

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

AIE Associazione
Italiana
Editori

In collaboration with

pepe
research



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

'60 – '70

ISTAT

From 18,0%
(1965) to
26,3%
(1973)

Social evolution

From rural economy to an industrial one; lower secondary school; from dialect to «Italiano standard» (T. De Mauro)

New products

Pocket-sized books (Oscar) and collectables; Garzantine; newsstand

'80-'90

From 33,7%
(1988) to
39,1%
(1995)

Socialist movements; from an industrial economy to a services society;

Best seller; large retail; mass-market

'90-'10

From 40,9%
(1996) to
46,8%
(2010)

post-Fordism; Erasmus generation;
Dot.com bubble;

Collectables sold in newsstand with newspapers

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

2010-'20

From 46,8%
(2010) to
40,5%
(2016)

Decrease of families's consumptions; uncertainty and precariousness; pervasive technologies and different use of free time; Millennials

E-book, blog, social, transmedia narrative

Methodology

TARGET

15-74 years
(45.474.772 people)*

METHODOLOGY

CATI-CAWI

INTERVIEWS

4.004*

2.000

SAMPLE

Representing the overall population >15-74

STATISTIC ERROR

+/-1,6%

+/-2,2%



Book reading: main questions

MAIN QUESTION 1

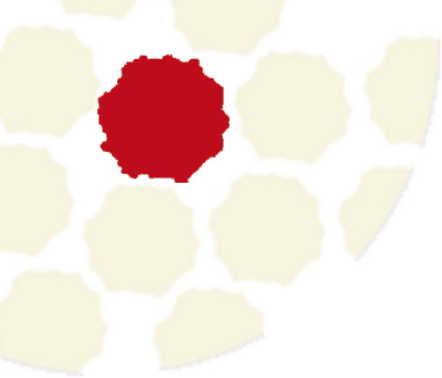
Considering the past 12 months: did you read a book (even if you did not finished it) of any genre (a novel, a crime fiction, a thriller, a fantasy, a non-fiction, a manual, a tourist guide...).

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

Book reading in the past 12 months: 2017

Fiction (all «genres»), non fiction, pratical non fiction, professional, scolastic books

Mupltiple responses, values in %



Books

62%



**E-book
(all devices)**

27%



Physical or digital format

Audiobooks

11%

Readers as a whole: 65% (29,6 ML)

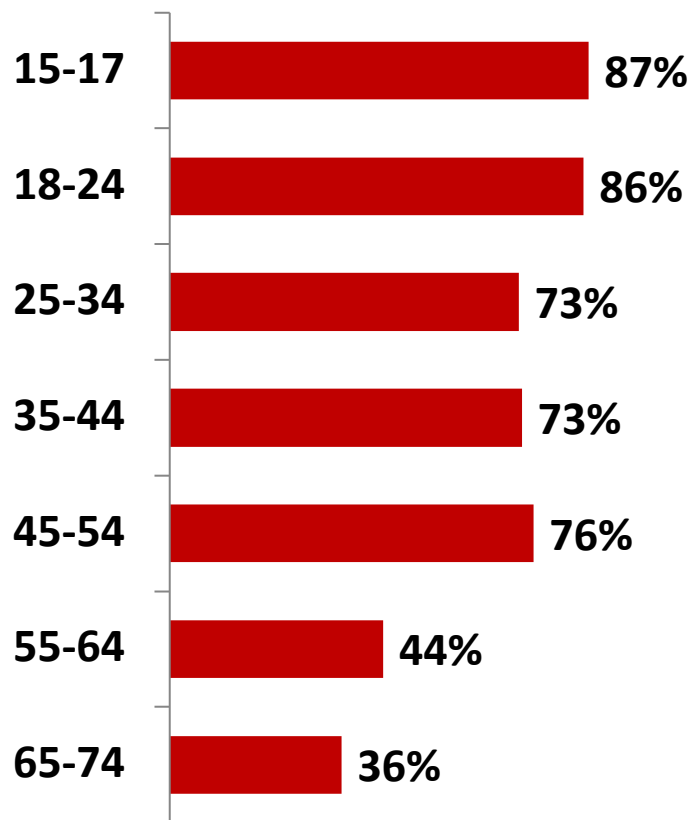
- **Question:** Lets speak about books in particoular. Considering the last 12 months, did you read (also not finishing it) a book of any genre (ex. Novel, crime story, fantasy, non-fiction, manual, touristic guide, cook guide...), both physical or digital format and audiobook? If yes, how many books?

Book reading in the past 12 months by gender and age: 2017

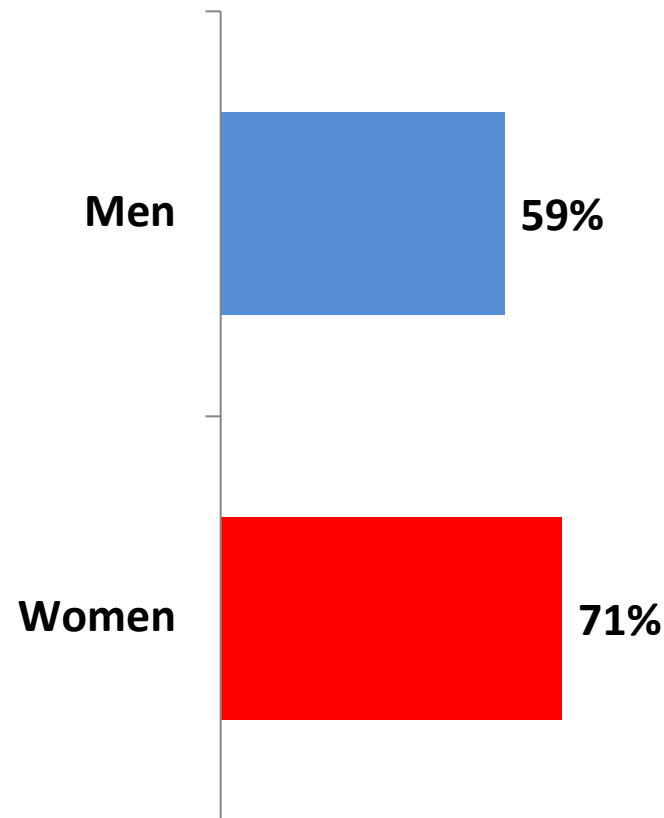
Values in %

Readers as a whole (all formats): 65%

Readers by age:



Readers by gender:



- **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:

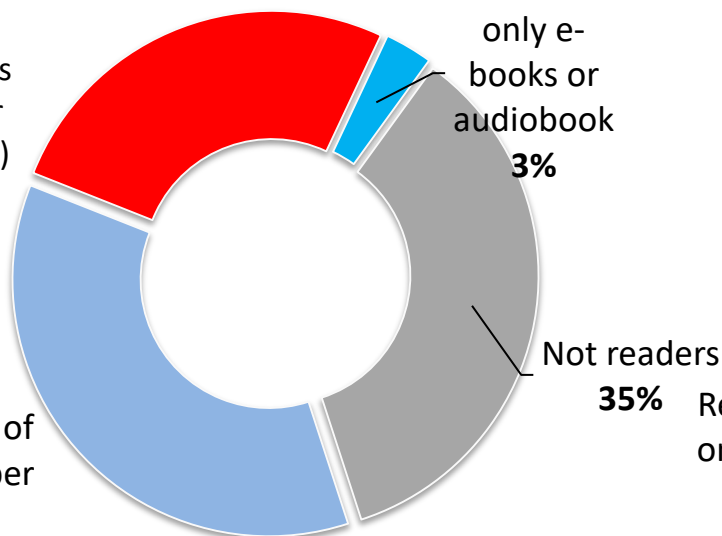


Readers of
paper and
digital books
(e-books or
audiobooks)
26%

Readers of
only paper
books
36%



Readers of
only e-
books or
audiobook
3%



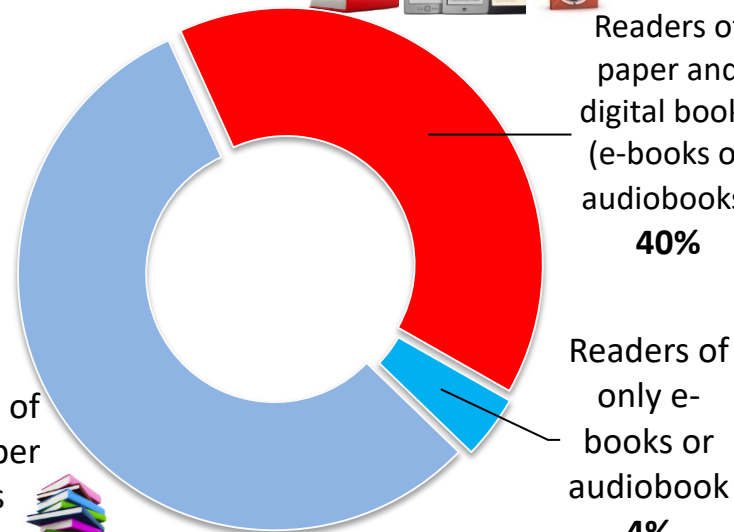
On the total of readers:



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%



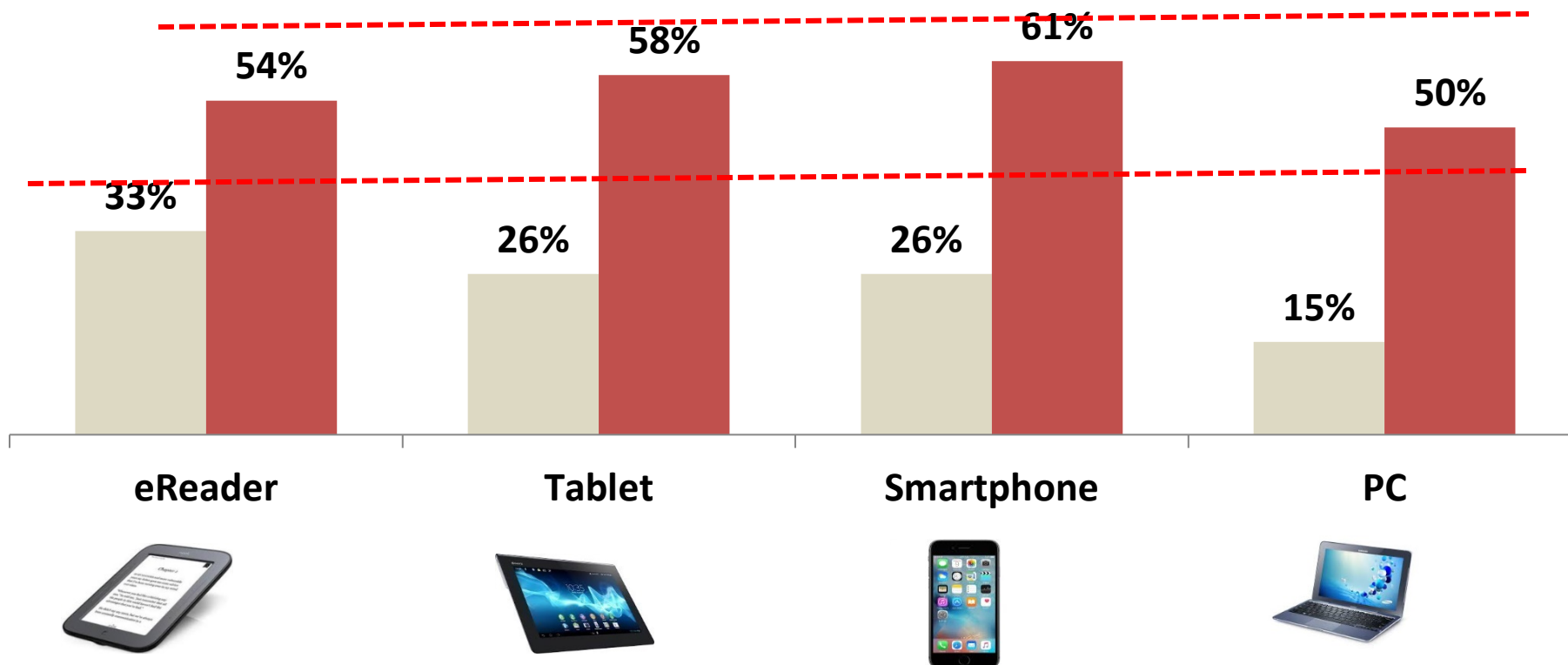
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Devices used to read e-books: 2017

Values in %

■ First choice

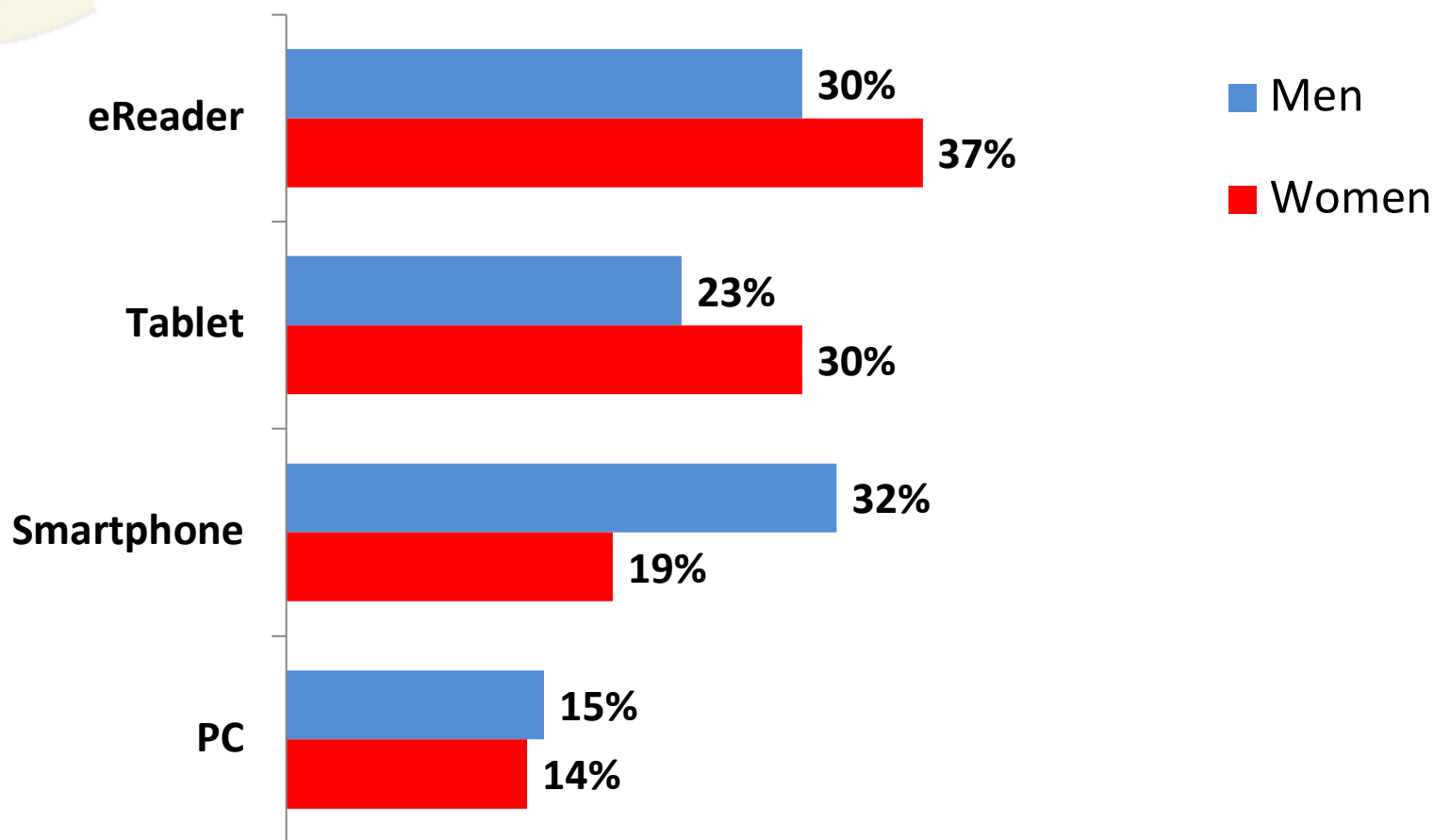
■ Overall



- **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

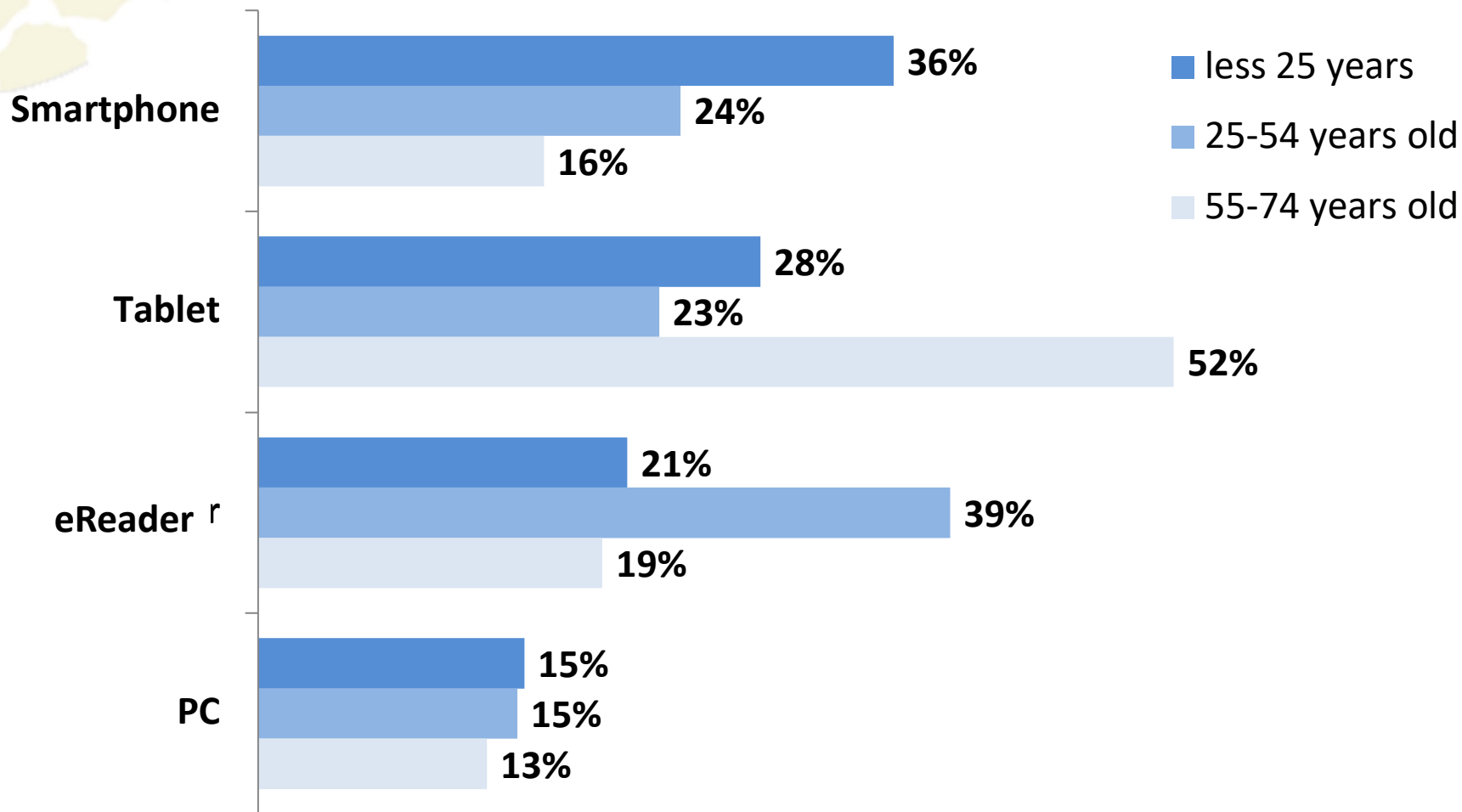
Values in %; first response



- 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

Devices mainly used to read e-books, by age: 2017

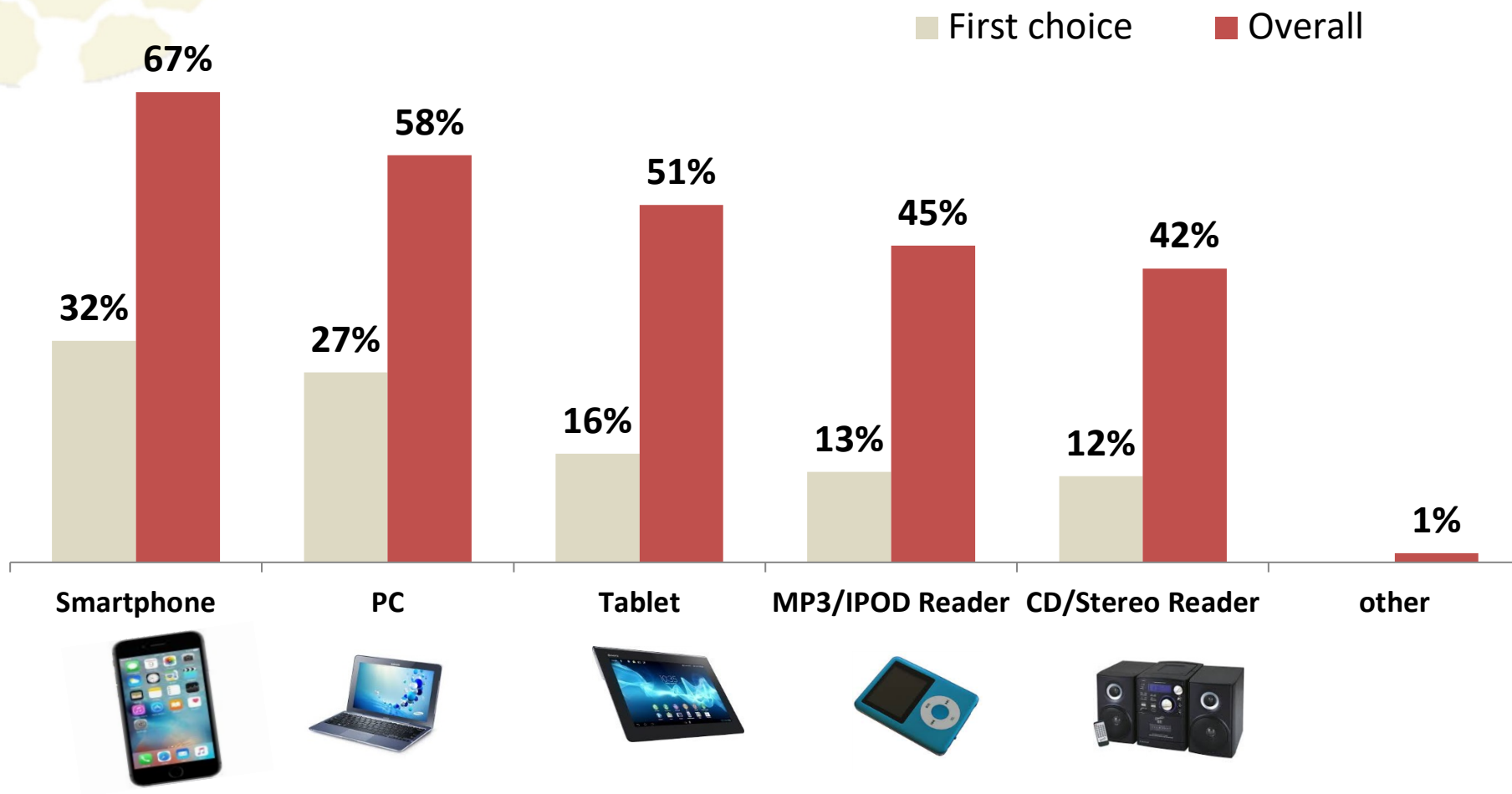
Values in %; first response



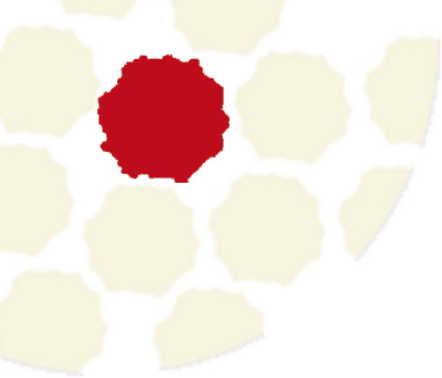
- Question:** You've said that you have read at least one e-book in the last year. What device did you use? If you used more than one device, please specify which you use the most and then which you use less

Devices used to listen audiobooks: 2017

Values in %; multiple responses

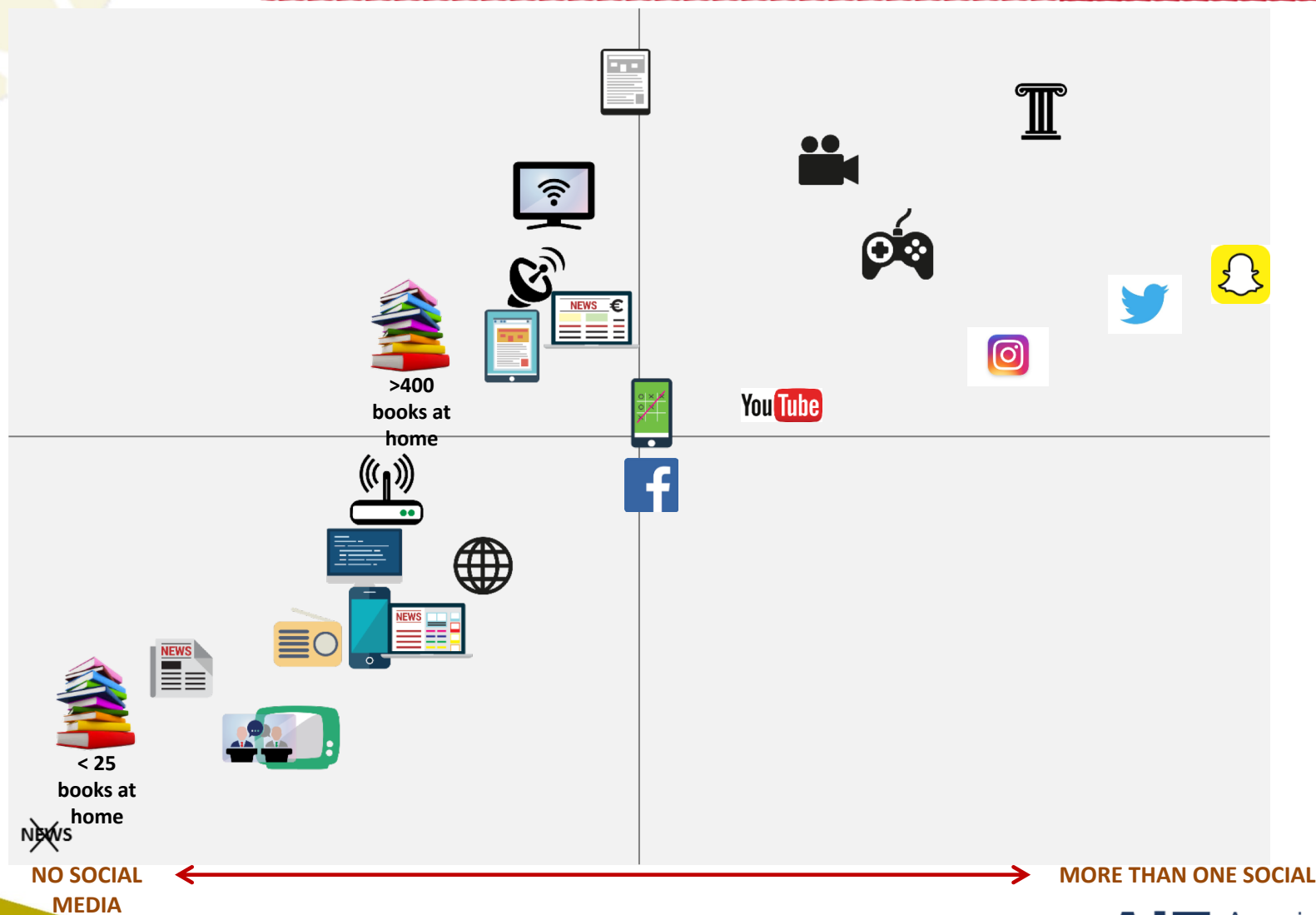


- **Question:** «You've said that you have listen at least one audiobook in the last year. Which device or devices did you use?»



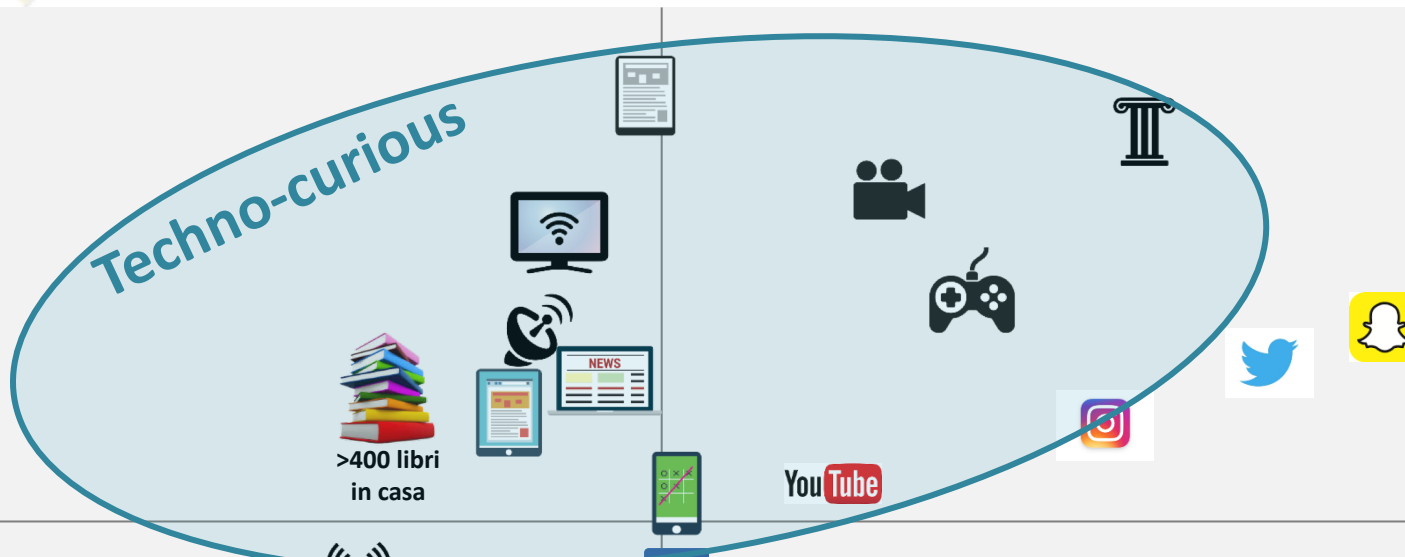
Italians vs reading, technologies and social: 2017

Availability of technologies vs media consumption



Cluster: techno-curious

Alta
dotazione di
tecnologie



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

Bas
dotazio
tecnolo

Non usano
social

Cluster: trendsetter

Alta
dotazione di
tecnologie

Tecno-Curiosi

Trendsetter

>400 libri

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)

5,5
ML

< 25 lib
in casa

NEWS

Non usano
social

Bassa
dotazione di
tecnologie

Cluster: mobile only

MOBILE ONLY: 12%

Very young e 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)

5,5
ML

Trendsetter

Mobile Only

Bassa
dotazione di
tecnologie

< 25 libri
in casa

Non usano
social

Usano
più social

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**

Tecno-Basic

Mobile Only



< 25 libri
in casa

Non usano
social

Non usano
social

Usano
più social

Cluster: disconnected

Alta
dotazione di
tecnologie

Tecno-Curiosi

Trendsetter

8
MI

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

Tecno-Basic

Bassa
dotazione di
tecnologie

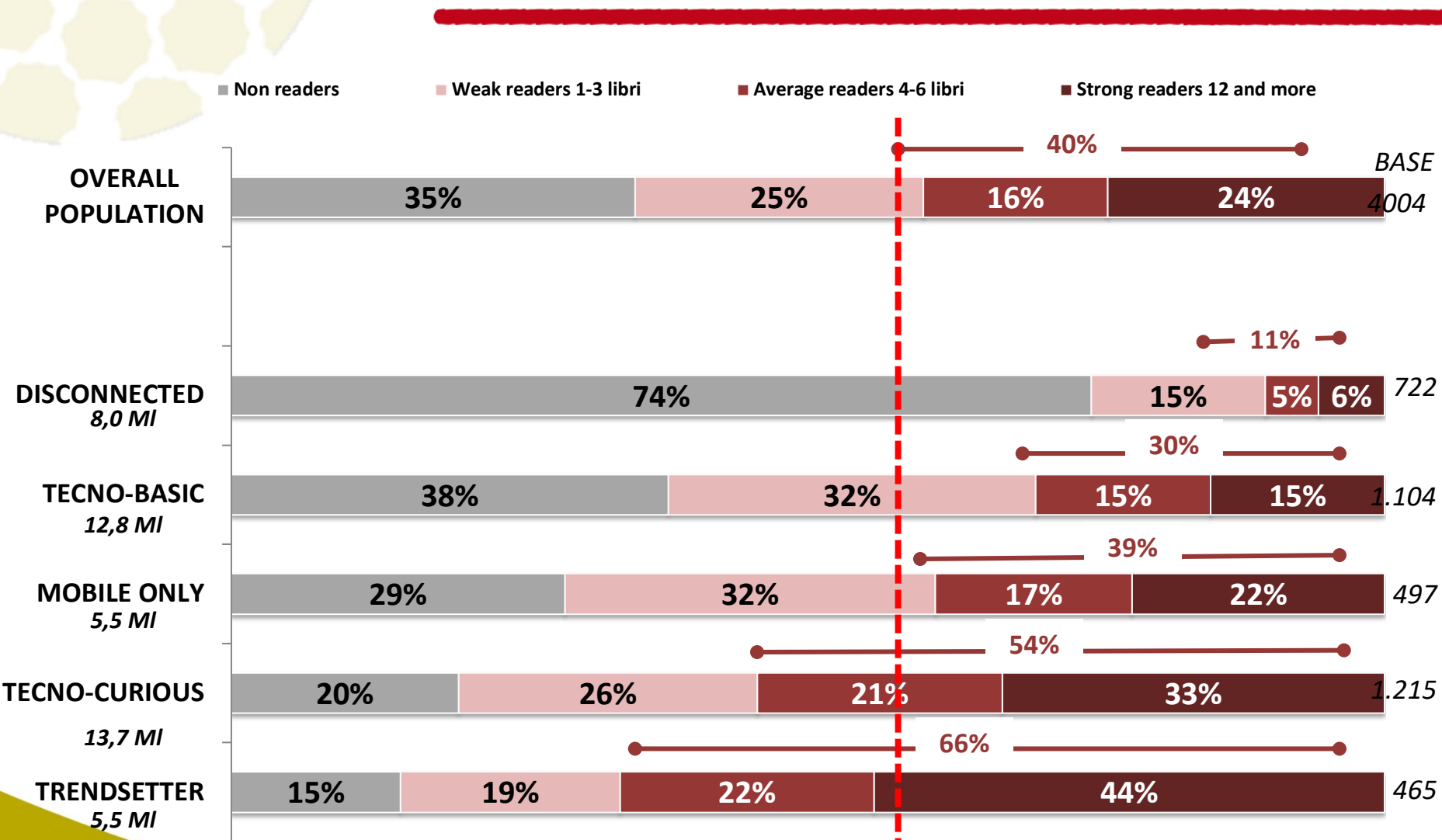
< 25 libri
in casa

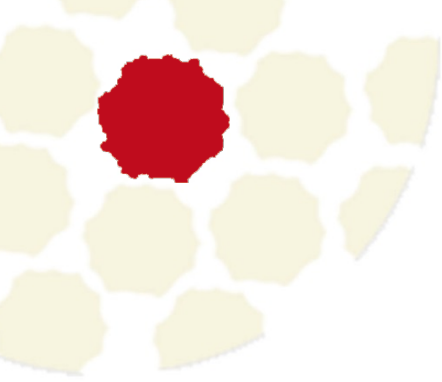
NEWS

Non usano
social

Sconnessi

Clusters: number of books read per year





Different formats and multiple channels to access different content genres



Thank you!