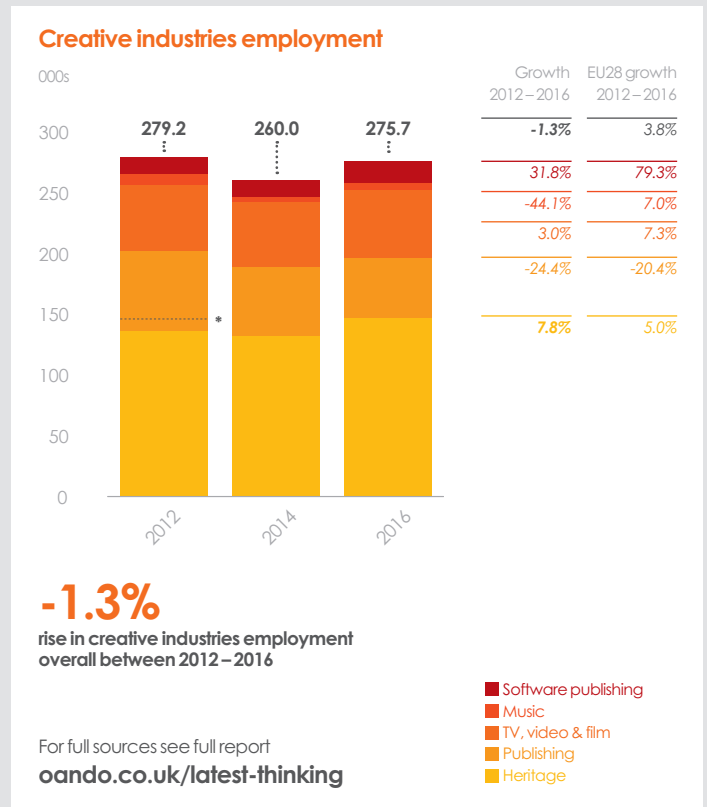
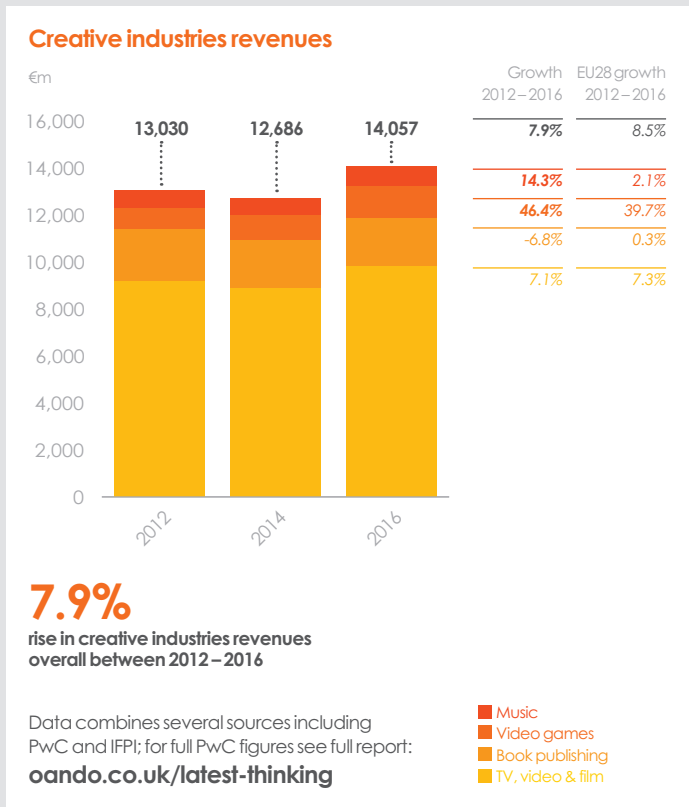


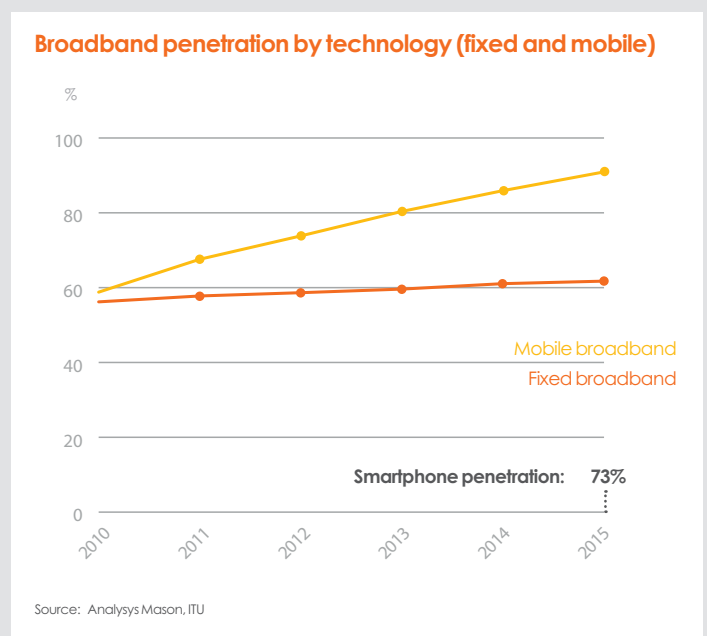
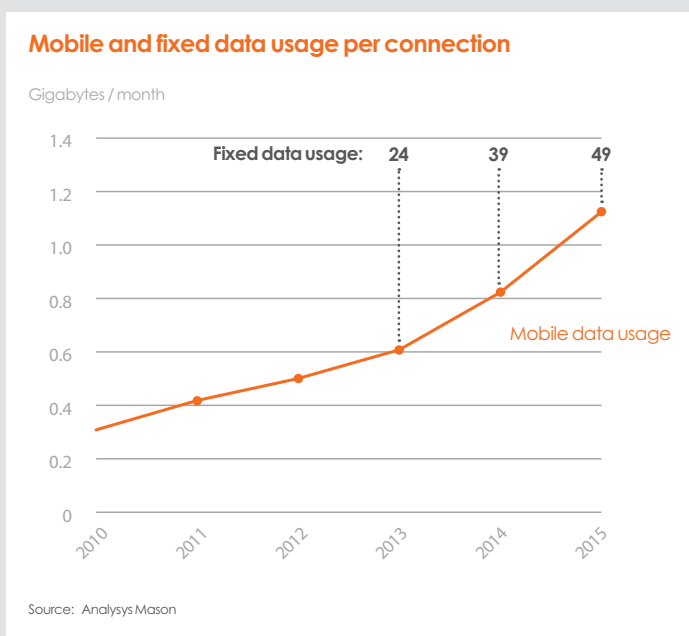
# The impact of the internet and digitalization on creative industries in Italy



## Increased creative industries revenues and employment



## Increased access to creative content

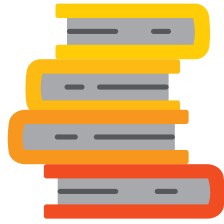


Publishing includes books and news, software publishing includes video games publishing, music includes radio. In 2013 it is possible to estimate book publishing and video games publishing (in 2013 video games publishing was <1,000). \*Of which book publishing.

## Reduced production and distribution costs

### Technological efficiencies have reduced distribution costs

Arianna+ is an integrated system for wholesalers and booksellers to streamline ordering – it is used by all major publishing groups and over 900 libraries



### Digital distribution has almost zero marginal cost

eBooks are discounted by an average of 40 percent – this is high compared to other European markets, and shows that lower costs allow retailers to pass on savings to consumers while still making a profit



## Benefits to consumers

### Digital enables consumers to engage with creative content across media and devices

The Karaoke One app allows users to share their performances on social media, and in 2016 the company collaborated with the X Factor



### A wider variety of services provides greater choice

The number of available nationwide channels increased from 120 in 2003 to 369 in 2013



### Digital technology democratizes content

Italy is at the forefront of heritage digitalization, and the national aggregators, *Internet Culturale* and *CulturalItalia* collect metadata, preserving cultural artefacts in digital form



## Benefits to producers

### Digital technology helps producers to monetize their work

Fanfiction website Fairbooks enables amateur authors to create new works based on existing fictional worlds, and shares royalties with the original authors



Sounday enables musicians to monitor and monetize the usage of their work. Founded in 2009, it currently has 1.5m users

### Creators are free from the traditional value chain and can reach consumers directly

More people can bypass the traditional publishing route – in 2015 41 percent of published eBooks were self-published, compared to just 1.2 percent in 2010



### Digital technology enables producers to reach a wider audience

GamePix helps games designers to convert their work to HTML5. 100m users play the games it distributes worldwide

