

The Italian publishing market & the e-books

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<p>This thesis will, at first, present an overview of the publishing market on a global level and then move to the specifics of the Italian publishing market and to the role the e-books play in it.</p> <p>Some of the most common terms the reader will encounter during the paper will be explained. For example the term “e-book” will be discussed and defined, along with the terms like “retailer” and “e-reader”. Besides, Amazon and its role in today’s market will be explained.</p> <p>In order to better understand the Italian publishing market, which is still in its infancy, an online survey aimed to Italian readers was conducted and ran between April and May 2016. The data from the survey was then analyzed with the help of Excel and the statistical software SPSS. The results were later discussed in connection with the marketing of e-books and with tips for Italian publishers on how to improve their marketing of digital books.</p>	
Keywords publishing market, Italian readers, e-readers, e-books, survey	

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1 Introduction

The first aim of this thesis is to clarify the topic of the publishing market and define what “publishing” exactly is. After shedding light on such topic, this paper will give the reader a global outlook of today’s publishing market by the means of statistics and forecasts, pinpointing the main markets and players. For example, the American publishing market turned out to be the largest market – and most important- in the world. However, the U.S. was not the chosen focus of this paper, Italy was. The Italian publishing market is the seventh most important one, on a global scale, and contrarily to the U.S. and U.K. markets has an e-book market still in its infancy, albeit slowly growing. To understand the reasons behind this, various statistical data was researched discovering that the low overall market penetration of e-books might be attributed to the complex dynamics of the Italian marketplace.

Aside from the statistics data, a whole chapter was dedicated to the topic of e-book, whose definition caused some mayhem between scholars and academics. Luckily, Vassilou & Rowley (2008) came up with a comprehensive two-part definition that definitely nails it. Since not everyone might be familiar with the topic of the digital books, exhaustive space was given not only to them but also to the reading devices necessary to read them, such as e-readers and tablets. For instance, while a tablet is a portable computer an e-reader is a device specifically designed for e-books with special screens that mimic the effect of ink on paper, making it suitable for reading and – at the same time – more comfortable for reading compared to other devices and screens. If people have ever wondered what a Kindle and Nook are, this paper will give the answer. Together with a short discussion regarding Amazon and its role on the global market.

After dealing with e-books and e-readers, the discussion will first move to the three different price models used in the publishing industry, namely the wholesale model, the agency model and the Resale Price Maintenance Model also known as fixed price model. After which the thesis will move deeper into the Italian market and its history by covering the years 2011 – 2015 and giving space to the data acquired through the Italian Publishers Association (IPA) and Rudiger Wischenbart (a consulting firm). The data discussed in this part of the paper will concern not only the average price of the e-book during a given year but also the progressive growth of the digital catalogue of Italian publishers. After this, the “general” topics will be left behind in order to concentrate the discussion on the creation of the survey and the data analysis. In fact, the second aim of this thesis is to gain a better understanding of the Italian readers – and consequently the Italian marketplace - in order

to gain insights and formulate tips for Italian publishers on how to improve the marketing of their e-books.

For this market research, the quantitative research method was used and specifically, the online survey was chosen as mean of research. The survey, once developed, comprised sixteen questions concerning the Italian publishing market in general and the Italian e-book market. The link to the survey hosted by the Facebook pages of two book blogs: “Honey, you never have enough books” and “Lily’s bookmark”. Facebook was chosen to host the link to the survey because – after a short research online – turned out to be the most used social media by the Italian publishers and the help of book blogs was enlisted due to the fact that these blogs are usually frequented by devotees of reading, therefore making sure the survey reached as much as “strong readers” as possible.

The survey link was open for a month from April 20th to May 20th by the end of which the survey had had 119 respondents, reaching and surpassing the sample size requirement of the research. The data gathered was later on analysed using Excel and the statistical software SPSS. Excel was used to do a more general analysis and generate percentages while SPSS was used for cluster analysis and cross-tabulation. The results of the analysis were then used to draw conclusions and to formulate suggestions aimed to the Italian publishers.

The choice to delve deeper in the Italian book market and its readers stemmed from being an avid reader myself and out of personal curiosity since most the statistical data available online on the topic usually concerns either the U.S. or the U.K. and very rarely the Italian market.

2 Book Publishing Industry

The verb “to publish” means “to produce and issue printed or electronic matter for distribution and sale” (English Dictionary 2016.) and this is exactly what the publishing industry does. The companies that operate within this industry produce and issue publications – in printed format or digitally – such as books, articles, magazines, newspapers and audio-books for distribution and sale (CollegeGrad 2016.). In short, all the companies and enterprises that take care of designing, editing, marketing and distributing books either in printed format and/or in electronic and audio format belong to the publishing industry (Ibis-World 2016.).

Publishing companies can sell their books (or publications) straight to the costumers – for example via their own webstore or flagship store – or reach the final customers via a retailer. A retailer is an entity that sells goods in small quantities directly to consumers, through various distribution channels. In general, retailers don't manufacture the goods they sell, although there are some exceptions to such rule, usually the retailer is the final link in the supply chain that links the product to the final customer. Stores with brick-and-mortar locations aren't the only kinds of retailers, in fact one of the largest retailers in the world is Amazon, which sells its goods entirely online and is – at the same time – the world's largest online retailer (Waters, 2016.). Amazon will be further discussed in chapter 3 where the specifics of the e-books and e-book reding will be dealt with.

2.1 An overview of the publishing market worldwide

The International Publishers Associations (IPA) in their 2014's annual report offers us a snapshot of the current book publishing market for the year 2014, ranking forty countries by market value. As IPA itself specifies, they gathered information from trustworthy sources such as local publishers, trade organizations, media reports and trade statistics. According to their data – which pertains the years 2012/13 and has been converted from Million € to US\$ billion – the US is the largest market in the world and has a market value of US\$30.71bn, followed by China (US\$17.19bn), Germany (US\$10.69bn) and Japan (US\$6.06bn). France (US\$4.93bn), UK (US\$4.34bn), Italy (US\$3.49bn), South Korea (US\$3.34bn), Spain (US\$3.04bn) & Brazil (US\$2.57bn). Canada (US\$235bn), Turkey (US\$1.96bn) and India (US\$1.12bn) close the top thirteen (Figure 1) (IPA 2014, 14.).

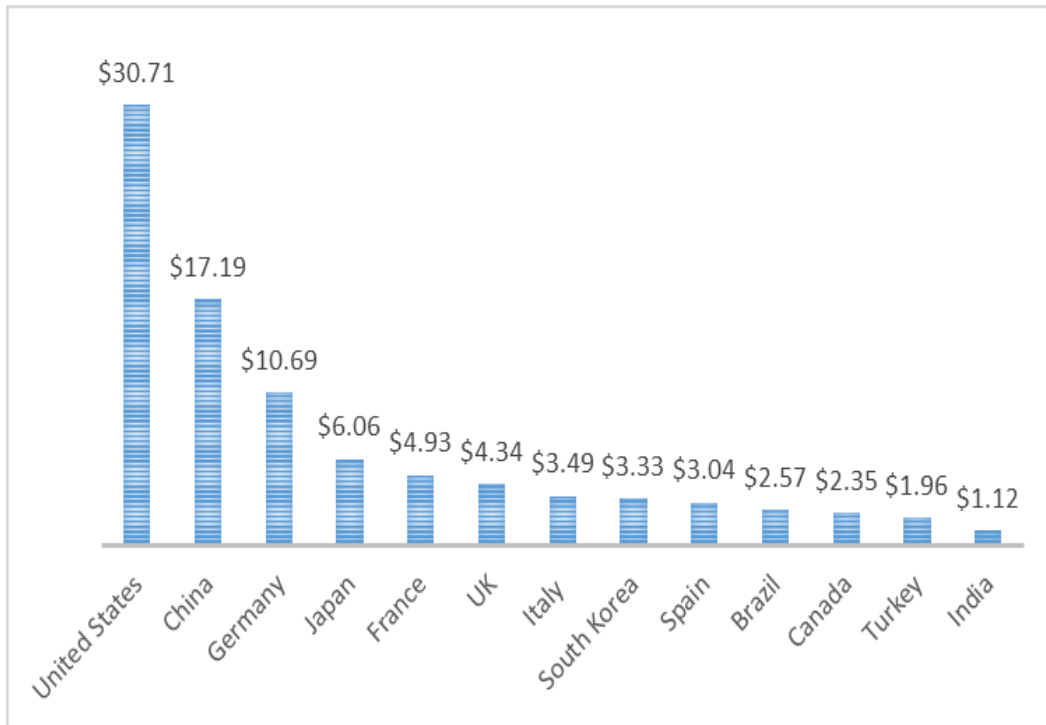


Figure 1. Main book publishing markets and their value in US\$ billion

In these past years, the book business has – for the most part – registered a negative growth in many of the wealthier countries but recorded growth in most emerging economies (IPA 2014a, 15.). In the case of Italy, the country registered a slow decrease of printed and audio books since 2009. However even though the book publishing market registered a negative growth, the e-books sector actually grew. According to PwC the declined of printed books and the slow rise of e-books will continue, it is in fact expected that by 2018 the revenue from printed and audio books will total US\$2.35bn. and the e-books revenue will reach US\$0.39bn (Statista 2016a.). Furthermore, PwC (previously known as PricewaterhouseCoopers) in their “Global Entertainment and Media Outlook 2015-2019” has forecasted that India will drive the expansion of the book publishing sector and become the tenth largest market by 2019 (PwC 2015).

The size of the book market relates to the affluence and not so much on the size of a country. In most countries the domestic audiences basically defines the industry, this not completely true for countries with strong exports (e.g. U.K. & U.S.) where the net revenues of publishers are influenced by the exports and where the domestic market turnover shows a different distribution compared to those countries that rely almost solely on domestic audiences. In addition, growing e-book sales – particularly in the US and UK – are producing new patterns due to the fact that e-books facilitate exports and not just to other English-speaking countries but also to all the territories with a readership that practices second language English reading (IPA 2014, 15.).

2.2 A look at the future of the publishing market

PWC (2015) in their “Global Entertainment and Media Outlook 2015-2019” predicted that the book publishing revenue would rise by US\$ 8.21bn during 2015-2019. The global total book revenue is set to rise from US\$ 120.13bn to US\$ 120.13bn in 2019. The growth of the global consumer books revenue will be slow until the digital gains scale and therefore driving the overall consumer growth. Where electronic books are concerned, tablets will be the key to the growth of global consumer, professional and educational books revenue; they are easy to carry around and – at the same time – allow people to have access to a wide range of books at all times. According to PWC’s data, the strongest growth will be registered in countries with high tablet penetration such as the U.S., U.K., Singapore and South Korea; these countries will in fact be the first markets to see the e-books’ share of consumer book revenue exceed 40%. Even though the global book publishing revenue is expected to rise by 2019, the global books print/audio revenue will still decline by 1.9%, going down from US\$101.63bn (year 2014) to US \$92.39bn in 2019. Despite this, the print/audio books revenue will continue to make up more than 70% of total books revenue.

Italy is not mentioned in the forecast by PwC (2015) probably because the Italian e-book market, on a global scale, has still marginal importance; as it will be shown in the next chapters.

3 E-books & Their Market

The Oxford English Dictionary (2016) defines an e-book as “an electronic version of a printed book which can be read on a computer or a specifically designed handheld device”; while Merriam-Webster Dictionary (2016a.) describes it as “a book composed in or converted to digital format for display on a computer screen or handheld device”. The last definition is – in my opinion – more “complete” than one given by the Oxford dictionary since it points out that an e-book can be either the digital version of a printed book or a book written specifically for the digital form. While the most conservative definition of e-book – which is also the predominant view of publishers – sees the e-book as simply an electronic copy or version of a printed text; purists of the genre argue that an e-book is a book that specifically written for the electronic format and is not available in other formats (Gall 2005, 26.). Whereas, Armstrong & Lonsdale (2003, in Vassilou & Rowley 2008, 357.) classified the e-books based on their content, coming up with the following types : textbooks, reference materials (e.g. dictionaries), scholarly monographs, directories, grey literature (e.g. technical reports, working papers, conference papers), official publications, trade literature, privately published material, theses, translations, out of print and free e-books. Researchers focused on different aspects of e-books – not just on their content – And divided the e-books in free e-books, charged e-books (which are purchased and licensed), plain text e-books, multimedia e-books (which are usually “born digital” and contain not just text but also sound and images) , desktop PC e-books and e-books that require dedicated e-book readers (Vassilou & Rowley 2008, 358.).

After extensive research and taking into considerations different definitions and perspective Vassilou & Rowley (2008, 363.) created – what I think is – probably the most comprehensive definition of e-book. They formulated a two parts definition in order to nail down the persistent as well as the dynamic nature of an e-book and described the e-book as “A digital object with a textual and/or other content, which arises as a result of integrating the familiar concept of a book with features than can be provided in an electronic format. E-books typically have in-use features such search and cross reference functions, hypertext links, bookmarks, annotations, highlights, multimedia objects and interactive tools”. As hinted in this definition, compared to printed books, e-books have some key benefits. For example, the possibility to easily browse through them and launch a keyword search both inside a book and inside a collection of books. E-books can also include features such as hyperlinks, bookmarks, annotations, built-in dictionaries and highlighting. In addition, an e-book is highly portable since it can be easily via web without time or geographical constraints. Interaction between users can be encouraged with the enhancement of chatting tools and commenting.

Furthermore, the interaction between users can be also enhanced by the use of “social media sharing” and “popular highlight” functions most e-readers, nowadays, offer. Specifically, the sharing function allows you to share your underlined text via Facebook while the “popular highlights” function enable people to see the passages of the selected book that have been highlighted the most by the other users. However this function works only on e-books people have bought through an online store and is not available on all the e-readers models, in fact – so far – it has been available only on Kindle, the e-reader made by Amazon and directly connected to it.

For those that are not familiar with it, Amazon is the world’s largest online retailer. The company started off a book seller but then expanded to sell a wide range of consumer goods and digital media. Besides, Amazon has its own electronic devices such as the Kindle e-book reader and the Kindle Fire tablet (Wigmore, 2014.).

An e-reader (or "e-book reader") is a portable device designed for reading digital publications such as e-books, electronic magazines, and digital newspapers. Most e-readers can store thousands of books and other publications. On the market, there are dozens of different e-readers available, however some of the most popular ones are: the Amazon Kindle, the Barnes and Noble Nook, and the Sony Reader. All of them support a wide range of formats and allow the download of the e-books over a wireless network. Most of these e-readers have a monochrome display, often called "electronic paper," such display does not provide color images but – instead – appears very similar to a paper page from a regular book, which facilitates the reading in bright sunlight (Christenson, 2011a.) Even though you can use a tablet to read an e-book they are separate from the e-readers and are different devices altogether. In fact, a tablet a portable computer that uses a touchscreen as its primary input device. The majority of tablets are slightly smaller and weigh less than the average laptop. Due to their lack of keyboard and mouse, tasks such as typing documents and writing e-mails are more difficult to carry out on them, therefore tablets are generally seen as accessories more than a replacement for laptops and desktop PCs (Christenson, 2011b.)

The peculiarity of the e-book market resides in the fact that e-books show both private and public good characteristics. In fact, readers can buy and download e-books but consumption remains non-competitive and – in some segment of the market – even non-excludable. E-books (and books in general) are experienced goods; their utility is unknown to consumers ahead of consumption, which implies a high level of uncertainty that goes hand in hand with oversupply and infinite variety. In addition, e-books have brought

disruption on the publishing market under the form of disintegration of the publishing value chain have started a new trend toward print on demand and disintermediation of the publishing market. The disintermediation gives publishers the opportunity to sell books directly online, gives authors the possibility of self-publication and direct promotion through social networks and user-generated criticisms such as Amazon recommendations. Due to the development of the e-book market, several stages are disappearing from the traditional value chain of the publishing market and doubts are arising concerning the survival of independent bookstores and brick and mortar bookshops. Moreover, the e-book market brings up – for publishers – another problem, the issue of piracy. However, its impact is considered questionable. Besides, the digital market has made possible for new competitors to enter the market; on the one side we can find giants such as e-commerce and computer companies and on the other micro-firms and pure players (companies that focus only on one-product or service). Meanwhile, the presence of vertical concentrations – meaning companies that act both as a publisher and as a retailer (e.g. Amazon) – creates a new balance of power between authors and publishers (Benhamou 2015, 125.).

There are three different pricing models that are used to market e-books and books alike; the wholesale model, the agency model and the Resale Price Maintenance Model (also known as fixed price model). In the first model, publisher sell books to retailer at a discounted price while retailers then resell the books to consumers at the price they prefer. In the agency model, the publisher sell their books to the consumers through the retailer; the retailer becomes the agent of the publisher. In the RPM pricing model instead, the publisher determines the price at which the bookseller will sell the book or books. At present, on the e-book market three giant players exist: Google, Amazon & Apple. The first operates on an open-format model where e-books are means of personal data collection and are tools of indirect or direct advertising. The model used by Amazon & Apple is, instead, based on a lock-in format; for example, Amazon's kindle files can be read on Kindle only and Apple has restricted iBooks only to the iPad & iPhone. Even when it is possible to download the files on another device users are restricted within the Amazon/Apple ecosystems of software and services. These three giants mentioned above (Apple, Amazon & Google) have shown a propensity to use the oligopolistic structure of the e-book market to increase their economic and/or cultural influence, helped by the lack of any real counterforce from controllers. For this reason unfair competition is, unfortunately, an intrinsic risk (Benhamou 2015, 129.).

The economic analysis of the e-books market it is still in its early stage (Benhamou 2015, 124.). Based on statistics – on a global level – the e-book revenue has been slowly increasing since 2009. In fact, in the year 2009 the North-American e-book market regis-

tered a revenue of US\$0.5bn., the Western European one US\$0.093bn, followed by the Asia Pacific with US\$0.817bn, Middle East & Africa with US\$0.005bn, Central & Eastern Europe with US\$0.004bn and Latin America \$0.001bn. In 2015 the revenue had risen to \$9.3bn in North-America, US\$1.8bn in Western Europe, US\$2bn. in Asia & Pacific, US\$0.108bn in Central & Eastern Europe, US\$0.107bn in Middle East & Africa and US\$0.046 in Latin America (Statista 2016b.).

According to the study by PwC, e-books will have a future but in the next year, their future will be different in different countries. In 2014, the U.S. e-book market was worth about \$ 5.7bn but by 2018, the same market is expected to be worth \$8.7bn, therefore surpassing the printed and audio book market. The same shift is expected to happen in the UK where the e-book market is going to be worth about US\$1.5bn compared to US\$1.4bn of the print market. While in the U.S. and U.K – which incidentally are the main exports market – the e-books are set to surpass the print and audiobooks, this won't happen in other countries; in Germany, China, Japan and Italy the printed market will maintain its popularity and continue being dominant (PwC 2014, in Statista 2014.). For what regards Italy in particular, PwC has forecasted a slow rise of the e-books market revenue, which is supposed to reach US\$ 0.39bn by 2018 (Statista 2016a.).

4 In-depth look at the Italian market during the years, from 2011 to 2015

In this chapter, a snapshot of the Italian e-book market will be offered, in order to give the reader an idea of its inception and evolution.

The time period that goes from 2011 to 2016 will be covered and details such as market share, revenue and average prices will be given.

4.1 From 2011 to 2012

In 2011, according to the Italian Publishers Association (AIE) the e-book market value was about 3.7 million euro (US\$ 0.0042bn) which amounted to the 0.2% of the whole book market; with a catalogue of e-books titles of 20.000 and a base of 533.000 e-readers and 858.000 tablets. In 2012, the Italian market faced a difficult economic situation that resulted in a consequent decline of sales equalling to -7.8% in value and – 7% in volume. Like in other European markets, children's book, young adults and fiction fared better than other genres. However, compared to the modest beginning of 2011, during the year 2012 the e-book market registered a strong growth, with the e-book market value rising to 12.6 million of euro (US\$ 0.014bn) and reaching 0.9 % of the whole market share.

Furthermore, during this year the catalogue of titles available in e-book was expanded up to 30.000. The low overall market penetration of e-books might be due to the complex dynamics of the Italian marketplace. In addition, the European financial crisis put a strain on the book market that in the recent years has been characterized by notable changes in the performance of the largest publishing groups (Mondadori, RCS, GeMs etc.). Still, all the major players in the industry invested in their e-book catalogues. Last but not least, in 2012 the average price of an e-book decreased from 11.18€ (2011's average price) to 11.07€, with e-books receiving higher visibility in professional databases, media and book fairs (Rudiger Wischenbart 2013, 41.).

4.2 From 2013 to 2015

According to the data supplied by AIE. (AIE 2014, 3.), in 2013 the e-book market continued to grow both in terms of available titles on the market and in terms of market share which reached 3% of the book market. However the revenue remains modest, this is due

also the 22% VAT applied to e-books (as opposed to the 4% VAT applied to printed books) that plays a part in limiting the digital market growth. During this year the price of e-books continues to decrease reaching -20.8%. At the same time, the number of e-books available grew and registered a solid +43% reaching approx. 40.800 titles available, while printed books suffered a - H 4.1 %. The year 2013 saw the readers of e-books grow to 1.9 million registering an increase of + 18.9% compared to the previous year, and of +72.72% compared to 2010. The rise of the e-books didn't stop to 2013, in fact in 2014 they continued to grow registering an increase of +26.7% with the titles available reaching the number of 51.692 with the e-book market share reaching 3.4% and a revenue of 40.5 million of euro (\$US 0.046bn) and registering a +26.1% compared to 2013 (AIE 2015, 13.).

Unfortunately the data concerning specifically the e-book market in the year 2015 has not yet been made available by AIE and will probably be made so later at the end of 2016. As of now, the only data that AIE made known was that during the 2015 the incidence of the e-book on the production of printed books reached 86.9% as opposed to 28.8% of the year 2011. However some browsing on the main Italian publishers webstores – specifically Mondadori Amazon & Feltrinelli – revealed that on those stores the average price is approximately 9 €, the only exception is represented by the smaller Newton Compton Editori which offers its e-books at the average price of approximately 5 €.

5 Research Description

The Italian e-book market is, in terms of sales, an undeveloped market. Even though the revenue from e-books sales has been increasing, it still does not reach the levels of growth reached in other markets such as the U.K. and U.S. Furthermore, the forecasts indicate that in Italy, printed and audiobooks will maintain their importance and still be the main source of revenue (Statista 2014.). Therefore, it was decided to gain a better understanding of the market by conducting a quantitative research among Italian readers. The aim is to gather a better understanding of the current market composition and gain insights that will allow a better marketing of e-books. This research focuses on the Italian publishing market and more specifically on the Italian e-books market, which – sadly – registered as slower growth compared to the same market in the U.S.

For this market research, the quantitative research method was used. The choice fell on this mean of research because such a method allows you to quantify a given problem by way of generating data; data that can be converted into utilizable statistics and it is – ultimately – useful to formulate facts and uncover patterns. Online survey, paper survey, face-to-face interviews and online polls all fall into the category of quantitative research methods (Wyse, 2011.). In this case, the online survey was chosen as tool of quantitative research and, in order to calculate the necessary sample for the survey to be reliable, three parameters were needed: the size of the population, the confidence level and the margin of error. The margin of error shows how certain the sample is to reflect the population while the confidence level indicates the probability that the chosen sample matters in the results you get. The most common margin of error is 5% but any number between 1-10% can be picked up, indeed the lower the number the more accurate the results are. In the case of the confidence level 95% is the most commonly used but – depending on the research – any number between 90% and 99% can be chosen. It is not advised to use a confidence level less than 90% or a margin of error higher than 10% (Survey Monkey 2016a.). The “population size” translated into the approximate number of Italian e-book readers, which amounted to 1.9 million (AIRE 2014, 3.). For the purposes research, the use a margin of error of 10% and a confidence level of 90% was deemed enough. The three parameters were then inserted into the online calculator available on the Survey Monkey website, which uses a normal distribution parameter of 50% to calculate the optimum sample size (Survey Monkey 2016b.). The calculation resulted in a sample size of 68, with 68 being the minimum number of completed surveys needed for the research to be reasonably founded.

The survey, once developed, comprised sixteen questions concerning the Italian publishing market in general and the Italian e-book market. The survey was created via Webropol, an online survey tool that boasts 50.000 users worldwide (Webropol 2016.) . This tool was chosen due to its user-friendliness and extremely useful technical features.

The link to the survey hosted by the Facebook pages of two book blogs: “Honey, you never have enough books” and “Lily’s bookmark”. As the names infer these two blogs focus on books and the e-books. There are about ten main book blogs in Italy, these two blogs can be defined “medium size” with about 1300 followers – meaning the Facebook’s users that follow a given page – between the two of them, specifically “Lily’s bookmark” had about 700 followers while “Honey there are never enough books” had about 500. Usually, the people following these blogs are active readers and call themselves “bookworms”, in other words “a person devoted to reading” (Random House Kernerman Webster’s College Dictionary 2010.). Only a minority of them are sporadic readers meaning people that read a book or e-book only once in a while.

All the main Italian book blogs share – more or less – the same users and readers, “Lily’s bookmark” & “Honey there are never enough books” were chosen to host and advertise the link to the survey because – after some talk with their owners – they indicated their availability to do so.

Facebook was chosen to host the link to the survey because – after a short research online – turned out to be the most used social media by the Italian publishers. Where “social media” means “a form of electronic communication through which users create online communities to share information, ideas, personal messages, and other content” (Merriam Webster 2016b.).

The survey link was open for a month from April 20th to May 20th by the end of which the survey had had 119 respondents, reaching and surpassing the sample size requirement of the research.

6 Data Analysis & Findings

The data gathered with the survey was later on analysed using Excel and the SPSS software. While Excel is an electronic spreadsheet program or – in other words - a computer software used for storing, organizing and manipulating data (French, 2016); SPSS is a computer application for statistical analysis of data, with extensive capabilities that encompass: analytical reporting, graphics and statistical modelling (Finders University 2016). In this case, Excel was used to do a more general analysis and generate percentages while SPSS was used for cluster analysis and cross-tabulation.

Whereas the cross-tabulation (or cross-tab) is used to discover possible relationships between two different variables with the table depicting the number of times each of the possible category combinations occurring in the given sample data (Kent State University 2016). The Cluster analysis, also known as segmentation analysis, is usually used to analyse big chunks of data and often comes handy – between many things – for marketing purposes where is commonly used to identify homogenous groups of customers that have similar needs and attitudes but are distinctively different from other customer segments (StatiscsSolutions 2016.).

As mentioned earlier the respondents totalled 119, of those 97% were female 3% male. In regards to the age of the respondents, 39% of them were aged between eighteen and twenty-five, 19% between twenty-six and thirty years old while those under eighteen totalled 17%. The people of aged between thirty-one and thirty-five were 10%, and while those of age comprised between thirty-six and forty were 9% the over forty amounted to 6% of the total respondents (Figure 2.). At this point, we can notice how the main age group included those from under eighteen and thirty years old, all together these three age-ranges gathered the biggest proportion of respondents, namely 75%.

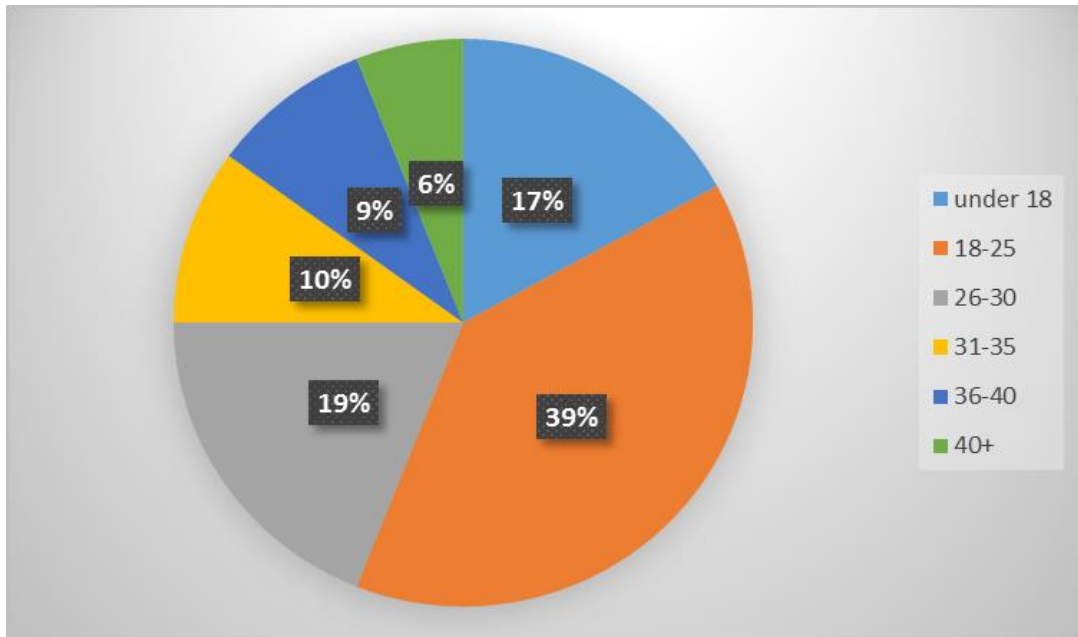


Figure 2. The Age of Respondents

Regarding the education of the respondents, 56% had a high-school diploma, 19% a middle school diploma/certificate, 15% owned a bachelor's degree and 9% had master's degree. Less than 1% of those who answered had a PhD.

After the precursory general questions, the survey moved to the topic of reading habits and – specifically – to the number of books and e-books people read per year. The results were mixed; with 29% of people reading between five and fifteen books, 18% between sixteen and thirty and 16% who read between forty-six and sixty books on yearly basis. They were followed by 11% of respondents that read between thirty-one and forty-five books and 7% of readers that even read more than ninety books per year. A small 4% read between sixty-one and seventy books per year and a smaller 2.5% of readers who read between seventy-six and ninety books. In addition, 12% of people read less than five books per year. Reading the e-books instead, 46% admitted to reading between five and thirty books on a yearly basis. Furthermore, 15% of respondents said to read between thirty-one and sixty e-books while 8% declared to read less than five e-books per year equalling the percentage of those reading between sixty-one and ninety e-books per year. Lastly, while 2% of readers said to even read more than ninety e-books per year, 21% of people declared to not read e-books altogether (Figure 3.).

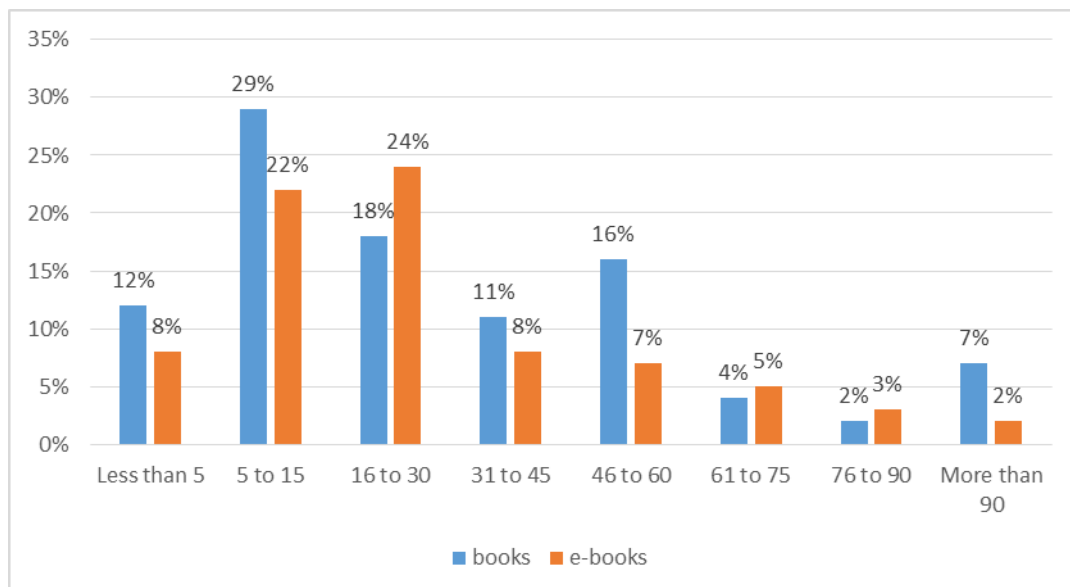


Figure 3. Number of books read per year

“Where do people buy their books?” I tried to answer this question by asking it directly to readers. Not surprisingly – given everything that has been said so far about the Italian publishing market – the Italian readers affirmed their preference for bookstores, in fact 45% of them indicated to buy their books from traditional bookstores. However, those that said to prefer online stores (e.g. Amazon, Mondadori, Feltrinelli) followed close behind with a strong 40%. Only the 8% of respondents said to use the library to acquire their reading material while another 7% said to “acquire them from other means”. Surprisingly, no one of the respondents borrowed books from their friends.

Another question presented to readers was how much time– on a daily basis – they spend reading books and e-books. A strong 42% said to spend from one to two hours reading while a solid 30% declared to read between three and five hours per day, instead. An additional 15% of people admitted to read less than one hour per day with 7% of readers confessing to read only on weekend due to the lack of time. Contrastingly, a small 3% indicated to spend more than five hours per day reading. Lastly, a very small 2% asserted to not read every day at all, a result that suggest they are sporadic readers.

Additionally, readers were tasked to evaluate a list of factors they consider when choosing to buy or not an e-book. The list presented to them included: the plot, the author, the cover, the price, the extras and the media content. Respondents were then asked to rank them from one to five, where five meant “the most important”, four “very important”, three “mildly important”, two “slightly important” and one “not important. The plot resulted to be the one of the most decisive factors, with 69% of respondents recognizing it as the most important factor, 23% as very important and 4% as “mildly important”. Only 3% of people indicated it being “slightly important” with another 3% marking it as “not important”. The

opinions concerning the cover were less homogeneous than those concerning the plot. On the one hand, 36% of people marked it as “mildly important” but on the other hand, 32% indicated it as “very important”. For 16% of respondents the cover resulted as being “not important”, while for 10% of readers it is “slightly important” followed by 6% of people that sees it as “very important”. Similarly, the results regarding the author were diverse as well; with 32% of people evaluating it as mildly important and 28% marking it as very important. Whereas 15% of respondents indicated it as “slightly important”, another 14% considered it the most important factor and, at last, 11% brushed the factor off as “not important”. The opinions pertaining the price were instead more homogeneous. About 31% of respondents classified the price as “very important” another 31% indicated it as “mildly important”, followed by 25% of readers that acknowledged it as “the most important factor”. Only 5% of readers considered it as “not important” with 8% of readers defining it as “slightly important”. Overall, a staggering 87% of respondents recognized the price’s importance when making a buying decision.

Interestingly people did not seem too concerned about the extra content that is sometimes offered with e-books. Over 47% of respondents described – in fact – the extra content (e.g. short stories, interviews, extra stories) either as “not important” or as “slightly important”. Specifically, 24% voted for “not important”, 23% went for “slightly important” and 29% of respondents marked it as “mildly important”. Only 15% considered the extra content “very important” with just a minority of people (9%) believing it to be the most important factor. The media content (e.g. images, links, drawing, embedded music) was the last factor to be examined and apparently it did not seem to interest readers that much either; 40% ranked it as not important, 22% as mildly important and 19% as slightly important. Only 9% indicated it as “very important” followed by another 9% that believed it to be the most important element. (Figure 4.).

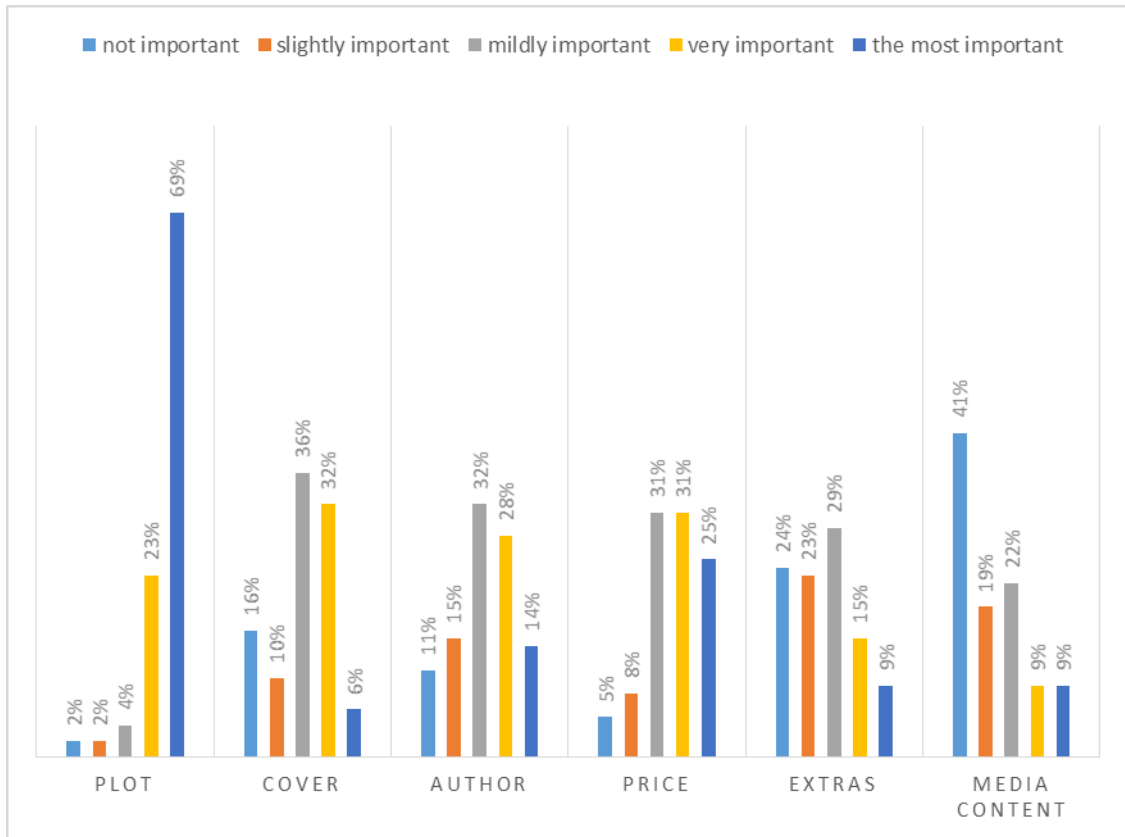


Figure 4. Buying decision factors and their importance according to readers

Subsequently, people were asked to express themselves on the matter of the price and were requested to indicate what was, in their opinion, the fairest price for a digital book. About 45% of them suggested a sum between three and five euro whilst 36% of respondents went lower, recommending a price between one and two euro. Another 12% pointed at a sum of 0.99 cents or less as fairest price, followed by a small 4% that thought the price range from six to ten euro to be the most appropriate. However, what people think as the fairest price might not always be the price that they are actually willing to pay. Therefore, respondents of the survey were required to indicate the maximum price beyond which they are unwilling to acquire an e-book. The result? A strong 59% answered that they would pay a maximum of five euro, confirming the 5 euro as price-threshold above which people would not buy an e-book. Still, 18% of readers would pay up to ten euro in order to acquire an e-book, whereas 11% would rather not go above the one-euro threshold. Only 3% of readers would pay a maximum of fifteen euro with less than 1% of respondents available to acquire a digital book for a price superior to fifteen euro.

Leaving, for a moment, the matter of the price behind the topic moved to the subject of the reading devices being used by readers. A good percentage of people, 39%, admitted to use dedicated e-readers (e.g. Kindle, Nook etc.), followed by 20% of readers choosing the smartphones as their usual reading device. An additional 20% declared to read on tab-

lets, while just 6% of respondents affirmed to use their personal computer or laptop to read (Figure 5.).

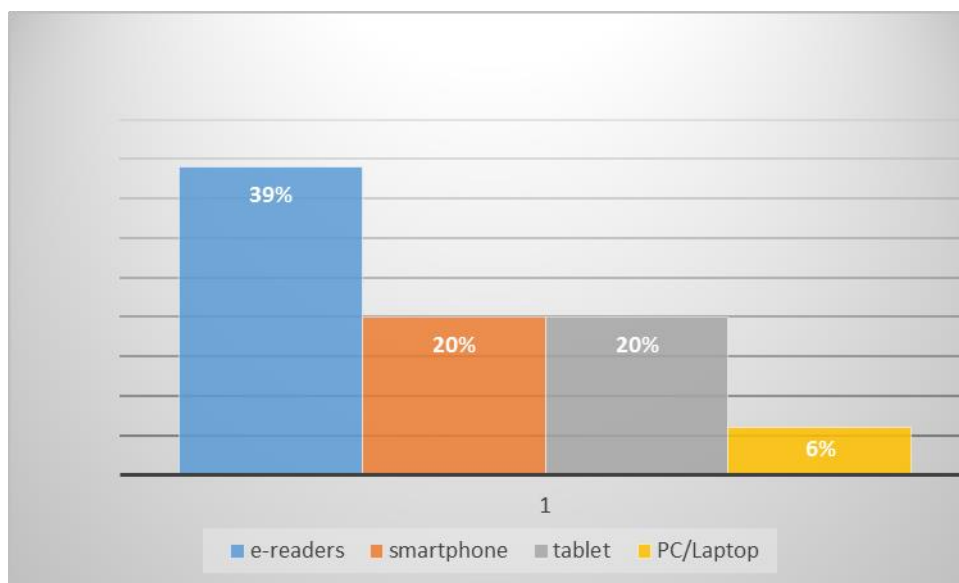


Figure 5. Preferred reading device

In order to dig deeper into the cultural side of e-book reading I asked people if they usually read in a foreign language. Interestingly, half of the respondents answered “yes” and of those 60% proclaimed to read in English.

Successively, respondents were inquired on if when buying a printed book they would be interested in also buying an e-book for a small additional price. The question stemmed from the fact that Amazon launched in the U.S. – as already mentioned earlier – a new service, allowing people to buy an e-book on their online store and then – at the same time – get the same book in audio-format for an additional price, usually about four or five dollars depending on the given title. This could be used as an inspiration by the Italian publishers and the general idea could be used with e-books. In fact, they could offer their consumers the possibility to get a digital copy of the printed book he/she is buying. However, would Italian readers be interested in such offer? The answer to the question produced mixed results. Only 10% answered affirmatively, with an additional 39% answering favourably but on the condition of being able to choose which e-book to get. However, 31% of readers declared to not be interested, and while 13% was unsure and answered with a “maybe” 8% simply did not know and could not express themselves on the matter.

As mentioned earlier, one of the characteristic of today’s publishing market is the possibility for authors to access the market directly by self-publishing their works. Yet, do readers actually read self-published books? From the data gathered through the survey, the an-

swer would be yes. In fact, 60% of respondents answered positively and an extra 21% of people declared that they would not mind considering reading self-published books. Only 19% of respondents answered “no”. Overall, about 79% of people see self-published book under a favourable light.

When people were asked to indicate the main disadvantage of an e-book, a strong 55% of mentioned the lack of smell and ink and paper, underlining how much people miss the physical feel. For a further 31% of the respondents, the main disadvantage of the digital format is the difficulty to read on screen. However, such difficulty might be influenced by the device used. It is good to remember that while smartphones, tablets and personal computer screens can be hard on the eyes, dedicated e-readers have a less harsh effect. In addition, for a tiny 4% of respondents the main drawback of e-books is the not appealing enough graphic, followed by 2% choosing “unsatisfactory layout” and another 2% mentioning the disappointing extra content (Figure 6.). Concerning – instead – the advantage of the digital format 59% of readers believed it to be its portability, 18% the price and 13% mentioned the easiness of access. The highlight and notes function was chosen by just a tiny 4% of while less than 1% of people indicated the “social sharing” (Figure 7.).

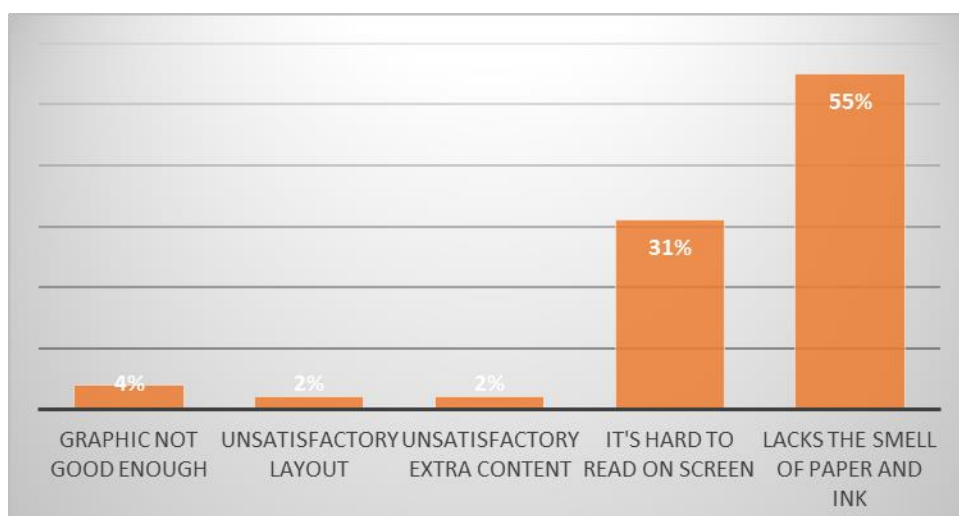


Figure 6. E-book main disadvantage according to readers

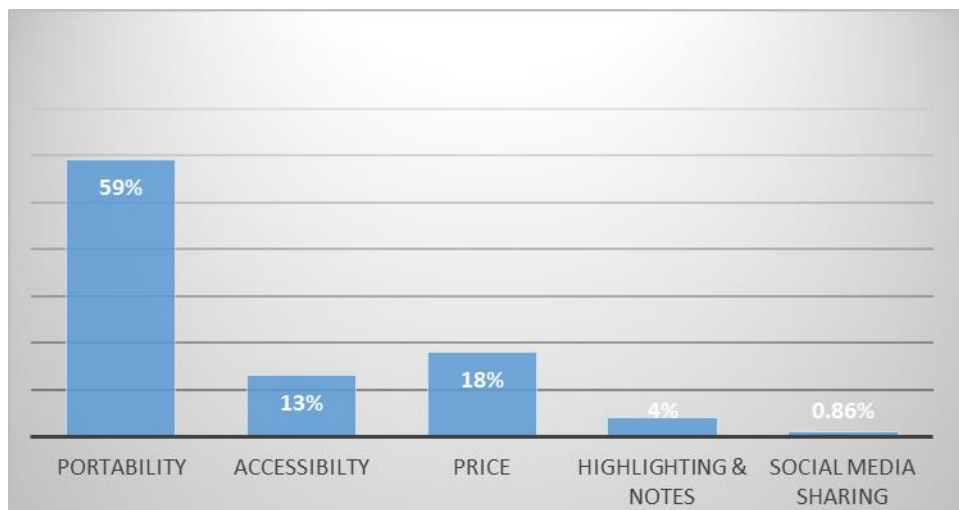


Figure 7. E-book main advantage according to readers

At this point, to see if existed a potential relationships between two of the different questions, SPSS statistical software was used to create a cross-tabulation. Since the focus of this thesis is the e-book market, the analysis was concentrated on the answers regarding the digital format and on its pricing. The focus was on the price because not only most readers consider it important when making a buying decision (as seen in the previous chapter) but also because – between the factors mentioned in the survey – it is the one that publishing companies can control as opposed, for example, to the plot or to the author's name. Readers have expressed their disinterest regarding media and extra content, thus the focus on the price.

The most interesting finding, perhaps, resulted from cross-tabulating age and reading devices used. Apparently, people between eighteen and thirty-five and the over forty tend to use more the e-readers while those under eighteen are split evenly between the use of an e-reader and the use of the smartphone. Quite surprisingly, the people between thirty-six and forty tend to read more on tablets (Table 1.). As for the quantity of e-books read per year, young people under eighteen tend to read a maximum of fifteen e-books yearly maybe due to the studies keeping them busy whilst people aged between eighteen and thirty and the over forty tend – instead - to read from five to thirty e-books. The age-range comprised between thirty-one and forty had more mixed results compared to other age-ranges with 33% of them between thirty-one and thirty-five reading between sixteen and thirty books per year, 17% reading less than five e-books per year, another 17% reading from five to fifteen of them and yet another 17% reading from sixty-one to seventy-five e-books, instead. Whereas 27% of respondents aged between thirty-six and forty read less than five e-books per year, another 27% read between sixteen and thirty e-books followed

by 18% of readers (of the same age range) reading between forty-five and sixty e-books per year (Table 2.).

At last, the age of the respondents was cross-tabulated with the maximum price they were willing to pay for an e-book. It was thus discovered that most of under eighteen were willing to pay from five euro to a maximum of fifteen. More specifically, 52.4% would be willing to pay up to five euro, 28.6% up to ten and 9.5% a maximum of fifteen euro. Most of people between eighteen and twenty-five – namely 56.5% - would willing to pay a maximum of five euro, while 17.4% would pay up to ten euro a substantial 15% would only pay up to one euro. Besides, a staggering 77% of twenty-six and thirty years old would spend only a maximum of five euro. Furthermore, 50% of readers between thirty-one and thirty-five would spend a maximum of five euro for an e-book, whilst 16.7% would be willing to pay up to ten euro a further 16.7% would not spend more than one euro. Of those between thirty-six and forty 54.5% would pay a maximum of five euro, and 36.4% up to ten. Moreover, 57% of the over forty would pay five-euro maximum, with only the 28.6% of them willing to spend up to ten euro for an e-book (Table 3.). In conclusion, the maximum price that the majority of people, independently from their age, would pay is five euro.

Table 1. Cross-tabulation: Age & Reading device used

Age		Reading device			
		e-reader	Smart-phone	tablet	Pc or laptop
Under 18	Count	6	6	3	1
	%	28.6%	28.6%	14.3%	4.8%
18-25	Count	19	10	8	4
	%	41.3%	21.7%	17.4%	8.7%
26-30	Count	10	3	4	1
	%	45.5%	13.6%	18.2%	4.5%
31-35	Count	5	2	3	0
	%	41.7%	16.7%	25.0%	0.0%
36-40	Count	3	2	4	1
	%	27.3%	18.2%	36.4%	9.1%
Over 40	Count	3	1	2	0
	%	42.9%	14.3%	28.6%	0.0%

Table 2. Cross-tabulation: Age & Maximum price people are willing to pay

Age		Maximum price you're willing to pay				
		1€	5€	10€	15€	Above 15€
Under 18	Count	0	11	6	2	0
	%	0.0%	52.4%	28.6%	9.5%	0.0%
18-25	Count	7	26	8	1	0
	%	15.2%	56.5%	17.4%	2.2%	0.0%
26-30	Count	4	17	0	0	0
	%	18.2%	77.3%	0.0%	0.0%	0.0%
31-35	Count	2	6	2	0	1
	%	16.7%	50.0%	16.7%	0.0%	8.3%
36-40	Count	0	6	4	1	0
	%	0.0%	54.5%	36.4%	9.1%	0.0%
Over 40	Count	0	4	2	0	0
	%	0.0%	57.1%	28.6%	0.0%	0.0%

Table 3. Cross-tabulation: Age & Number of e-books read per year

Age		E-books read per year							
		Less than 5	5-15	16-30	31-44	45-60	61-75	76-90	More than 90
Under 18	Count	3	4	0	2	2	1	0	0
	%	14.3%	19.0%	0.0%	9.5%	9.5%	4.8%	0.0%	0.0%
18-25	Count	1	9	14	6	2	3	2	1
	%	2.2%	19.6%	30.4%	13.0%	4.3%	6.5%	4.3%	2.2%
26-30	Count	1	7	6	0	2	0	1	1
	%	4.5%	31.8%	27.3%	0.0%	9.1%	0.0%	4.5%	4.5%
31-35	Count	2	2	4	0	0	2	0	0
	%	16.7%	16.7%	33.3%	0.0%	0.0%	16.7%	0.0%	0.0%
36-40	Count	3	1	3	1	2	0	0	0
	%	27.3%	9.1%	27.3%	9.1%	18.2%	0.0%	0.0%	0.0%
Over 40	Count	0	3	2	0	0	0	1	0
	%	0.0%	42.9%	28.6%	0.0%	0.0%	0.0%	14.3%	0.0%

After the cross-tabulation, an explorative cluster analysis to identify structures within the data was carried out. However, due to the small sample size the clusters (Table 4) the results from the analysis were not significant, as the Significance (Sig.) column of the ANOVA table (Table 5.) indicates and therefore the cluster analysis was not carried forward

Table 4. Cluster analysis: Final Clusters

	Cluster		
	1	2	3
	Maximum price you're willing to pay for an e-book	3	6
E-book main advantage	5	3	2
The fairest price for an e-book	2	6	2

Table 5. Cross-tabulation: ANOVA table

	Cluster		Error		F	Sig.
	Mean Square	df	Mean Square	df		
	Maximum price you're willing to pay for an e-book	36.493	2	.902		
E-book main advantage	38.576	2	.604	116	63.904	.000
The fairest price for an e-book	34.659	2	.670	116	51.761	.000

7 Conclusion & Future research

From the survey that was conducted online from April 2016 to May 2016 among Italian readers, it emerged that Italian readers do really prefer the traditional printed format to the digital one, with 20% of respondents declaring not read e-books. However, those reading digital books see them under a positive light. This was quite unexpected, especially seen the not brilliant performance of the Italian e-book market compared to the performance of markets such a U.S. or U.K. and Germany.

A reason for amazement came from the majority of respondents indicating the author's name, along with the price and the plot, among the most important factors taken into consideration when making a buying decision. While it was expected to have the plot and the price figure in the list, the author's name was an interesting surprise.

As mentioned in chapter four, in 2012 the Italian average price of an e-book was 11.07€ (Rudiger Wischenbart 2013, 41.) and even though AIE had not made available the average for the years 2014 and 2015 a quick browse on the main online bookshops (e.g. Amazon, Mondadori, Feltrinelli) revealed that as of today the average price of a digital book is around 9 €. Thus, the average price is above the five euro the majority of survey's respondents indicated as the maximum price they are willing to pay for a digital book. It can then be assumed that publishers wishing to increase their e-books sales should try decreasing their e-books prices. If not by lowering altogether their digital catalogue's general price at least by organizing discount or promo days (e.g. where certain titles/catalogues are discounted) or even release day deals. In addition – considered the importance given by readers to the author's name – publishers should offer e-books from unknown or emerging authors at the price of 2 or 3 €. Whereas for established authors, which already have a certain fan base, they could price the e-books up to 5 €. Besides, a slight lowering of the general prices and the offering of discounted titles should also help to steer people toward acquiring e-books legally. Italian publishers could not only lower the prices of their e-books but also collaborate with e-readers producers, for example people could by an e-reader and get a discount code for buying some e-books on a given publisher's website.

Additionally, a better market of e-readers should help improve the e-books sales as well. E-readers can come especially handy to people with eyesight's problems, thanks to the comfortability of their screens and the possibility to enlarge the font with a tap of the finger. It can be surmised that a better marketing e-readers would make people more comfortable toward buying and reading e-books.

Certainly, this research was limited to readers of “Lily’s Bookmark” & “Honey there are never enough books” . However, as already explained, all the Italian book blogs share most of their readers and active users (meaning the people that like and comment). Thus it can be reasonably assumed that the results of the survey are, in a general way, reliable, giving a quite comprehensive picture of what Italian readers want and like. All in all, the objective of clarifying the topic of publishing market was reached and a worldwide perspective was certainly gained. While regarding the purpose of expanding the understanding of the Italian market and its readers, the data gathered provided satisfactory insights into the readers’ minds and allowed to draw-up suggestions for Italian publishers on how better market their e-books.

Indeed, further research on a larger scale is in order, as Italian publishers would definitely benefit from an in-depth understanding of their readers. Such cognizance would allow them to improve and customize the marketing of not only their digital offer but also their printed catalogue.

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Appendices

Appendix 1. The Survey (Italian version)

Il Mercato Editoriale Italiano & Gli E-book

Salve a tutti e grazie per essere giunti fin qui! Innanzitutto, il questionario che vi apprestate a completare è completamente anonimo ed è parte di una mia ricerca sul mercato editoriale italiano e, specificatamente, sul settore degli e-books. La ricerca non è sponsorizzata da nessuno ed è semplicemente ai fini della mia tesi di laurea (in Wellness & Experience Management all' Haaga-Helia U.A.S di Helsinki). Quindi, senza ulteriore indugio...rispondete in tutta tranquillità al seguente questionario (ho cercato di non farlo troppo lungo) e – nel farlo – aiutatemi a laurearmi!

1. Prima di tutto, sei...?

- Femmina
- Maschio
- Top secret

2. Quanti anni hai?

- Meno di 18 anni
- 18-25
- 26-30
- 31-35
- 36-40
- Più di 40

3. Quale titolo di studio possiedi?

- Licenza media
- Diploma di scuola superiore
- Laurea di primo grado
- Laurea specialistica o Master
- Dottorato
- Non applicabile

4. Quanti libri all'anno leggi (esclusi gli e-books)?

- Nessuno
- Meno di 5
- 5-15
- 16-30
- 31-45
- 46-60
- 61-75
- 76-90
- Più di 90

5. Quanti e-book leggi all'anno?

- Non leggo e-books
- Meno di 5
- 5-15
- 16-30
- 31-44
- 45-60
- 61-75
- 76-90
- Più di 90

6. Di solito dove acquisti i tuoi libri?

- Libreria
- Negozi online (Feltrinelli, Mondadori, Amazon etc.)
- Non li acquisto, li prendo in biblioteca
- Non li acquisto, me li faccio prestare da un amico/a
- Altro

7. Di solito, quante ore al giorno leggi?

- Meno di un'ora
- 1-2 ore
- 3-5 ore
- Più di 5 ore
- Non leggo

- Leggo solo nel week-end

8. Indica in una scala da 1 a 5 l'importanza che attribuisce ai seguenti fattori quando sceglie se acquistare o meno e-book (1= non importante, 2 = poco importante, 3 = di media importanza, 4 = molto importante, 5 = importantissimo)

- La trama
- La copertina
- L'autore
- Il prezzo
- Contenuti esclusivi (scene inedite ecc.)
- Contenuto multimediale integrato (e.s. immagini, musica, link esclusivi)

9. Secondo te, qual è la fascia di prezzo più idoneo per un e-book?

- 0.99€ o inferiore *
- 1-2€
- 3-5€
- 6-10€
- 11-15€
- Oltre 15€

10. Qual è il prezzo massimo che saresti disposto a pagare per un e-book?

- 1 €
- 5€
- 10€
- 15€
- Oltre 15€

11. Su quale dispositivo di solito leggi gli e-book?

- E-readers (Kobo, Kindle etc.)
- Smartphone
- Tablet
- PC
- Non applicabile

12. Leggi e-books in lingua?

- Sì
- No

Se sì, in che lingua?

- Inglese
- Francese
- Tedesco
- Altro

13. Leggi libri auto-pubblicati?

- Sì
- No
- Potrei considerarne la lettura

14. Nel caso acquistassi un libro cartaceo in un online store, saresti interessato a pagare un prezzo massimo di 3 euro per ricevere lo stesso titolo anche in e-book?

- Sì
- No
- Forse
- Non so
- Sì ma preferirei ricevere un e-book di mia scelta (diverso dal titolo acquistato in cartaceo)

15. Secondo te qual è il principale svantaggio di un e-book?

- La grafica lascia a desiderare
- Il layout non è sufficientemente buono
- Mancano contenuti speciali degni di nota (e.s. illustrazioni, extras ecc.)
- E' difficile leggere a lungo su uno schermo
- La mancanza dell'odore di carta e inchiostro
- Altro

16. Secondo te, qual è il principale vantaggio di un e-book?

- E' facilmente accessibile
- La portabilità
- Il prezzo
- La possibilità di sottolineare il testo e aggiungere note

- La facilità di poter condividere le citazioni preferite sui diversi social networks
- Altro

E questo è tutto.

Grazie mille!

Appendix 2. The Survey (English Version)

The Italian Publishing Market & The E-books

Introduction: purpose of the survey, assurance that all the data is anonymous etc.

1. Gender?

- Female
- Male
- I want it to remain top-secret

2. How old are you?

- Under 18
- 18-25
- 26-30
- 31-35
- 36-40
- More than 40

3. What is your highest education?

- (Middle School) Diploma
- High School Diploma
- Bachelor's Degree
- Master Degree
- PhD
- N/A

4. How many books per year do you read (excluding e-books)?

- Less than 5
- 5-15
- 16-30
- 31-45
- 46-60
- 61-75
- 76-90
- More than 90

5. How many e-books per year do you read?

- I don't read e-books
- Less than 5
- 5-15
- 16-30
- 31-45
- 46-60
- 61-75
- 76-90
- More than 90

6. Where do you usually get your books?

- Bookstores
- Online retailers (e.g. Amazon, Feltrinelli, Mondadori etc.)
- Borrow them from the library
- Borrow them from friends
- Other

7. How much time do you usually spend reading (daily)?

- Less than 1h
- 1-2h
- 3-5h
- More than 5h
- I don't have much time, I read only during the week-end

8. Rate (from 1 to 10) the importance of the following factors when choosing an e-book

- Plot
- Cover
- Author
- Price
- Extras (e.g. extra content of the digital edition)
- Embedded media content (e.g. music, pictures etc.)

9. What price range would you consider fair for an e-book?

- 0.99 € and less*

- 1-2€
- 3-5€
- 6-10€
- 11-15€
- More than 15€

10. Which is the highest price would you be willing to pay for an e-book?

- 1 €
- 5€
- 10€
- 15€
- More than 15€

11. On what device do you usually read e-books?

- E-book readers (e.g Kobo, Kindle etc.)
- Smartphone
- Tablet
- PC
- N/A

12. Do you usually read e-books in another language than Italian?

- Yes
- No
- If Yes, which one?
- English
- French
- German
- Other

13. Would you consider reading self-published books?

- Yes
- No

14. When buying a printed book on an online store would you be interested in also receiving the e-book for a small additional price (of max. 3€*)?

- Yes
- No
- Maybe
- I don't know
- Yes but I'd like an e-book of my own choice (different from the one I'm buying in printed format)

15. In an e-book what the main disadvantage of an e-book?

- Graphic not appealing enough
- Layout
- Lack of extra content (e.g. illustrations etc)
- Difficulty to read (on screen)
- Misses the feel and smell of ink and paper
- Other

16. In your opinion what is the main advantage of an e-book?

- Easy-access from wherever you are
- Portability
- Pricing
- Highlight & Notes function
- Easy to share paragraphs you line on social networks (e.g. FB, TW etc.)
- Other

Thank you message

*based on the price in different on-line stores.