

Italian Book Market An Overview



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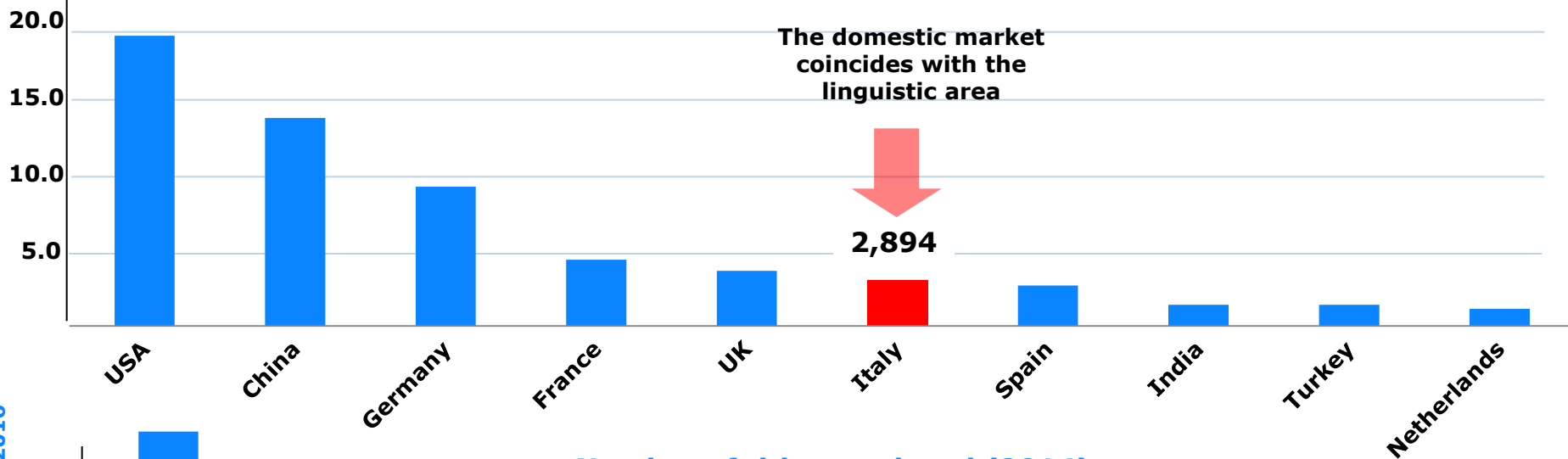


Abu Dhabi International Book Fair, April 2016

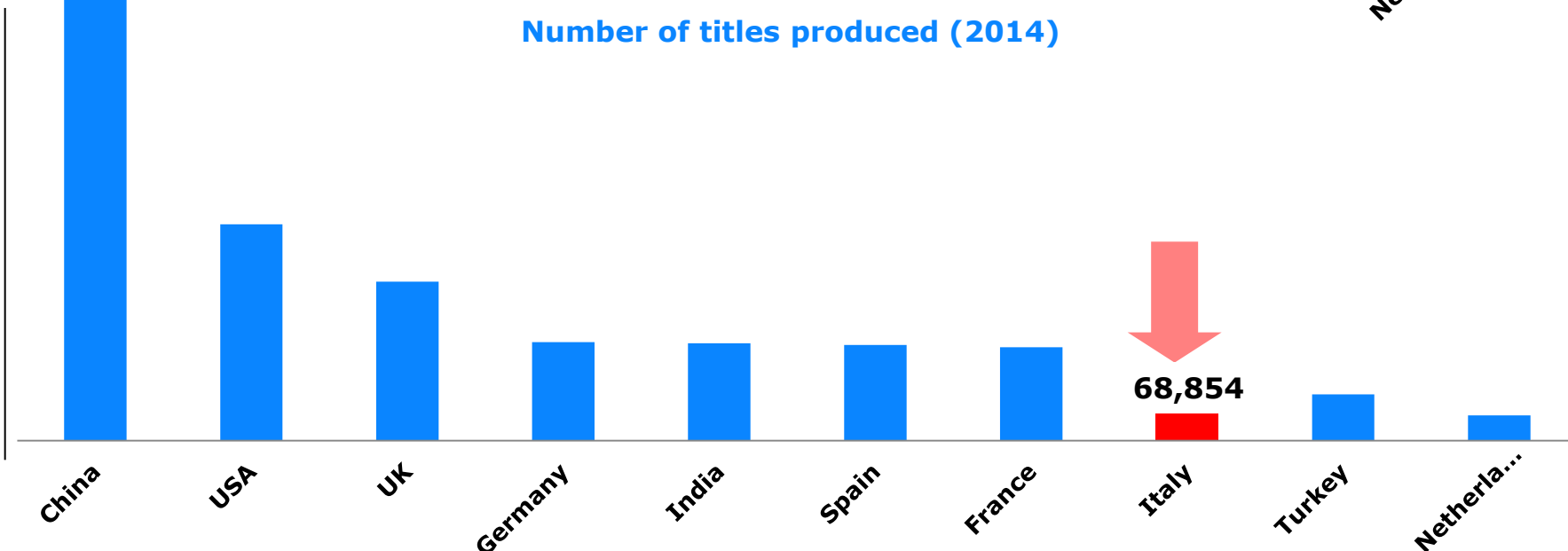
Key figures

The Italian market ranks worldwide for turnover/titles

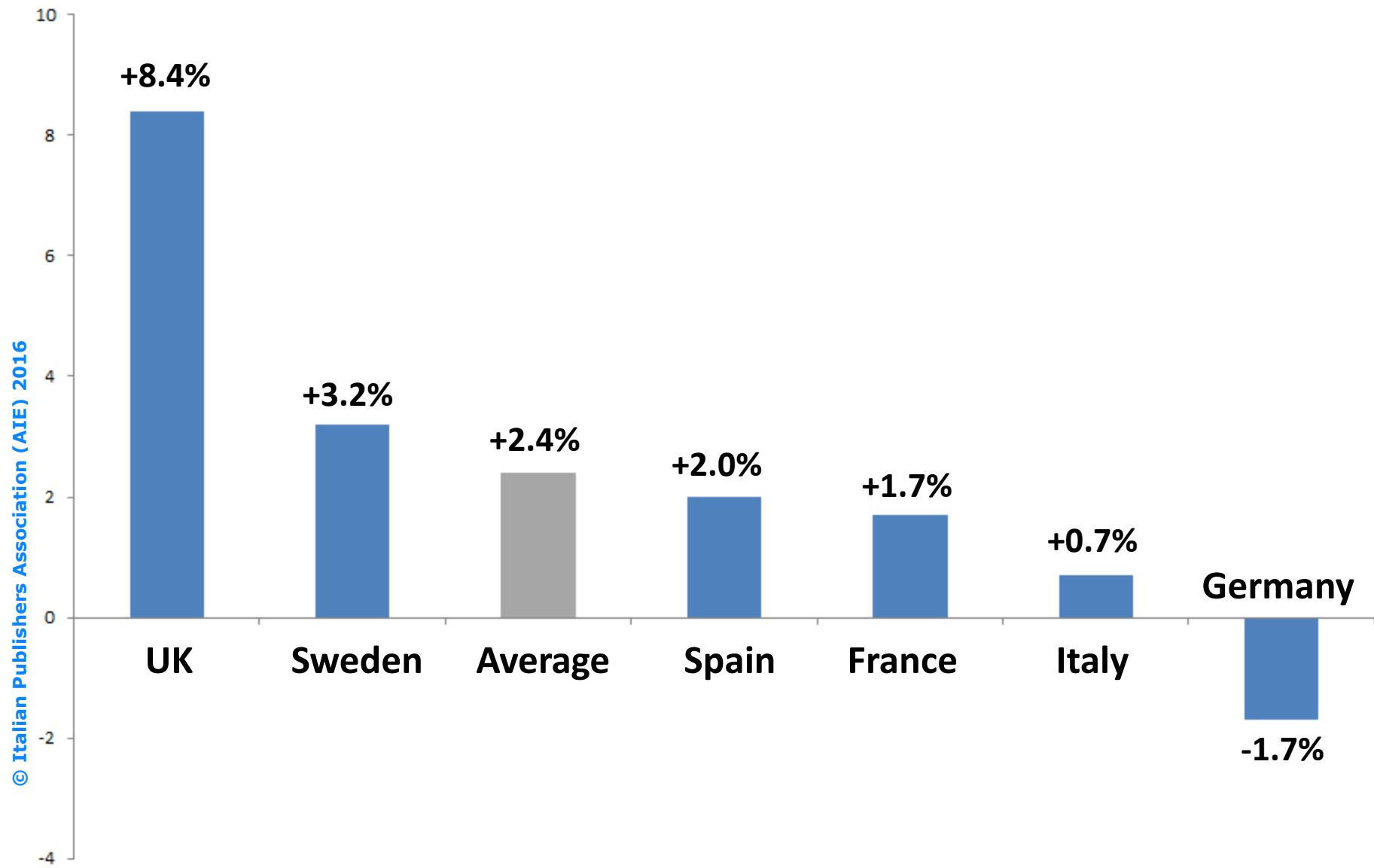
Turnover (cover price; billion euro; 2014)



Number of titles produced (2014)



European book market trends 2014-2015



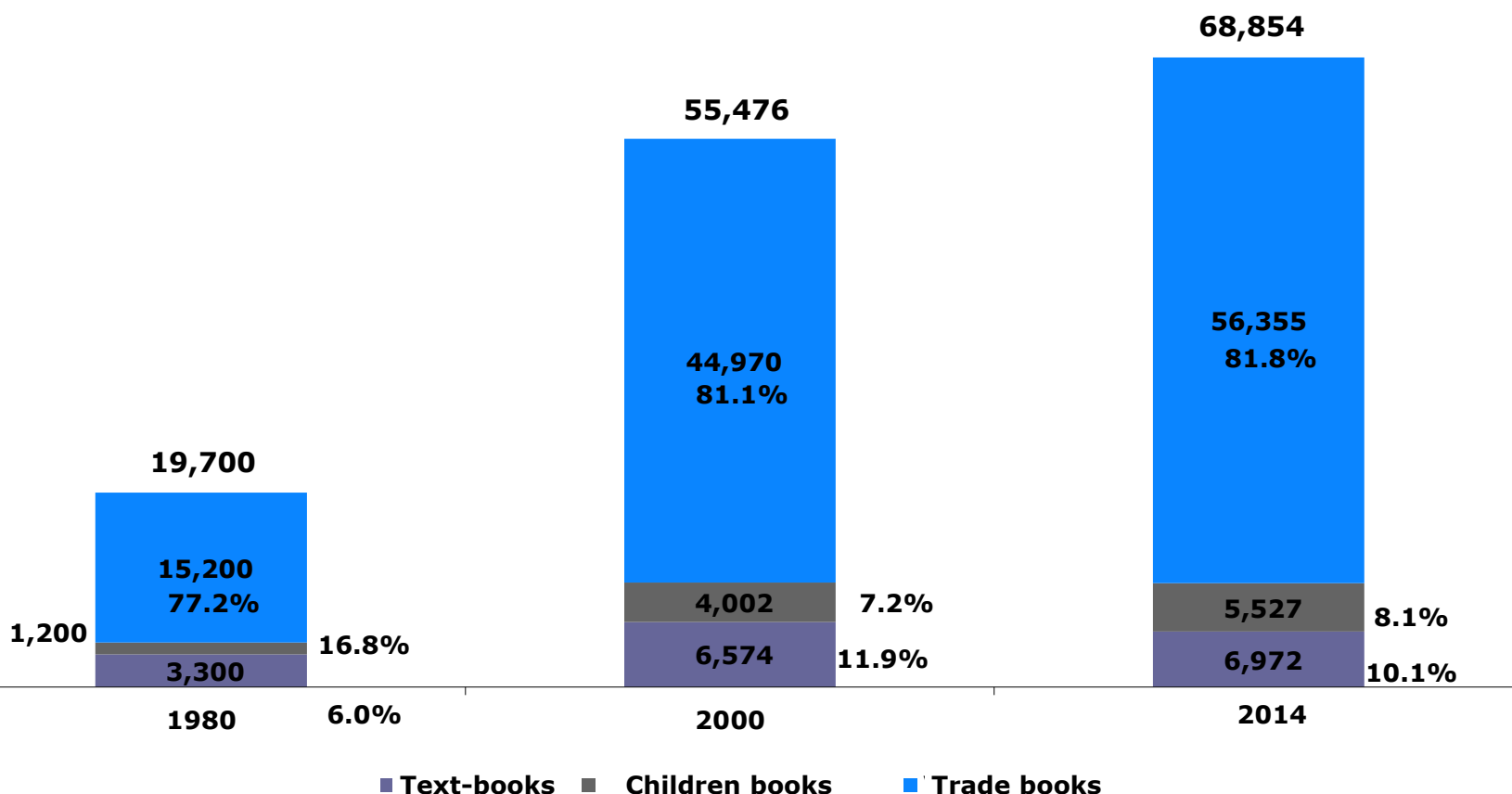
Long term trend in the books published and traded

Every year **181 million copies** are printed

68,800 titles issued per year (net from ebooks and self publishing)

In-print titles are about **861,000** (source: IE)

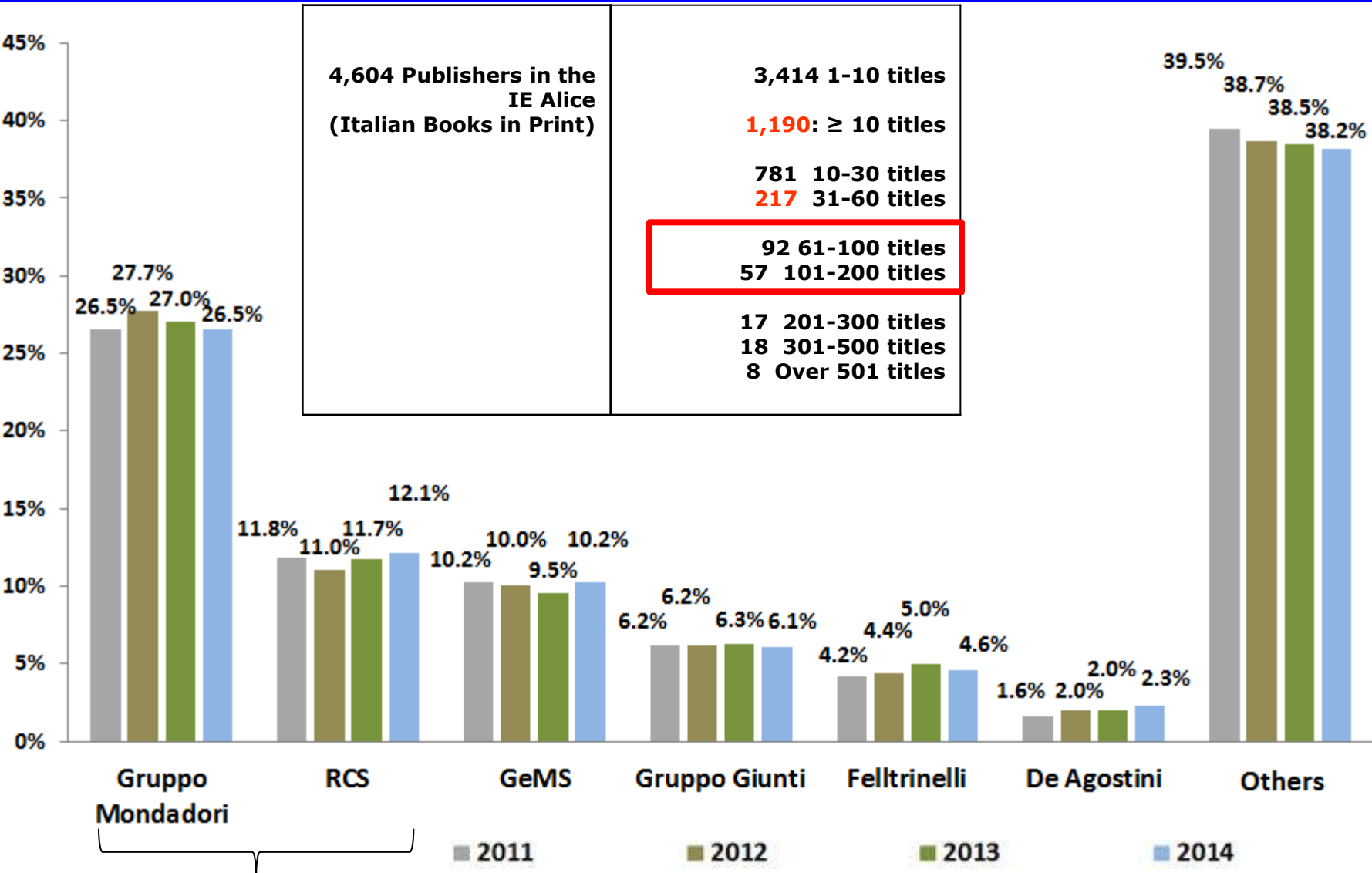
Very rich variety of books: per genre, authors, prices...



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6 big groups and a number of very active small and medium sized publishers



Merged (april 2016)

The competitive arena...

- Six major players (the first 4 are in the list of 60 biggest publishers in the world)

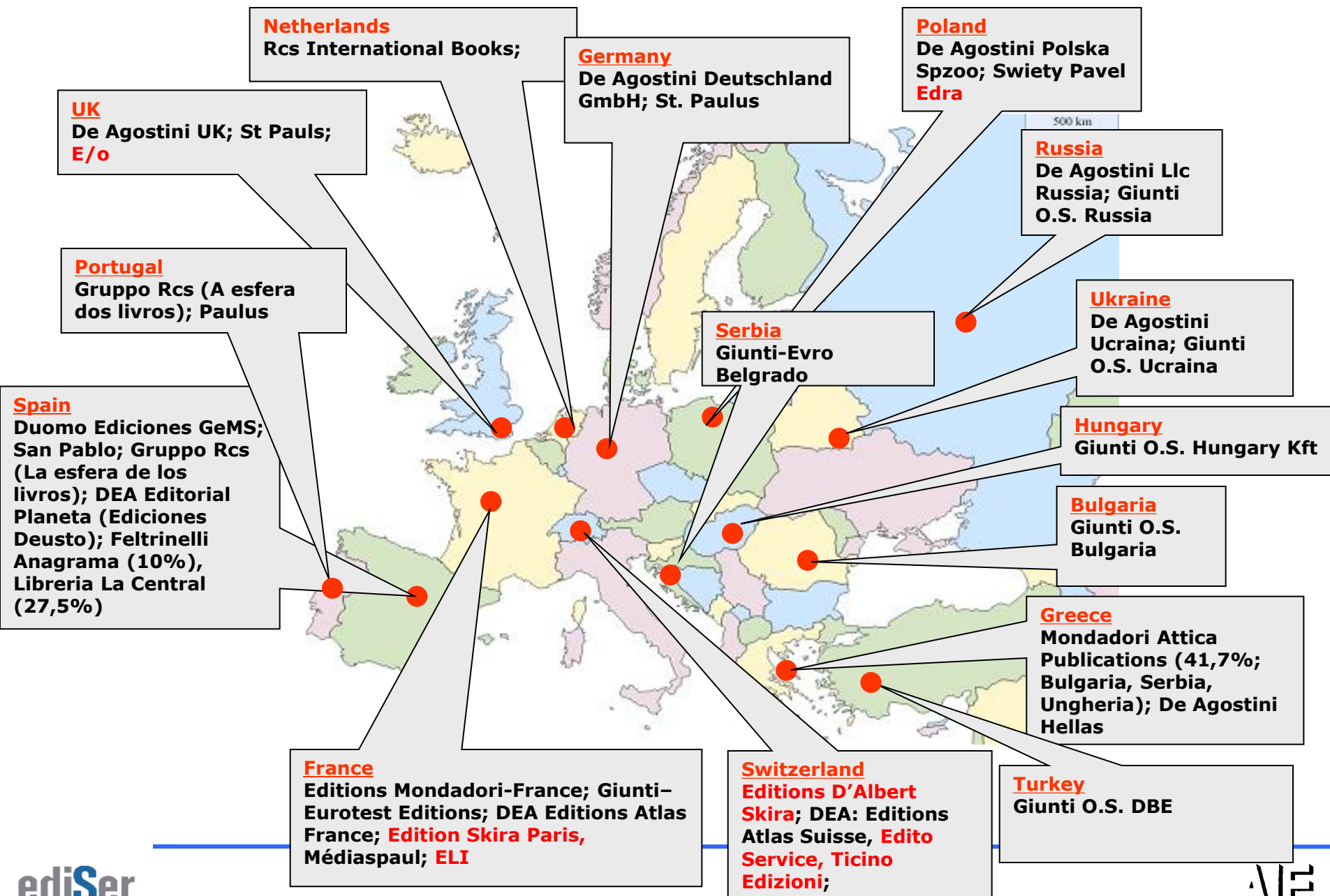
					
Big media group, involved in all market segments, leader in trade, one of the largest in school book, owns a large bookshop chain and the second Internet bookshop	Similar approach, but without the vertical integration with bookshop chain	Focus on trade, expanding in scholarly (HSS), linked to Messaggerie, the largest Italian book distributor and wholesaler + the largest Internet bookshop and a book chain	International approach; strong in collectible and other newsstand production; among the leaders in school books; important in academic publishing	Focus on trade; owns the largest bookshop chain and an Internet shop	Strong in trade books and illustrated Present in text book

Merged (april 2016)

Other medium size companies are important in particular segments

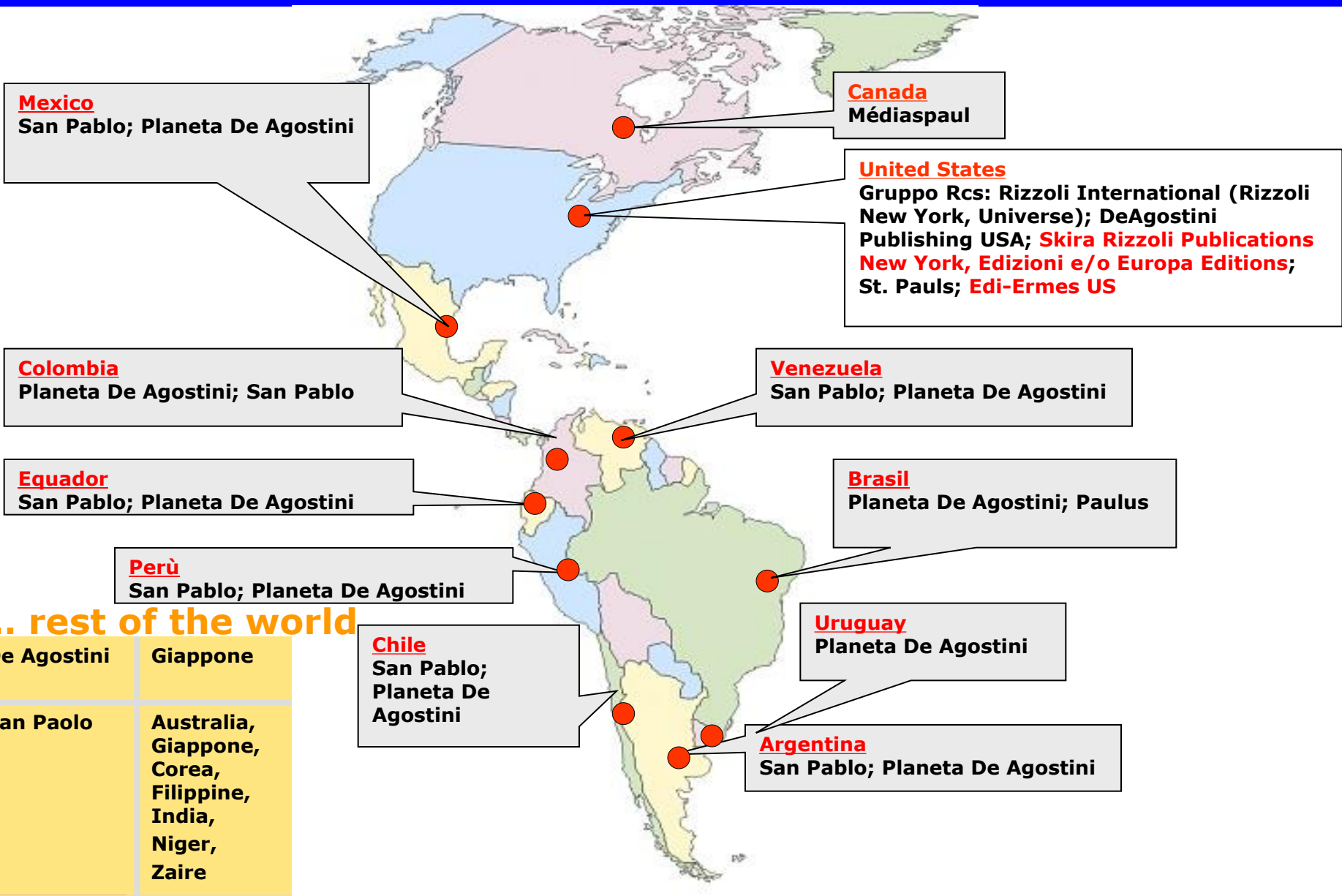
- In textbooks Mondadori, RCS and De Agostini also compete with Zanichelli, Pearson education and a number of small and medium publishers
- In the academic and professional segment the large groups are less relevant:
 - Presence of foreign companies: Wolter Kluwer Italia is the leader in legal publishing; Pearson, McGraw Hill and Springer have important branches in the country
 - Il Mulino, Il Sole 24 Ore, Franco Angeli, Giuffrè, Carocci, and many others
 - Increasing presence of University press

With a significant presence in Europe...



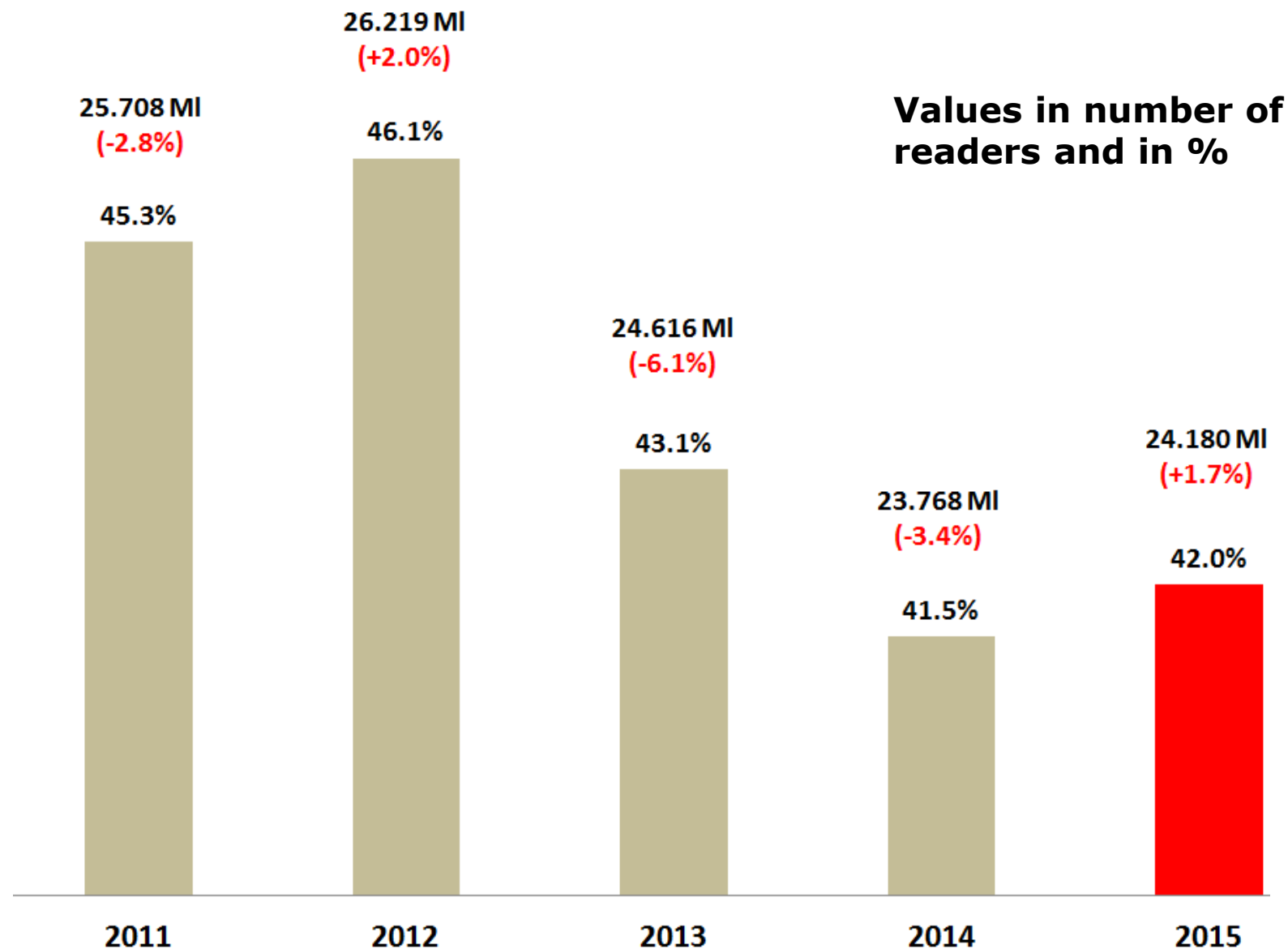
Source: Elaboration by AIE research dept

... and in the world



Atlantyca Entertainment (Cina, USA) vendita di diritti

Trends in books reading: 2011-2015



Trends in e-books reading: 2013-2015

% of the population +6

9.5%

8.7%

8.2%

% of Internet users (last 3 months)

18.2%

16.2%

14.1%

4,921,000

4,964,000
(+0.9%)

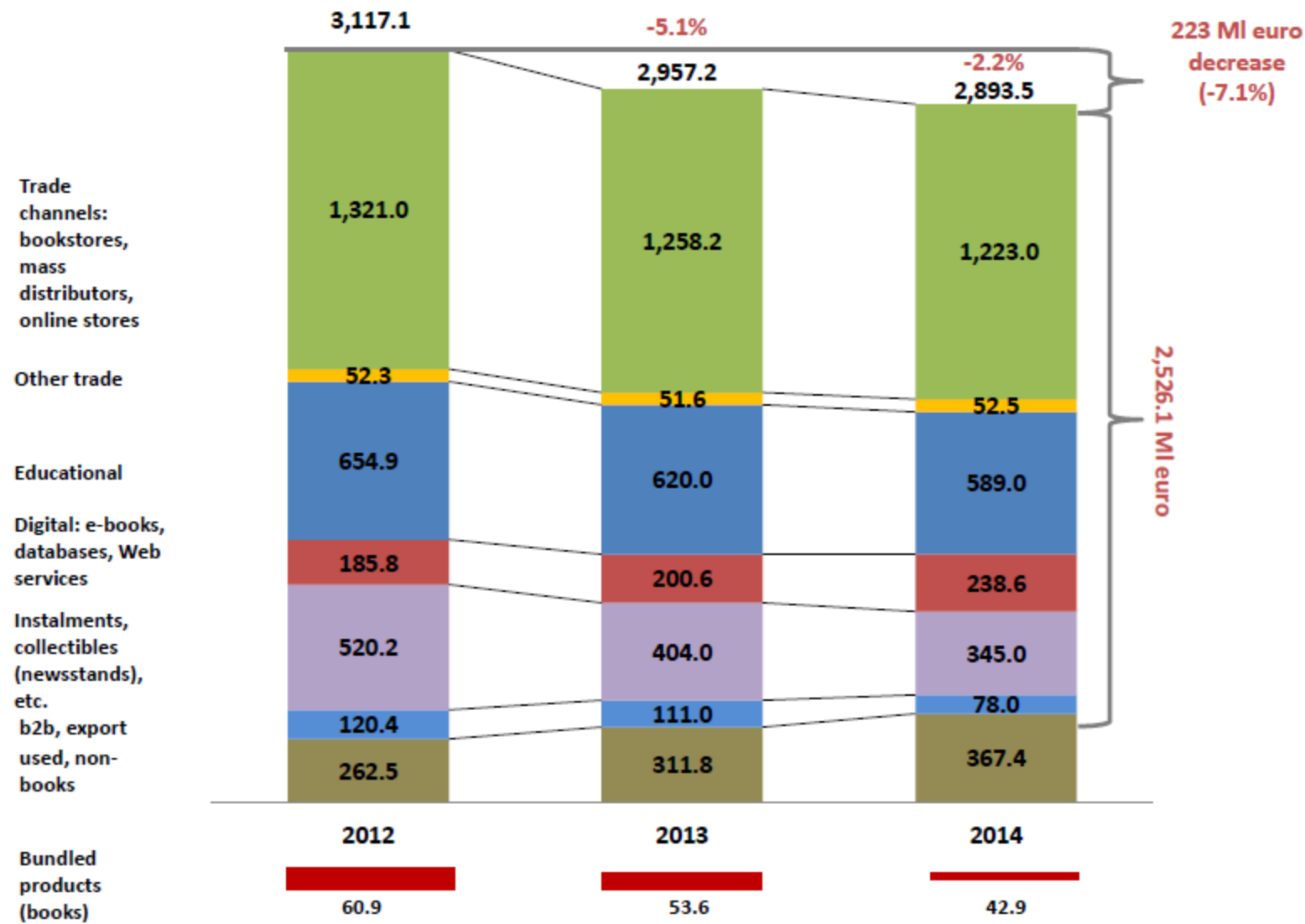
4,687,000
(-5.6%)

2013

2014

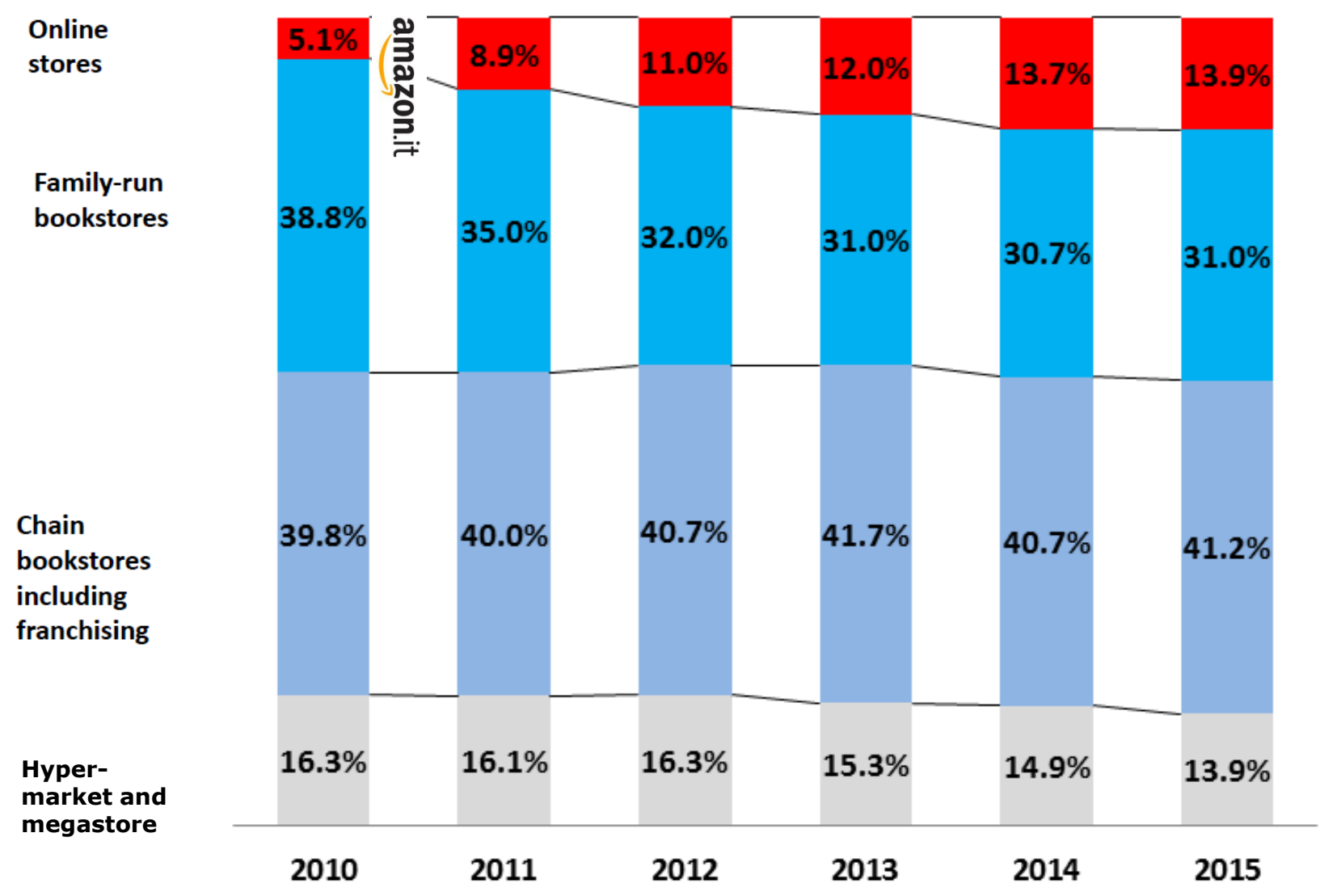
2015

Market trend: 2012 -2014



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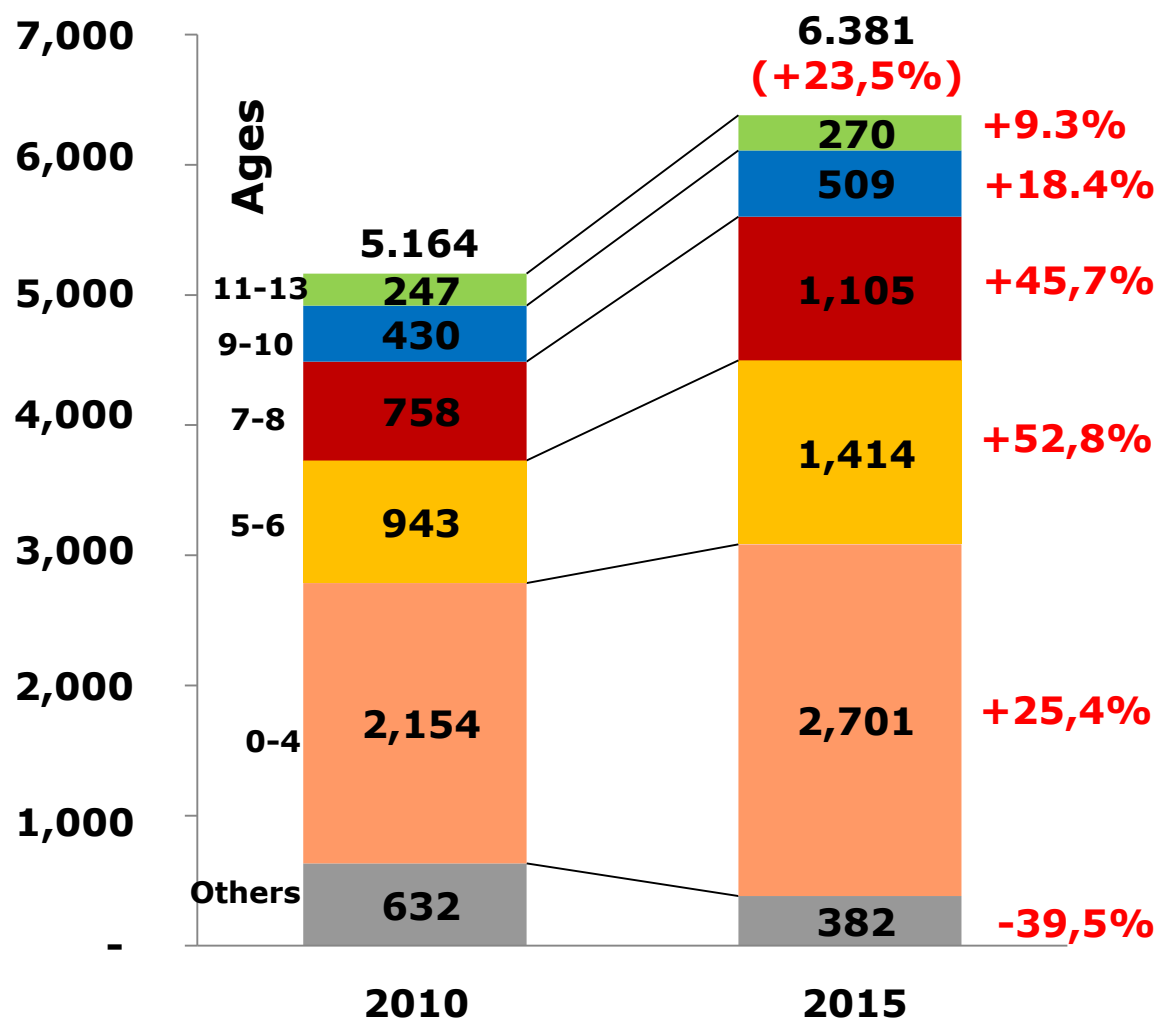
Market shares of trade channels (excluding e-books): 2010-2015



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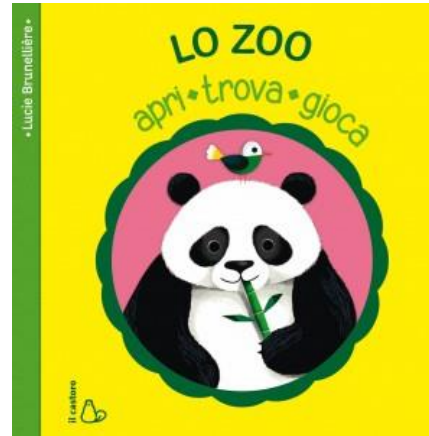
Children's books: production 2010-2015

The production of these titles has increased due to the growing investments of parents in the reading/culture of their children



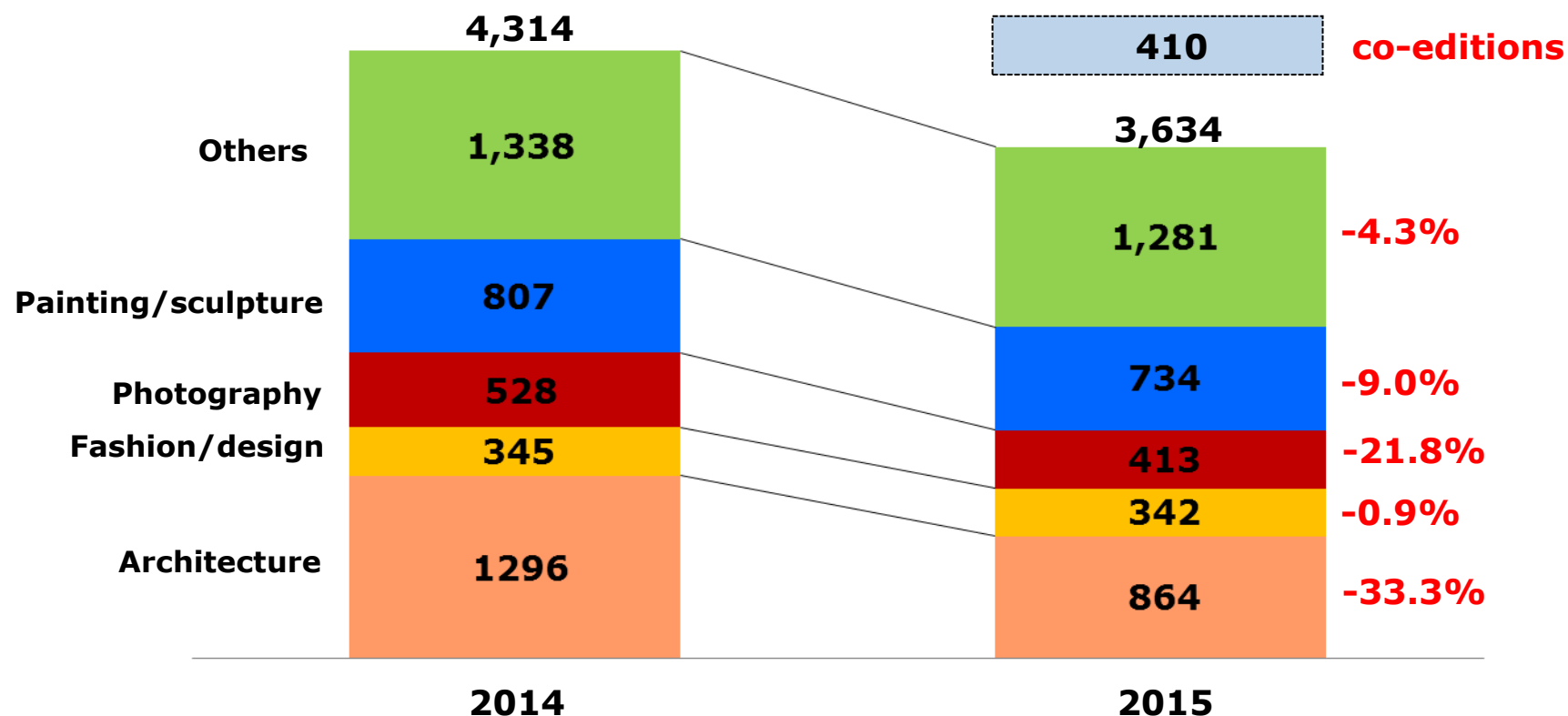
Children's books: production 2014-2015

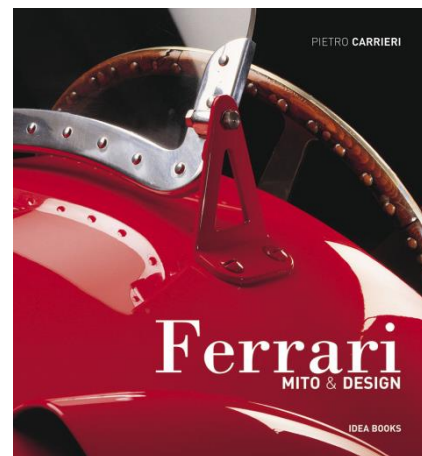
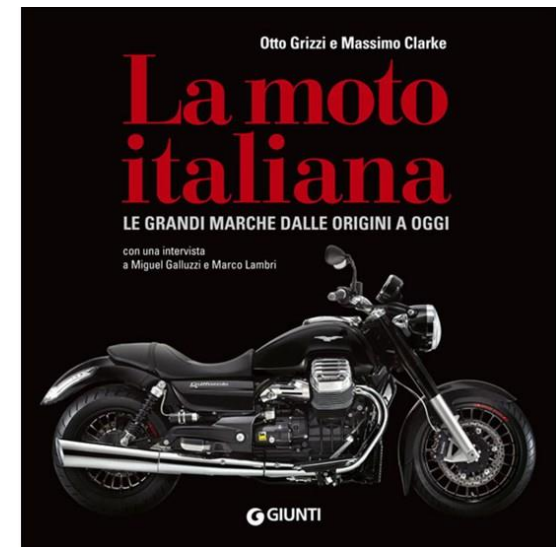
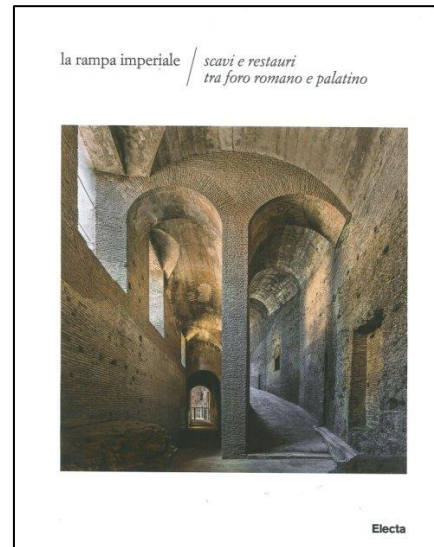
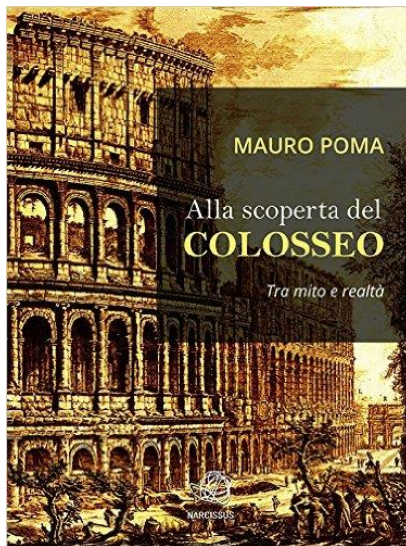
The production cover all the genres and the different ages related to this sector



Art books: production 2014-2015

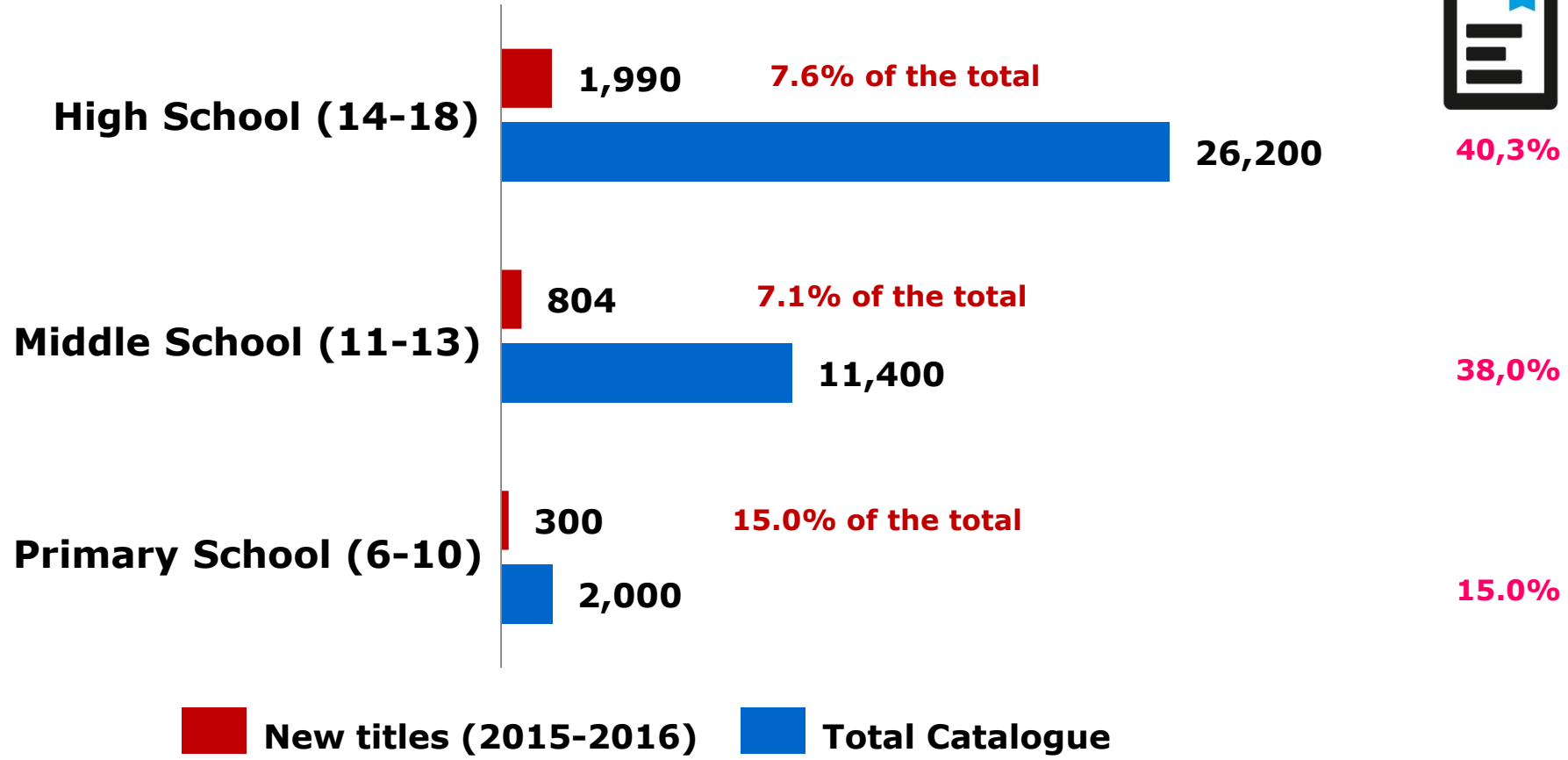
The production of these titles has decreased due to the high realization costs. In 2015 notable development of co-editions (nearly 410)



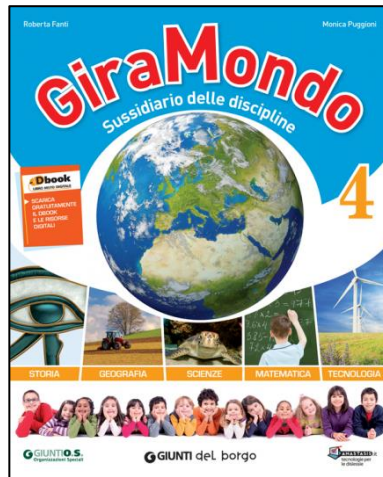


Educational: production 2014-2015

The largest number of titles is for High School but for Primary School 15% of the total are new titles. The total catalogue consist of a list annually updated.



Educational books



The bookshops



	2006		2010		2013		2014	
	N°	%	N°	%	N°	%	N°	%
Bookshop chains	583	30.4	717	37.7	940	48.0	927	49.0
Indipendent chains	45	2.4	69	3.6	84	4.3	78	4.1
Indipendent bookshops	1,290	67.2	1,115	58.7	936	47.8	887	46.9
Total	1,918	100	1,901	100	1,960	100	1,892	100

Innovation in the design and business model



Book Fairs & Literary Festivals

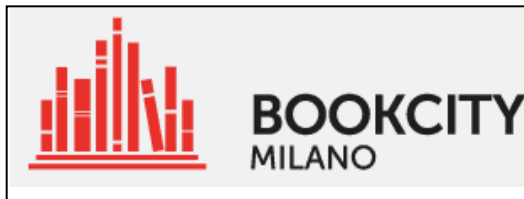
Book Fairs



Più libri

Tutte le forme della scrittura

Literary Festivals



Some figures of «Più libri più liberi»

	2002	2005	2010	2011	2012	2013	2014	2015
Open days	4	4	5	5	4	4	5	5
Visitors	30,259	41,395	56,923	56,000	51,024	53,383	55,540	53,360
professional	1,531	5,955	6,933	6,370	6,677	6,824	5,099	3,777
Exhibitors	262	358	431	430	415	380	382	378
Stands	168	262	296	293	293	295	291	293
Events	85	205	335	300	280	310	331	326
Copies sold	40,000	51,000	87,000	85,000	80,000	80,000	78,000	80,000



The e-book market

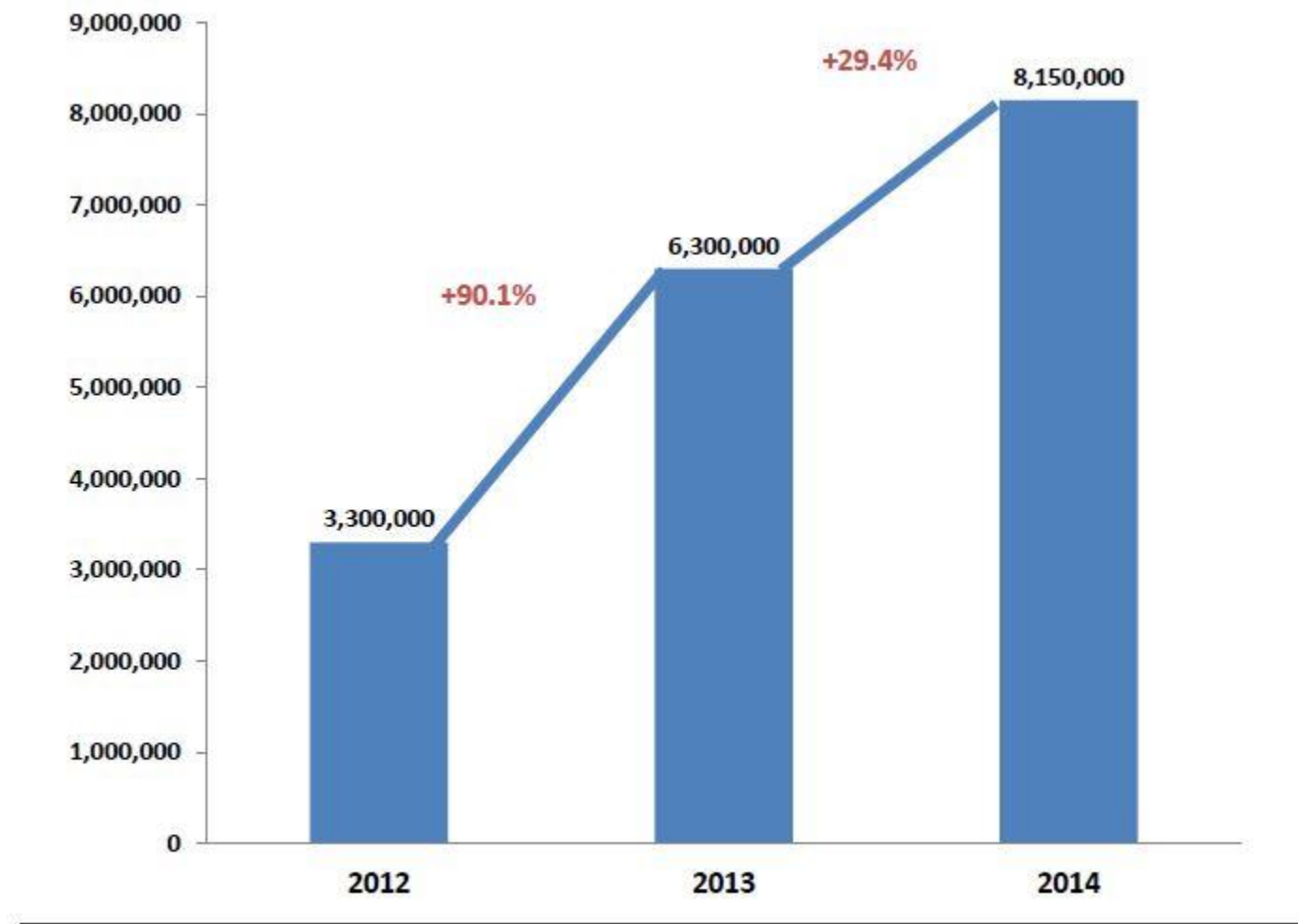


	2011	2012	2013	2014
E-book M€	12.6	23.8	32.1	40.5
Δ%		+88.9%	+34.9%	+26.1%
Trade channels¹ M€	1,489.7	1,373.3	1,238.2	1,191.6
Δ%		-7.8%	-6.1%	-3.8%
e-book/trade %	0.8%	1.7%	2.8%	3.4%

¹ Nielsen includes in this definition bookstores, mass distribution and online stores

Estimate of downloaded copies¹ of e-books:2012-2014

Values in number of purchasers and in %



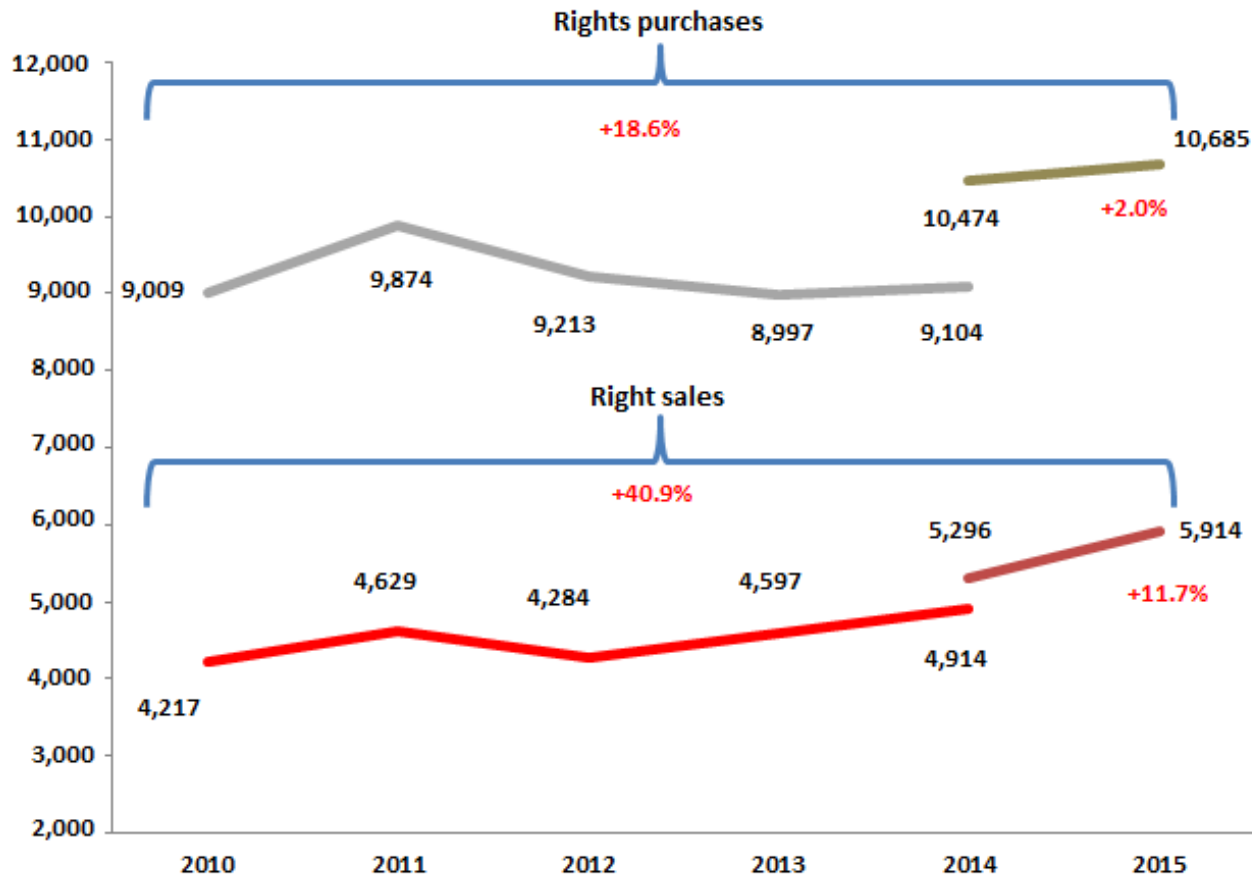
¹ They (probably) include free and illegal copies.

Source: Processing of Assinform – NetCom data by the Italian Publishers Association Research Department

Translation rights

Trends in translation rights exchange

Traditionally, Italian publishing is very sensitive to what is published in other countries: 19-20% of Italian titles are translations (and in the 90s this percentage reached 24-25%). The Italian reader is very interested to foreign literature and culture. In the last decade, the capacity of Italian publishers to sell rights abroad grew dramatically: leading areas are **children books, fiction, art, design, religion**.



Source: Elaboration by AIE research dept on declarations of publishers

Grants and awards for the translation of Italian works



National Translation Award

Body: Ministero per i Beni e le Attività Culturali Direzione Generale per le Biblioteche, gli Istituti Culturali ed il Diritto d'Autore

www.librari.beniculturali.it

Frequency: Annual

Deadline: February of each year



Awards & Grants for the Promotion of Books and Translated Works

Body: Ministero degli Affari Esteri Direzione Generale per la Promozione e Cooperazione Culturale

www.esteri.it

Frequency: Annual

Deadline: March 31st, September 30th of each year



Translation Grants

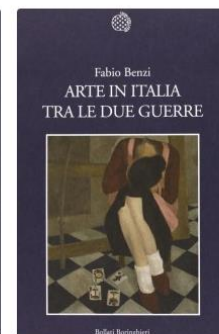
Body: SEPS – Segretariato Europeo per le Pubblicazioni Scientifiche

www.seps.it

Deadline: on-going

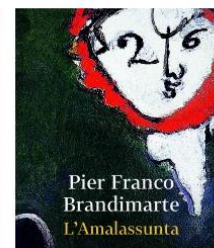
The platform present the best of Italian publishing production of the present and the past and facilitate its translation.

In Evidenza



I pareri di lettura di BooksinItaly

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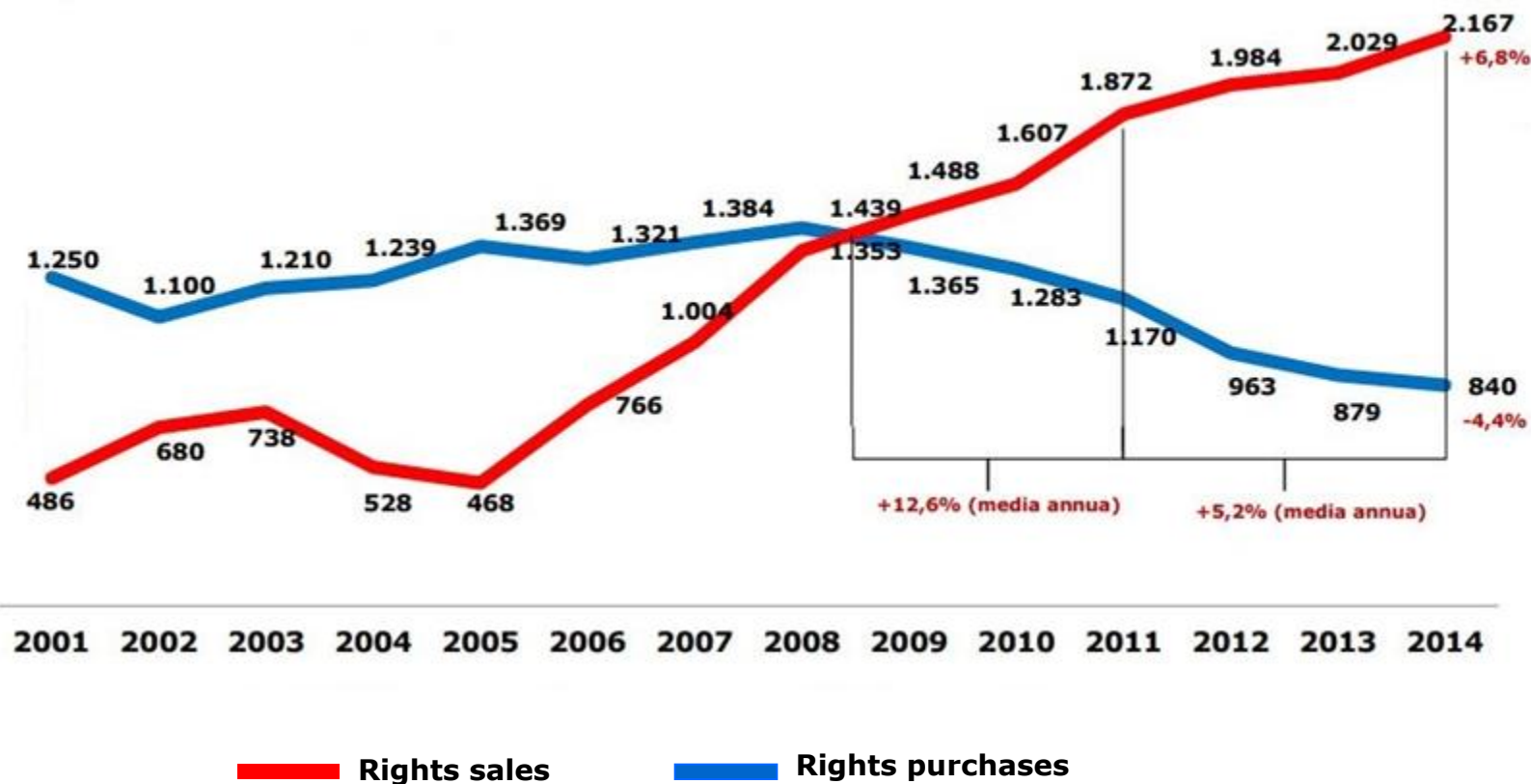
MINISTERO
PER I BENI E
LE ATTIVITÀ
CULTURALI

Italy from net buyer to net seller of rights: The case of children books

Trend in translation rights exchange in children books

10 years ago we were buying more than the double than we were selling. In 2011 we sell 50% more titles than we buy.

The importance of the international cooperation in this field is even more important when considering also co-editions.



Source: ICE-Doxa 2001-2007; Aie 2008-2014

Reasons for this performance

The survey points out very clearly the importance of children books in Italian export of translation rights:

- 30% of the exported titles are children books!
- Other fields where export is significantly more important than import are "Illustrated books" and "Religious books"

The role of the Children Book Fair Bologna is probably crucial, since it allows also small companies to be active in export:

- And creates a favourable cultural milieu within the industry
- Children books are now often conceived as addressed to an international audience since the very first steps

Children book publishing in Italy dramatically grew in the 90s:

- From 1990 to 2000 number of new titles published grew by 62%, number of printed copies by 75%.
- This created the prerequisite for the growth of export in the following decade

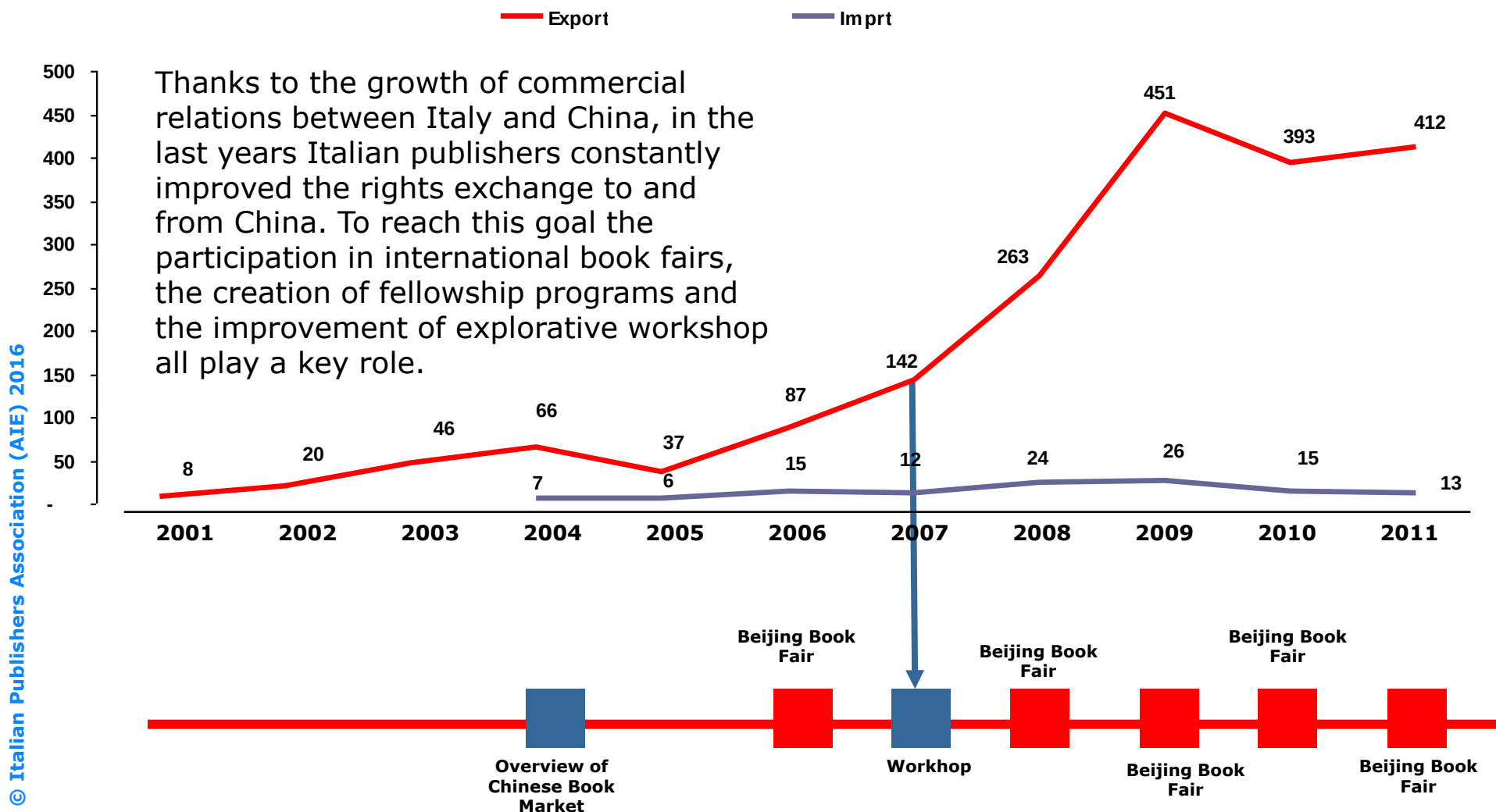
An important tradition of authorship

- From Collodi (*Pinocchio*) and De Amicis to Geronimo Stilton!



Import/Export in China: the relevance of networking

The improvement of the import-export trade of rights is directly connected with the development of mutual long term relationships.



Innovation in digital services



LIA started as a project funded by the Italian Ministry of Culture and carried out by AIE in collaboration with the Italian Blind Union.

In May 2014 the **LIA Foundation** was created to promote inclusion and accessibility.

The objective of the LIA Foundation is the promotion of a cultural change in the way accessibility is addressed all along the value chain: a **mainstream accessible digital reading experience** needs the efforts of all the actors and players involved, each for its part.

It offers over **11,000 accessible e-books**, produced by **68** publishers (which represent about 80% of the Italian publishing market).

400 new books a month are added.

The LIA service is based on three key elements:

- The **use of standards** for production (EPUB) and book data communication (ONIX for Books);
- A production model that, at full capacity, allows publishers to **produce accessible titles since their first edition**;
- A book data communication and distribution model able to integrate as much as possible in **the mainstream digital publishing value chain**.

More info: www.fondazionelia.org - www.libriitalianiaccessibili.it



ARROW is a distributed system to streamline “rights information discovery” in a book or collection of books to lawfully digitise and make available the European cultural heritage.

ARROW is up and running in 16 European countries. The Arrow Association, a not-for-profit entity is responsible for the management of the system.

The **European Directive on Orphan Works** lists ARROW has been listed among the appropriate sources to be consulted to perform the diligent search process for rightholders of published works.

Moreover, Arrow suits perfectly any implementation of the Memorandum of Understanding on the digitisation and making available of **out-of-commerce works**.

ARROW has already being used:

- in UK for Wellcome Trust and British Library World War I digitisation programs;
- in France for ReLIRE project, where ARROW is being used by the French National Library following the implementation of the recent law on out of commerce books.

AIE currently chairs the Board of the ARROW Association. mEDRA is a technical provider for the ARROW system.

For more info: www.arrow-net.eu



RDI (Rights Data Integration) is a pilot project started in October 2013 aiming at demonstrating how to efficiently manage and trade intellectual property rights online for any and all types of usage, across any and all types of content, in any and all media.

At the core of RDI is the creation of an interoperable **communication layer between rights data sources and rights users.**

The joint initiative between **mEDRA** and **CLEARedi**, the Italian collective management organisation for publishers, **to facilitate rights transactions for online licensing**
Developed in **collaboration with CCC.**

The use case includes:

- the creation of an aggregation platform to manage the mandates given by Italian publishers for licensing their repertoire of textual works and the related data exchanges
- piloting of the LCC Common Rights Format to support rights information exchanges between the parties
- piloting the use of rights-aware DOIs to promote discoverability of the rights related to textual content.

AIE participates through Ediser and mEDRA.

For more info: www.rdi-project.org



TISP (Technology and Innovation for Smart Publishing), started in January 2013, is the European thematic network coordinated by AIE to promote collaboration between publishing companies and ICT industry, in order to stimulate innovation in the two sectors.

The network organises events and seminars addressing the publishing and ICT professionals, and helps publishing and ICT converging on specific business needs and on the strategic view for the future.

In April 2014, the first edition of policy recommendations, giving the publishing and technology sectors a common base at European level to foster and sustain innovation, has been released.

The results of the network activities are published online on the Smart Book, along with studies, interviews, original contribution and relevant business cases that demonstrate how publishing and ICT can build win-to-win partnerships.

AIE coordinates the project and the network. mEDRA is a project partner.

For more info: www.smartbook-tisp.eu

Conclusions

Conclusions

- **Italian publishing is a dynamic industry**
- **Open to the international market, particularly in import/export of rights**
- **A market where small and medium sized publishers play an important role**
 - Not only for cultural reasons
 - Also important from the business viewpoint



Check out all the data on
Italian publishing industry in
the

Report on Publishing in Italy 2015

Available in the main on line
stores



Info and updates on
www.aie.it



Thank you

