

# Italy

## Italy: key data 2023

Population (m)	60.1	Comparison with 2022	10.9%
TV households (m)	26.2	Consumer spending on total video (€m) - Total Europe	26,435.1
Consumer spending on total video (€m)	1,598.5	Comparison with 2022	12.1%

## Italy key commentary

In 2023, total consumer spending on video (physical carriers and digital distribution models) presented an increase of approximately 11% in the Italian market, whereas consumer spending on physical formats continued the gradual decline experienced over the past couple of years.

Films and audiovisual content remain highly appreciated by Italian consumers. More and more consumers are looking for premium titles and special editions at an average price of above EUR 25.

To encourage the purchase of films and TV series, both for physical carriers and on digital distribution services, Univideo developed a communication campaign in 2023, called “Dal tuo divano a Hollywood” (From Your Sofa to Hollywood). By buying or renting a film or TV series in a shop or online and registering the purchase receipt on the dedicated site, consumers can win a trip to Hollywood for two people.

In 2023, Univideo commissioned IPSOS to conduct research to understand and analyze the relationship between the offer of films and audiovisual content and the enjoyment of the same by the younger generations in Italy. The study “Young people and audiovisual content, an unprecedented and eclectic relationship,” is looking at young people between 16 and 25 years old and their views on films and audiovisual content. The young audiences surveyed for the study expressed a strong interest in cultural and home entertainment content, with a tendency expressed to enjoy content individually through different access modes and devices. However, the study also identified the young audiences’ views on unauthorized access to audiovisual content. Almost 2 out of 3 the young people surveyed responded that they watch films and TV series accessed through illegal sources. This result raises great concerns within the film and audiovisual sector in Italy and abroad, and the resulting damage to the Italian economy unauthorized access to films and audiovisual content is still underestimated.

Univideo also organized a panel discussion with participation by industry players and government officials aimed at showcasing the value of home viewing of films and audiovisual content focused on the added value of home entertainment, including allowing access to both additional content (behind-the-scenes, Director’s Cut, etc.) and titles which are not always readily available in other distribution channels. The exchanges at the event further highlighted the intrinsic value of physical carriers (discoverability and unique/exclusive content only available on physical carriers) as well as the value of the digital services such as search and discovery.

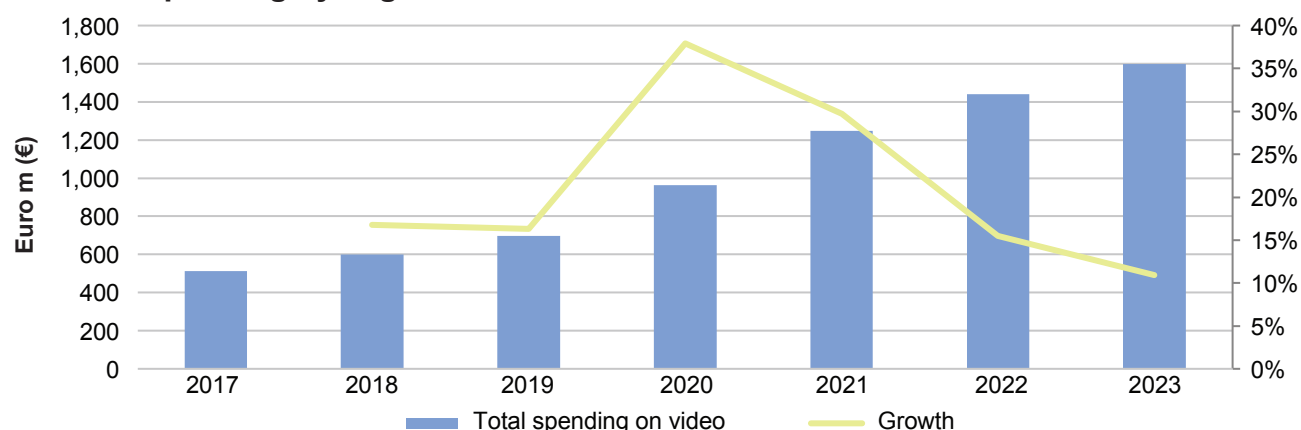
## Other relevant developments

Piracy continues to be a serious concern for the film and audiovisual sector in Italy, although the figures have declined slightly compared to previous years. Recent IPSOS/FAPAV research reveals that in 2023, 39% of Italian adults and 45% of 10-14 years old committed at least one act of piracy through unauthorized access to films, TV series/programmes or live sport events.

79% of pirates are aware that piracy is a crime, but 47% of the Italian population see no harm in accessing films and audiovisual content from illegal sources. These results show that Italian audiences still underestimate the damage to the Italian film and audiovisual sector and to the Italian economy of continuing to pursue unauthorized access to film and audiovisual content – with an estimated damage of EUR 2 billion per year to the economy and around 11,200 jobs put at risk. There is a need to continued communication and awareness-raising efforts on this issue in order to reduce the harm to the Italian economy, employment as well as the Italian film and audiovisual sector.

*This commentary was provided by Univideo, the Italian Video Association.*

## Consumer spending by segment



## Video market: Italy

	2017	2018	2019	2020	2021	2022	2023	22/23
<b>GENERAL</b>								
Population (m)	60.7	60.6	60.6	60.5	60.4	60.3	60.1	-0.2%
TV households (m)	25.5	25.6	25.7	25.9	25.9	26.0	26.2	0.4%
Population Total Europe (m)	632.8	634.4	635.7	636.7	637.3	637.7	637.8	0.0%
TV households Total Europe (m)	262.1	263.8	265.7	267.6	269.2	270.7	272.2	0.5%
Broadband households (m)	13.5	13.8	14.3	14.9	15.5	16.0	16.7	4.6%
Nominal GDP (EUR m)	1,738.4	1,770.7	1,789.4	1,643.8	1,709.8	1,783.0	1,826.8	2.5%
Consumer price index (100 in 2010)	102.9	109.1	104.1	105.3	107.7	109.7	114.8	4.7%
DVD Video player/recorder penetration (%)	82.0	80.5	79.1	77.8	76.4	75.1	73.7	-1.8%
Blu-ray Disc player/recorders penetration (%)	22.2	22.0	21.4	20.6	19.8	18.9	18.0	-4.9%
DVD Video player/recorder Total Europe (%)	64.4	61.7	59.2	56.9	54.7	52.7	50.8	-3.6%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	22.3	21.7	21.0	20.2	19.4	18.7	-3.7%
OTT Subscriptions (m)	3.4	5.6	8.5	15.3	20.3	21.5	22.8	6.4%

## Total video software market

	2017	2018	2019	2020	2021	2022	2023	22/23
<b>CONSUMER LEVEL ALL VIDEO</b>								
<i>Total market figures include consumption of both physical and digital video</i>								
Total spending on video (EUR m)	513.6	600.0	697.8	962.3	1,248.1	1,441.2	1,598.5	10.9%
Growth (%)		16.8%	16.3%	37.9%	29.7%	15.5%	10.9%	
Total spending on video Total Europe (EUR m)	9,632.5	11,109.4	13,467.8	17,634.9	21,442.7	23,589.9	26,435.1	12.1%

## Key players in the market (in alphabetical order)

Physical	Digital
Amazon	Google Play
DISCOTECA LAZIALE	iTunes
DVD STORE	Mediaset
Euronics	Rakuten TV
FINIPER	Sky Italia
IBS (Internet Book Shop)	Sony Playstation store
TERMINAL VIDEO	Telecom Italia
Unieuro	

## Average home entertainment spending

