Italy

Italy: key data 2025

Population (m)	59.1	Comparison with 2024	17.0%
TV households (m)	25.1	Consumer spending on total video (€m) - Total Europe	35,795.1
Consumer spending on total video (€m)	2,397.4	Comparison with 2024	13.3%

Italy key commentary

Market overview

In recent years, the Italian Home Entertainment market has undergone a profound transformation, driven by the evolution of audiovisual content consumption habits. The COVID-19 pandemic acted as a major catalyst for at-home entertainment, significantly accelerating the adoption of digital platforms. In the years that followed, the market entered a more stable phase: streaming services have continued to grow, albeit at a slower pace, while the physical media segment has consolidated its position within a niche market consisting of loyal consumers and collectors.

Today, more than one quarter of the Italian population uses digital platforms on a daily basis to watch audiovisual content. At the same time, the Home Entertainment market is increasingly characterized by the coexistence of different access models. Physical media continues to play an important role in the premium and collector segments, while digital distribution keeps expanding its relevance through both subscription-based services and the transactional market.

Physical Media Market

The physical media market continues to represent a significant component of the Home Entertainment industry in Italy, despite the growing popularity of digital services. Nevertheless, in recent years, the physical media market has undergone a profound transformation. The steady expansion of streaming platforms and the evolution of consumer viewing habits have led to a decline in demand for DVDs and Blu-ray discs, a trend that accelerated in the post-pandemic period.

Following this period of contraction, the Italian market for physical media is now showing signs of greater stability, supported by a loyal consumer base. The number of Italians purchasing DVDs and Blu-ray discs has stabilized at around three million consumers.

Physical media is increasingly aimed at enthusiasts and collectors, who value not only the audiovisual content itself but also the overall quality of the product, including its technical features and the editorial content of special editions.

Within this context, the 4K Ultra HD Blu-ray segment remains the most dynamic part of the market. In 2025, approximately 33,000 4K audiovisual discs were sold, generating more than €5 million in revenue, with a 4% increase in turnover compared with 2024.

Growing consumer interest in superior audio and video quality, together with the success of special editions, Steelbooks, and collector’s box sets, continues to support the overall value of the physical media segment, partially offsetting the decline in sales volumes and thus confirming the increasing demand for premium, value-added products aimed at enthusiasts and collectors.

Online Distribution

Online distribution continues to be the main driver of the Home Entertainment industry in Italy. After the rapid growth during the pandemic, the streaming market has reached a mature stage while continuing to grow steadily.

In Italy, the online distribution market is consolidating. Electronic sell-through (EST) performance has slightly declined, while transactional video-on-demand (TVOD) remains stable. Consumers are becoming more selective, primarily choosing titles they have already identified.

Catalog titles remain a key asset. Alongside new releases, popular franchises and evergreen titles continue to support both digital purchases and rentals.

EST is experiencing growth in premium releases, on premium conditions, as well as catalog titles offered on tailor-made conditions. In contrast, TVOD is seeing a decline, with rentals becoming less popular as consumers increasingly opt for subscription services or take advantage of discounted digital purchases.

Piracy

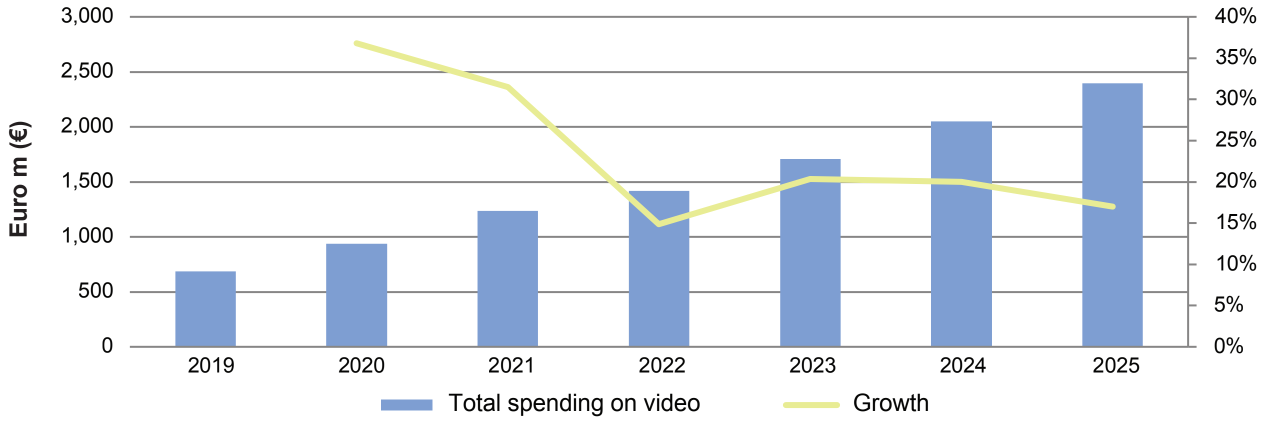
In 2025, audiovisual piracy in Italy affected 37% of the population aged 10 and over, corresponding to approximately 20 million people who engaged in at least one act of audiovisual piracy during the year. This represents a 4% decrease compared to 2024 and a 7% decline since 2023, meaning that more than 1 million Italians stopped consuming pirated audiovisual content over the previous two years. The decline is particularly pronounced among younger audiences. Among adults, films remain the most pirated content (28%), followed by TV series/dramas (23%), television programmes (19%), and live sports (14%).

The estimated impact of illegal film and TV series consumption is €450 million in lost legal sales and 57 million lost viewings. Including lost subscription revenues, the total potential loss reached €734 million, representing a 6% decrease compared with 2024. In contrast, the potential loss attributable to live sports piracy rose to €419 million, an increase of 19% from the previous year.

Overall, the total estimated impact on the Italian economy is €2.3 billion in lost revenues for companies, resulting in a loss of around €902 million in GDP, and total loss of approximately 11,000 jobs.

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

Consumer spending by segment



Video market: Italy

	2019	2020	2021	2022	2023	2024	2025	24/25
GENERAL								
Population (m)	60.1	59.9	59.7	59.6	59.5	59.3	59.1	-0.3%
TV households (m)	25.0	24.9	24.9	24.6	25.1	25.1	25.1	0.0%
Population Total Europe (m)	638.1	638.8	638.7	640.6	642.5	642.2	640.9	-0.2%
TV households Total Europe (m)	258.5	259.6	259.4	260.4	262.9	264.1	264.5	0.2%
Broadband households (m)	14.2	14.8	15.4	16.2	16.9	17.7	18.3	3.3%
Nominal GDP (EUR m)	1,789.4	1,643.8	1,709.8	1,783.0	1,826.8	1,874.2	1,921.3	2.5%
Consumer price index (100 in 2010)	104.1	105.3	107.7	109.7	114.8	120.5	124.3	3.2%
DVD Video player/recorder penetration (%)	81.6	80.9	79.7	79.5	76.9	75.7	73.4	-3.0%
Blu-ray Disc player/recorders penetration (%)	22.1	21.4	20.7	20.0	18.7	18.0	17.4	-3.5%
DVD Video player/recorder Total Europe (%)	60.9	58.7	56.8	54.8	52.6	50.9	48.8	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	21.6	21.0	20.2	19.4	18.7	18.2	-3.1%
OTT Subscriptions (m)	8.4	15.3	20.6	23.2	25.7	27.1	30.3	11.7%

Total video software market

	2019	2020	2021	2022	2023	2024	2025	24/25
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	686.8	939.5	1,235.4	1,418.9	1,707.8	2,049.0	2,397.4	17.0%
Growth (%)		36.8%	31.5%	14.9%	20.4%	20.0%	17.0%	
Total spending on video Total Europe (EUR m)	13,405.6	17,667.2	21,515.8	24,335.6	27,508.5	31,585.1	35,795.1	13.3%

Key players in the market (in alphabetical order)

Physical	Digital
Amazon	Chili
Deltavideo	Google Play
Euronics	iTunes
Feltrinelli	Mediaset
IBS (Internet Book Shop)	Rakuten TV
Mediamarket	Sky Italia
Mondadori	Sony Playstation store
Unieuro	Telecom Italia

Average home entertainment spending

Spending per TV household (EURO)

€76.1

Spending per broadband household (EURO)

€113.8

Source: Omdia