BILLION)	+99.8% (+$313 MILLION)	-8.1% (-$34 MILLION)	+67.1% (+$75 MILLION)

HOTELS	PACKAGE HOLIDAYS	VACATION RENTALS	CRUISES
$6.00 BILLION	$3.39 BILLION	$2.31 BILLION	$102.6 MILLION
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
+194% (+$4.0 BILLION)	+42.4% (+$1.0 BILLION)	+48.5% (+$753 MILLION)	+20.1% (+$17 MILLION)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK, STATISTA MOBILITY MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** FIGURES REPRESENT ESTIMATES OF FULL-YEAR REVENUES FOR 2022 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. VALUES DO NOT INCLUDE REVENUES ASSOCIATED WITH PUBLIC TRANSPORT, NON-COMMERCIAL FLIGHTS, FERRIES, TAXIS, RIDE-SHARING, RIDE-HAILING, OR CHAUFFEUR SERVICES. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

TYPES OF DIGITAL CONTENT PURCHASED

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO PAY FOR EACH KIND OF DIGITAL CONTENT EACH MONTH

ITALY

MOVIE OR TV STREAMING SERVICE	MUSIC STREAMING SERVICE	MOBILE APP	MOBILE GAME	MOBILE APP IN-APP PURCHASES
37.3%	17.6%	8.4%	8.4%	5.6%
YEAR-ON-YEAR CHANGE -1.1% (-40 BPS)	YEAR-ON-YEAR CHANGE -15.8% (-330 BPS)	YEAR-ON-YEAR CHANGE -3.4% (-30 BPS)	YEAR-ON-YEAR CHANGE +7.7% (+60 BPS)	YEAR-ON-YEAR CHANGE -3.4% (-20 BPS)

MOVIE OR TV DOWNLOAD	MUSIC DOWNLOAD	NEWS SERVICE	SUBSCRIPTION TO AN ONLINE MAGAZINE	DIGITAL BOOKS AND E-BOOKS
6.8%	6.4%	5.3%	4.1%	9.3%
YEAR-ON-YEAR CHANGE +3.0% (+20 BPS)	YEAR-ON-YEAR CHANGE -5.9% (-40 BPS)	YEAR-ON-YEAR CHANGE -7.0% (-40 BPS)	YEAR-ON-YEAR CHANGE -14.6% (-70 BPS)	YEAR-ON-YEAR CHANGE -3.1% (-30 BPS)

GWI. GWI. GWI. GWI.

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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DIGITAL MEDIA SPEND

FULL-YEAR 2022 SPEND ON DIGITAL MEDIA SUBSCRIPTIONS AND DOWNLOADS (IN U.S. DOLLARS)

ITALY

TOTAL	VIDEO GAMES	VIDEO-ON-DEMAND	EPUBLISHING	DIGITAL MUSIC
$3.65 BILLION	**$1.79 BILLION**	**$1.35 BILLION**	**$388.0 MILLION**	**$123.0 MILLION**
YEAR-ON-YEAR CHANGE -1.7% (-$63 MILLION)	YEAR-ON-YEAR CHANGE +1.8% (+$32 MILLION)	YEAR-ON-YEAR CHANGE -1.8% (-$25 MILLION)	YEAR-ON-YEAR CHANGE -12.2% (-$54 MILLION)	YEAR-ON-YEAR CHANGE -11.0% (-$15 MILLION)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR SPEND IN 2022 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. INCLUDES CONTENT DOWNLOADS AND SUBSCRIPTIONS TO STREAMING SERVICES AND ONLINE PUBLISHERS. DOES NOT INCLUDE PHYSICAL MEDIA OR USER-GENERATED CONTENT. **COMPARABILITY:** BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

ONLINE MEAL DELIVERY OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF ONLINE MEAL AND TAKEAWAY DELIVERY SERVICES

ITALY

NUMBER OF PEOPLE ORDERING FOOD DELIVERY VIA ONLINE PLATFORMS	YEAR-ON-YEAR CHANGE IN THE NUMBER OF ONLINE FOOD DELIVERY USERS	TOTAL ANNUAL VALUE OF ONLINE FOOD DELIVERY ORDERS (USD, 2022)	YEAR-ON-YEAR CHANGE IN THE VALUE OF ONLINE FOOD DELIVERY ORDERS	AVERAGE ANNUAL VALUE OF ONLINE FOOD DELIVERY ORDERS PER USER (USD, 2022)
12.96 MILLION	-1.9% -253 THOUSAND	$1.03 BILLION	-10.5% -$121 MILLION	$79.38 -8.8% (-$7.69)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. NOTES: ONLY INCLUDES ORDERS OF PREPARED FOOD THAT ARE MADE VIA ONLINE SERVICES. INCLUDES ONLINE ORDERS THAT ARE COLLECTED AT A RESTAURANT. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. ONLY INCLUDES ORDERS MADE VIA ONLINE SERVICES. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 30% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. COMPARABILITY: BASE AND CATEGORY DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

E-HEALTH OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF DIGITALLY ENABLED HEALTHCARE DEVICES AND SERVICES

ITALY

NUMBER OF PEOPLE USING E-HEALTH DEVICES AND SERVICES	YEAR-ON-YEAR CHANGE IN THE NUMBER OF E-HEALTH USERS	TOTAL ANNUAL VALUE OF THE E-HEALTH MARKET (USD, 2022)	YEAR-ON-YEAR CHANGE IN THE VALUE OF THE E-HEALTH MARKET	AVERAGE ANNUAL SPEND ON E-HEALTH PER USER (USD, 2022)
21.41 MILLION	**-0.5%** -118 THOUSAND	**$1.25** BILLION	**+5.5%** +$65 MILLION	**$58.54** +6.0% (+$3.33)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. NOTES: INCLUDES E-HEALTH DEVICES AND APPS, OVER-THE-COUNTER PHARMACEUTICALS SOLD VIA THE INTERNET, AND ONLINE DOCTOR CONSULTATIONS. DOES NOT INCLUDE DIGITAL FITNESS DEVICES AND SERVICES, SMART CLOTHING, SMART SHOES, OR SMART EYEWEAR, APPS FOR TRACKING SLEEP OR TRACKING HEALTH, MOOD IMPROVEMENT APPS, OR APPS TO MANAGE ADDICTION, DEPRESSION, EATING DISORDERS, OR SCHIZOPHRENIA. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS TO EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE; "BPS" VALUES SHOW ABSOLUTE CHANGE.

JAN 2023

DIGITAL FITNESS & WELL-BEING OVERVIEW

HEADLINES FOR THE ADOPTION AND USE OF DIGITAL FITNESS & WELL-BEING DEVICES AND SERVICES

ITALY

NUMBER OF PEOPLE USING DIGITAL FITNESS & WELL-BEING DEVICES AND SERVICES	YEAR-ON-YEAR CHANGE IN THE NUMBER OF DIGITAL FITNESS & WELL-BEING USERS	TOTAL ANNUAL VALUE OF THE DIGITAL FITNESS & WELL-BEING MARKET (USD, 2022)	YEAR-ON-YEAR CHANGE IN THE VALUE OF THE DIGITAL FITNESS & WELL-BEING MARKET	AVERAGE ANNUAL SPEND ON DIGITAL FITNESS & WELL-BEING PER USER (USD, 2022)
16.12 MILLION	**+4.3%** +666 THOUSAND	**$1.05** BILLION	**-7.6%** -$86 MILLION	**$65.29** -11.4% (-$8.36)

statista

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. NOTES: INCLUDES SMARTWATCHES, FITNESS AND ACTIVITY TRACKING WRIST-WEAR, SMART SCALES, FITNESS APPS THAT TRACK ACHIEVEMENTS, NUTRITION APPS (E.G. CALORIE COUNTING), AND MEDITATION AND MINDFULNESS APPS. DOES NOT INCLUDE SMART CLOTHING, SMART SHOES, SMART EYEWEAR, HEALTH TRACKING APPS, PARAMETER-SPECIFIC BIOSENSORS (E.G. BLOOD GLUCOSE MONITORS), OR APPS THAT FOCUS ON SPECIFIC DISEASES. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS TO EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE; "BPS" VALUES SHOW ABSOLUTE CHANGE.

JAN 2023

OVERVIEW OF CONSUMER DIGITAL PAYMENTS

HEADLINES FOR THE ADOPTION AND USE OF DIGITALLY ENABLED PAYMENT SERVICES BY END CONSUMERS

ITALY

NUMBER OF PEOPLE MAKING DIGITAL PAYMENTS	YEAR-ON-YEAR CHANGE IN THE NUMBER OF PEOPLE MAKING DIGITAL PAYMENTS	TOTAL ANNUAL VALUE OF DIGITAL PAYMENT TRANSACTIONS (USD, 2022)	YEAR-ON-YEAR CHANGE IN THE VALUE OF DIGITAL PAYMENT TRANSACTIONS	AVERAGE ANNUAL VALUE OF DIGITAL PAYMENTS PER USER (USD, 2022)
37.45 MILLION	+4.8% +1.7 MILLION	$100.9 BILLION	+11.0% +$10 BILLION	$2,695 +6.0% (+$153)

SOURCE: STATISTA DIGITAL MARKET OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. NOTES: "DIGITAL PAYMENTS" INCLUDE MOBILE P.O.S. PAYMENTS (E.G. PAYMENTS VIA APPLE PAY OR SAMSUNG PAY), B2C DIGITAL COMMERCE, AND B2C DIGITAL REMITTANCES. VALUES DO NOT INCLUDE B2B TRANSACTIONS. FIGURES REPRESENT ESTIMATES FOR FULL-YEAR FOR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. COMPARABILITY: BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

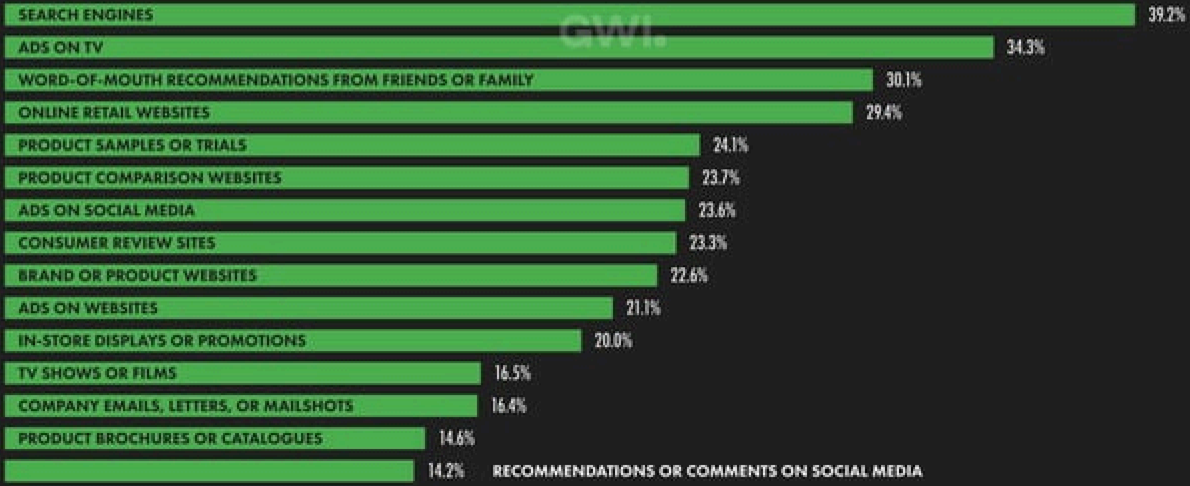
DIGITAL MARKETING

JAN 2023

SOURCES OF BRAND DISCOVERY

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO DISCOVER NEW BRANDS, PRODUCTS, AND SERVICES VIA EACH CHANNEL OR MEDIUM

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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JAN 2023

ENGAGEMENT WITH DIGITAL MARKETING

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO SAY THEY ENGAGE IN EACH KIND OF ONLINE ACTIVITY

ITALY

RESEARCH BRANDS ONLINE BEFORE MAKING A PURCHASE	VISITED A BRAND'S WEBSITE IN THE PAST 30 DAYS	CLICKED OR TAPPED ON A BANNER AD ON A WEBSITE IN THE PAST 30 DAYS	CLICKED OR TAPPED ON A SPONSORED SOCIAL MEDIA POST IN THE PAST 30 DAYS	DOWNLOADED OR USED A BRANDED MOBILE APP IN THE PAST 30 DAYS
56.3%	54.5%	11.8%	13.2%	12.1%
YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE	YEAR-ON-YEAR CHANGE
-2.8% (-160 BPS)	-0.2% (-10 BPS)	+0.9% (+10 BPS)	+3.1% (+40 BPS)	+5.2% (+60 BPS)

GWI.

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

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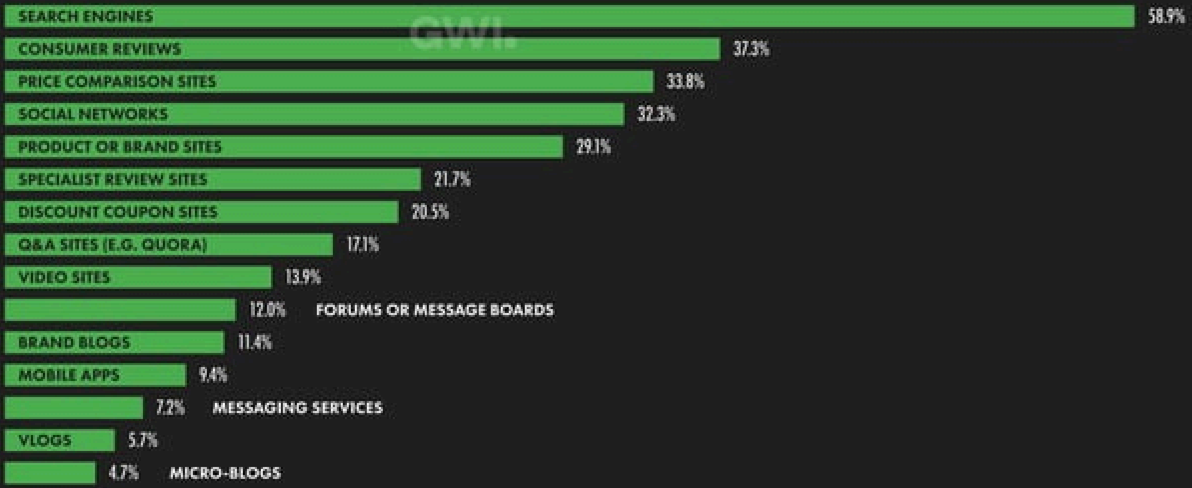
MAIN CHANNELS FOR ONLINE BRAND RESEARCH

PERCENTAGE OF INTERNET USERS AGED 16 TO 64 WHO USE EACH CHANNEL AS A PRIMARY SOURCE OF INFORMATION WHEN RESEARCHING BRANDS

ITALY



SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

JAN 2023

ADVERTISING SPEND: TOTAL vs. DIGITAL

TOTAL AD SPEND ACROSS ALL CHANNELS, WITH DETAIL FOR DIGITAL AD SPEND (U.S. DOLLARS, FULL-YEAR 2022)

ITALY

TOTAL AD SPEND (INCLUDING ONLINE AND OFFLINE CHANNELS)	YEAR-ON-YEAR CHANGE IN TOTAL AD SPEND (ALL CHANNELS)	DIGITAL AD SPEND (INCLUDING SEARCH AND SOCIAL MEDIA)	YEAR-ON-YEAR CHANGE IN DIGITAL AD SPEND	DIGITAL AD SPEND AS A PERCENTAGE OF TOTAL AD SPEND
$9.93 BILLION	+3.9% +$376 MILLION	$5.90 BILLION	+9.1% +$490 MILLION	59.4% +4.9% (+279 BPS)

SOURCE: STATISTA MARKET OUTLOOKS. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL YEAR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). **COMPARABILITY:** BASE AND DEFINITION CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS. **ADVISORY:** THE DEFINITION OF "DIGITAL ADVERTISING" USED ON THIS CHART INCLUDES A BROADER VARIETY OF CHANNELS AND ACTIVITIES THAN THE DEFINITION USED ON SOME OTHER CHARTS IN THIS REPORT, SO VALUES MAY NOT CORRELATE ACROSS CHARTS.

JAN 2023

DIGITAL ADVERTISING SPEND

ANNUAL SPEND ON DIGITAL ADVERTISING BY FORMAT (U.S. DOLLARS, FULL-YEAR 2022)

ITALY

TOTAL ANNUAL SPEND ON DIGITAL ADS (ALL TYPES)
$5.90 BILLION
YEAR-ON-YEAR CHANGE
+9.1% (+$490 MILLION)

ANNUAL SPEND ON ONLINE SEARCH ADS
$2.10 BILLION
YEAR-ON-YEAR CHANGE
+12.0% (+$225 MILLION)

ANNUAL SPEND ON DIGITAL VIDEO ADS
$1.58 BILLION
YEAR-ON-YEAR CHANGE
+8.5% (+$124 MILLION)

ANNUAL SPEND ON DIGITAL BANNER ADS
$1.46 BILLION
YEAR-ON-YEAR CHANGE
+5.2% (+$72 MILLION)

ANNUAL SPEND ON ONLINE INFLUENCER ACTIVITIES
$296.2 MILLION
YEAR-ON-YEAR CHANGE
+15.1% (+$39 MILLION)

ANNUAL SPEND ON ONLINE CLASSIFIEDS
$200.5 MILLION
YEAR-ON-YEAR CHANGE
-2.7% (-$5.5 MILLION)

ANNUAL SPEND ON DIGITAL AUDIO ADS
$115.6 MILLION
YEAR-ON-YEAR CHANGE
+20.7% (+$20 MILLION)

SHARE OF TOTAL DIGITAL AD SPEND: MOBILE DEVICES*
50.4%
YEAR-ON-YEAR CHANGE
+5.2% (+249 BPS)

SHARE OF TOTAL DIGITAL AD SPEND: SOCIAL MEDIA
35.8%
YEAR-ON-YEAR CHANGE
-0.9% (-31 BPS)

SHARE OF TOTAL DIGITAL AD SPEND: PROGRAMMATIC
79.8%
YEAR-ON-YEAR CHANGE
+1.0% (+81 BPS)

SOURCE: STATISTA ADVERTISING & MEDIA OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR SPEND IN 2022 IN U.S. DOLLARS, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. PERCENTAGES MAY NOT CORRELATE WITH ABSOLUTE FIGURES DUE TO ROUNDING IN THE SOURCE DATA. ***ADVISORY:** REVENUE FIGURE FOR DIGITAL AD SPEND ATTRIBUTABLE TO MOBILE DEVICES IS BASED ON MOBILE'S SHARE OF SPEND ACROSS A SUBSET OF DIGITAL ADVERTISING ACTIVITIES, AS REPORTED IN STATISTA'S DIGITAL MARKET OUTLOOK. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

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PROGRAMMATIC ADVERTISING OVERVIEW

SPEND ON PROGRAMMATIC ADVERTISING AND ITS SHARE OF THE DIGITAL ADVERTISING MARKET

ITALY

ANNUAL SPEND ON PROGRAMMATIC ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN PROGRAMMATIC ADVERTISING SPEND (USD)	PROGRAMMATIC'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND	YEAR-ON-YEAR CHANGE IN PROGRAMMATIC'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND
$4.71 BILLION	+10.2% +$435 MILLION	79.8%	+1.0% +81 BPS

statista

SOURCE: STATISTA ADVERTISING & MEDIA OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. NOTES: FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. COMPARABILITY: BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

SEARCH ADVERTISING OVERVIEW

SPEND ON ONLINE SEARCH ADVERTISING (IN U.S. DOLLARS) AND ITS SHARE OF THE DIGITAL ADVERTISING MARKET

ITALY

ANNUAL SPEND ON ONLINE SEARCH ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN ONLINE SEARCH ADVERTISING SPEND	ONLINE SEARCH'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND	YEAR-ON-YEAR CHANGE IN ONLINE SEARCH'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND
$2.10 BILLION	+12.0% +$225 MILLION	35.6%	+2.7% +93 BPS

statista

SOURCE: STATISTA ADVERTISING & MEDIA OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. **NOTES:** FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. **COMPARABILITY:** BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

SOCIAL MEDIA ADVERTISING OVERVIEW

SPEND ON SOCIAL MEDIA ADVERTISING (IN U.S. DOLLARS) AND ITS SHARE OF THE DIGITAL ADVERTISING MARKET

ITALY

ANNUAL SPEND ON SOCIAL MEDIA ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN SOCIAL MEDIA ADVERTISING SPEND	SOCIAL MEDIA'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND	YEAR-ON-YEAR CHANGE IN SOCIAL MEDIA'S SHARE OF TOTAL DIGITAL ADVERTISING SPEND
$2.12 BILLION	**+8.1%** +$159 MILLION	**35.8%**	**-0.9%** -31 BPS

statista

SOURCE: STATISTA ADVERTISING & MEDIA OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. NOTES: FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 30% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. COMPARABILITY: BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

INFLUENCER ADVERTISING OVERVIEW

SPEND ON INFLUENCER ADVERTISING ACTIVITIES (IN U.S. DOLLARS) AND THEIR SHARE OF THE DIGITAL ADVERTISING MARKET

ITALY

ANNUAL SPEND ON INFLUENCER ADVERTISING (USD)	YEAR-ON-YEAR CHANGE IN INFLUENCER ADVERTISING SPEND	INFLUENCER ADVERTISING'S SHARE OF TOTAL DIGITAL AD SPEND	YEAR-ON-YEAR CHANGE IN INFLUENCER ADVERTISING'S SHARE OF TOTAL DIGITAL AD SPEND
$296.2 MILLION	**+15.1%** +$39 MILLION	**5.0%**	**+5.6%** +26 BPS

statista

SOURCE: STATISTA ADVERTISING & MEDIA OUTLOOK. SEE STATISTA.COM FOR MORE DETAILS. NOTES: FIGURES REPRESENT ESTIMATES FOR FULL-YEAR 2022, AND COMPARISONS WITH EQUIVALENT VALUES FOR THE PREVIOUS CALENDAR YEAR. FINANCIAL VALUES ARE IN U.S. DOLLARS. FIGURES REPRESENT THE MONETARY VALUE PAID DIRECTLY TO INFLUENCERS OR THEIR AGENTS, AND DO NOT INCLUDE THE VALUE OF PRODUCT GIVEAWAYS, MEDIA SPEND TO "BOOST" POSTS, OR AFFILIATE COMMISSIONS. PERCENTAGE CHANGE VALUES ARE RELATIVE (I.E. AN INCREASE OF 20% FROM A STARTING VALUE OF 50% WOULD EQUAL 60%, NOT 70%). "BPS" VALUES REPRESENT BASIS POINTS, AND INDICATE ABSOLUTE CHANGE. COMPARABILITY: BASE CHANGES. FIGURES ARE NOT COMPARABLE WITH PREVIOUS REPORTS.

JAN 2023

ATTITUDES: ADS AND AD TRACKING

HOW INTERNET USERS AGED 16 TO 64 FEEL ABOUT ADS, AND THE STEPS THEY TAKE TO AVOID ADVERTISING AND AD TRACKING

ITALY

FEEL REPRESENTED IN THE ADVERTISING THAT THEY SEE OR HEAR	USE AN AD BLOCKER FOR AT LEAST SOME ONLINE ACTIVITIES	DECLINE COOKIES AT LEAST SOME OF THE TIME	USE A VIRTUAL PRIVATE NETWORK (VPN) FOR AT LEAST SOME ONLINE ACTIVITIES
7.7%	28.9%	48.7%	19.4%
YEAR-ON-YEAR CHANGE -6.1% (-50 BPS)	YEAR-ON-YEAR CHANGE -9.1% (-290 BPS)	YEAR-ON-YEAR CHANGE +19.7% (+800 BPS)	YEAR-ON-YEAR CHANGE -4.0% (-80 BPS)

SOURCE: GWI (Q3 2022). FIGURES REPRESENT THE FINDINGS OF A BROAD GLOBAL SURVEY OF INTERNET USERS AGED 16 TO 64. SEE GWI.COM FOR FULL DETAILS.

MORE INFORMATION

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BAHRAIN	COMOROS	GAMBIA	JORDAN	MEXICO	PHILIPPINES	SOUTH AFRICA	U.S. VIRGIN IS.
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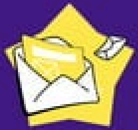

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NOTES ON DATA VARIANCE, MISMATCHES, AND CURIOSITIES

Note: This page is a summary of our comprehensive notes on data variance, potential mismatches, and curiosities, which you can read in full at https://datareportal.com/notes-on-data.

This report features data from a wide variety of different sources, including market research agencies, internet and social media companies, governments, public bodies, news media, and private individuals, as well as extrapolations and analysis of that data.

Wherever possible, we've prioritised data sources that provide broader geographical coverage, in order to minimise potential variations between data points, and to offer more reliable comparison across countries. However, where we believe that standalone metrics provide a more reliable reference, we use such standalone numbers to ensure more accurate reporting.

Please note that some data points may only be available for a limited selection of countries, so we may not be able to report the same data in all reports.

From time to time, we may also change the source(s) that we use to inform specific data points. As a result, some figures may appear to change in unexpected ways from one report to another. Wherever we're aware of these changes, we include details in the footnotes of each relevant chart, but please use caution when comparing data from different reports, because changes to research samples, base data, research methodologies, and approaches to reporting may mean that values are not comparable.

Furthermore, due to the differing data collection and treatment methodologies, and the different periods during which data have been collected, there may be significant differences in the reported metrics for similar data points throughout this report. For example, data from surveys often varies over time, even if that data has been collected by the same organisation using the same approach in each wave of their research.

In particular, reports of internet user numbers vary considerably between different sources and over time. In part, this is because there are significant challenges associated with collecting, analysing, and publishing internet user data on a regular basis, not least because research into public internet use necessitates the use of face-to-face surveys. Different organisations may also adopt different approaches to sampling the population for research into internet use, and variations in areas such as the age range of the survey population, or the balance between urban and rural respondents, may play an important role in determining eventual findings. Note that COVID-19 has limited internet user research.

Prior to our Digital 2021 reports, we included data sourced from social media platforms' self-service advertising tools in our calculations of internet user numbers, but we no longer include this data in our internet user figures. This is because the user numbers reported by social media platforms are typically based on active user accounts, and may not represent unique individuals. For example, one person may maintain more than one active presence (account) on the same social media platform. Similarly, some accounts may represent 'non-human' entities, including: pets and animals; historical figures; businesses, causes, groups, and organisations; places of interest; etc.

As a result, the figures we report for social media users may exceed internet user numbers. However, while this may seem counter-intuitive or surprising, such instances do not represent errors in the data or in our reporting. Rather, these differences may indicate delays in the reporting of internet user numbers, or they may indicate higher instances of individuals managing multiple social media accounts, or 'non-human' social media accounts.

If you have any questions about specific data points in these reports, or if you'd like to offer your organisation's data for consideration in future reports, please email our reports team: reports@kepios.com.

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