From the readers’ point of view

Observatory on the impact of technology on cultural consumption and reading habits in Italy

DPUB Summit 2018
Berlin – May 16 2018
Observatory’s goals

Explore ways of reading that we don't know - because done through technologies and not on paper - our clients question us about the fruition of our contents

Understand how people spend their time accessing the various cultural and entertainment contents

Push companies to think about developing new products/services

Create a point of view to provide publishers and content providers, twice a year, a coherent interpretation, comparing all variables (formats, technologies, sales channels, information sources, etc.)
## Reading and social evolution

<table>
<thead>
<tr>
<th>ISTAT</th>
<th>Social evolution</th>
<th>New products</th>
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<tbody>
<tr>
<td>'60 – ‘70</td>
<td>From 18,0% (1965) to 26,3% (1973)</td>
<td>From rural economy to an industrial one; lower secondary school; from dialect to «Italiano standard» (T. De Mauro)</td>
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<td>‘80–’90</td>
<td>From 33,7% (1988) to 39,1% (1995)</td>
<td>Socialist movements; from an industrial economy to a services society;</td>
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<td>‘90–’10</td>
<td>From 40,9% (1996) to 46,8% (2010)</td>
<td>post-Fordism; Erasmus generation; Dot.com bubble;</td>
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<td>2010–’20</td>
<td>From 46,8% (2010) to 40,5% (2016)</td>
<td>Decrease of families's consumptions; uncertainty and precariousness; pervasive technologies and different use of free time; Millennials</td>
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</table>

«Unaware» readers:: 13,4% (1995); 11,8% (2001); 12,8% (2006)
## Methodology

<table>
<thead>
<tr>
<th>Wave 1+2 (2017)</th>
<th>Wave 2  (September 2017)</th>
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<tbody>
<tr>
<td><strong>TARGET</strong></td>
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<tr>
<td><strong>METHODOLOGY</strong></td>
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<tr>
<td><strong>INTERVIEWS</strong></td>
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<td><strong>SAMPLE</strong></td>
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<td><strong>STATISTIC ERROR</strong></td>
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<tr>
<td>15-74 years (45,474,772 people)*</td>
<td>2,000</td>
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<tr>
<td>CATI-CAWI</td>
<td></td>
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<tr>
<td>4,004*</td>
<td>2,000</td>
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<tr>
<td>Representing the overall population &gt;15-74</td>
<td></td>
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<td>+/-1,6%</td>
<td>+/-2,2%</td>
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* Context Demoistat January 1 2017
Book reading: main questions

MAIN QUESTION 1

Considering the past 12 months: did you read a book (even if you did not finished it) of any genre (a novel, a crime fiction, a thriller, a fantasy, a non-fiction, a manual, a tourist guide...). Consider books, e-books, audiobooks

MAIN QUESTION 2

Consider now narrative universes you can find in novels (best-seller, crime novel, fantasy, etc.), biographies, comics or graphic novels, and also stories you can find in TV series or in a movie, etc. Did you read or access one of these contents in the past 3 months by:

- Books
- E-books
- Audiobooks
- Public readings and radio
- Blog forum, community
- Social network
- TV series (Netflix, Sky)
- Movies
- Videogames (es: Assassin Creed, Halo, Final fantasy, ecc.)
Book reading in 2017
Question: Let's speak about books in particular. Considering the last 12 months, did you read (also not finishing it) a book of any genre (ex. Novel, crime story, fantasy, non-fiction, manual, touristic guide, cook guide...), both physical or digital format and audiobook? If yes, how many books?

Readers as a whole: 65% (29.6 ML)

Books: 62%
E-book (all devices): 27%
Audiobooks: 11%

Fiction (all «genres»), non fiction, practical non fiction, professional, scolastic books
Multiple responses, values in %

Physical or digital format
**Book reading in the past 12 months by gender and age: 2017**

Values in %

**Readers as a whole (all formats): 65%**

<table>
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<tr>
<th>Readers by age:</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>15-17</td>
<td>87%</td>
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<tr>
<td>18-24</td>
<td>86%</td>
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<tr>
<td>25-34</td>
<td>73%</td>
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<tr>
<td>35-44</td>
<td>73%</td>
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<tr>
<td>45-54</td>
<td>76%</td>
</tr>
<tr>
<td>55-64</td>
<td>44%</td>
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<tr>
<td>65-74</td>
<td>36%</td>
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</table>

<table>
<thead>
<tr>
<th>Readers by gender:</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>Men</td>
<td>59%</td>
</tr>
<tr>
<td>Women</td>
<td>71%</td>
</tr>
</tbody>
</table>

**Question:** Lets speak about books in particular. Considering the last 12 months, did you read (also not finishing it) a book of any genre (ex. Novel, crime story, fantasy, non-fiction, manual, touristic guide, cook guide...), both physical or digital format and audiobook? If yes, how many books?
Readers by format: 2017

Values in %

On the total population:

- Readers of paper and digital books (e-books or audiobooks): 26%
- Readers of only e-books or audiobook: 3%
- Readers of only paper books: 36%
- Not readers: 35%

On the total of readers:

- Readers of paper and digital books (e-books or audiobooks): 40%
- Readers of only e-books or audiobook: 4%
- Readers of only paper books: 56%
- Not readers: 35%

• Question: Lets speak about books in particular. Considering the last 12 months, did you read (also not finishing it) a book of any genre (ex. Novel, crime story, fantasy, non-fiction, manual, touristic guide, cook guide...), both physical or digital format and audiobook? If yes, how many books?
Question: You’ve said that you have read at least one e-book in the last year. What device did you use?

- If you used more than one device, please specify which you use the most and then which you use less.
Devices mainly used to read e-books, by gender: 2017

Values in %; first response

- **Question:** You’ve said that you have read at least one e-book in the last year. What device did you use? If you used more than one device, please specify which you use the most and then which you use less.
Question: You’ve said that you have read at least one e-book in the last year. What device did you use? If you used more than one device, please specify which you use the most and then which you use less.
• **Question:** «You’ve said that you have listened at least one audiobook in the last year. Which device or devices did you use?»
Italians vs reading, technologies and social: 2017
Availability of technologies vs media consumption

Sample: 4.004
Cluster: techno-curious

TECHNO-CURIOUS: 30%

Men
Middle aged (25-54 years)
Middle class
Strong internet user but low social users
Many technologies at the same time
Middle/high cultural consumption

13,7 ML
Cluster: trendsetter

TRENDSETTER: 12%

Very young and young adults (15-34 year)
- High social status
- High availability of technologies
- Always connected to many social
- Medium high cultural consumption

Strong book readers (>12 books a year)
Cluster: mobile only

**MOBILE ONLY: 12%**

- Very young and young adults (15-34 year)
- Different mixed social status
- Medium low availability of technologies
- Often connected to social via mobile
- Medium high cultural consumption
- Strong mobile users and mobile gamers

**Weak book readers** (1-3 books a year)
Cluster: tecno-basic

TECNO-BASIC: 28%

Mainly 45-64 years
Different mixed social status
Very low availability of technologies
Limited use of basic social (FB)

Weak book readers (1-3 books a year)

12,8 ML
Cluster: disconnected

DISCONNECTED: 18%

More than 55 year
Housewife and retired persons
Low social status
No internet connection
Very low availability of technologies (mainly TV and old phones)

Non readers
Clusters: number of books read per year

- **Overall Population**
  - Non readers: 35%
  - Weak readers 1-3 libri: 25%
  - Average readers 4-6 libri: 16%
  - Strong readers 12 and more: 24%

- **Disconnected (8,0 MI)**
  - Non readers: 74%
  - Weak readers 1-3 libri: 15%
  - Average readers 4-6 libri: 5%
  - Strong readers 12 and more: 6%

- **Tecno-Basic (12,8 MI)**
  - Non readers: 38%
  - Weak readers 1-3 libri: 32%
  - Average readers 4-6 libri: 15%
  - Strong readers 12 and more: 15%

- **Mobile Only (5,5 MI)**
  - Non readers: 29%
  - Weak readers 1-3 libri: 32%
  - Average readers 4-6 libri: 17%
  - Strong readers 12 and more: 22%

- **Tecno-Curious (13,7 MI)**
  - Non readers: 20%
  - Weak readers 1-3 libri: 26%
  - Average readers 4-6 libri: 21%
  - Strong readers 12 and more: 33%

- **Trendsetter (5,5 MI)**
  - Non readers: 15%
  - Weak readers 1-3 libri: 19%
  - Average readers 4-6 libri: 22%
  - Strong readers 12 and more: 44%
Different formats and multiple channels to access different content genres
Thank you!