



Editoria Digitale Tolino nelle Librerie Indipendenti

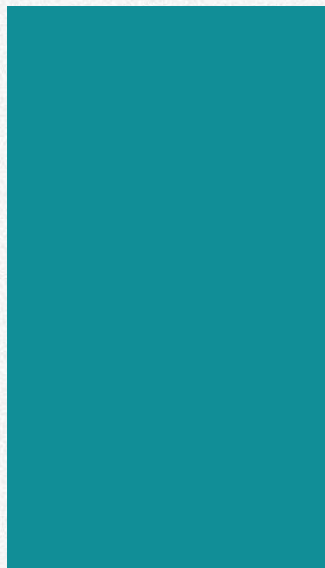
**Scuola per Librai Umberto e Elisabetta Mauri 2015
Fondazione Giorgio Cini
Isola di San Giorgio Maggiore
Venezia
29 gennaio 2015**

**Vincenzo Russi
Chief Digital Officer
Messaggerie Italiane SpA**

CONTENUTI

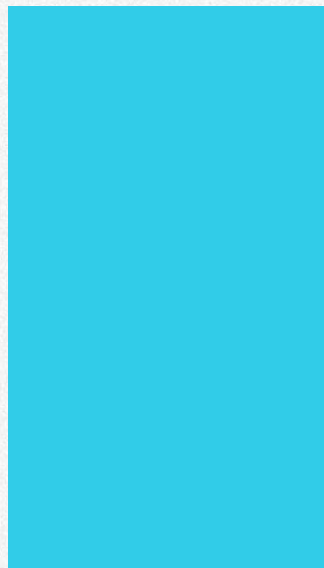
01

Editoria
Digitale



02

Smart Data
non Big Data



03

Linee Guida
per la Libreria



04

Il Progetto
Tolino



Nuove Forme di Intrattenimento si Confermano



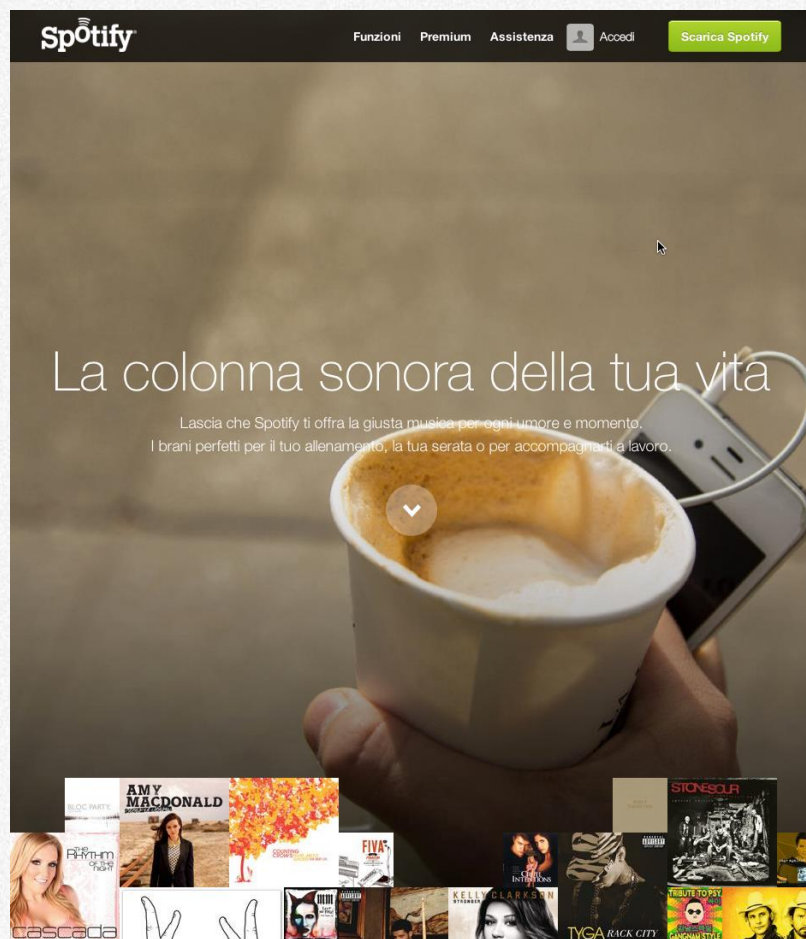
Video Audio Images Places

News

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Stories

Dal Contenuto al Servizio



APRE LA PIÙ GRANDE EDICOLA ITALIANA ONLINE

OLTRE 60 TESTATE TRA QUOTIDIANI E PERIODICI
IN UN UNICO SITO.

Ampia selezione dei migliori quotidiani e riviste, disponibili su pc e tablet

Gratis per 7 giorni il tuo quotidiano preferito

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accessi illimitati a riviste mensili a **9,99 €** al mese
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GAZZETTINO EDITORE	GRUPPO EDITORIALE	T3 Gruppo Editoriale L'Espresso T3	LA STAMPA	MONDADORI	RCS
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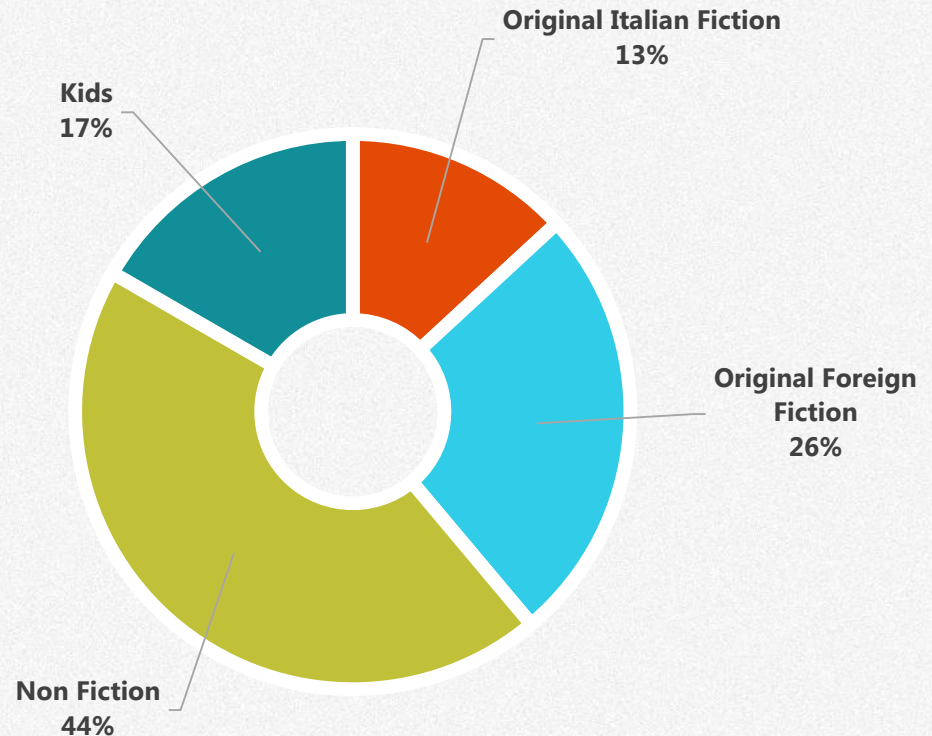


fare shopping

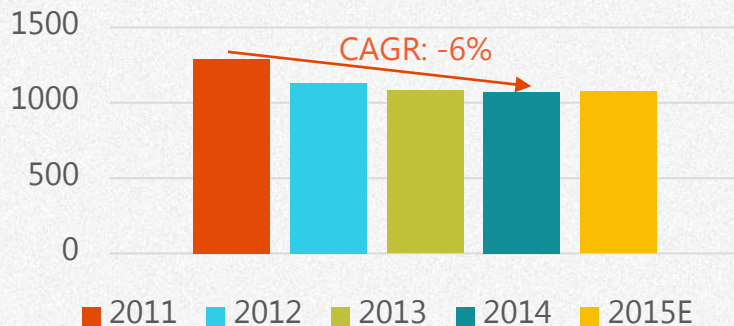


2014 Trade Print Book Market (Italian language)

- € 1.1 Bn sales
- 87 millions books sold
- Avg. price €12



Trade Print Book Market Trends
2011 – 2015° (€ mln)



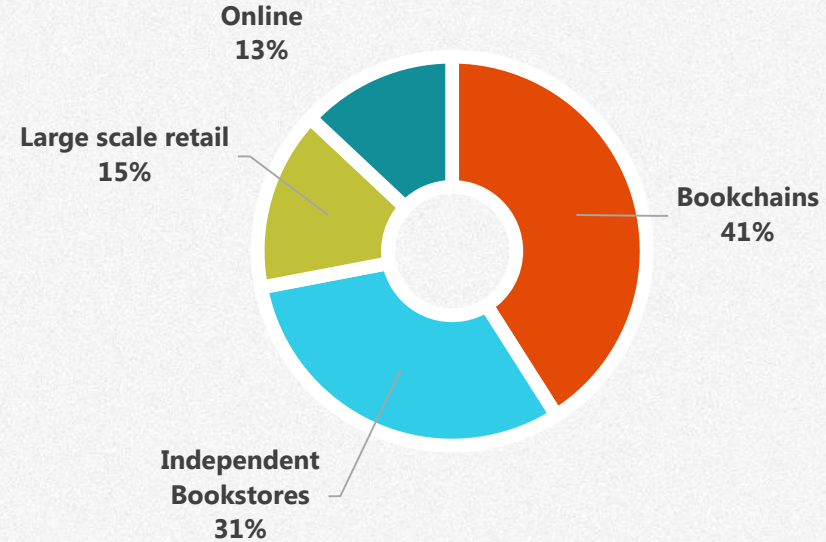
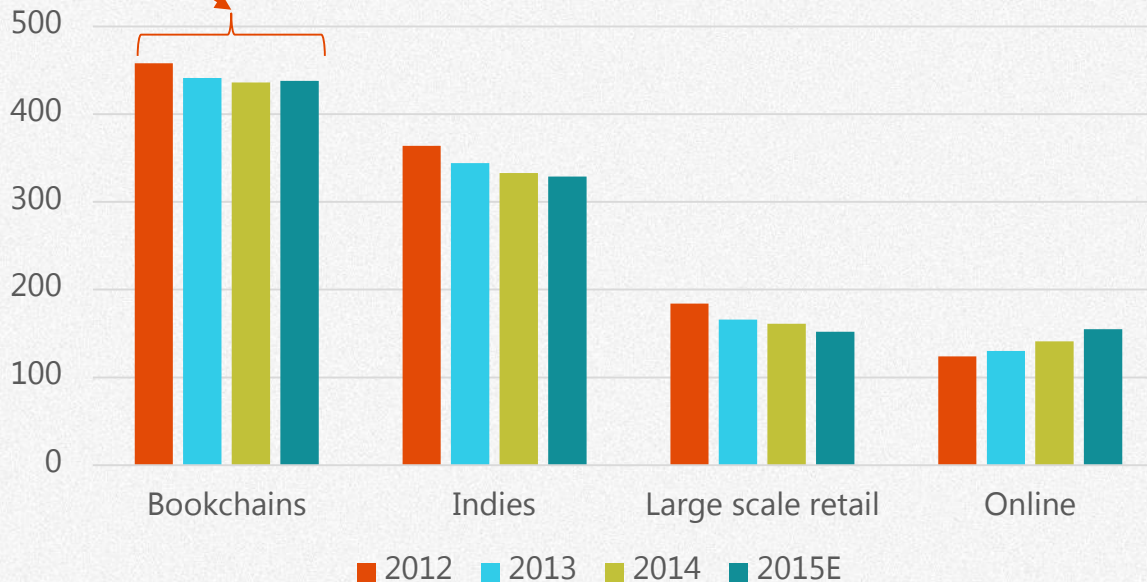
Outlook 2015

Market size poised to be
same as 2014 ($\pm 1.5\%$)

Retail Channels Breakdown and Trends

Owned by major publishing groups such as: Feltrinelli, Mondadori, Giunti, Messaggerie

Print book sales trends
2012-2015 (€ mln)



87% of total 2014 sales (value) are made offline

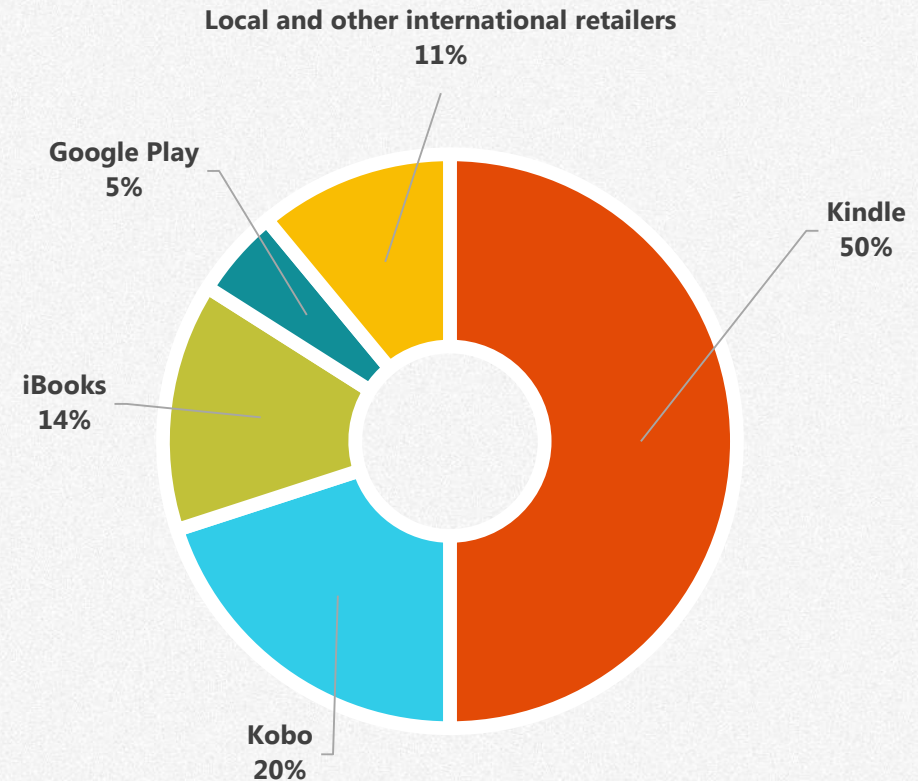
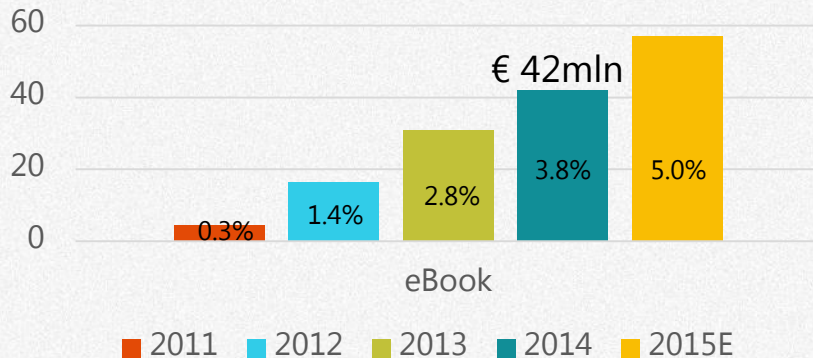
Online is the only growing channel: 8% yoy in 2014

2015: Online will overtake Large scale retail with sales of €150+ mln.

2014 eBook sales estimates

- €39-44 mln sales
- ~ 7 millions ebooks sold
- Avg. price ~€6
- Mostly fiction: romance and mystery/crimes above all

Digital book sales trends
2011-2015 (€ mln)



Mainly thanks to pivotal partnerships with leading bookchains: Mondadori, Feltrinelli

Outlook 2015

ebook market poised to grow by 30%-40% and to reach 5% of total book market (p+e)

2014 Online Sales (p + e)

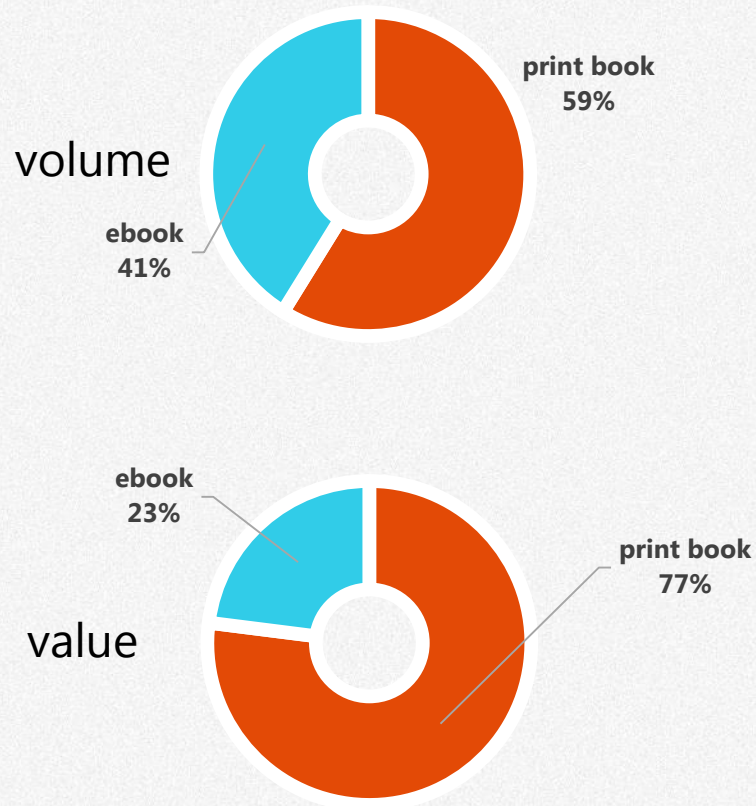
~ €180 mln sales

~ 17 millions p+e books sold

~ 16% of total book market value

~ 18% of total book market volume

only 5% of adult population buying books online (including non-trade books)



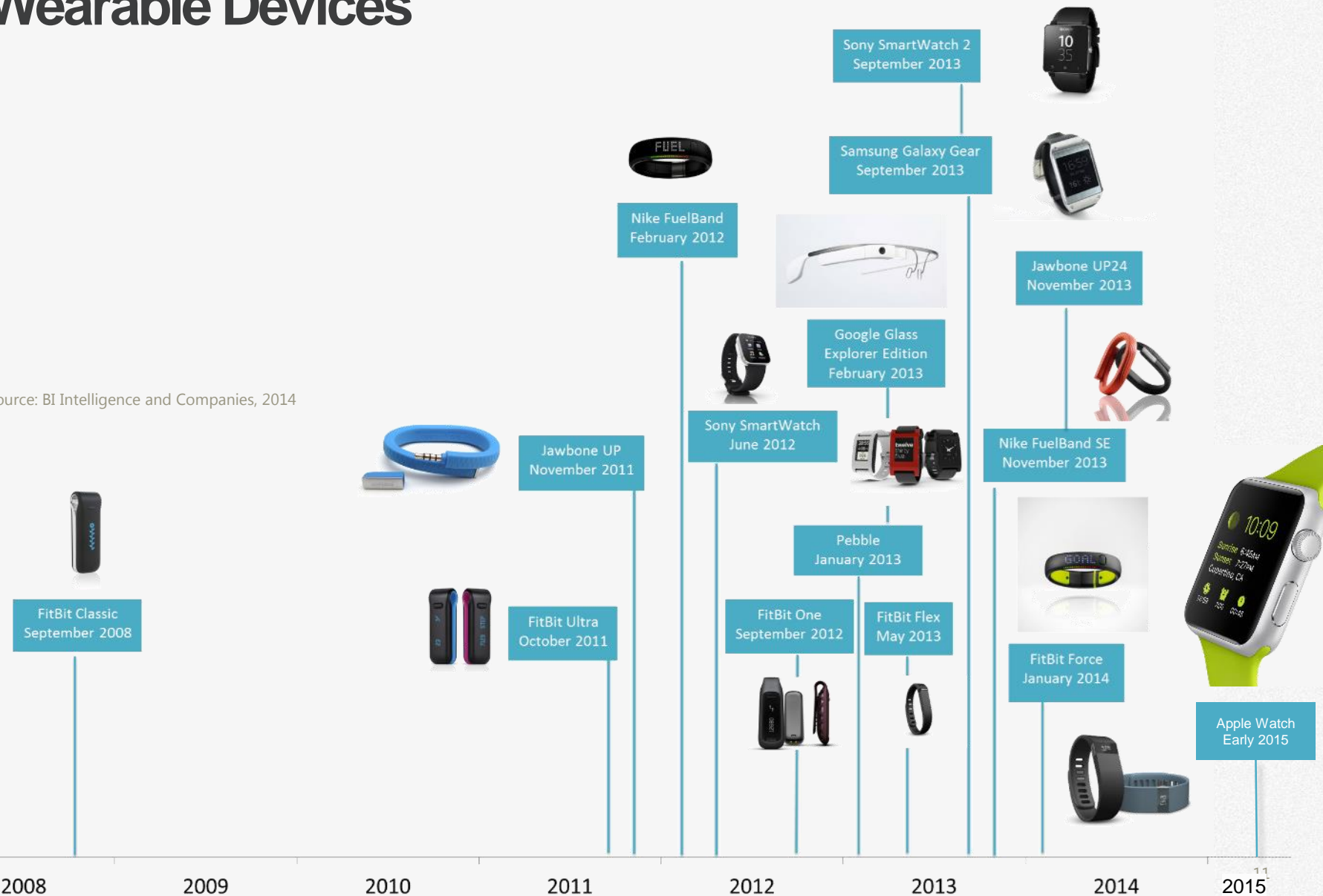
Outlook 2016

ebooks to surpass pbooks
(online volume sales)

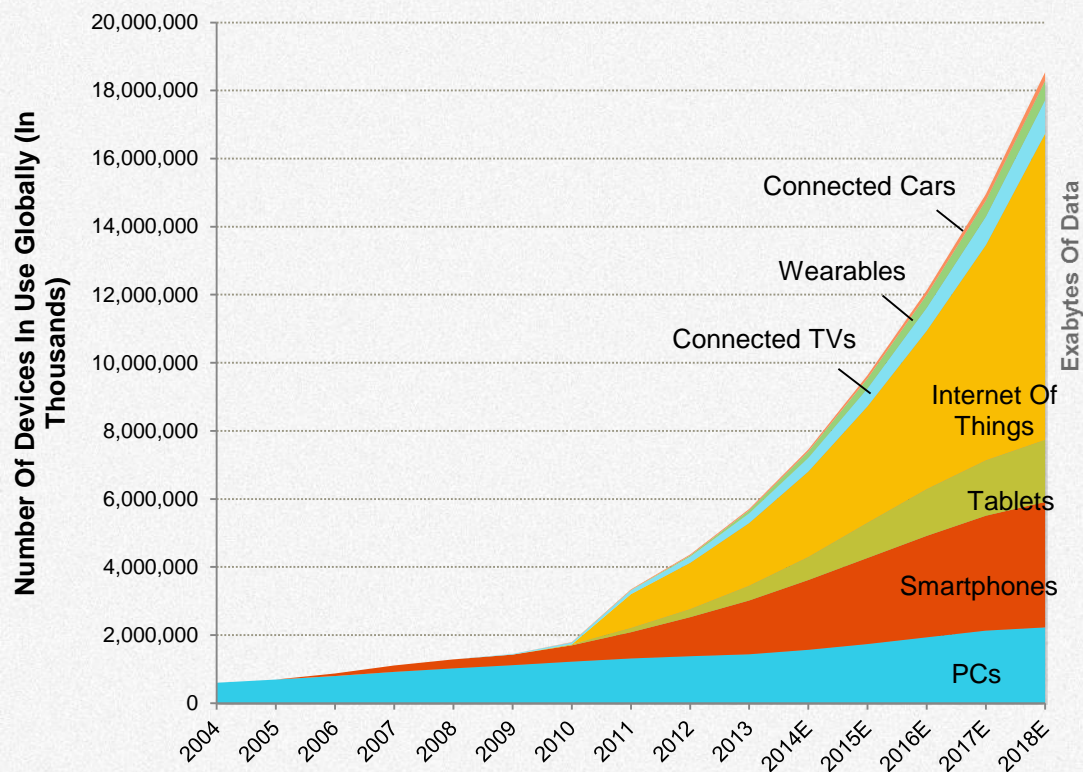
p+e online 20%-25% of total
market value

Wearable Devices

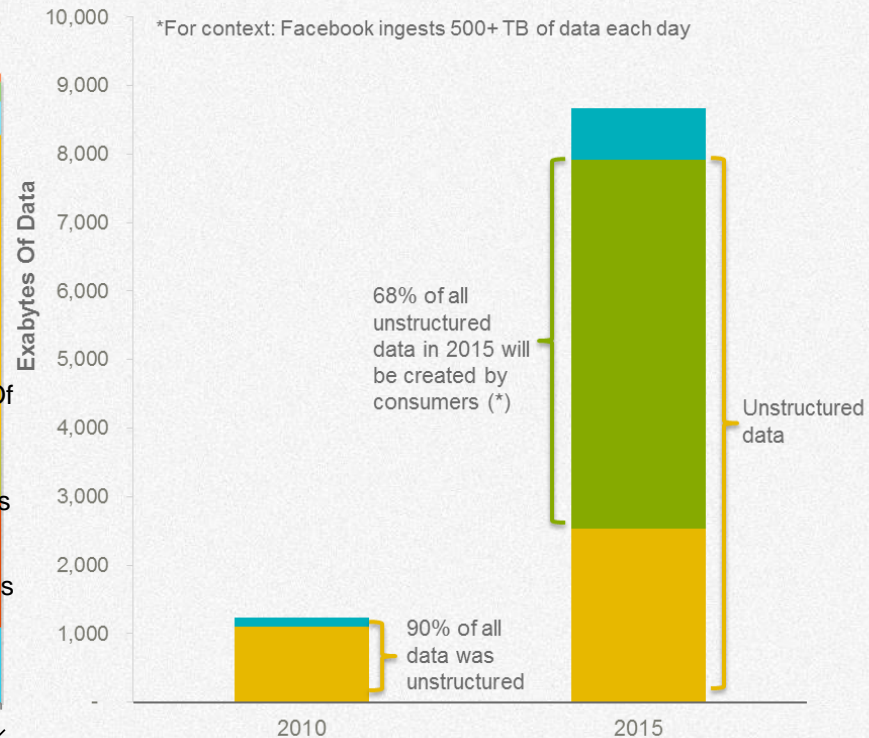
Source: BI Intelligence and Companies, 2014



The Digital World and Data «Caos»

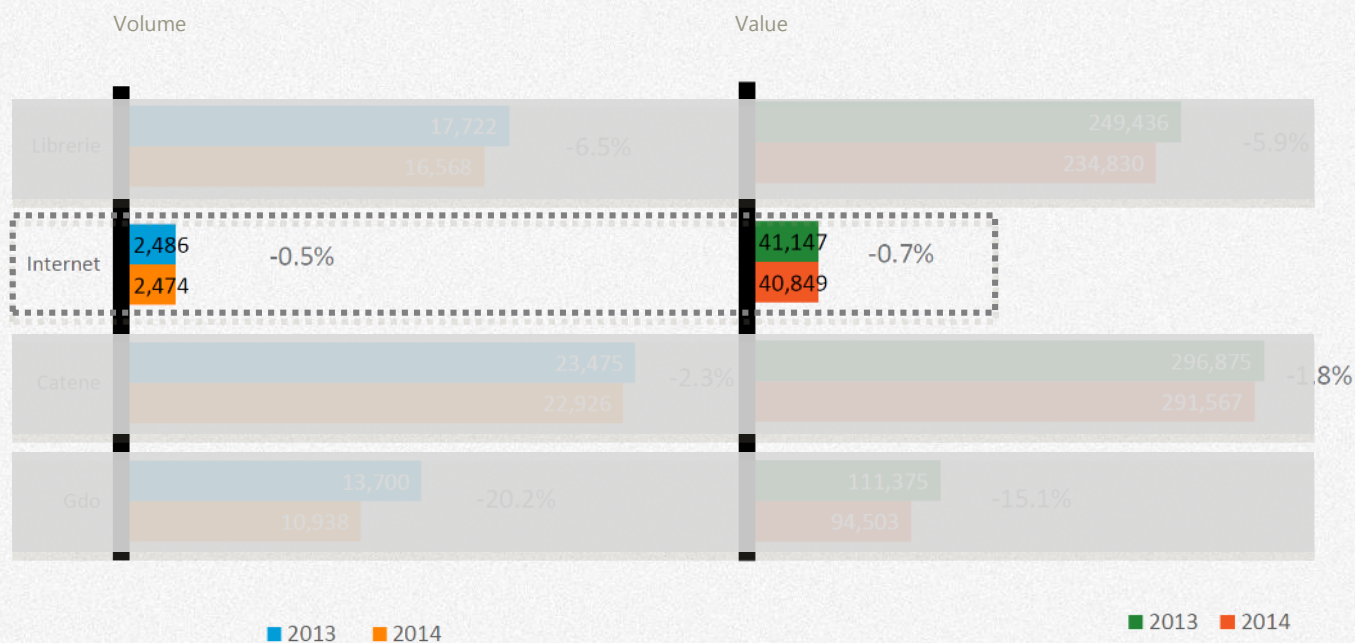
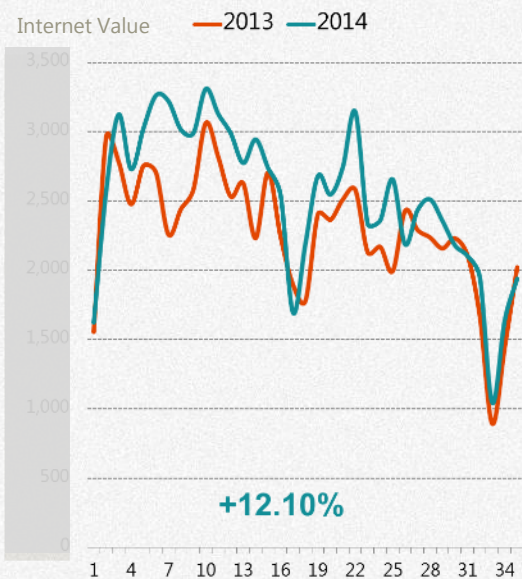


Source: BI Intelligence, 2014



Source: IDC, BI Intelligence Estimates

Market Analysis



Sources: Market Analysts

Decisioni Data Driven

Emerging Actors



New Publishing Models



Stakeholders and Market

Authors and Readers

**Publishers, Distributors,
Wholesalers, OnLine and Offline
Retailers, Agencies**

Price, margin and profit turbulence

Digital and Physical opportunity

Velocità ed Iterazione: Project Spiral Approach

Characteristics

Stage-based

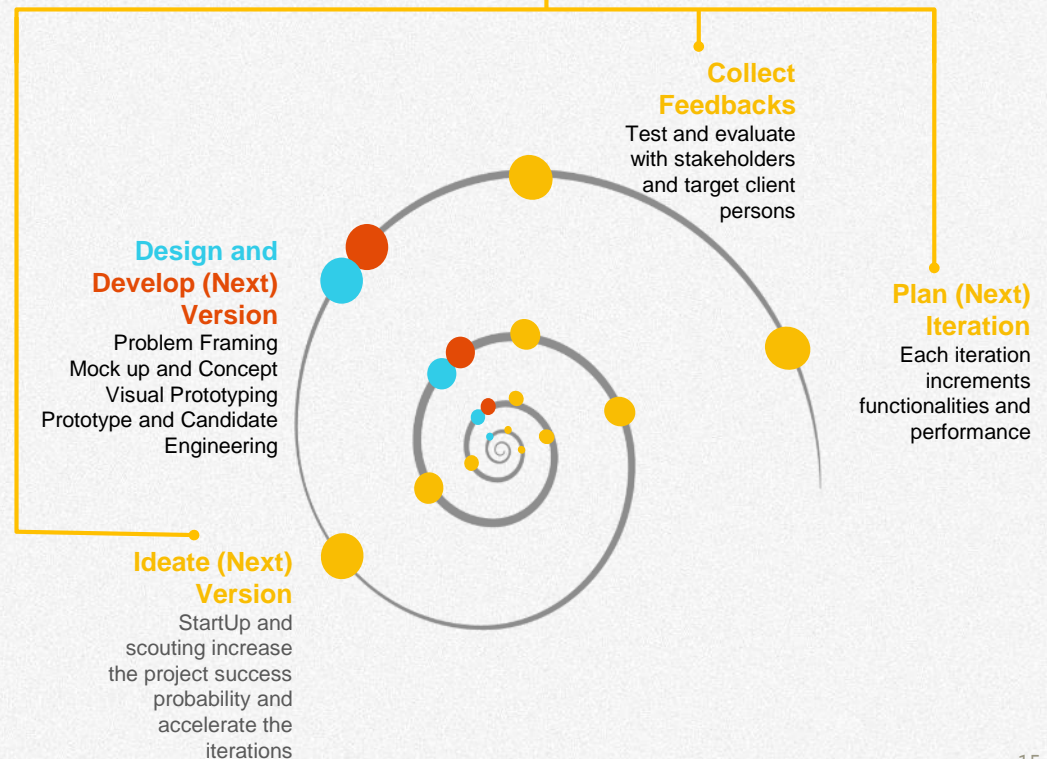
Agile project management

Flexibility, Resiliency and
Responsiveness

Quick release of incremental
deliverables and integration of
client feedbacks towards the
next version

Tested method for innovative
projects

*Design
Sources*
*Engineering
Sources*
*NewTeam
Sources*



Source: Vincenzo Russi

Confronti degli Approcci

Key Figures

3 months project duration as planned

12 companies involved

Circa 20 stakeholders involved in not invasive meeting and interviews

Circa 30 operating professionals involved in definite data collection and ingestion

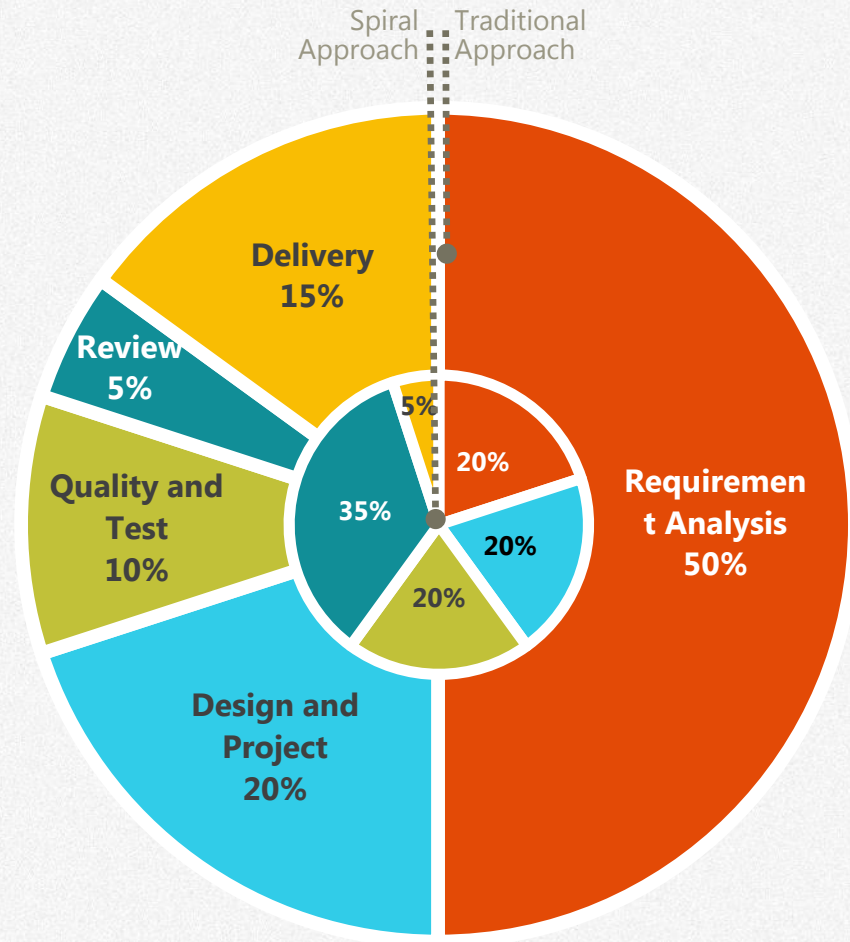
Project leader team: group objectives, data, technology

6 technology and process consultants

25% cost less than the forecasted budget

Board and Shareholders support and contribution

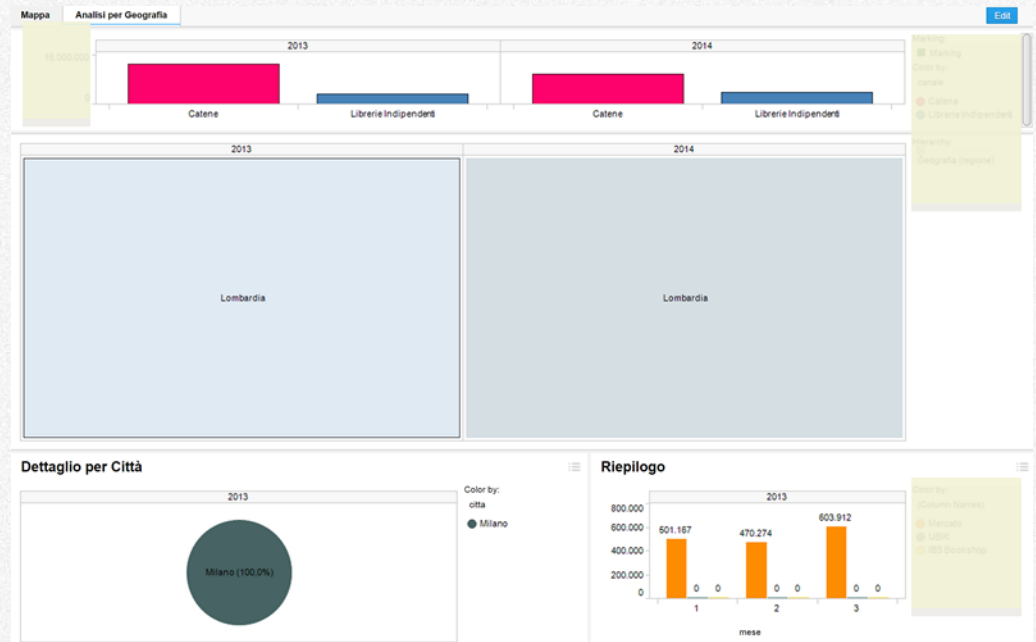
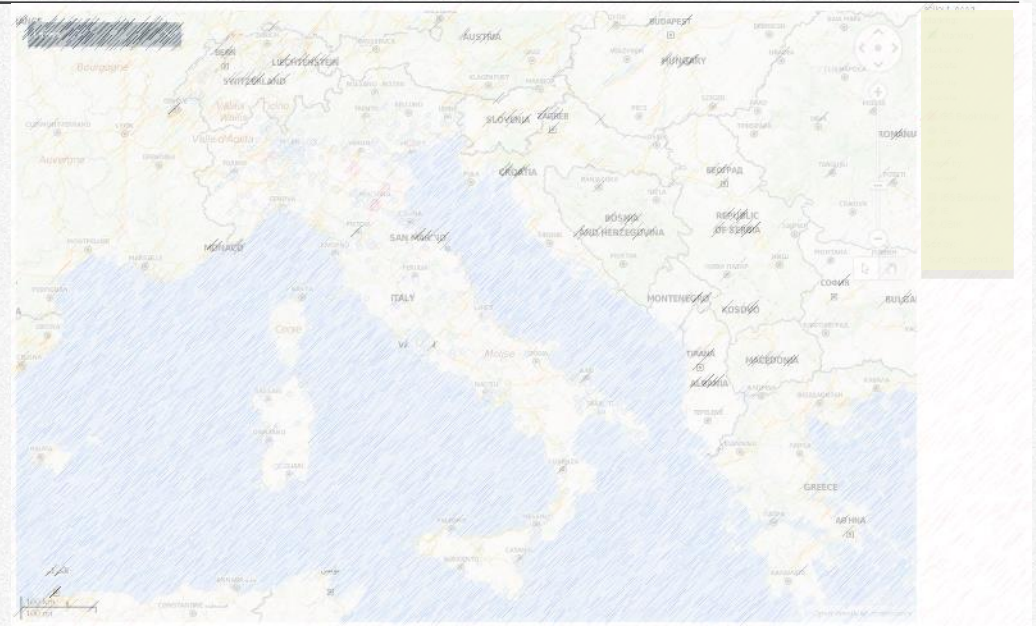
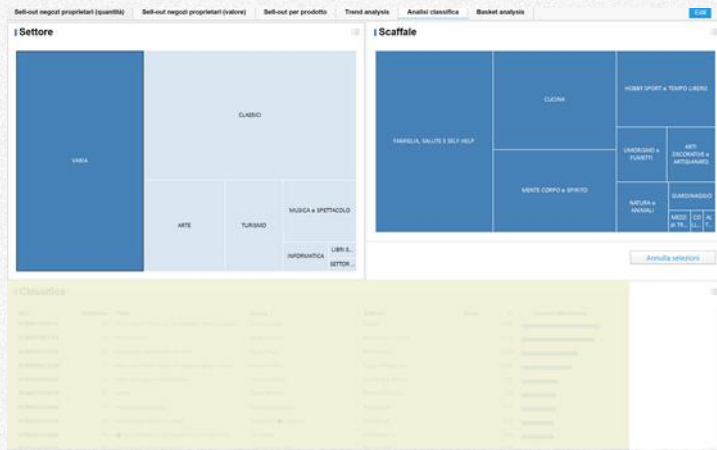
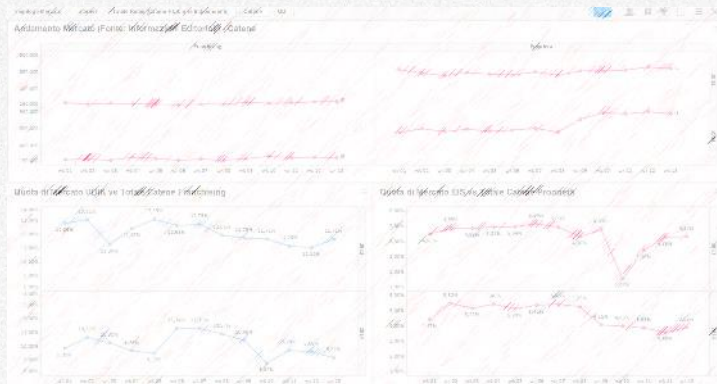
Over expectation deliverables, performances and functionalities



Phases general cost in percentage of the total cost

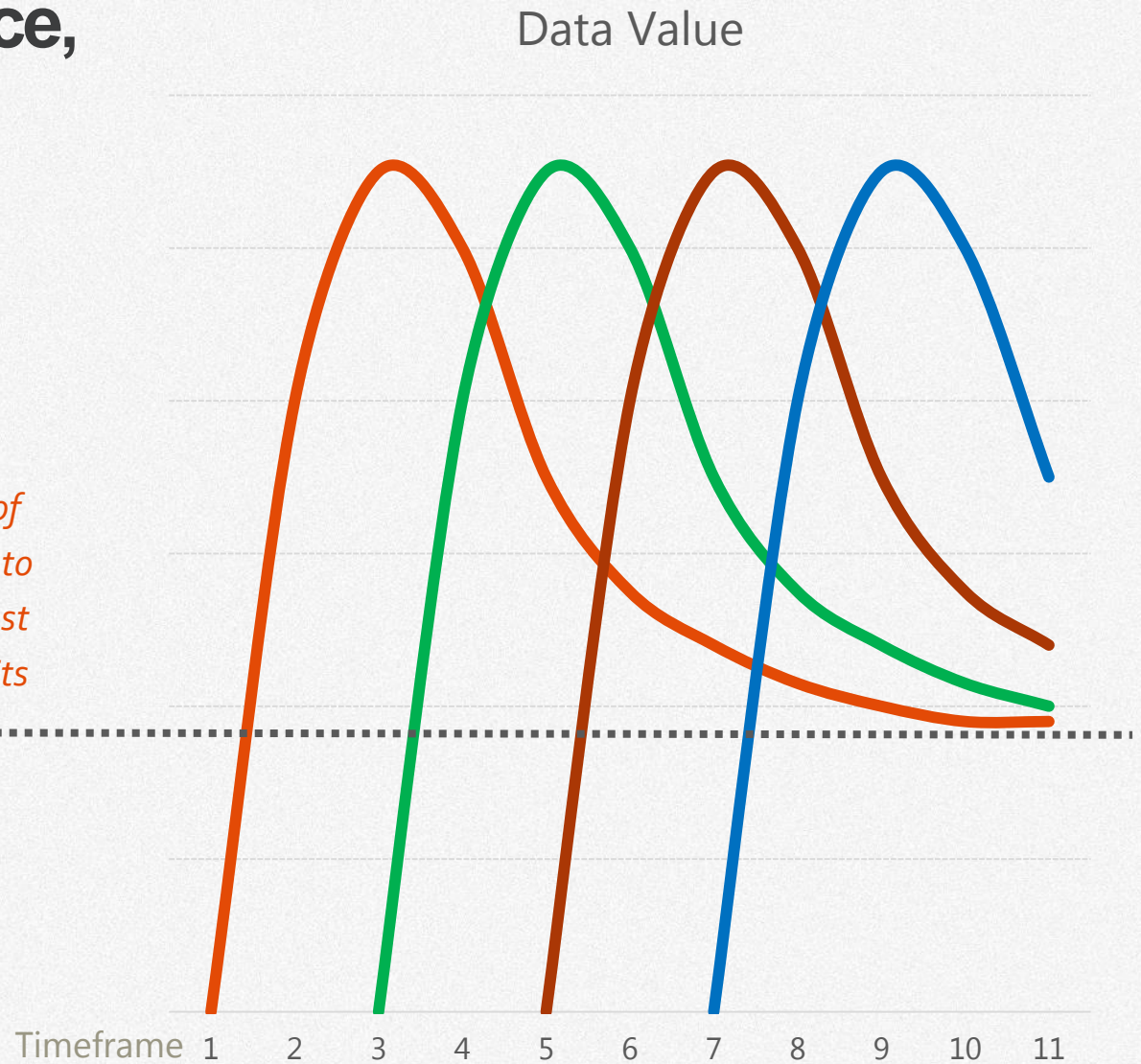
Pie charts areas are proportional to project costs

Distribution of Data



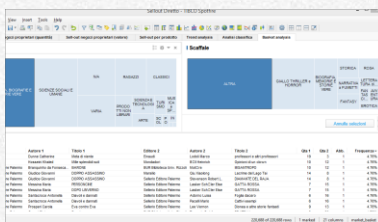
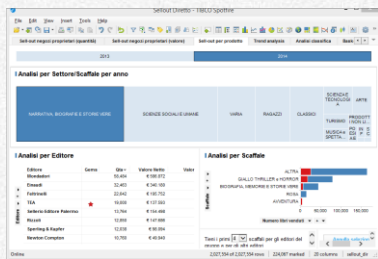
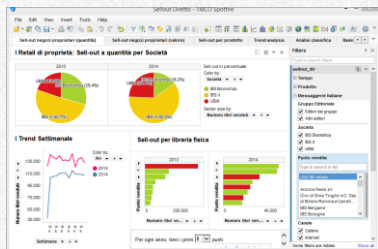
Data Obsolescence, Resilience, Relevance

An integrated data storage of multiple data streams helps to protect the data value against obsolescence, by extending its life and relevance.



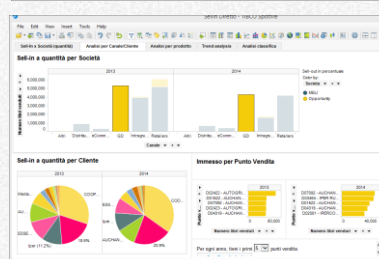
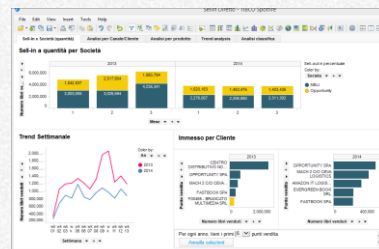
Emerge l'Importante Step by Step (un esempio)

1 Sell-Out



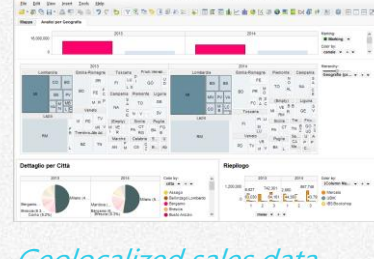
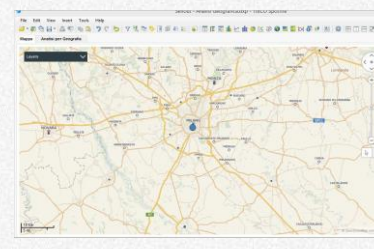
Sales data and market basket
analysis

2 Supply



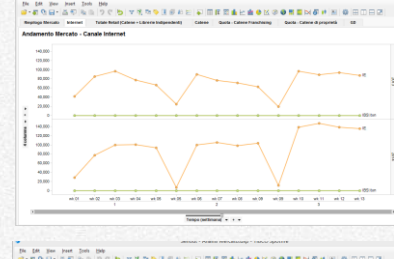
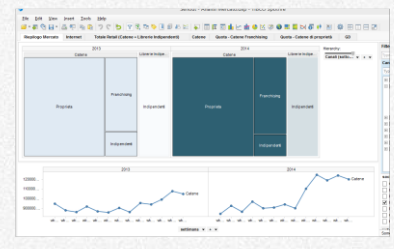
Supply data sell-in

3 Geolocalization



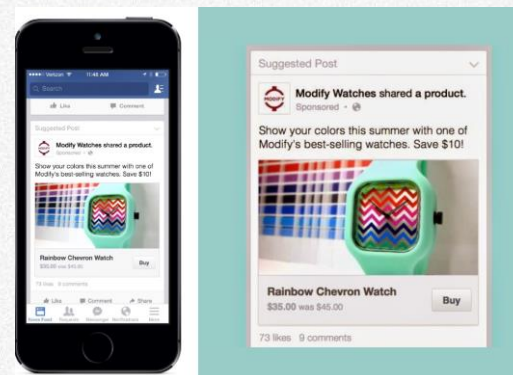
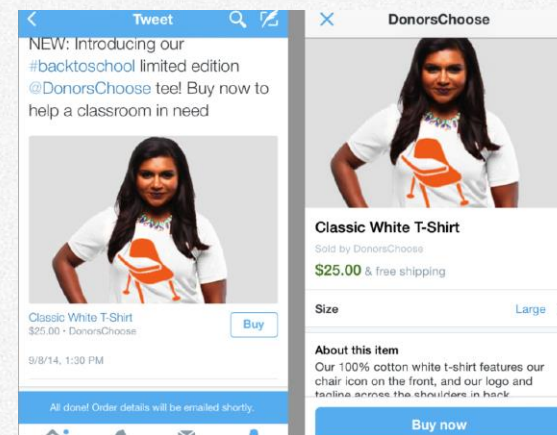
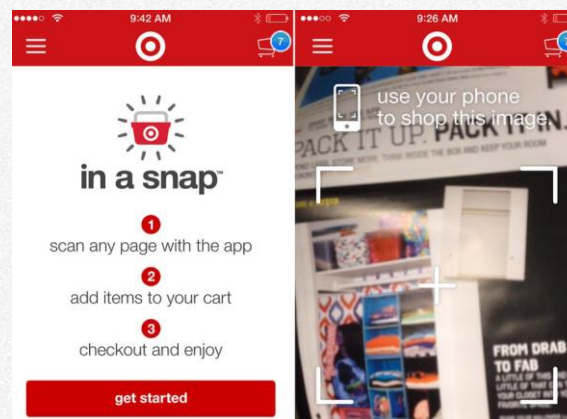
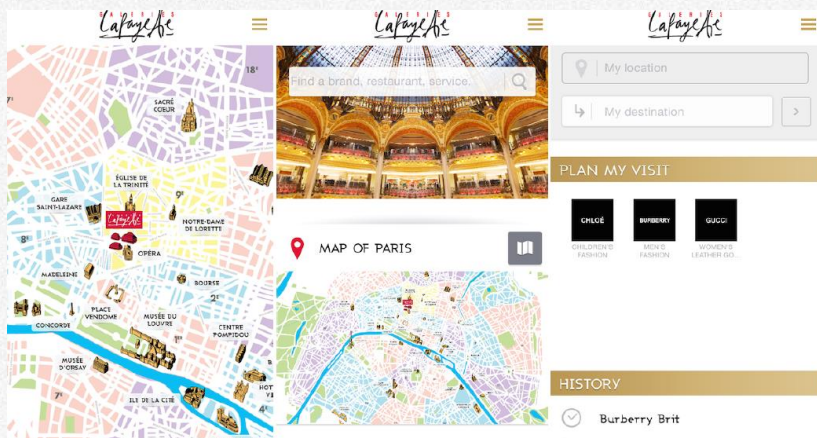
Geolocalized sales data

4 Market Analysis

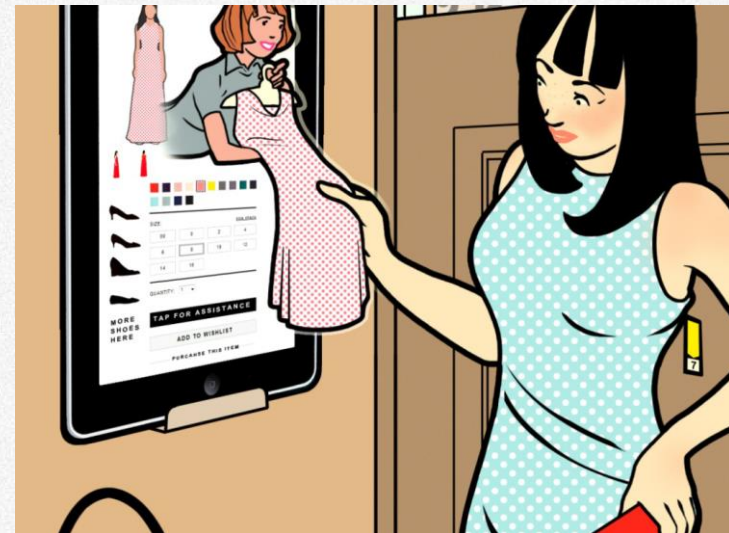


Aggregated sales data by
channel

Acquistare Dove e Come si Vuole One Click



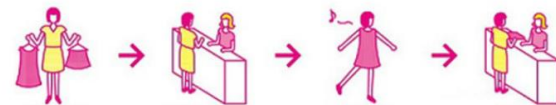
Fornire Strumenti al Personale Digitalizzare il Mondo Reale



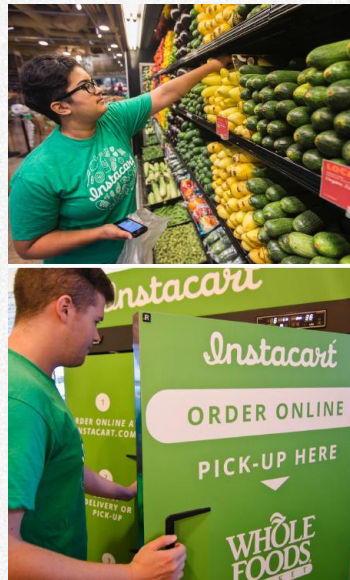
Costruire una Propria Esperienza Essere un Hub



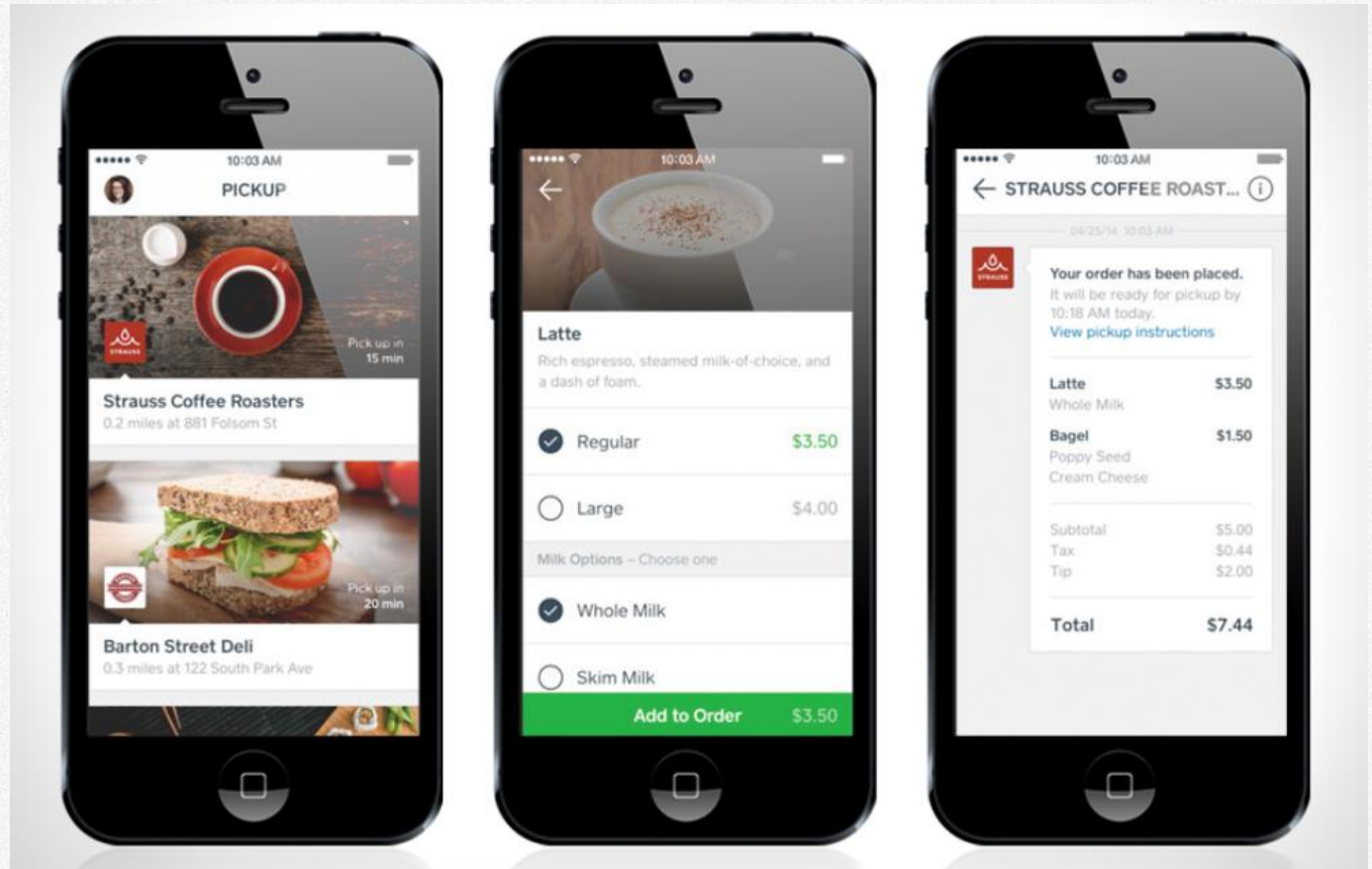
Immaginare l'Ideale Costruire Esperienze



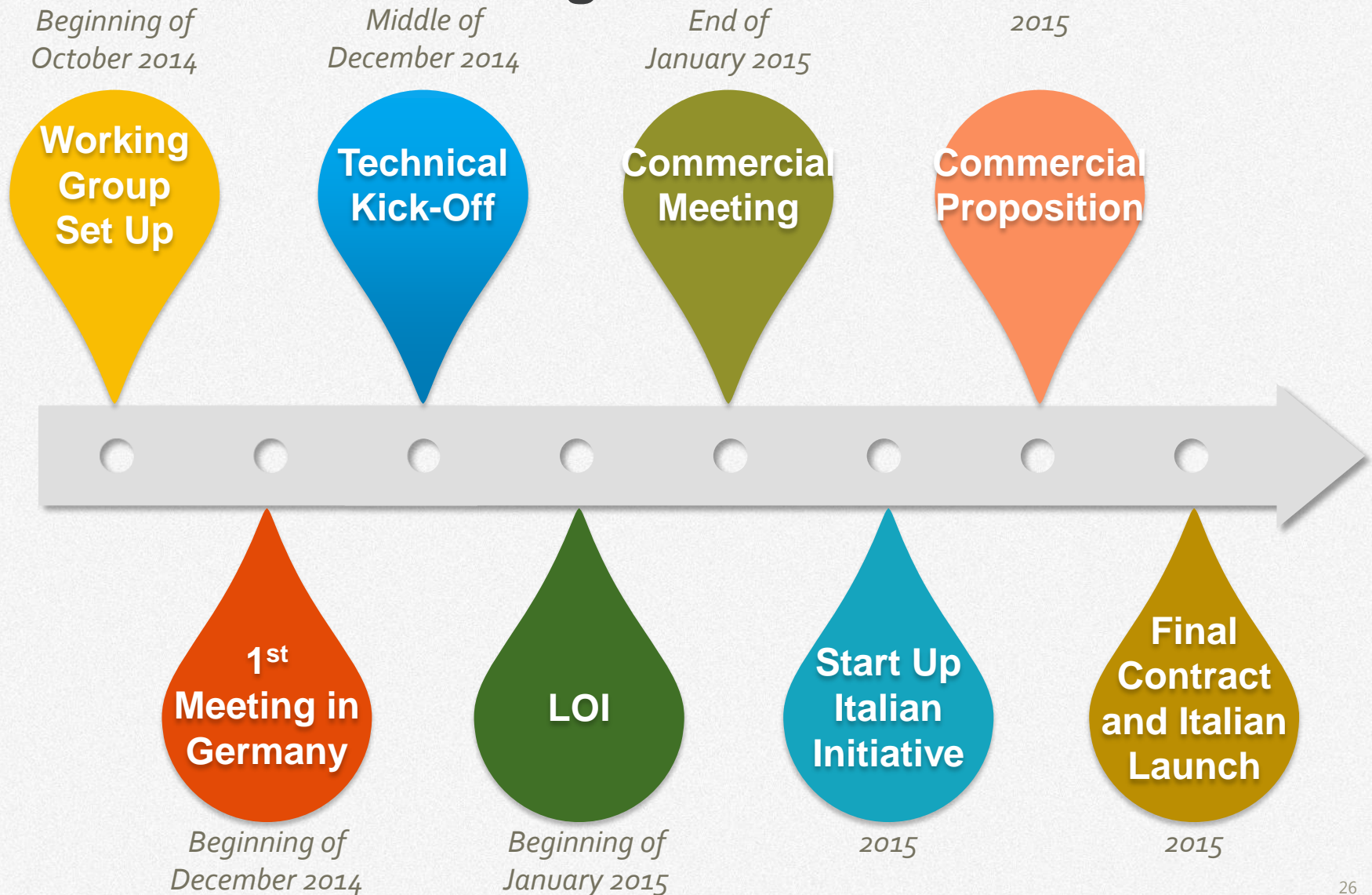
Rendere Immenso Magazzino Zero



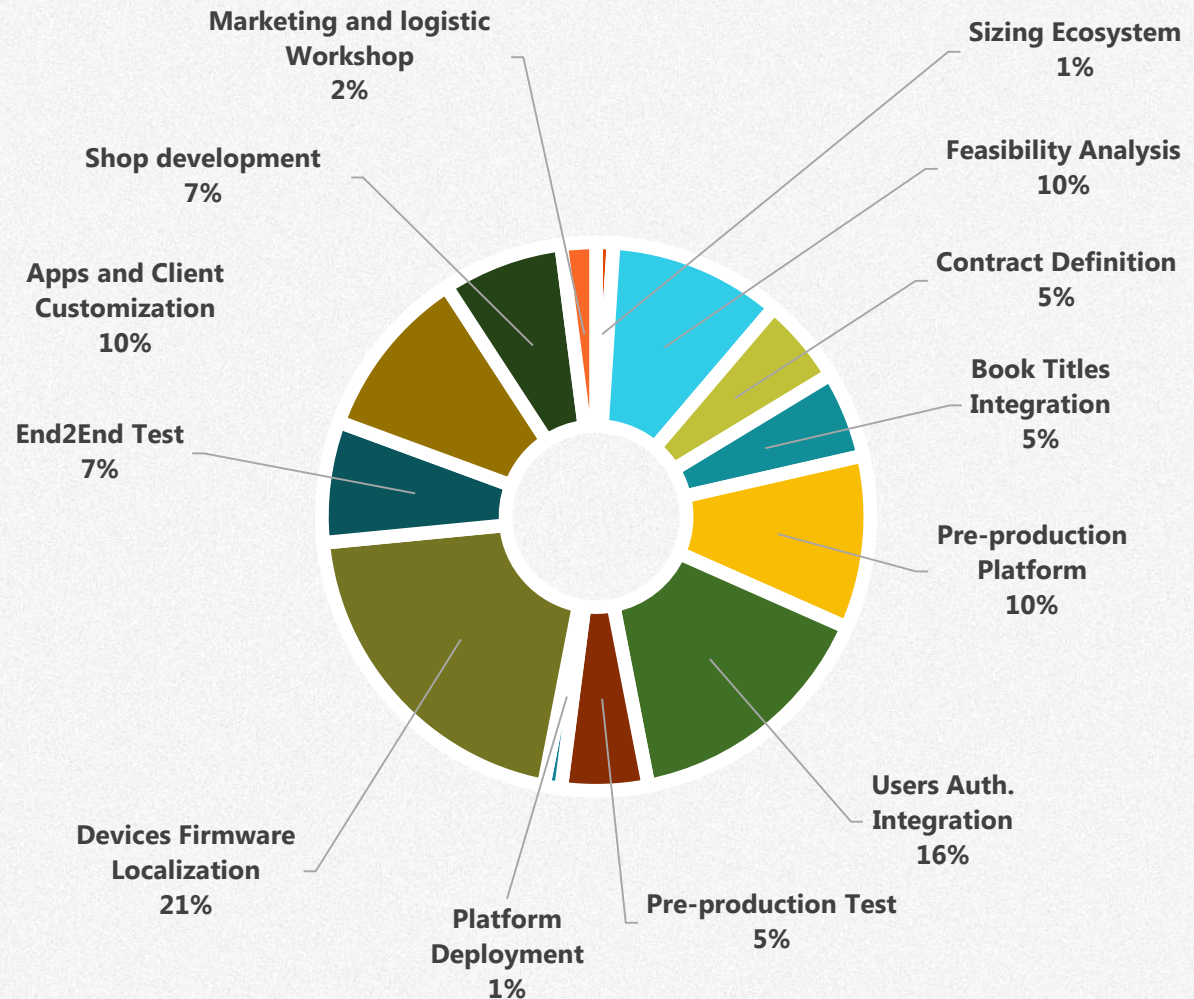
Rimuovere la Cassa



Tolino White Label Program in Italy



Il Programma Italiano Qualitativo e Quantitativo



Sfide ed Opportunità

Opportunity

**Implementation of *real hybrid*
Booksellers**

Innovative digital project

European dimension and perspective

**Collective technology and innovation
from an international player**

Joint best practices

Business and data intelligence

Reading analytics

Pioneering business models

Challenges

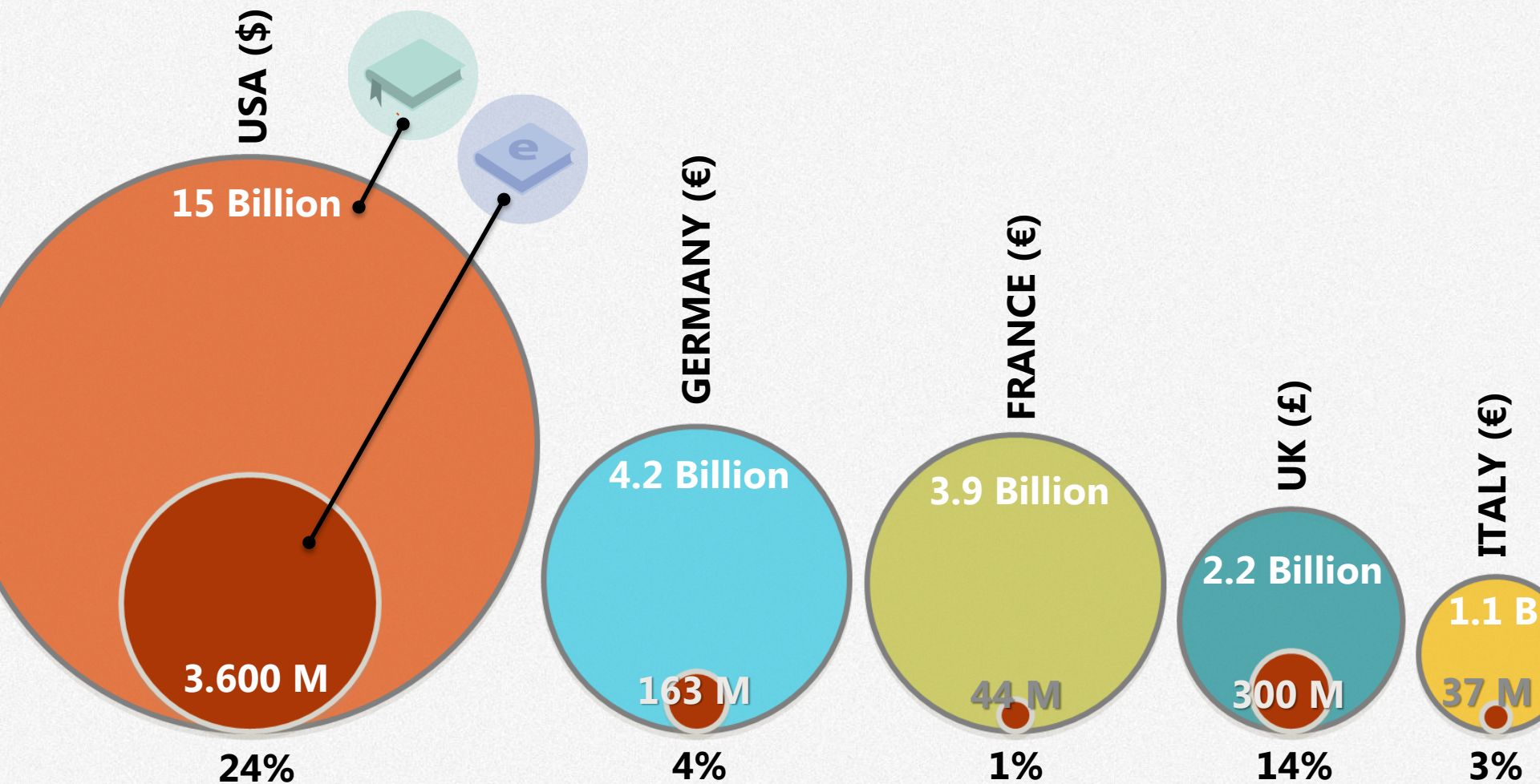
**Extensive roles for
Booksellers**

Ecommerce knowledge

Hybrid experience

**Hardware and software
local management**

Book and Digital Book Market 2013



Book and Digital Book Market: an European Perspective

