

www.pwc.com/it/mediaoutlook

Key highlights

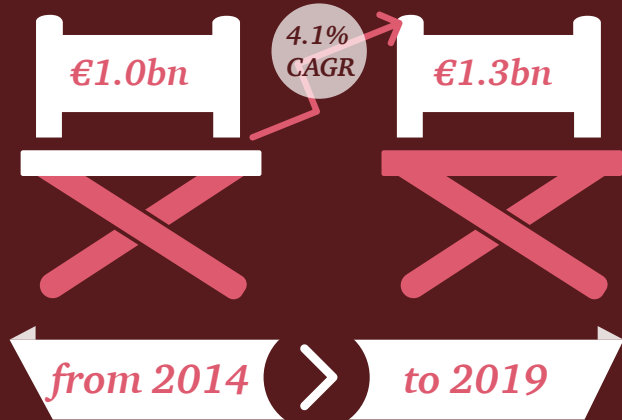
Entertainment & Media Outlook in Italy 2015 - 2019



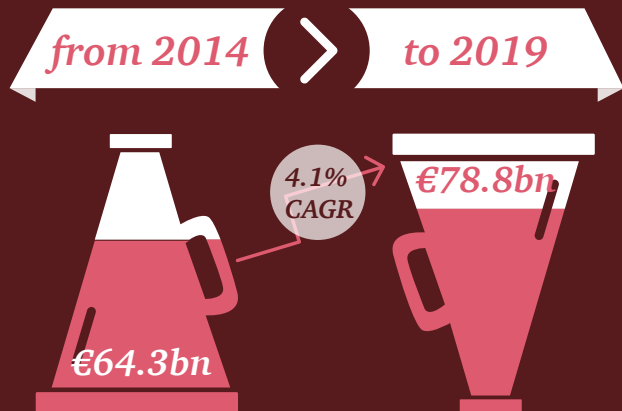
Filmed entertainment



Italy's total filmed entertainment revenue will rise at



Global total filmed entertainment revenue will rise at



TV advertising



Total TV advertising revenue in Italy

in 2014 was



€3.5bn



to 2019



CAGR
2.7%

This is split in

Broadcast TV

Free to air
Pay-TV

and

Online TV

CAGR
2.0%

€3.3bn



WebTV

CAGR
28.9%

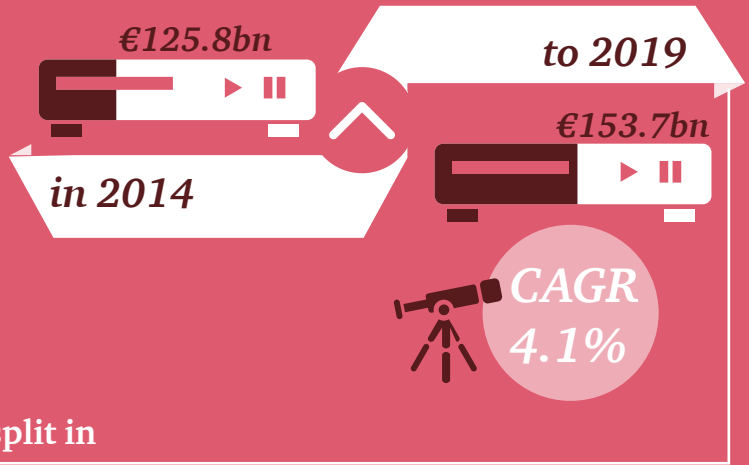
€176mn



in 2019

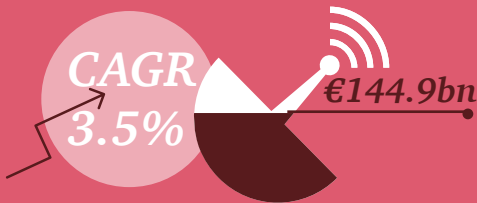


The global TV advertising generated revenue of



This is split in

Broadcast TV *Free to air* and *Pay-TV* and Online TV

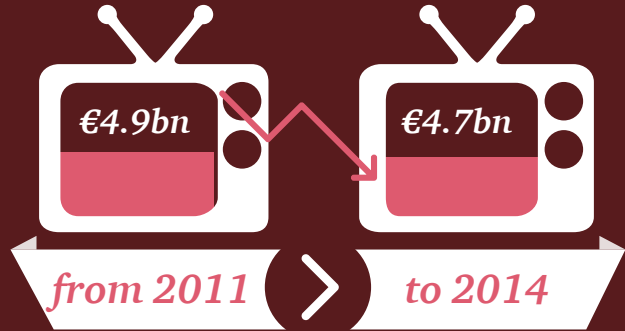


in 2019

TV subscriptions and licence fees



Italy TV subscription revenue and public TV licence fees have **declined**



In the forecast period we expect

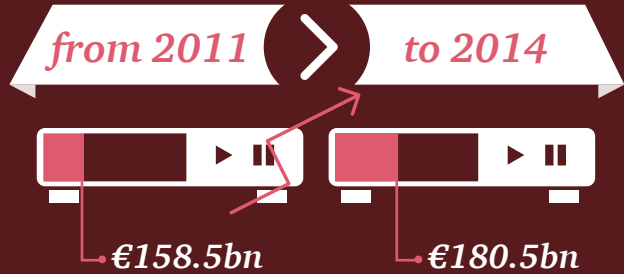


5.4bn
CAGR 2.9%

an increase in 2019



Global revenues have **increased**



In the forecast period we expect



210.7bn
CAGR 3.1%

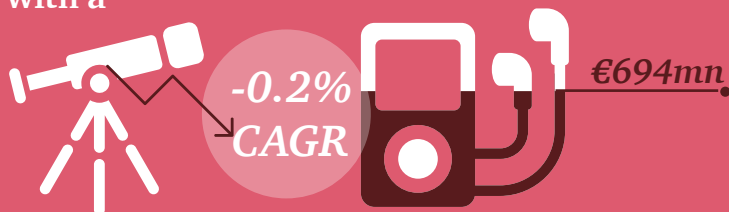
an increase in 2019



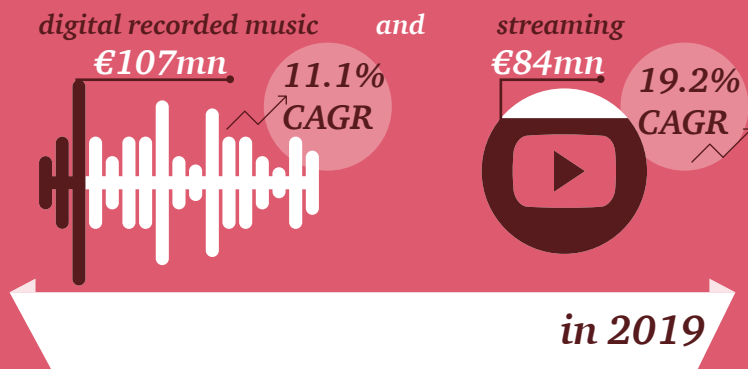
The Italian music market generated revenues of



In the forecast period this is set to continue with a

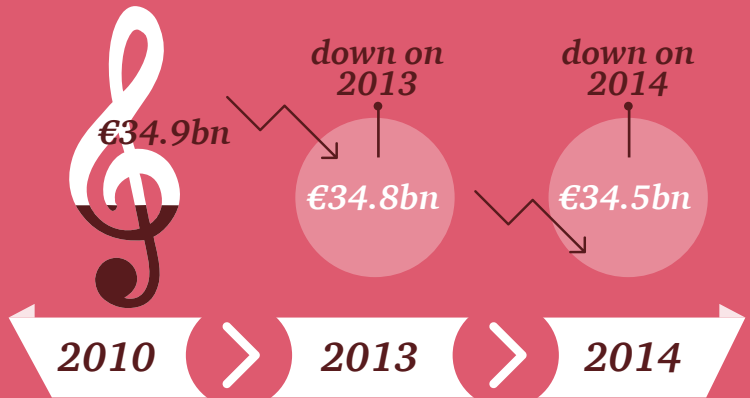


The categories that will continue to grow are

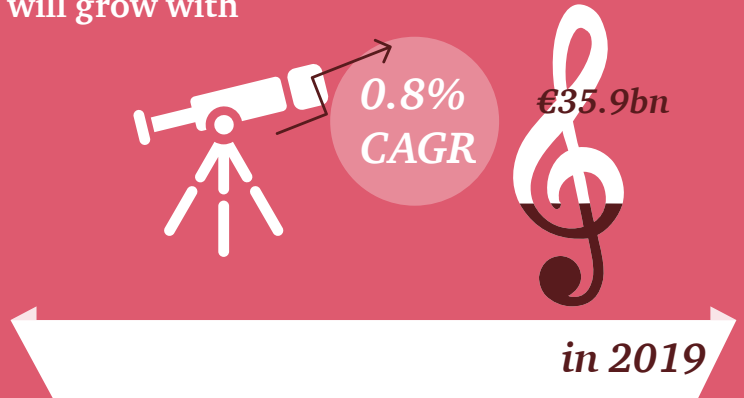




The global music market generated revenues of

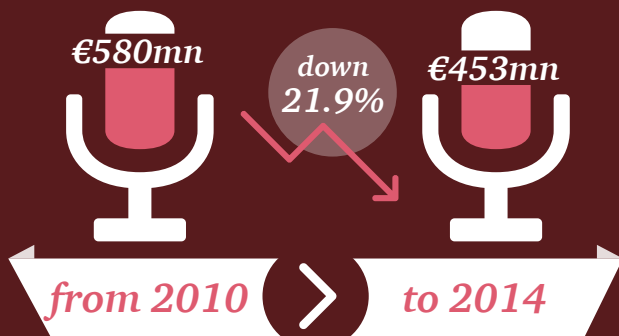


In the forecast period the global music market will grow with





Total Italian radio market revenue declined

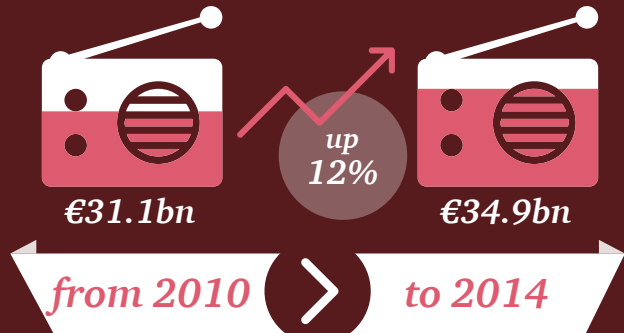


Total radio revenue will continue to fall





Total global radio market revenue increased



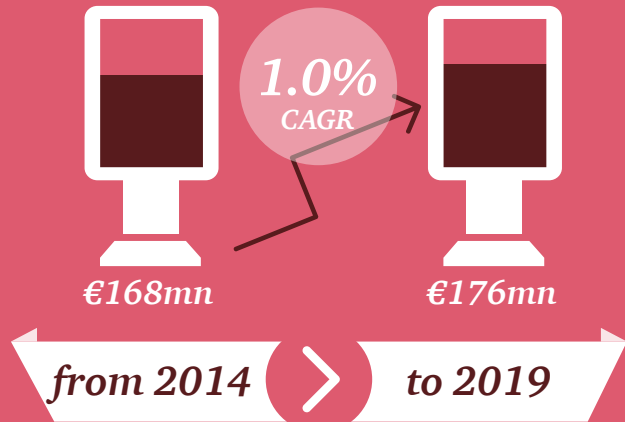
Total radio revenue will continue to grow



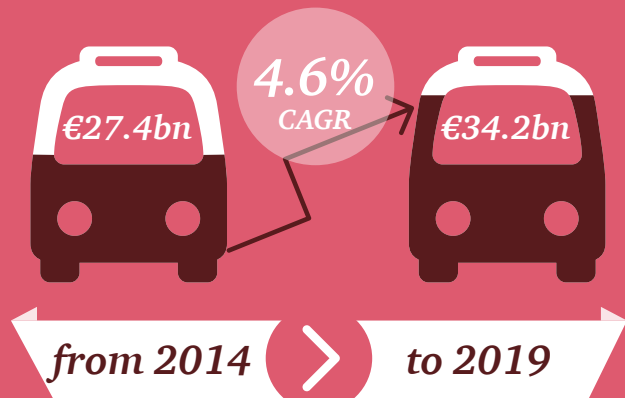
Out of Home advertising



Italy OOH advertising revenue is set to grow to reach



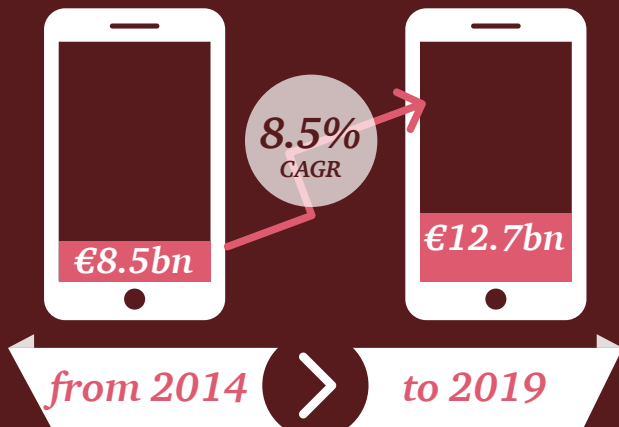
Global OOH advertising revenue is set to grow to reach



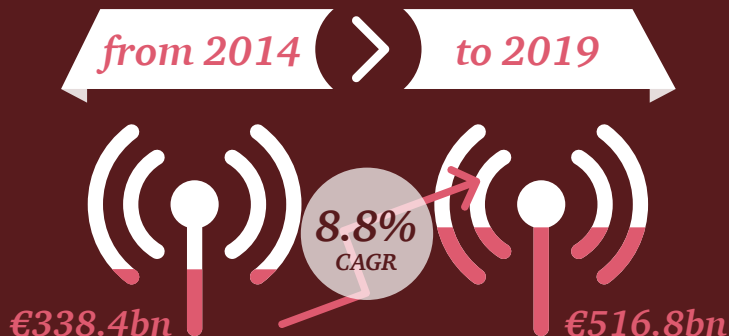
Internet access



The Italian total internet access (including mobile and fixed broadband) revenue will increase by



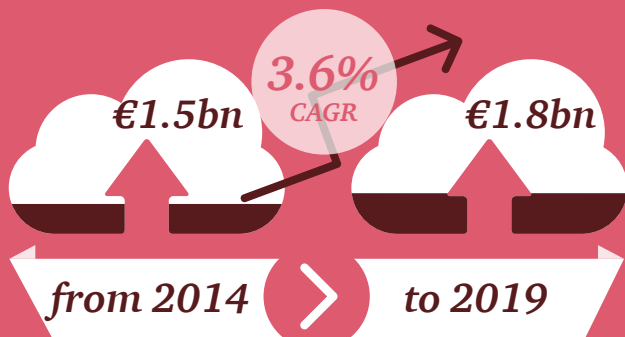
The Global total internet access (including mobile and fixed broadband) revenue is set to continue its **strong growth** at



Internet advertising



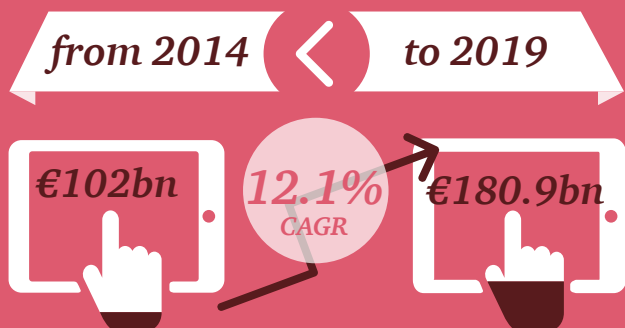
Italy's internet advertising market saw total revenues of



as advertisers gradually redirect their spend towards to online formats.



Global internet advertising market saw total revenues of

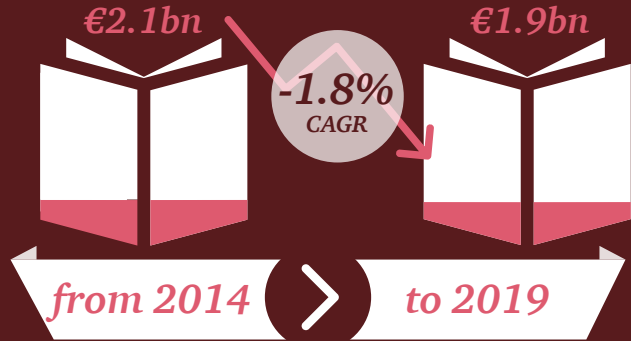


It will exceed TV to become the largest single advertising category globally by 2019.

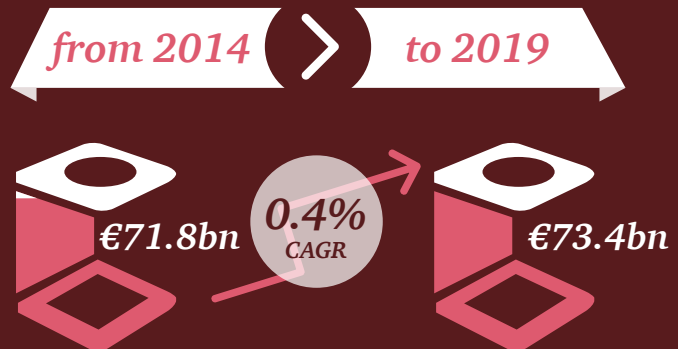
Magazine publishing



Italy's total magazine market
will be worth



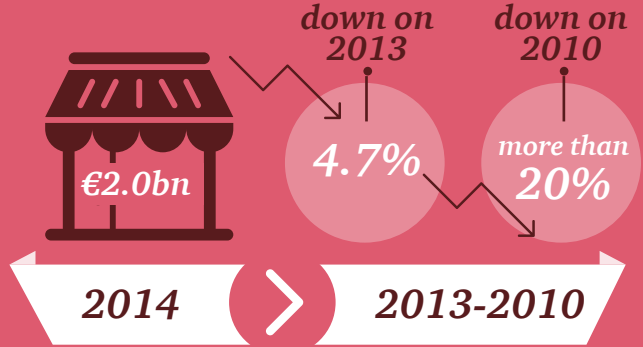
Global total magazine market
will be worth



Newspaper publishing



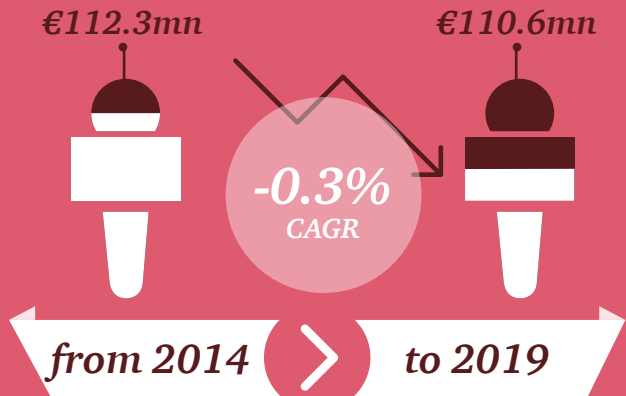
Total newspaper revenue in Italy was



Forecasted to continue to fall to



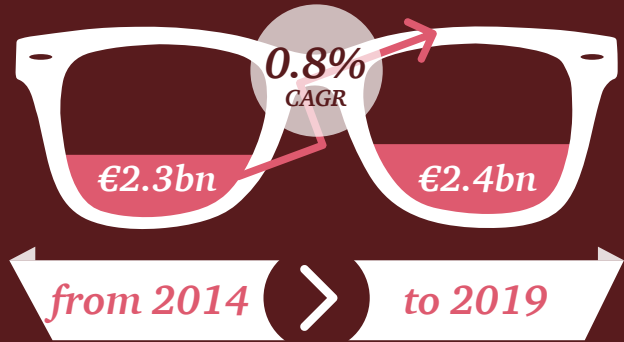
Global total newspaper revenue will decline



Book publishing



The Italian book publishing market will grow at

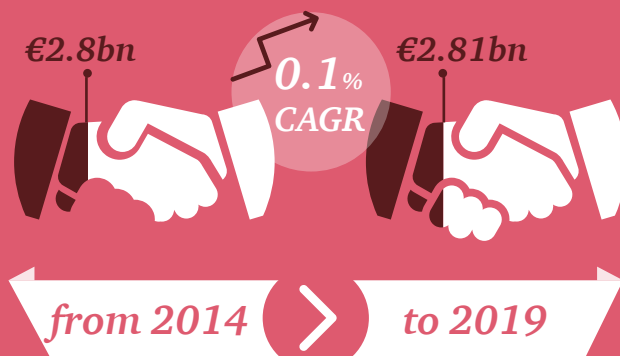


The global book publishing market is set to rise at

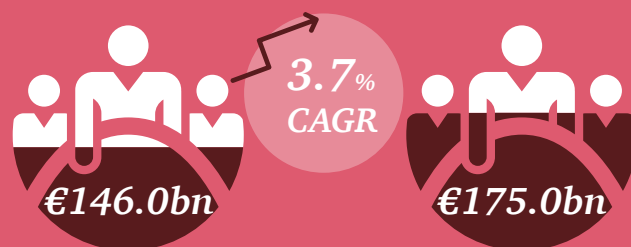




Italy total B2B revenue will reach



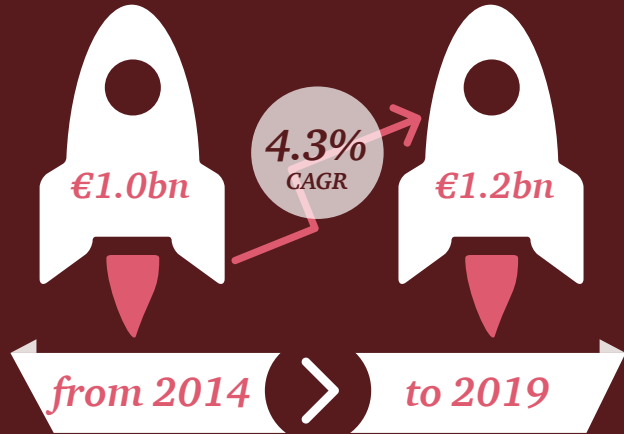
Global total B2B revenue is



Video games



The Italian video games market is forecast to grow



The global video games market is forecast to grow

