

# ITALY MARKET PROFILE

An EMEE Music Market Study

2023

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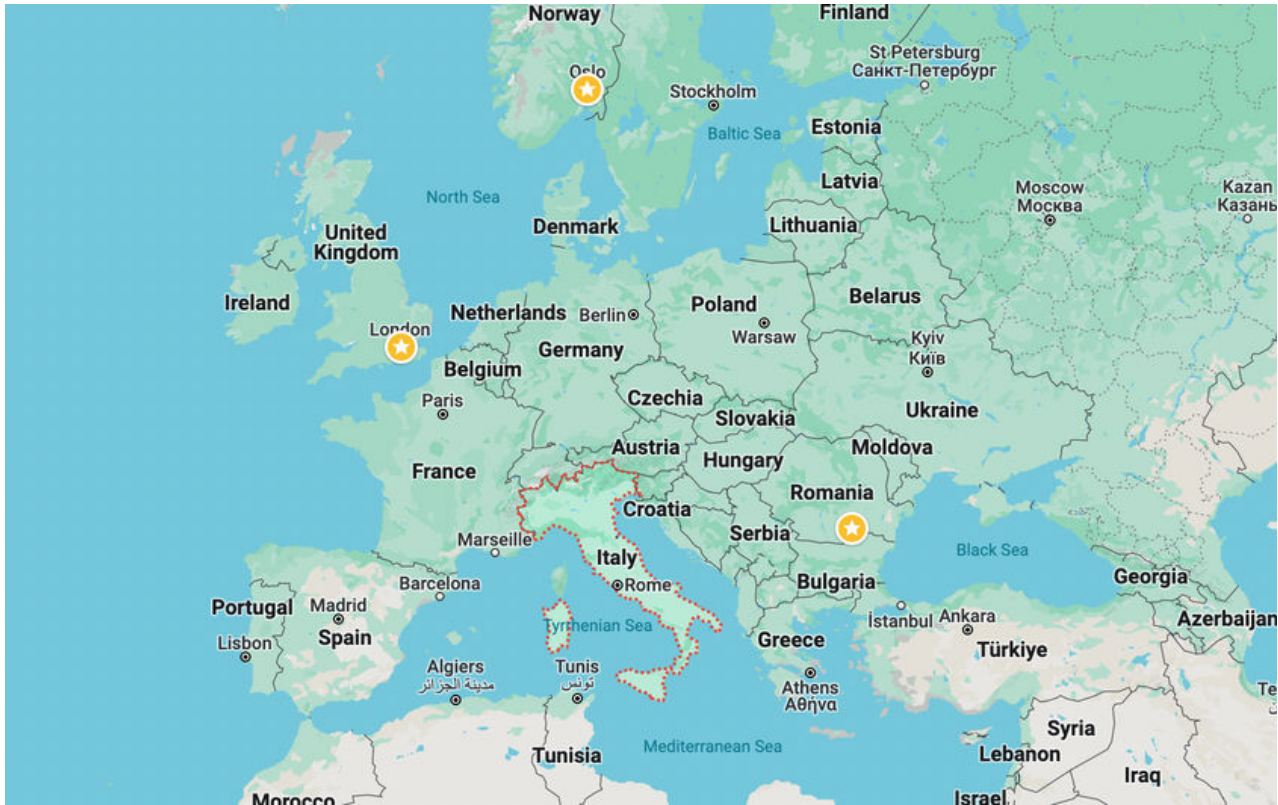
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# 1. General country overview



## Population age structure

The median age of Italy's population is 47,6.

Here's how Italy's total population breaks down by age group:

- 3,5% is between the ages of 0 and 4.
- 6,9% is between the ages of 5 and 12.
- 4,8% is between the ages of 13 and 17.
- 6,9% is between the ages of 18 and 24.
- 10,6% is between the ages of 25 and 34.
- 12,1% is between the ages of 35 and 44.
- 15,7% is between the ages of 45 and 54.
- 15,2% is between the ages of 55 and 64.
- 24,3% are aged 65 and above.

Source: [Datareportal](#).

## Population

59 109 668

(World Bank 2021)

<b>Rome</b>	4,3 million
<b>Milan</b>	3,26 million
<b>Naples</b>	2,2 million
<b>Turin</b>	1,8 million
<b>Florence</b>	984 991
<b>Palermo</b>	850 000

## Society

**Official language(s):** Italian

**Other important language(s):** N/A

**Recommended language to communicate with local professionals:** English

**Currency:** €

**Living cost (PPP) in relation to EU average:** PPP (2022): 0,617. EU average (2022): 0,649. Measured in terms of national currency per US dollar. Source: [OECD](#).

## Economy

GDP (nominal), in comparison with EU av	US \$2,058 trillion as of 2022. 3rd in EU ( <a href="#">Wikipedia</a> )
GDP per capita, in comparison with EU av	US\$ 34 997 as of 2021 ( <a href="#">Wikipedia</a> )
YOY growth, in comparison with EU av	6,7% annual GDP growth as of 2021 ( <a href="#">The World Bank</a> )
Minimum and average wage, in comparison with EU av	Minimum wage: Italy has no minimum wage by law ( <a href="#">WageIndicator</a> ) Average monthly gross wage 2479€ ( <a href="#">WikiWand</a> )
VAT rates	22% ( <a href="#">EC Europa</a> )

## Communication & Digital

### Cellular mobile connections and change

“Active cellular mobile connections: 78,19 million, equivalent to 132,6% of the population.”

Source: [Datareportal](#)

### Internet users and change

“Internet users: 50,78 million Internet penetration: 86,1%.”

Source: [Datareportal](#)

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## Active social media users and change

"Italy was home to 43,90 million social media users in January 2023, equating to 74,5% of the total population."

- "Data published in Meta's advertising resources indicates that Facebook had 27,95 million users in Italy in early 2023. Figures published in Meta's own tools indicate that Facebook's potential ad reach in Italy decreased by 600 000 (-2,1%) between 2022 and 2023."
- "Updates to Google's advertising resources indicate that YouTube had 43,9 million users in Italy in early 2023. The company's own data suggests that YouTube's ad reach in early 2023 was equivalent to 74,5% of Italy's total population at the start of the year."
- "Numbers published in Meta's advertising tools indicate that Instagram had 26,2 million users in Italy in early 2023. The company's recently revised figures suggest that Instagram's ad reach in Italy was equivalent to 44,4% of the total population at the start of the year."
- "Figures published in ByteDance's advertising resources indicate that TikTok had 17,15 million users aged 18 and above in Italy in early 2023. For context, ByteDance's figures indicate that TikTok ads reached 34,3% of all adults aged 18 and above in Italy at the start of 2023. Meanwhile, figures indicate that the potential reach of ads on TikTok in Italy increased by 677 000 (+4,1%) between October 2022 and January 2023."

Source: [Datareportal](#)

## 1.5 Tax & Legal

### **1.5.1. Artist status and business identity management**

There is no official legal recognition or status of artist in Italy, however, a specific definition of an artists can be found in some specific laws, such as the Copyright Law or the Tax Code. It can be derived from the recognition of authors' and performers' rights, for example.

Freelance work is considered a type of work and a freelancer is a professional worker without an employee. Since 2004, it is possible to register one's freelance status as a "self-employed worker carrying out musical activities", get a tax number, pay taxes and social security (source: [Note Legali](#)). When registering the status freelancers have to declare their field of activity by choosing appropriate codes (NACE), no additional evidence is required

Artists can be paid by agents, promoters, etc. as workers, issue invoices directly as

self-employed professionals, or become members of cooperatives that take care of invoicing, taxes, etc. on their behalf for a certain fee. Authors and composers often have their own publishing company and some bands might work through a joint company.

Taxes in Italy have different regimes. There is a simplified flat fee regime (regime forfettario) suitable for freelancers, for those starting to work independently, for anyone who is starting a small or medium-sized business, and self-employed individuals. The regime allows for a fixed fee tax rate (15%) rather than calculating taxes based on income. To be eligible for this scheme, earnings must not be above €85 000 per year (source: [Agenzia Entrate](#)). Under the normal tax regime VAT 22% needs to be added to the invoice as well as withholding tax (ritenuta d'acconto), which for self-employed professional workers resident in Italy, is 20% (source: [Agenzia Entrate](#)). For the flat rate regime, no VAT is added nor tax withheld.

Until 2012, Entertainment Workers had a dedicated social security agency (ENPALS), but in 2012 it was abolished and merged into the National Institute of Social Security (INPS) (Source: [INPS](#)). Social security is 33% and the payment is divided between the employer (23,81%) and the worker 9,19% (subtracted from the net fee agreed upon).

	Gross	Social Security subtracted	VAT added	Withholding tax subtracted
Normal regime	€500	- 9,19%	+22%	-20%
Flat rate regime	€500	- 9,19%	-	-

Self-employed persons have to pay all the taxes and social security contributions themselves, but then the fee agreements should reflect the added commitments on the part of the self-employed artist or professional providing the services (source: [Note Legali](#)).

According to EU regulations ([No. 883/2004](#) ), a person can only be subject to the legislation of social security systems of one country at a time. In this regard, the A1 Certificate is issued to certify the social security legislation applicable to the worker, in cases where the worker is employed in one or more States that apply EU regulations. The A1 Certificate is issued by the country whose legislation applies and is used to certify that the posted worker is not obliged to pay social security contributions (including health insurance) to the other countries in which he is working. (source and more info [A1 Form: release of a new procedure for requesting the certificate in Italy](#)).

The INPS The National Institute for Social Security also provides lots of useful information [here](#).

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### **1.5.2. Copyright law and collective licensing**

In Italy, copyright is largely regulated by the Copyright Law on the protection of copyright and other rights related to its exercise (more precisely, Law No. 633 of April 22, 1941), as well as by the Civil Code (Art. 2575 - 2583). Over the years, the Copyright law has not remained unchanged, as important additions have been made partly due to the influence of European legislators and treaties signed internationally.

According to the copyright law (art.1) and the Italian Civil Code (Art. 2575), the “object of the author's right is an intellectual work of a creative nature that belongs to the sciences, literature, music, figurative art, architecture, theater, and cinematography, regardless of the style or form of expression”. The work also has to be novel and objectively represented, or externalised. (EP, 2018, Copyright Law in the EU).

Authors have both moral and economic rights. The moral rights of authors are eternal, non-transferable and inalienable and therefore not subject to any deadlines or expiration dates. The authors can claim authorship over their works and retain the right to oppose any mutilation of their work even after transfer of economic rights (Arts. 20,22). Upon the author's death, the moral rights will be inherited by the author's family and descendants (Art. 23). (EP, 2018, Copyright Law in the EU).

According to the Copyright Law, performers are also afforded moral rights and may oppose any communication or reproduction of their performances that might harm their honour or reputation (Art. 81). The duration of this particular moral right, however, is 50 years from the performance (Art. 85).

The Copyright Law provides an open list of examples of the economic rights of authors (Art. 12). The author has an exclusive right to publish the work and use it in any way (both original and derivative, within the limits fixed by the law). The author also controls the reproduction, public performance rights, and communication by wire wireless or internet. According to Art. 25 of the Copyright Law, the duration of protection of author's economic rights lasts for the author's whole life and can be exercised by their heirs for 70 years after the author's death. Once such a period has expired, the work falls into the “public domain”, and therefore can be freely published.

The Italian Copyright Law also provides certain economic (exploitation) rights for phonograph producers and performers. Phonograph producers have the exclusive right for 50 years from fixation to authorize reproduction, distribution, rental, lending, and Internet availability of the sound recording (Art. 72). Performers have the exclusive right for 50 years from performance to authorize the fixation of the performance (as well as the reproduction, distribution, etc.) and the broadcasting of live performances (Art. 80). (Wikipedia Copyright law of Italy).



The recognition of copyright does not require any special procedure because it is activated automatically through the mere creation of the work. However, to protect one's work, it is necessary to file it with the Italian Society of Authors and Publishers (SIAE), an association-based public economic institute to which the Copyright Law assigned the task of carrying out the activity of intermediation regarding copyrights and related rights.

In 2017, The Copyright Law was modified to overcome the exclusivity assigned by the government to the SIAE in the past, giving other entities the opportunity to operate in Italy. This allowed the independent management entity Soundreef to operate in Italy through arrangements made with LEA, an Italian nonprofit association that protects copyright.

USAGE	AUTHOR'S RIGHTS	NEIGHBOURING RIGHTS
Public performance	SIAE licenses for both live and recorded music performance: private parties, public and corporate events, concerts, venues and clubs, theater performances, sports centers and dance schools, etc. <a href="#">LINK</a>	SCF licenses the neighbouring rights for the use of music in public performances like concerts, cinemas, clubs, fashion shows, corporate parties etc. <a href="#">LINK</a>
Broadcasting in radio and TV	For music, SIAE provides a single (blanket) license for radio and television broadcasters. <a href="#">LINK</a>	SCF and Nuovo Imaie both issue licenses for the use of music in radio, TV broadcasting. <a href="#">LINK</a> and <a href="#">LINK</a>
Reproduction and distribution (physical)	SIAE issues licenses for the distribution of physical records like CDs, DVDs and vinyl. <a href="#">LINK</a>	The phonogram producers license performer's rights to record, reproduce and distribute physical copies of performances directly.
Background music	SIAE offers an annual or seasonal plan for public spaces (like restaurants, bars, hotels, airports, gyms, shopping malls etc) that allows them access to SIAEs entire catalogue. <a href="#">LINK</a>	SCF and Nuovo Imaie both issue licenses for the use of music in public spaces. <a href="#">LINK</a> and <a href="#">LINK</a>
Making available online	SIAE licenses music streaming and download, opera works on the web, audio/video in-store sound systems and search engines. <a href="#">LINK</a>	The phonogram producers license digital distribution to platforms directly (via digital distributors).

Licensing to film production	Licenses must be negotiated directly with the rightsholders.	Licenses must be negotiated directly with the rightsholders.
Licensing to TV production	Licenses must be negotiated directly with the rightsholders.	Licenses must be negotiated directly with the rightsholders.
Licensing to advertisements	Licenses must be negotiated directly with the rightsholders.	Licenses must be negotiated directly with the rightsholders.
Licensing to video games production	Licenses must be negotiated directly with the rightsholders.	Licenses must be negotiated directly with the rightsholders.
Private events	SIAE licenses music for private events like wedding, birthday parties. <a href="#">LINK</a>	

### **1.5.3. Visa and other mobility info**

#### **Visa (if you are not a Schengen Area member)**

Nationals from the EU/EEA and Schengen Area can enter Italy visa-free. For nationals of third countries, artistic performance work requires a self-employment/freelance working visa type (D). The cost is relatively low and there are few documents to provide when applying at your closest embassy for the Visa. Processing the visa will require at least 15 working days. More information can be [found here](#).

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## 2. Music Ecosystem

### 2.1. Music sector general overview

#### 2.1.1. General facts & figures

Despite its relatively small size, Italy holds a significant position in the global music market. The Italian recorded music sector increased by 11,1% in 2022, exceeding €370 million. Streaming played a major role in this growth, accounting for 66,7% of total industry revenue. The export of Italian recorded music has also seen a remarkable 92% increase over the past three years reaching over €22 million in revenue (Italia Music Export, 2023). The live music sector is another pillar of Italy's music industry, with a turnover of €450 million between January and September in 2022 ([SIAE](#)).

The success of the Italian music industry can largely be attributed to the combined efforts of local record companies and evolving consumer habits. Despite its successful export, the Italian music market has been primarily focused on local acts, with local Italian-language music dominating the charts. This, however, seems to be changing and more opportunities are emerging for international artists (Italia Music Export, 2023). Some of the music professionals interviewed for this report also stated that “The Italian market used to be more focused domestically but now is expanding outwards.”

In the last few years, the Italian music industry has successfully managed to export and gain international acclaim, as evidenced by the [Italian Music Export](#) report (SIAE, 2022). Italian music is listened to across Europe and the US, with the most successful Italian band internationally being Maneskin (SIAE, 2022).

Further resources: [Italia Music Export News](#) | [FIMI News](#)

#### 2.1.2. Music industry professional events

##### [Linechek Music Meeting & Festival](#)

**Location:** Milan

**Timing:** November

**Type of Event:** International showcase festival and industry conference

##### [Medimex](#)

**Location:** South of Italy

**Timing:** June

**Type of Event:** Music festival that has a small showcase component.

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### [Music Connect Italy](#)

**Location:** Naples

**Timing:** December

**Type of Event:** Showcase festival

### [Milano Music Week](#)

Milano Music Week is an umbrella event featuring concerts, interviews with artists, workshops, and talks open to the public. Among the gatherings aimed at music professionals included in the program, the main event is Linecheck Music Meeting & Festival.

**Location:** Milan

**Timing:** October

**Type of Event:** Umbrella event with multiple activities

## **2.1.3. Music sector organisations**

There are several associations and organisations in Italy dedicated to different subgroups of the music sector. Some notable ones include:

### **Professional Associations**

- [Afi](#) (Italian Phonographic Industry Association)
- [Assomusica](#) (Live Music Association of Promoters and Organizers)
- [Assoconcerti](#) (Live Music Association of Promoters and Organizers)
- [Audiocoop](#) (Independent Music Organization)
- [FEM](#) (Music Publishers Federation)
- [Festival Experience](#) (Italian Festivals Association)
- [FIMI](#) (The Italian Federation of Phonographic Industry)
- [IQMF](#) (Italian Quality Music Festivals Association)
- [MMF Italy](#) (Music Managers Forum Italy)
- [PMI](#) (Independent Music Producers)
- [KeepOn Live](#) (Italian Live Music Clubs Network)
- [EMusa](#) (Italian Publishers Association)

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## Collective Management Organisations

### [SIAE](#) (Author's Rights/Publishing)

Established in 1882, the Italian Society of Authors and Publishers (SIAE) is the main Italian copyright collective management organisation. It protects the copyright of its 100 000 members across Italy and manages 62 million Italian and international works (SIAE, 2023). SIAE licenses its members' music to TV and film. Syncs for advertisements need to be negotiated directly between the rights holders and music users.

### [SCF](#) (Neighbouring Rights)

SCF manages the collection and distribution of royalties for phonogram producers and performers in Italy. They handle the rights for public performance of recorded music and work with over 400 record labels, managing more than 20 million tracks. SCF has international partnerships with music licensing companies, allowing them to receive royalties for their members' catalogues abroad and distribute earnings accordingly. They also pay out royalties to record companies and artists represented by these international partners for the use of their music in Italy (SCF, 2023).

### [Nuovo Imaie](#)

NUOVOIMAIE, Nuovo Istituto Mutualistico Artisti Interpreti Esecutori, is a collecting society born in 2010. Founded and managed by artists, it deals with neighbouring rights legal protection due to audiovisual and musical works exploitation that are transmitted via radio, TV, web, and public businesses. It collects performing artists' rights, such as actors, dubbers, singers, musicians, orchestra and choir directors (Nuovoimaie, 2023).

### [LEA](#) (Liberi Editori Autori)

LEA is an association of publishers and authors in charge of licensing the use of the repertoire administered by Soundreef on Italian territory. It is listed in the Autorità per le Garanzie nelle Comunicazioni (authority established by the Italian legal system that ensures the proper competition of operators in the market) Directory of Collective Management Organisations and Independent Management Entities.

### [Soundreef](#)

Soundreef was established in 2011 as an alternative to SIAE. Soundreef represents over 43,000 Songwriters and Publishers worldwide – of which 26,000 are from Italy. As an Independent Management Entity, it collects royalties in over 90 countries and is registered with the Intellectual Property Office of the United Kingdom, Greece, Spain and Portugal.

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## **Export Organisations**

### [Italia Music Export](#)

Italia Music Export is the first official Italian music export office, supported by Italia Music Lab Foundation. The office aims to promote Italian music worldwide, boost music export revenues, and support local music companies going global by providing numerous services such as facilitating networking between Italian and international music professionals, providing funding and travel support for export activities and boosting the participation of Italian artists, labels and other companies to international trade shows, conferences and festivals.

### [Puglia Sounds](#)

Puglia Sounds is an Apulia Region project supporting the music industry. Since 2010, it has offered opportunities for growth and visibility through public calls, partnerships, and communication and promotional activities. Puglia Sounds works with Apulian artists and professionals at every stage of music production. Puglia Sounds has also been organizing the MEDIMEX International Festival & Music Conference since 2011.

### [E-R Commission/Region Of Emilia Romagna](#)

Since 2022, the Emilia-Romagna Region – through the E-R Music Commission and ATER Foundation – has launched a programme to develop the region’s international connections, building an export office. The actions implemented include mapping the artistic and professional organisations operating in the region, attending major international music events, during which artists from the region had the opportunity to perform, and organising events such as "SUONO GRASSO”.

### [I-Jazz Association](#)

The I-Jazz Association has been involved in the export of Italian jazz music since 2018 thanks to the FUS Nuova Generazione Jazz project, which supported in the first three years, and also in 2022, the organisation of concerts and showcases in prestigious international venues and festivals like the London Jazz Festival. The total number of concerts organised internationally in recent years is over 50 events, with an average of six bands per year to support.

### [Italian World Beat](#)

Italian World Beat has been carrying out significant international networking initiatives since 2017, with the aim of supporting Italian music operators in the World Music and singer-songwriter music area, participating in the leading international trade fairs in the industry such as WOMEX. It is also an official partner of Visa for Music (Morocco) and Atlantic Music Expo (Cape Verde). Plus, it is one of the founders of the global project Music Connect, launched in 2018 in Canada.

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### [Arezzo Wave Italia Foundation - Italian Music Office IMO](#)

The Arezzo Wave Italia Foundation, with its Italian Music Office branch, has been supporting Italian artists abroad since 2003. Negramaro, Elio & Le Storie Tese, Modena City Ramblers and Afterhours are just some of the names supported by the Foundation in Europe and America over the years. They have been joined by dozens of new and up-and-coming artists: among them, in the last year, Giorgio Poi, Anna Bassy, Piqued Jacks and many others.

### [FIMI - Federation Of The Italian Music Industry](#)

FIMI is distinguished by its wide-ranging strategy for the promotion of Italian music abroad with a permanent settlement in the most significant markets. Thanks to the collaboration with ITA – Italian Trade Agency, FIMI organises Italian music showcases at renowned international music events, such as Billboard Latin Music Week and SXSW. Once again in collaboration with ITA, FIMI also launched Hit Week, the most important festival dedicated to the Italian creative industry.

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## 2.2. Live music Sector

### 2.2.1. *The size and overall structure of the live music market*

With a turnover of 450 million euros between January to September 2022 the live music sector is one of the pillars of Italy's music industry (SIAE, 2022). Similar to most European nations, Italy's live entertainment landscape is composed of a diverse array of touring circuits, music festivals, and live venues.

### 2.2.2. *Music festivals*

Music festivals are quite popular in Italy and can be divided into two distinct groups: "classic" festivals that last two or three days in a row, and festivals called *Rassegne* that can last for a month or more. *Rassegne* festivals consist of a series of concerts during a certain period where different headliners perform every night (Italia Music Export, 2023).

Between the months of May to November, from North to South of Italy, there are hundreds of festivals taking place throughout the country. The Italian Music Export office has put together a list of music festivals taking place in Italy, divided by region (Italia Music Export, 2023).

#### **Northern region**

##### [Ferrara Sotto Le Stelle](#) (Ferrara)

Ferrara Sotto Le Stelle is a music festival established in 1996 thanks to the Municipality of Ferrara and ARCI (Italian cultural promotion organization). For the past 25 years the festival has welcomed some of the best rock, indie rock and world music artists both from Italy and abroad. It usually takes place between late June and early July and welcomes about 90 000 spectators in total.

##### [I-Days](#) (Milan)

Founded in 1999, initially known as Independent Days Festival, I-Days has hosted some of the biggest names in international rock, indie and pop music such as Arctic Monkeys, Green Day, Imagine Dragons and many others. In the last edition held in Milan at Ippodromo Snai from June 22 to July 15, it welcomed more than 300,000 spectators.

##### [TOdays Festival](#) (Turin)

TOdays Festival is a music festival held annually since 2015 in Turin, Italy. Every year it brings together great international acts such as Hozier, Wilco, L'Impératrice and Italian artists such as Giorgio Poi, Andrea Laszlo De Simone, Levante. In the 2023 edition, 10,000 spectators attended the event.



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### [MI AMI Festival](#) (Milan)

MI AMI (Musica Importante a Milano) Festival is a music festival organized by the online magazine Rockit since 2005. It takes place every year in Milan during the last weekend of May. For years it hosted only Italian artists of all genres, with a meticulous musical selection. In recent years, it has also hosted foreign acts such as Ada Oda and Deki Alem. The festival brings together over 20 000 people over three days.

### [Club To Club](#) (Turin)

C2C Festival, born in 2002 as Club To Club, is an avant—garde and pop music festival in Turin. Over the course of twenty years, C2C Festival has presented some of the most adventurous evolutions of the avant—pop music scene, hosting artists such as Arca, Caribou, Thom Yorke amongst many others. The entire event brings together around 35 000 spectators.

### [Robot Festival](#) (Bologna)

roBOt Festival is an international festival founded in 2008 in Bologna and dedicated to electronic music and visual arts. The festival, which takes place in October, features more than 100 events each year including concerts, DJ sets, performances, screenings, digital installations and workshops.

### [Un Altro Festival](#) – (Segrate, Milano)

UNALTROFESTIVAL is a music festival for indie rock and punk lovers founded in 2013 in Milan. In its past editions, its headliners included renowned artists from the indie rock scene such as Fontaines D.C., Tame Impala, Of Monsters and Men, and MGMT.

### [Terraforma Festival](#) (Villa Arconati – Milano)

Terraforma is an international music festival dedicated to artistic experimentation and sustainability. It has taken place since 2014 in the garden of Villa Arconati, near Milan, for three days in early July. The artists range from genre precursors to young talents of the experimental music scene. About 5000 people usually attend the festival.

### [Jazz:re:Found](#) (Turin)

Jazz:Re:Found 2023 is a jazz and electronic music festival in Cella Monte, on the hills of Monferrato in Piedmont. Four days of concerts, DJ sets, panels, meetings, tastings, and cultural tourism, bring together around 12 000 people each year.

### [MusicalZoo](#) (Brescia)

Sub Limen is a music festival ranging from electronic, pop and experimental. Two Marco happened for the 2023 edition, one from July 21-23, 2023 at the Roman Theater in Brescia and one from November 17-19, 2023 at the Daste Cul 2023 Cdition, one from

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### [Nameless](#) (Como)

Nameless Festival has been the leading Italian event for electronic music and hip hop on a national and international level for 10 years. Held in the first weeks of June, it takes place in Annone di Brianza, near Lake Como. The festival has hosted artists such as Afrojack, Axwell & Ingrosso, Alesso, and Steve Aoki. The number of participants has been increasing each year reaching 100 000 in 2023.

### [Movement](#) (Turin)

The Movement Torino Music Festival, or just Movement, is an annual electronic music festival which started in 2006. It is held between late October and early November and is attended by more than 30 000 people.

### [KappaFuturFestival](#) (Turin)

KappaFuturFestival is an electronic music festival held in Turin since 2009. It welcomes more than 90 000 attendees from 118 countries and has hosted artists such as Major Lazer, Fatboy Slim and Swedish House Mafia.

### [La Prima Estate](#) (Lido di Camaiore)

First Summer is a music festival that takes place over two weekends in June. Each night it welcomes top international artists and bands from the indie, classic rock and dance scene. It hosts more than 20 000 spectators in Lido di Camaiore, Tuscany.

### [Poplar](#) (Trento)

Poplar is a music festival held annually in Trento, bringing together both Italian and international performers from multiple different genres. The festival welcomes about 15 000 spectators each year.

## **Central region**

### [Spring Attitude Festival](#) (Rome)

Spring Attitude is held in Rome every September. The festival features everything from electronic music to the most innovative and heterogeneous pop, including stars of the new Italian and indie scene. The live and DJ sets, performances and installations, digital art, workshops, and talks, bring together over 16 000 people each year.

### [Arezzo Wave](#) (Arezzo)

Arezzo Wave is a music festival and contest held in Arezzo, Tuscany every July. It attracts world-class artists and audiences of all ages. The festival covers a wide range of musical genres, from rock to pop, electronic to folk, and each year hosts internationally renowned artists.

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### [Lucca Summer Festival](#) (Lucca)

The Lucca Summer Festival is a music festival held in Lucca, mainly during the month of July, since 1998. The festival is not dedicated to a specific musical genre but is open to any style. Since the first editions, the event has been characterized by the participation of top international artists, including Bob Dylan, Neil Young and many others. As it is held throughout the month it hosts about 1 000 000 spectators.

### [Rock in Roma](#) (Rome)

Rock in Roma is a major music event held annually in Rome throughout June, July and August, hosting major international and Italian artists such as the Arctic Monkeys, Maluma and Roger Waters. It welcomes 370 000 spectators.

### [Firenze Rocks](#) (Florence)

Firenze Rocks is a music festival held annually in June since 2017 in Florence. The festival features artists and bands from the global rock scene such as Aerosmith, System of a Down, Foo Fighters and many others. It welcomes about 50 000 spectators.

### [Umbria Jazz](#) (Perugia)

Umbria Jazz is Italy's most important jazz music festival and one of the most important in the world. Established in 1973, it is held annually in Perugia in July. The artistic choices are varied though focused on jazz: from Brazilian music and black music to rock, pop and alternative music. Today it hosts more than 40 000 spectators.

### [Pistoia Blues Festival](#) (Pistoia)

The Pistoia Blues Festival is a music festival that has been held in July in Pistoia since 1980. The festival welcomes great performers and legends of rock and blues from around the world such as Jimmy Page, Rory Gallagher, Brian Auger, and B.B. King. It hosts an average of 20 000 people.

### [Dancity Festival](#) (Foligno)

Dancity Festival is an international electronic music and culture festival held in Foligno in June since 2006. The festival features a rich lineup with concerts, live and DJ sets with artists from Italy and from all over the world.

### [Decibel Open Air](#) (Florence)

Decibel Open Air is an electronic music festival held in Florence in September. It is now recognised as a meeting place for the best in the global techno-house scene and attracts thousands of people from all over the world.

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## Southern Region

### [Ypsigrock Festival](#) (Castelbuono, Palermo)

Ypsigrock is Italy's first boutique festival, now a European meeting point for fans of indie culture. The festival was founded in 1997 in Castelbuono, Sicily. Among the most prestigious bands that have performed at the festival are Alt-J, The National, Belle & Sebastian, Cigarettes After Sex and many other international and Italian talents. It welcomes more than 12 000 spectators.

### [Ortigia Sound System](#) (Ortigia, Syracuse)

Ortigia Sound System is an electronic music festival held in July in Ortigia, Sicily, since 2014. The festival combines traditional Mediterranean rhythms with new trends in contemporary music from around the world, hosting artists such as Acid Arab, Marina Herlop and Arushi Jain. It attracts about 10 000 spectators.

### [Locus Festival](#) (Locorotondo, Bari)

Locus Festival is a festival held in August in Locorotondo, near Bari, since 2005. Its lineup is devoted to jazz sounds and the new frontiers of black music, including elements of high-quality pop: they have hosted artists such as Jacob Collier, Ms Lauryn Hill, David Byrne, Thundercat and many others. It welcomes 35 000 spectators.

### [Viva! Festival](#) (Itria Valley, Bari)

Viva! has been held in the Itria Valley, Puglia, since 2017. Every year in August it hosts Italian and international electronic artists such as Arca, DayKoda and Jamie xx, expanding to genres like alternative and RnB. It welcomes about 15 000 spectators.

### [Frac Festival](#) (Calabria)

FRAC Research Festival for the Contemporary Arts stands as a meeting point between contemporary arts, new languages of the art scene and the territory. It includes performances, live shows and electronic music DJ sets with nationally and internationally renowned exponents. It is held in August in Lamezia Terme, Calabria.

### [Color Fest](#) (Lamezia Terme)

Color Fest is a festival held in Maida, Calabria, in August. Since 2013 it has hosted some of the most interesting names in the Italian indie scene such as Verdena or Iosonouncane while also including international artists such as Franz Ferdinand. It welcomes an average of 6000 spectators.

### [Mish Mash](#) (Milazzo)

Mish Mash is a festival held in Milazzo, Sicily, in August since 2016. Four days of concerts, art installations and live performances where Italian indie, rock pop and electronic music takes the spotlight. The festival hosts an average of 5000 people.

### 2.2.3. Venues and clubs

Music Export Italia has compiled useful information for artists targeting the Italian market. The following excerpt is from their report:

#### **Grassroots clubs**

In Italy, a network of small clubs form a captivating touring circuit that spans both minor and major cities across the Northern and Southern regions. Taking the stage at these intimate venues serves as an excellent starting point for cultivating an Italian audience throughout the entire peninsula. These clubs often have limited capacity (50-200 people), making them a suitable choice for artists who can adapt to small fees, often ranging up to 300/350€ (per group).

Most of these small venues fall under the umbrella of ARCI clubs. ARCI is a popular cultural association to which many Italian music clubs belong. Every member of the audience has to subscribe to the association and pay an annual membership (usually around 5-10€) which will be valid for all ARCI clubs around the country. It's important to note that this membership cost is usually separate from the concert ticket price.

Another category of grassroots venues is CSA or CSOA, referring to occupied and self-managed spaces. These venues are run by the neighbourhood community and offer a variety of political and social bonding activities.

In addition, house concerts are also relatively common in Italy, and you can find Italian versions of Sofar Sounds and Balcony TV.

#### **Main venues**

The main venues in Italy usually have three types of capacity:

- regular music clubs (up to 3000 attendees)
- sports venues (“palazzetti”, up to 13 000 attendees)
- stadiums (up to 60 000 attendees)

Most Italian music clubs are part of KeepOn, a national network representing around 280 clubs all around Italy.

#### **Seasonal Venues**

From the beginning of June to the end of August, most of Italy’s indoor clubs either close their doors or transition to outdoor spaces. This is the reason why Italy has many seasonal venues that operate exclusively during the summer months, e.g. the popular bathing establishment Hana-bi or Parco Gondar in Puglia. Additionally, many public squares transform into concert venues during the summer season.

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#### **2.2.4. Promoters, producers and agents**

International artists seeking to tour and perform in Italy can greatly benefit from working with a local promoter, event producer or booking agency. These professionals can help artists secure and promote gigs. Most booking agencies in the country are open to working with international artists. Some Italian promoters and live booking agencies include:

[All Things Live IT](#): All Things Live is the largest independent live music promoter in the Nordics and Belgium. After taking over the Italian company Radar Concerti, it now represents international artists such as Idles, The XX, Fka Twigs, Grimes and Italian acts like Iside and Studio Murena.

[Annibale](#): Annibale is an independent music agency based in Firenze, taking care of full European tours for bands from all over the world. It represents Italian artists such as Leatherette, Aquarama and A/lpaca.

[Antenna Music Factory](#): Antenna Music Factory is an Italian booking agency & management for indie-alternative music.

[Barley Arts](#): Barley Arts is a Milan-based management, booking and event production agency founded in 1979. It organises concerts by Italian and international artists as well as events, festivals and edutainment shows.

[BPM Concerti](#): BPM is a booking agency with a large roster of both Italian and foreign artists. Two key characteristics are the focus on young up-and-coming talent and the promotion of Italian music abroad.

[Bass Culture](#): Bass Culture is an Italian-based live music production company and booking agency founded in 2001. It represents both Italian and international artists such as FKJ, Jacob Collier, La Femme, Little Simz and many others.

[Comcerto](#): Comcerto, based in Ancona, specialises in the promotion and production of music festivals and concerts by national and international artists. International artists represented in Italy include Mumford & Sons, Lorde, The Lumineers and many others.

[DNA Concerti](#): DNA Concerts is a booking and event production agency that has been working for years with Italian artists such as Calcutta and Andrea Laszlo De Simone and foreign artists such as Kings of Convenience, Wilco and Weyes Blood.

[D'Alessandro e Galli](#): D'Alessandro and Galli, founded in 1987, has worked with many of the world's best-known artists such as Adele, Justin Bieber, Paul McCartney, Bob Dylan, Elton John and many others, organising concerts and festivals in Italy and abroad.

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[Django Music](#): DJANGO CONCERTI was founded in 2017 as a national and international artist booking and event organisation. Its roster embraces various genres of black music: from reggae, and hip-hop, to funk and world music.

[Friends & Partners](#): Friends & Partners is involved in various activities: concerts, sponsorships, events, multimedia and TV productions. Its roster includes mainly Italian artists.

[Hangar Booking](#): Hangar is booking agency and management company, founded in 2017 and based in Europe. They work with artists who frequently perform around Europe and the world such as Marta Del Grandi, Qlowski and Leatherette.

[HERØ Booking](#): HERØ Booking is an Italian booking agency based in Verona. They work with Italian and foreign artists from the rock and metal scene.

[IMARTS](#): International Music and Arts was founded in May 2005 out of Modena International Music (an agency operating since 1988). It organises concerts of contemporary music (rock, pop, jazz, world music, gospel), classical music, dance, theater. It also manages Italian and foreign artists throughout Italy and Europe.

[Indipendente Concerti](#): Indipendente Concerti is part of Live Nation Italia and has organised numerous tours and concerts of both Italian and international artists of great public and critical acclaim, including Radiohead, Muse, Kasabian, Paolo Nutini and many others.

[Live Nation Italy](#): Live Nation is the world's leading live entertainment company. Its Italian branch produces and promotes the most important concerts of Italian and international artists in Italy.

[Locusta](#): LOCUSTA is a booking and management agency operating in the field of music and performing arts events. Active since 1998, it has organised tours in Italy and throughout Europe, working with some of the most interesting artists in the independent area such as Fast Animals and Slow Kids, Baustelle and Caribou.

[Magellano](#): Magellano Concerti is a concert and event organisation agency that works with some of the most important Italian artists such as Tananai and Pinguini Tattici Nucleari.

[Musicalista](#): Musicalista is an agency that promotes world music, folk, Latin and jazz artists. Their services include the management of Italian artists and bands in Italy and abroad, tour organization, and planning and production of events and festivals. They work with artists such as Bombino and Les Amazones d'Afrique.

[Orfeo](#): Orfeo is a booking and production agency that works on musical projects, cultivating visions and promoting contamination. They work with artists of different genres including Guinevere, Parbleu and Capibara.

[Panico Concerti](#): Panico Concerti is an Italian booking agency that organises tours, and concerts and produces events for Italian and international artists such as Ada Oda, Iosonouncane, European Vampire and many others.

[Sanavio](#): Sanavio is an international artist booking company that provides international artists for major TV shows, private and public events, conventions and concerts. They have worked with well-known artists such as Duran Duran, Amy Winehouse, Jason Derulo, Il Volo, Busta Rhymes and many others.

[Trident Concerts](#)

[Vertigo](#)

[Vivo Concerti](#): Vivo Concerti produces and promotes the concerts and tours of major Italian and international artists such as Måneskin, Post Malone and Sam Smith.

### ***In focus: festivals, touring and gigs***

#### ***An interview with Salvatore Cataudella from Panico Concerti***

Salvatore Cataudella, from the boutique booking agency [Panico Concerti](#), shares his experience working with international acts in the Italian market and offers tips on how to approach bookers and promoters as an international artist.

#### **Festivals that are open to International Artists**

[Milan Music Week](#) and [Linecheck](#) are great showcase festivals for emerging artists to perform at and to get their foot in the door. Other music festivals that book emerging international acts include:

- [Ypsigrock](#)
- [Lost Music Festival](#)
- [SEI Festival](#)
- [Beaches Brew Festival](#)
- [MI AMI Festival](#)
- [C2C](#)
- [Spring Attitude](#)
- [Poplar festival](#)
- [Jazz:Re:Found Festival](#)
- [Apolide Festival](#)



### **Finding a local partner as an international artist**

Salvatore emphasises Panico Concerti's proactive approach to engaging with international artists. They typically reach out to international artists who they are interested in themselves. It is important for Panico Concerti to build trust and reputation within the industry so that when they recommend an artist, people listen, due to their previous track record. Salvatore and Panico Concerti also focus on building long-term relationships with artists, often working with them multiple times when they come to Italy.

When speaking about which international artists they consider working with at Panico Concerti, Salvatore explains, "I think about our roster and if we have a gap in a certain genre and then we find a band for that gap. Of course, it also depends on how other promoters and the press speak about the band but that is not the most important aspect. It's about thinking if we can do something with that band in Italy and whether humanly we are kindred. That's really important for us!"

### **Booking a Show or Organising a Tour**

When booking a tour or a gig in Italy, it is recommended to work with a local partner, either a booking agency, promoter, PR professional, label etc. According to Salvatore Catauduella, there has been an increase in interest towards international bands, particularly from promoters. This interest is, however, mainly directed toward the more well-known artists and it can be more challenging for smaller bands to garner the attention of Italian promoters. There are some promoters though who are always looking for the next big act and thus take more of an interest in emerging international artists.

Geographically, there is a large difference between Northern Italy (Rome and above) and Southern Italy and international artists typically only plan tours and gigs in the Northern part. Booking gigs and touring in Southern Italy can be more challenging for foreign artists since the promoters are not as strong and there aren't so many festivals or venues for the artists to perform at. If a band is touring in Italy for a few weeks, then they might perform a few gigs in the South, otherwise, if they are just coming for a few days, they will mostly just stay in the Northern part. When planning an artist's first tour in Italy, it might also be better to stick to the Northern region.

In terms of getting around, Italy has a great network of trains particularly in the Northern part of the country and between major cities. To get to more rural areas or the Southern part of the country, using a tour van would be best.

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### **2.2.6. Other resources**

- [Live DMA \(2023\) The Survey: Facts and Figures of Live Music Venues and Clubs in Europe](#)
- [I Live Club in Italia](#)

## 2.3. Recorded music sector

### 2.3.1. The size and overall structure of the recorded music market

Italy has a strong and well-developed recorded music market with its value reaching above 300 million euros in 2022. Recorded music revenues have been rising at a steady pace seeing a 62% increase from 2018 to 2022 (see Figure 1).

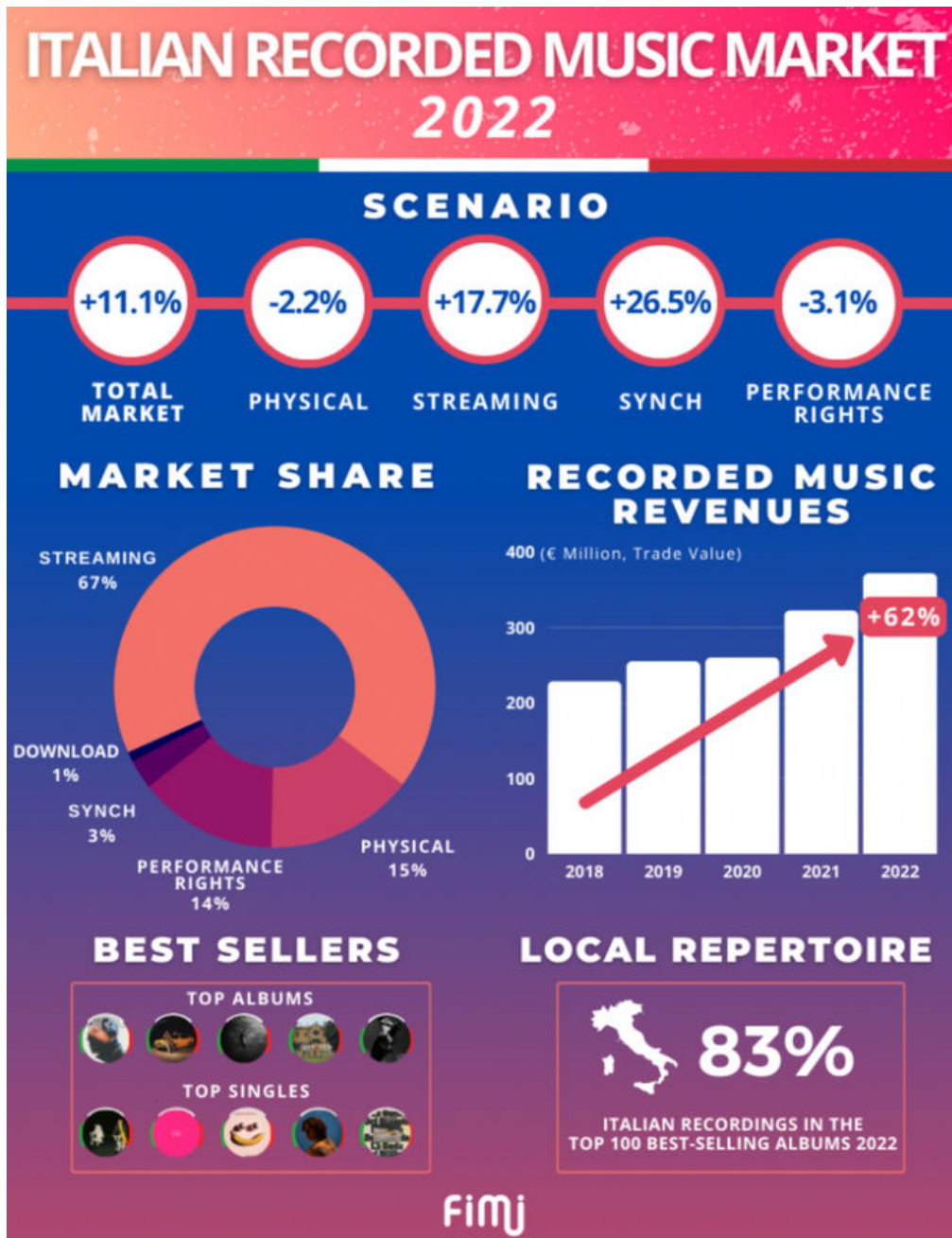


Figure 1. Italian recorded music market 2022

Source: FIMI 2022

Digital revenues played a crucial role in the revenues of the Italian recorded music industry, with streaming making up 67% of the market share. Physical records make up 15% and there was an overall 2,2% decline in the market share from the previous year (see Figure 1). However, vinyl sales experienced a resurgence with an 11,7% increase. Italy's physical music market remains strong internationally, ranking eighth globally.

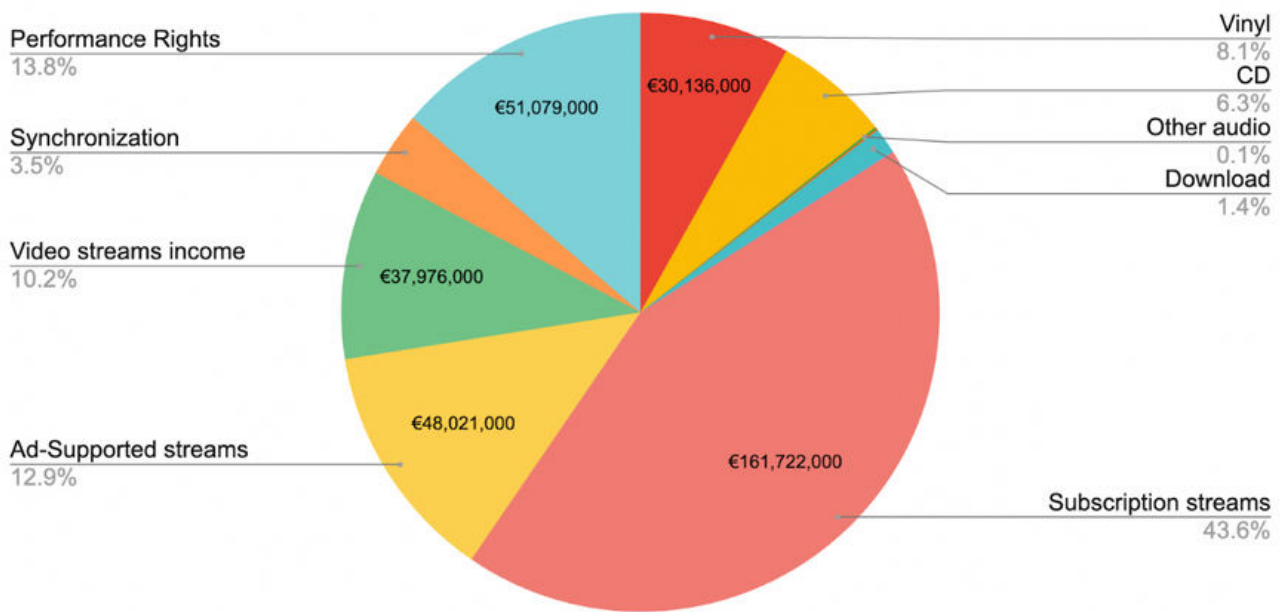


Figure 2. Breakdown of recorded music revenue in 2022. Graph based on data from the FIMI (2023) report and Billboard (2023).

Local repertoire dominates the market with 83% of the albums in the TOP100 being Italian. This creates a narrow space for international acts. Nonetheless, considering Italy's substantial market size, it can still be a good market for international artists to explore.

### 2.3.2. What kind of recorded music are audiences listening to?

Some of the most popular genres include pop (particularly Italian pop), with hip hop and urban music growing each year. There are also some local genres, like neomelodic music that is listened to in Southern Italy.<sup>1</sup> In Southern Italy, YouTube is also the first source of streaming since it's seen as the most convenient. 39% have paid subscriptions to streaming (IFPI, 2022).

<sup>1</sup> Based on an interview with Chiara Sacchini from Believe

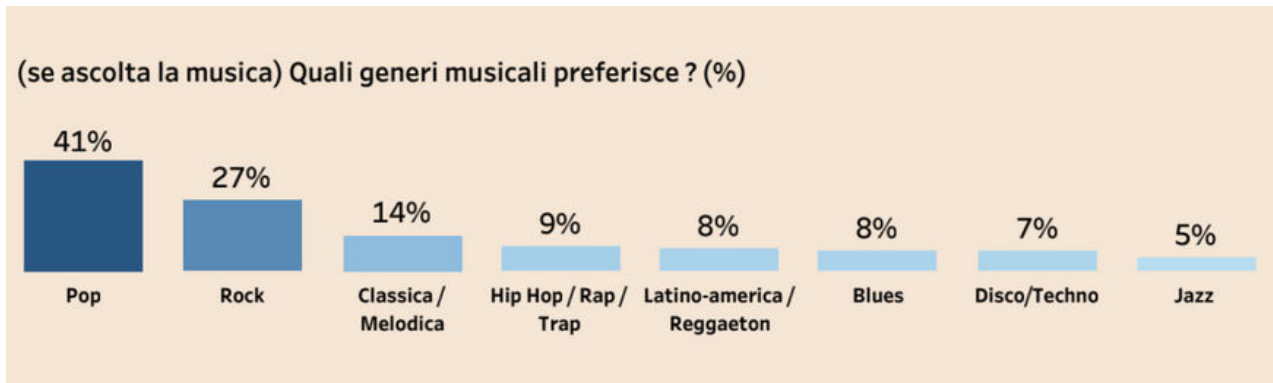


Figure 3. Preference of musical genres among Italian music listeners.  
Source: Tremolada, L. (2020), based on CSA research.

Data from CSA research shows that the most popular genres are pop, rock, classical, hip-hop/rap/trap, Latin/reggae, blues, disco/techno and jazz.

### 2.3.3. The digital recorded music market – structure and main trends

All major streaming services are present in Italy, Spotify, Apple Music, Tidal, Deezer, Google Play Music, Soundcloud and YouTube. Data from CSA Research, published by Ol Sole 24 Ore shows the most used streaming platform in 2020 was YouTube, across all age groups, with Spotify coming in second.

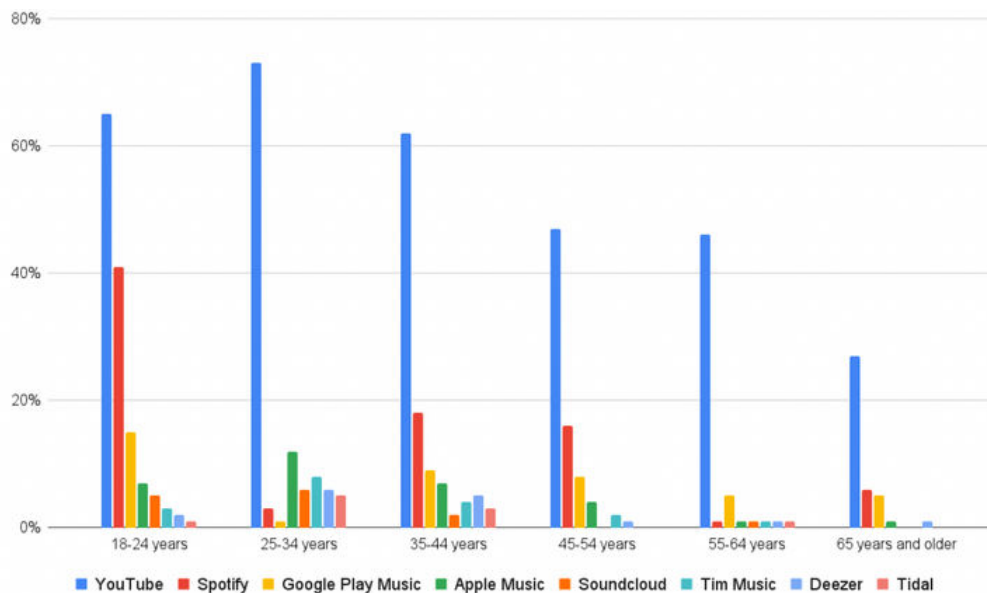


Figure 4. Streaming platforms used to listen to music by age groups.  
Source: Tremolada, L. (2020), based on CSA research.

Italy also has its own Spotify playlist editors for most genres (contrary to smaller European markets), however for some genres, like classical or neo-classical, the playlist editors are in the Spanish region.

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#### **2.3.4. The main recorded music companies**

All of the major labels, Sony Entertainment, Warner Group and Universal Music are present and active in the Italian market. There are also a variety of independent record labels, some examples include:

[Sugar Records](#): Founded in 1932, Sugar Records' catalogue ranges from soundtracks to pop music and includes classical and modern music, all deeply rooted in a strong Italian matrix.

[42 records](#): Founded in 2007, its catalogue ranges from indie to jazz and electronic music with artists such as Cosmo, I Cani and Andrea Laszlo De Simone.

[Bomba Dischi](#): Bomba Dischi is an Italian independent record label, founded in Rome in 2012. Its artists mainly belong to the indie scene, including some very notable ones such as Calcutta and Ariete.

[Asian Fake](#): Asian Fake was founded in Milan in 2016 as an independent label, aiming to enhance hidden gems without labeling them or locking them in genre cages. Its roster includes artists such as Coma Cose and Venerus.

[La Tempesta Dischi](#): La Tempesta Dischi is an independent record label based in Pordenone, Italy, founded in 2000. It includes artists ranging from electronic to rock and alternative.

[Undamento](#): Undamento is a Milan-based independent label established in 2012. Its roster ranges from rap to R&B to electronic with artists such as Frah Quintale and Joan Thiele.

[Woodworm](#): Woodworm is an Italian independent record label based in Arezzo, Tuscany. The label, founded in 2011, includes singer-songwriters and artists from the indie and rock scene.

[Maciste Dischi](#): Maciste Dischi is an Italian independent record label founded in Milan in 2014. It includes artists from the Italian indie scene such as Gazzelle and Fulminacci.

[Maple Death](#): Maple Death Records is a label founded in 2014, based in Bologna and London. It ranges between noise, avant-pop, punk, psych, industrial, and rock with a particular attention to the underground.

[WWNBB](#): We Were Never Being Boring is an independent label established in 2009. Its artists mainly belong to the indie-pop and indie-rock scene.

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[Bronson Recordings](#): Bronson Recordings is an independent label based in Ravenna, Italy. It ranges from genres such as electronic, rock and alternative.

[Trovarobato](#): Trovarobato is a record company and cultural association founded in 2004 based in Bologna, Italy. Its artists belong mainly to the electronic and indie spheres.

[Thaurus](#)

[Machete](#)

[Glory Hole Records](#)

[Tanta Roba Records](#)

[Macro Beats](#)

[Factory Flaws](#): Factory Flaws is a boutique label established in 2016, specialising in the promotion and distribution of Italian artists whose sounds are aimed at an international audience, especially alternative pop projects.

[Costello's Records](#): Costello's Records is a Milan-based independent label established in 2014. It ranges across different genres and focuses on new talent.

[Hyper Jazz Records](#): Hyperjazz Records is an Italian label focused on jazz and the encounter of this genre with new influences and contaminations.

[Cam Jazz](#): CAM JAZZ is an Italian record company, owned by the Kepach Music Group, operating from Rome and New York.

[Carosello Records](#): Carosello Records is one of the mainstays of the Italian record industry and part of a historical Italian independent publishing group, Curci. Founded in 1959, it works with some of the brightest talent in Italy, both established and up-and-coming.

[Eibon Records](#): Eibon Records is an independent record label from Milan, Italy, founded in 1996. It primarily focuses on very fringe underground music, noise/ambient and doom metal. They also work with international artists.

[Frontiers](#): Frontiers Records is a record label founded in Naples in 1996 specialising in hard rock, pop metal, and AOR. They work with both Italian and international artists.

[Go Down Records](#): Go Down Records is a record label based in Treviso, Italy. Since its foundation, the label's mission has been to support the independent music scene and in particular stoner rock, garage rock and rock'n'roll genres, working with Italian and international artists.



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[Minotauro Records](#): Minotauro Records is a small independent record label based in Pavia, Italy. Starting in the early 80s, the label played a pivotal role in the early underground Italian heavy metal scene. They also work with international artists.

[Nicolosi Productions](#): Nicolosi Productions is an Italian record label founded in 1997. They produce various genres including jazz, soul, funk, and pop music by both Italian and international artists.

[O Music Recordings](#): O Music Recordings is an Italian independent record label founded in 2016 that releases pop and dance music by Italian and international artists.

[Old Europa Cafe](#): Italian label specialized in ambient, noise, industrial and power electronics since the late 1980s. They work with both Italian and international artists.

[Record Kicks](#): Record Kicks is a Milan-based independent record label and music publishing, specialising in both new and vintage black sounds: deep funk, soul, northern soul, afrobeat, rocksteady, and dancefloor jazz. Its roster includes both Italian and international artists.

[Rude Records](#): Rude Records is an independent and international record label founded in 2000 and based in Milan. The label's artists are generally considered to fall under the genres of punk rock, pop punk, post-hardcore, and alternative rock.

[Scarlet Records](#): Scarlet Records is an Italian record label founded in 1998, specialising in the hard rock and metal genres. They work with both Italian and international artists.

[Toast Records](#): Toast Records is a historical label which has been producing contemporary Italian music since 1985.

### **Main distributors in the Italian market**

According to Chiara Sacchini from Believe, working with an Italian label and/or distributor can be helpful. International artists can get in touch with a label's A&R department to pitch their project and explain why they need editorial spaces in Italy.

The main distributor in the Italian market is [Believe](#), followed by [The Orchard](#), Warner's distributor [ADA Music](#) and a local distributor [Artist First](#) (which only operates in the Italian market). The most popular distributors amongst independents include [TuneCore](#) (a part of Believe) and [CDBaby](#). Although Believe is an international company with offices across the globe, its Italian office just occasionally works with foreign artists or labels, as they carefully evaluate and select only the projects that might be effective within the local market. At the same time, they work with partners like other distribution companies in foreign countries through other offices of Believe.



## 2.4. Music publishing & sync sector

### 2.4.1. How do audiences discover music?

The music publishing and synchronization market is well-established and developed in Italy. All major publishers, Warner Chapell, Universal Music Publishing Group and Sony Music Publishing are present and active in the Italian market, alongside a multitude of independent publishers. The collective management organization, SIAE, is over 100 years old, overseeing the copyright of rights holders across Italy.

Music's role in Italian advertising is on the rise, and the country remains a prominent center for film and TV production, notably with the presence of Amazon Italy and Netflix Italy. The Italian film industry is well-known worldwide, hosting prestigious festivals like the Venice International Film Festival, Rome Film Fest etc. and producing award-winning films.

In 2022, music synchronization revenues from audiovisual productions, such as advertisements, movies, and TV series, amassed a turnover of €13 million, growing by 26,5% from the previous year (FIMI, 2022). According to the music supervisor Silvia Siano, budgets for music used in advertisements typically exceed the budgets of music for film or TV, however, the latter two fields are experiencing large growth.

### 2.4.2. Some of the main music publishing and sync companies

Major publishers such as Warner Chappell, Sony Music Publishing, and Universal Music Publishing are key players in the Italian music market, collectively holding more than half of the market share. In addition to these industry giants, Italy boasts several prominent independent publishers, including:

- Sugar Music
- Cafe Concerto
- Curci

As well as many smaller publishers who mainly work with lesser-known catalogues.

- Metatron – artist management, label, publishing and consulting
- Oyez! – publisher and label
- Peer Music
- Irma Group
- Tanzan Music Publishing
- Ricordi – under Universal
- Rai Com – publisher of the national TV network
- D+ – A small publisher
- FlipperMusicWorld – publisher and label but focuses mostly on production music<sup>2</sup>

<sup>2</sup> Interview with music licensing expert Francesca Barone from Dolce & Gabbana

Italian music publishers have their own publisher associations like Federazione Editori Musicali ([FEM](#)) and [EMusa](#).

Regarding the synchronization market, larger brands like Dolce & Gabbana and Ferrero have dedicated in-house teams responsible for music licensing. In contrast, other brands collaborate with music consultants, supervisors, or production libraries (commonly known as music libraries). Notably, the term "music supervisor" isn't commonly used in Italy. According to Eleonora Danese, a music supervisor, "Most of the people who actively do this job are better known as music consultants or coordinators, producers responsible for music and other utterly imprecise titles. Some of them do not even include the word "music" in their job title. For this reason, it is quite difficult to have a clear overview of all the professionals who actually work as music supervisors in our country."

Nevertheless, some well-known professionals actively involved in music supervision include:

- Francesca Barone
- Silvia Siano
- Federico Diliberto Paulsen
- Giorgia Benedetti
- Giovanni Guardi
- Eleonora Danese
- Gabriele Lilli<sup>3</sup>

Additionally, some TV and film production companies, such as [Cross Productions](#), [Fandango](#), and [Groenlandia Group](#), maintain in-house music supervisors, while others choose to hire freelancers or establish agreements with record labels or publishing companies.<sup>4</sup>

### ***In focus: music synchronisation***

#### ***Interview with music licensing consultant and music supervisor Francesca Barone, and music supervisors Silvia Siano and Eleonora Danese***

To better understand the synch market in Italy, three synch professionals were interviewed – Francesca Barone, a Content Rights Manager for Dolce & Gabbana, who is an expert on licensing music for advertising; Silvia Siano, music supervisor from [Cross Productions](#) who has worked on numerous movies and TV series; and Eleonora Danese, the youngest female music supervisor in Italy from [Groenlandia](#)

<sup>3</sup> Interview with music supervisor Eleonora Danese from Groenlandia Group

<sup>4</sup> Interview with music supervisor Silvia Siano from Cross Productions

Group, also working on film and TV.

Below is a brief summary of the interviews. A more in-depth blog post based on the interviews can be found [here](#).

### **Music for Advertising**

Regarding synch for advertising, Francesca Barone advises international artists to have a local partner, for example, a sub-publisher, a sync agent or even a PR person, who understands the Italian market and can promote the artist's work. Entering the Italian synch space can be challenging for international emerging artists, as brands prefer well-known artists or instrumental music that has universal appeal. Being under a major label can also boost credibility, however. To secure synch deals for Italian advertisements, artists should first establish themselves in the Italian market through other channels like radio, streaming, social media, and promotion.

### **Music for TV and Film**

Music supervisors Silvia Siano and Eleonora Danese believe that there are multiple opportunities for international artists to have their music synched in Italian films and TV series. Major players in the Italian TV space include [RAI](#) and [Mediaset](#), followed by private services like [SKY](#), Netflix, Prime Video, and Disney+. Silvia notes that music supervision in Italy is a relatively recent development, growing as streaming platforms like Netflix and Amazon create local content. While some companies hire in-house music supervisors, others work with freelancers or music companies.

Although Italian composers are often preferred for bespoke scores, opportunities for international composers do exist. Both Eleonora and Silvia have recently been a part of international synchs in Italy. Two projects that Eleonora worked on recently with her colleague Gabriele Lilli, the TV series "[The Law According to Lidia Poet](#)" and the film "[Mixed By Erry](#)", both featured soundtracks from international artists. Two of Silvia's recent projects "[Skam Italia](#)" and "[Prisma](#)" also include synchs by international artists.

In terms of challenges for international artists in the Italian market, Eleonora points out the lack of official organizations of music supervisors and Silvia mentions potential language barriers between composers and directors as another hurdle.

Overall though, the Italian market offers numerous opportunities for international artists, however, it is important to have the right connections. Building trusted relationships in the industry is crucial, whether through direct contact, networking events, or email outreach.

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## 2.5. Media

### 2.5.1. *How do audiences discover music?*

The main sources of music discovery in Italy tend to be via social media and music streaming according to PR professionals Marta Falcon and Sara Testori from the agency [Parole & Dintorni](#). In terms of the distribution of streaming platforms, Marta and Sara explain: “A 2021 [study](#) by Kantar and ComScore for Google revealed that over 90% of Italian adults listen to music via streaming, with 74% of them stating that they use YouTube, followed by Spotify (54%), Prime Music (34%), web radio (15%), and Apple Music (9%).”

Although YouTube is currently the most popular streaming platform, newer platforms like TikTok are rapidly growing in popularity, especially among the younger generation. “For instance, TikTok recently contributed to the success of Jain's 2015 single Makeba,” Marta and Sara said.

Marta and Sara also emphasise the importance of TV series and movies (sync) in music discovery. “The inclusion of a song often leads to unexpected success not only for that particular song but also for the artist. This is evidenced by the increasingly prominent role of the music supervisor in the TV series industry.” One example of this is the Wednesday dance from the Tim Burton series which has been reinterpreted by users of social networks worldwide, including Italy.

### 2.5.2. *Radio landscape and audiences*

The radio landscape in Italy is diverse. There are public radio stations like Rai Radio and a multitude of commercial radio stations catering to different genres. Commercial radio channels tend to have a larger viewership than public radio channels.

Public radio stations:

- [Rai Radio 1](#) focused on news and talk shows.
- [Rai Radio 2](#) light entertainment shows and popular music.
- [Rai Radio 3](#) shows about literature, theater, cinema, and history with mostly jazz and classical music.

Commercial radio stations:

- [Virgin Radio](#) for rock
- [M2o](#) for dance music
- [Radio DeeJay](#) for pop and brand new artists
- [RTL 102.5](#) (not related to the [RTL Group](#), hit radio)

- [Radio 105](#) general radio
- [Radio Capital](#) general radio
- [Radio Kiss Kiss](#) general radio
- [Radio Monte Carlo](#) general radio
- [Radio 101](#) general radio
- [Radio 24](#) news & talk radio
- [Radio Latte e Miele](#) for mainly Italian music
- [RDS](#) general radio
- [TRX Radio](#) for hip hop and rap.
- [Radio Popolare](#) indie radio, interviews emerging Italian and international artists.

#### Independent web radio

- [Radio Raheem](#) discovers new national and international music scenes.
- [NEU radio](#) covers new national and international music scenes.
- [Est Radio](#) young web radio focusing on Italian and international emerging artists

### 2.5.3. Music press, blogs and webzines

As a large country with a well-established music market, Italy has a diverse array of music magazines, blogs, webzines that feature updates from artists. General newspapers and magazines also have dedicated pages and columns for music-related topics. Below is an adapted excerpt from Italia Music Export with key information on the online press and print press options for music-related content.

#### Online Press

Online music magazines have gained enormous popularity in Italy within the last 15 years and they have quite an influence on their readership, so it's important to take this into consideration when planning a promo campaign in Italy.

Speaking of global brands, there is an Italian edition of [Rolling Stone](#) (which is quite popular, both online and on newsstands) and [Noisey](#) (VICE Magazine's music platform). Moreover, there are a number of well-known independent webzines that have been publishing original online content since the late '90s: among them, the most popular ones are [Rockit](#) (only focusing on Italian music) and [Rockol](#), [Rumore](#) and [Blow Up](#), two historical print magazines that have their own online version.

For what concerns electronic music, popular online magazines are [Soundwall](#), [DJ Mag](#), [Parkett Channel](#) and [Clubber Confession](#), while [Esse Magazine](#), [La Casa del Rap](#), [OutPump](#), [Four Domino](#) and [Rap Burger](#) concentrate on rap music in all its forms. [Dance like Shaquille O'Neal](#) and [Deerwaves](#) have a younger readership and while focusing on music, it's not unusual to find other kinds of articles regarding TV series, sneakers, pop culture or technology. Other popular web magazines include [Onstage](#), [Sentireascoltare](#), [Rockon](#), [All music italia](#) and [Ondarock](#).

The online versions of historical daily newspapers such as [La Repubblica \(Il Venerdì\)](#), [Corriere della Sera \(Sette\)](#), [La Stampa](#), [Il Sole 24 Ore](#), [Quotidiano Nazionale](#), [Panorama](#), [L'Espresso](#), [Famiglia Cristiana](#) as well the Italian editions of international magazines like [Wired](#), [Esquire](#), [l'Officiel](#), [Vogue](#), [Vanity Fair](#), [Elle](#), [Marie Claire](#), [Grazia](#) and many others also give space to music-related content.

The most popular webzine for what concerns music, concerts and lifestyle is [Zero](#), which has city-specific editions in Rome, Milan, Bologna, Turin, Florence and Naples.

As it happens in every country, there are specific web magazines focusing on each music genre, so it's important to do some research before planning a promo campaign.

### **Print Press**

Considering the growing popularity of new digital platforms, print music magazines in Italy are struggling. The most popular music magazines in Italy include [Rolling Stone](#), [Rumore](#), [Blow Up](#), [Billboard Italia](#) and as it happens for online webzines, there are specific magazines focusing on each music genre like [Rockerilla](#). Daily newspapers such as [La Repubblica \(Il Venerdì; D\)](#), [Corriere della Sera \(Sette; Io Donna\)](#), [La Stampa](#), [Il Messaggero](#), as well as free press publications such as [Metro](#) or [Leggo](#) all feature music (interviews, reviews etc.) and have columns detailing upcoming concerts.

#### ***In focus: media landscape***

##### ***An interview with Marta Falcon and Sara Testori from Parole & Dintorni***

Sara Testori and Marta Falcon, two media professionals at a well-known press agency [Parole & Dintorni](#), highlight the pivotal role newspapers, magazines, and websites play in the communication strategies of both Italian and foreign artists. They emphasize that journalists act as a bridge, connecting the artist with the public, thereby expanding their audience beyond the artist's existing fan base on social media.

“While social media platforms are invaluable for engaging directly with fans, journalists have the ability to reach a much wider and more diverse audience through their work in newspapers, magazines, and online publications,” Sara and Marta note.

In addition to valuable exposure, the media can also shape the artist's public image and perception. Certain media outlets and journalists hold a position of authority and credibility, and they are successfully able to shape the public opinion of an artist

The landscape for music-related publications in Italy is wide. There are newspapers with entertainment sectors that are read by industry professionals. There are also a multitude of music websites catered to specific genres, as well as music-focused magazines, which still remain important for certain audiences despite their dwindling popularity. Music can also be a prominent feature in lifestyle magazines like Vogue, Vanity Fair, Elle, Marie Claire, Grazia and many others.

### **2.5.5. Music in TV**

Italia Music Export has put together key information on television in Italy and options for music-related content on TV.

Italian television is divided into public and private broadcasters. RAI (Radiotelevisione Italiana) is the Italian state-owned public service broadcaster, while Mediaset and SKY are the two main commercial TV broadcasters in the country. Rai is the national public broadcaster and with its main channels (RAI 1, RAI 2, RAI 3) covers an average audience share of almost 40%. RAI is followed by the commercial broadcaster Mediaset (with the three main channels Rete 4, Canale 5, and Italia 1) and Sky, the pay-TV broadcaster home of popular TV shows such as X Factor Italy and Masterchef Italy.

Some Italian radio stations have their own TV channel, for example, Deejay TV, Radio Italia and Radio Capital, while there are also ‘traditional’ music channels like VH1 and MTV Italy (part of SKY).

For what concerns music TV shows, the most popular ones are X Factor Italy (SKY) and Amici (Mediaset), both talent shows. The most famous music event in Italian television is Festival di Sanremo, a mainstream song contest aired once a year (usually in February) on Rai 1 since 1951. Another popular TV event is Primo Maggio, a concert organized in Rome by labour unions every 1st of May, and aired live by RAI. Finally, there is the Wind Summer Festival, a four-day live showcasing summer hits.

Several Italian TV shows host brief showcases of independent and new artists, both Italian and international: “Che Tempo Che Fa” (Rai3), the Sunday football show “Quelli che il calcio” (Rai2) and “E poi c’è Cattelan” (SKY) are among the most popular ones.



## 2.5.6. What would a good PR & marketing strategy be like?

### ***In focus: What would a good PR & marketing strategy be like?***

***Interviews with Valentina Ferrara from the Communication Agency Words for You and Marta Falcon and Sara Testori from the Press Agency Parole & Dintorini***

Marta Falcon and Sara Testori from the press agency Parole & Dintorini, and Valentina Ferrara from the communication agency Words for You, give their insight and tips on how foreign artists should approach the media, PR and marketing in Italy.

#### **Find the right angle**

Media relations specialist Valentina Ferrara believes that a good strategy for promoting international artists in Italy should consist of a creative approach pitching a different story angle to various media types. Both traditional and new media should be considered including social media (TikTok, Instagram) and digital magazines and video podcasts.

“It’s important to reach music magazines like Rolling Stone, Rockol, Billboard, and, depending on the artists, community or digital media that take care of a particular genre (e.g. EsseMagazine and Outpump for rap, etc.),” Valentina emphasises.

Aside from these magazines, newspapers and weekly/monthly magazines can also play an essential role in promotion, as can getting in touch with well-known music critics and pitching the project.

Artists should also take a creative approach when reaching out to media outlets, tailoring their emails and finding a good angle to attract the attention of the media. “It’s very difficult to find a space for an unknown international artist on the main pages dedicated to the music on traditional media, but if the music is good and the narrative around the project is interesting, it’s possible to attract the attention,” Valentina says.

#### **Work with the right partners**

International artists seeking to establish themselves in the Italian market can benefit from the support of a local PR agency or dedicated press officer. These people typically have good relationships with the media, relevant contacts and skills that they can dedicate to promoting the artists. They can play a vital role in managing the



public relations and media outreach. According to PR agents, Marta and Sara, from the agency Parole & Dintorni, one of the key responsibilities of an Italian press officer is to develop a comprehensive press kit tailored specifically to the local market. “This press kit serves as a valuable resource for journalists, providing them with essential information about the artist, their background, achievements, upcoming projects, and any significant events they are involved in,” they express.

Additionally, local press officers are aware of other events, projects and commitments of Italian journalists and hence can figure out the best times to communicate with them. “It will be important to introduce the artist to the journalists and invite journalists, TV, and photographers to any concerts or events increasing the likelihood of media coverage and boosting their chances of success in the Italian music industry,” Sara and Marta say.

Press officers also ensure that when an artist releases an album, EP or single, it also reaches the right journalists and music critics. Positive reviews from journalists and critics can help generate a buzz around an artist and attract a broader audience, boosting the artist’s reputation and popularity.

The landscape for PR agents is quite varied. There are individual agents that work only with specific genres and types of artists, and agencies who work with multiple artists in larger teams. The strategy is tailored to each artist individually and the fees for the services of these agencies depend on the type of project, the length of the promotion and the amount of time and energy invested.

Sara and Marta gave further insight into their work, “At Parole & Dintorni, we frequently collaborate with emerging foreign artists, not exclusively focusing on well-established ones like Foo Fighters or Adele. Among the latest artists that Parole & Dintorni, as a press office, has assisted in their development in Italy are Lous And The Yakouza and Aurora (when she plays at Primo Maggio Roma). We have increased their visibility and recognition among Italian journalists and media by consistently sending out press releases, organizing interviews, and securing media coverage.”

### **Have a good press kit**

Valentina, Marta and Sara all agree that it is crucial for artists to have a comprehensive press kit that includes a well-crafted and professionally written biography, captivating press releases with all the information necessary about the project/release/tour and high-quality photos (both vertical and horizontal) that represent the artist in the best light possible, as well as any relevant multimedia

content including music videos and audio samples. “The press kit aims to capture the attention of Italian journalists and provide them with all the necessary materials to craft engaging stories or features about the artist,” Marta and Sara state.

Having a good visual identity is also paramount. The press officer can help select the best photos that might appeal the most to the Italian audience. “Presenting the artist in the best possible light through visually appealing and relevant imagery enhances the chances of media coverage and positive publicity.”

### **Connect with opinion leaders**

Marta and Sara also emphasise the importance of reaching out to opinion leaders within the Italian music community. These can be prominent musicians, trendsetters, and industry leaders with a large social media following. The opinions and endorsements of these public figures hold considerable weight and can greatly shape the public perception of an artist.

### **Plan ahead**

A typical communication campaign for releasing an album in Italy lasts for a minimum of six months, starting a few months before the launch and including a few months of maintenance and follow-ups after the release. The campaign can involve not only interviews with the media but also participation in panels, workshops and other events organized by the media.

### **Some marketing, PR and communication agencies include:**

[Words for You](#): Words For You is a Milan-based PR and communications agency specializing in media relations in the entertainment industry.

[Parole & Dintorni](#): Founded in 1990, this communications agency specialises in traditional and digital media relations in the fields of music, television and film.

[Coco District](#): Coco District is a press office that builds communication strategies in traditional and new media for artists and events.

[Good Ones](#): Good Ones is a boutique PR agency based in Milan, representing a bespoke roster of record labels and artists across a variety of genres.

[Goigest](#): Goigest, a press office based in Milan, has been providing media, communication and public relations services for over 30 years, with a focus on music, entertainment, culture and leisure.

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[Help PR & Media Relations](#): Help PR & Media Relations focuses on communication and storytelling across traditional and digital media for artists and professionals in the music industry.

[MN](#): MN is a communication company that works with leading national and international companies in entertainment (TV & music), food, travel, art, sport and hi-tech industries.

[About](#): About is a communications, new business, and event planning agency focused on the music industry.

[A buzz supreme](#): A Buzz Supreme, based in Milan and Florence, professionally handles promotion, publishing and management activities in the field of music.

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## 2.6. Other resources

- [Focus on Italy-Italia Music Export Guide](#)
- [IME 2022 Report](#)
- [Mobility Funding Guide by On the Move](#)
- [Live DMA \(2023\) The Survey: Facts and Figures of Live Music Venues and Clubs in Europe](#)
- [I Live Club in Italia](#)

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