World Association of Newspapers and News Publishers

WORLD PRESS TRENDS

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Italy

01. Commentary

General economic situation

On an annual basis, GDP rose by 1.3% overall in 2010 following the sharp contraction of 5.2% in 2009. Exports provided the main impulse to growth, while housholds are still spending cautiously as a result of the shrinkage in real disposable income and the poor job market. Daily newspapers, which are particularly sensitive to the economic cycle, suffered a drop in circulation (-4.3%) and in advertising revenues (-3%).

Thanks to restructuring and reorganization plan for the purpose of keeping costs under control and making the publishing companies more profitable, in 2010 Ebitda showed a considerable improvement (from – 30.7 million euros in 2009 to +118 million euros in 2010). Notwithstanding some improvement in financial conditions, the newspaper companies as a whole has not yet turned the corner. In 2010, they recorded revenues of 2.915 billion euros (down -1.2% on 2009), while production costs decreased by 6.1%. The lower sales of add-on products (-30%) greatly weighed upon the final results.

Performance of newspapers vs. other media

See under paragraph “Performance of newspapers vs. other media”

Performance of different types of newspapers

There are about 100 daily newspapers in Italy. A handful of dailies have a national circulation topping 300,000 copies or more. The major part of dailies are local or regional which, however, have showed a better capacity to face the current recession.They seem to be somewhat insulated against the problems several of the largest newspapers in the country are struggling to deal with. The rootedness of local community titles in their circulation areas is one of the main factors making them less vulnerable to the economic downturn and the crisis that other printed media face. In other words, local dailies fill a niche in the community and they remain an important way for people to be informed about the events of their hometowns or regions. In 2006-2010 period, while revenues of national newspapers dropped by about 22.2%, revenues of local and regional dailies fell by 9.3%. The rate of decline slowed in 2010 compared to 2009. Publishing companies eked out earnings by cutting stuff, raising selling prices, reducing circulation costs, and carrying out other strategies of cost control.

Free dailies on the whole suffered steeper declines in their practically unique source of revenues: advertising fell by 10.9% in 2010 and in the first four months of 2011 the drop grew up to 24%.

Newspaper launches / closures

In January 2011, the Court of Cagliari passed an adjudication in bankruptcy for the company publishing E-Polis, the daily newspaper marked out by the free-pay formula. E-Polis had 20 local editions distributed for free, although the official cover price was 0.50 euros.

Advertising

Advertising is the activity with the greatest problems, since it is linked to the economic cycle.In 2010, the ad market has shown a moderately positive increase compared to 2009 (+3.8%). In fact, it was a modest recovery on the 15.2% contraction reflected in 2008-2009 period. In the first four months of 2011, vis à vis the same period of 2010, the trend changed and the ad market went back again (-2.6%). As regards every single medium, in 2010 TV stations (+6.0%), radio (+7.7%), direct mail (+10.3%) and above alla the Internet (+20.1%) recorded the best performances. In the first four months of 2011, TV stations (-1.8%), radio (-7.2%) and direct mail (-4.4%) suffered a turnabout, while the Internet seems to be a cut above (+17.6%).

The publishing sector suffered a decline in 2010 (-2.7%) as regards both daily newspapers (-3.0%) and periodicals (-2.1%). Decline in daily newspaper ad revenues

was mainly due to the negative performance of local and classified advertising (-5.7%) as a consequence of the persistent economic difficulties that have affected the world of small business, while national advertising held the values of the previous year (-0.2%). In the first four months of 2011, newspaper ad revenues still declined (-4.9%) and the drop has affected both national (-5.5%) and classified and local advertising (-4.7%).

Circulation

As for circulation, the overall framework is still critical. In 2010, newspaper sales reported a 4.3% drop year-on-year and the downward trend did not change in the first four months of 2011 with the sales still decreasing by 2.4% compared with the same period of 2010. In 2010, national (-5%), economic (-11%) and sport (-8%) dailies suffered the steeper declines. Local and regional dailies experienced slighter declines (-3%).

Subscriptions are still very low. They represent nearly 9% of total print and 6.3% of single-copy sales. The suppression in 2010 of subsidies to cover 50% reduction of postal tariff for dispatching newspapers and periodicals will heavily affect subscriptions in the future.

Readership

Even though circulation is declining, readership of daily newspapers has managed to hold high levels. The last survey of Audipress certifies in the third cycle of 2010 24.072 million of adult readers aged 14 years and over in an average day. This means a very slight decrease (-0.3%) on the second cycle of the same year, but a large increase (+3.4%) compared to the last survey of 2008.

Online / Digital

See under paragraph “Performance of newspapers vs. other media”

Media / Press Laws

In 2011, the law-decree n.27 of 26 March has postponed to the end of December 2012 the application of the rule limiting cross-ownership of national Tv stations and daily newspapers. Up to that date, national Tv stations cannot buy or control publishing newspaper companies, except for those publishing only online.

Copyright

On 26 August 2010, the Italian Antitrust Authority decided to open an investigation based on a complaint from the Federation of Italian Newspaper Publishers (FIEG) against Google for possible abuse of dominant position. FIEG took these steps because of the current position that Google has on the media market especially as regards advertising, and which would therefore be detrimental to newspaper activities and competition in this area. The investigation ended on January 2011 and the Authority accepted (and made binding) the commitments proposed by Google to let publishers to gain more control over their own contents in the Google News service and more transparency and verifiability in the economic terms and conditions imposed by website companies that use Google's advertising intermediation services. The following commitments were proposed by Google and made binding by Antitrust Authority resolution:

1) Google ensures the provision of separate Google News software that allows publishers to choose the journalistic contents to propose through Google News without jeopardizing the indexing in the Google Web Search engine. More specifically, publishers can decide whether or not to provide Google News with access to their own sites, to selectivity exclude specific articles or images and to display artcle titles without any text excerpts.

2) The AdSense program, which is the advertising solicitation platform used by Google to help connect advertisers and publishers, shall be managed transparently. In practice, publishers publish the advertising announcements of AdWords advertisers on their own websites and profit from every click on the advertising links that are displayed. The mechanism that instigated the Antitrust Authority investigation, however, found Google Ireland calculating compensation entirely at its own discretion, at times, without acknowledging any obligation to explain how the shares were being calculated. They also reserved the right to change the price and payment structure at any time at their own exclusive discretion. The commitments being adopted will instead make the parceling of proceeds from advertising sales transparent to the publishers themselves. This makes it possible for publishing companies to check the economic terms and conditions that determine the amount of their due compensation. In the future, publishers will have to be notified of prospective modifications before their implementation. Lastly, the full prohibition on third-party access to user click counts for specific advertisments has been lifted on the condition that the access technologies are compatible with technical procedures and conditions as announced by Google.

The Antitrust Authority, which found the proposed measures sufficient to ammeliorate the competition-related concerns linked to Google's behaviour, also submitted a report to Government and Parliament requesting a review of copyright laws in light of web-based technological and economic innovations. According to the Authority's view, antitrust inquiries are insufficient to untangle the due compensation knot for businesses that produce the published online content used by other parties for the sake of gain. A national law would be needed to define a system of intellectual property rights that could promote virtuous forms of cooperation between holders of exclusive rights to published contents and the providers of innovative Internet services that reproduce and adapt the contents protected by such rights. The Authority has also highlighted that the problem from a pro-competition point of view lies in the objective discrepancy between the value that the published content contributes to the Internet system as a whole and the actual proceeds received by online publishers for their contributions. Given the supra-national dimension of the Internet phenomenon, this is a cause that Italian institutions should be promoting in the appropriate international milieu.

Postal Issues

See under paragraph "Circulation"

State Support

30 million euros have been set aside by art.1, paragraph 40, of the Financial Law n. 220, 13 December 2010, to subsidize purchases of newsprint by newspapers, periodicals and books in 2010. The subsidy takes the form of a

tax credit of 10% and it is granted only for 2010 purchases. To benefit, publishers, included those operating inside the European Union, were required to register their titles with the Register of Communicaion Operators (ROC).

Opportunities

2011 is again disclosing a difficult market situation for the traditional press sector, characterized by stagnation of advertising, and circulation dynamics that are confirming the same slight erosion experienced in recent years, even if mitigated by the good performace of readership that shows the interest in print products is still high. The persistence of a low-growth economy and the scarce visibility over the macro-economic perspectives do not allow foreseeing any market trend that could be notably different from the present one.

In this framework, the publishing companies are going on with the activity aimed at fighting against this unfavorable trend through a series of interventions to be carried out on the traditional products, developing the digital activities and giving a great attention to cost reduction.

So far, no traditional publishing company has come up with a workable strategy for raising sufficient advertising or subscription revenues on the Internet, or through a hybrid print/online model. The problem is that it is very hard to experiment with new business models when the old ones become less viable. But the current situation of the press market, by cutting into newspaper earnings and limiting the amount of resources newspapers have to invest, has compressed the time period for developing new business plans. Probably, newspaper companies will have to insist on finding new sources of revenues such as charging micropayments for select content on the Internet, suggesting revenue-sharing with online search engines, cracking down on unauthorized reproduction of their content and creating their own spin-off websites and web portals.

Sources

FIEG

02. Population

Population by age and sex

Numbers in (000)

	ALL INDIVIDUALS	ALL INDIVIDUALS %	MALE	MALE %	FEMALE	FEMALE %
0-14	8,506	14	4,410	15	4,096	13
15-24	6,037	10	3,060	10	2,976	10
25-34	7,650	13	3,931	13	3,720	12
35-44	9,855	16	5,049	17	4,805	16
45-54	8,705	14	4,344	15	4,362	14
55-64	7,422	12	3,620	12	3,802	12
65 +	12,309	20	5,169	17	7,140	23
Total	**60,484**		**29,583**		**30,901**	

Source:
World Bank

03. Number of titles and circulation

3.a Number of titles

	2006	2007	2008	2009	2010	2010/2006	2010/2009
All newspapers (A+B+C)	**96**	**94**	**93**	**94**	**95**	**-1.0 %**	**1.1 %**
A. Total dailies	**96**	**94**	**93**	**94**	**95**	**-1.0 %**	**1.1 %**
A.1. Total paid-for dailies	86	85	84	85	90	4.7 %	5.9 %
A.1.1 National paid-for dailies	21	23	23	24	25	19.0 %	4.2 %
A.1.2 Regional and local paid-for dailies	65	62	61	61	65	0.0 %	6.6 %
A.1 Total paid-for dailies	86	85	84	85	90	4.7 %	5.9 %
A.1.3 Morning paid-for dailies	86	85	84	85	90	4.7 %	5.9 %
A.1.4 Evening and afternoon paid-for dailies							
A.2 Total free dailies	10	9	9	9	5	-50.0 %	-44.4 %
B. Total non-dailies							
B.1 Total paid-for non-dailies							
B.2 Total free non-dailies							
C. Total Sundays							
C.1 Total paid-for Sundays							
C.2 Total free Sundays							

Source:
Among the free dailies, a title carries a selling price, althought it is usually distributed free. It has 20 local editions, registered as single titles. That's why we have reduced the number of free dailies given in the past.

3.b Total average circulation per issue

Circulation in thousands (000)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
A. Total dailies	**9,484**	**9,453**	**9,676**	**8,865**	**8,581**	**-9.5 %**	**-3.2 %**
A.1 Total paid-for dailies	5,510	5,494	5,291	4,842	4,581	-16.9 %	-5.4 %
A.1.1 National paid-for dailies	3,595	3,577	3,440	3,050	2,863	-20.4 %	-6.1 %
A.1.2 Regional and local paid-for dailies	1,915	1,917	1,851	1,792	1,718	-10.3 %	-4.1 %
A.1 Total paid-for dailies							
A.1.3 Morning paid-for dailies							
A.1.4 Evening and afternoon paid-for dailies							
A.2 Total free dailies	3,974	3,959	4,385	4,023	4,000	0.7 %	-0.6 %
B. Total non-dailies							
B.1 Total paid-for non-dailies							
B.2 Total free non-dailies							
C. Total Sundays							
C.1 Total paid-for Sundays							
C.2 Total free Sundays							

Source:
FIEG

Comment:
Paid-for dailies circulation figures are based on information from Fieg members

04. Sales

4.b Sales revenues

Total annual revenue (EUR - mln)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
All paid-for newspapers (A+B+C)	**3,557.0**	**3,508.0**	**3,348.0**	**2,949.0**	**2,915.0**	**-18.0 %**	**-1.2 %**
A Total paid-for dailies	3,557.0	3,508.0	3,348.0	2,949.0	2,915.0	-18.0 %	-1.2 %
A.1 National paid-for dailies	2,412.0	2,380.0	2,193.0	1,896.0	1,877.0	-22.2 %	-1.0 %
A.2 Regional and local paid-for dailies	1,145.0	1,127.0	1,155.0	1,053.0	1,038.0	-9.3 %	-1.4 %
B Total paid-for non-dailies							
C Total paid-for Sundays							

Source:
FIEG

Comment:
No paid-for non dailies and sundays are published in Italy

4.c Type of newspaper sales (%)

	2006	2007	2008	2009	2010
Single copy sales	69.7	69.2	68.1	68.3	68.2
Subscriptions (home and postal deliveries)	6.5	6.3	6.3	6.3	6.1
Home deliveries					
Postal deliveries	6.5	6.3	6.3	6.3	6.1
Office deliveries					
Bulk (sponsored) deliveries	1.0	1.5	1.3	1.0	0.5
Free distribution	0.5	0.6	0.7	0.5	0.5
Other print	22.3	22.4	23.6	23.9	24.7
Total	100.0	100.0	100.0	100.0	100.0

Source:
FIEG

4.d Cover prices

Average cover price in EUR

	2006	2007	2008	2009	2010	CURRENT YEAR HIGH	CURRENT YEAR LOW
Single copy						1.50	
Subscription						0.87	

Source:

FIEG

05. Newspaper reach, readership and media consumption

5.a Newspaper reach in %

In % of population group

	2006	2007	2008	2009	2010
All adults	44.3	44.7	45.3	46.2	45.9
Men	55.0	55.6	56.3	56.7	56.9
Women	34.4	34.5	35.0	36.5	35.7
Main household shopper	36.4	36.9	37.8	39.3	38.5

Source:
AUDIPRESS

Comment:
Survey universe: adult population 14+ Readership: readers in an average day

5.b Age structure of readership

	CURRENT YEAR % OF READERSHIP	CURRENT YEAR % DAILY REACH WITHIN AGE GROUP
14-17	3.5	37.2
18-24	8.6	47.1
25-34	15.2	48.1
35-44	19.5	47.6
45-54	18.3	50.7
55-64	14.7	47.6
65 +	20.2	39.9

Source:
AUDIPRESS

5.c Media consumption

Minutes per day

	2006	2007	2008	2009	2010
Newspapers	80	75	70	70	65
Magazines					
Radio	150	148	145	140	135
Television	200	200	180	180	180
Internet	60	70	75	90	97

Source:

IAB + Others (Camera Commercio Milano)

5.d Number of readers

Readers in thousands (000)

	2006	2007	2008	2009	2010
A Total dailies	22,494	22,798	23,278	24,108	24,072
A.1 Total paid-for dailies					
A.2 Total free dailies	5,346	5,987	6,248	6,005	5,217

Source:

AUDIPRESS

Comment:

For free dailies total amounts have been calculated gross. In other terms, readership duplications have not been deducted

06. Online / Digital publishing

6.a Online editions

	2006	2007	2008	2009	2010	2010/2006	2010/2009
Number of newspaper online editions	96	95	94	95	100	4.2 %	5.3 %

Source:
FIEG

6.b Online readership

Unique visitors in (000)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
Total newspaper online unique monthly visitors	45,000.0	65,000.0	80,000.0	86,000.0	103,500.0*1	130.0 %	20.3 %
Total newspaper online unique daily visitors	2,800.0	3,200.0	3,633.0	4,004.0	5,477.0	95.6 %	36.8 %

***1**
WAN-IFRA Estimation

Source:
AUDIWEB

6.c Top daily newspaper websites
(See next page)

	NEWSPAPER	PUBLISHING COMPANY / TITLE	AVERAGE CIRCULATION	UNIQUE MONTHLY VISITORS	MONTHLY PAGE VIEWS	UNIQUE DAILY VISITORS	DAILY PAGE VIEWS
1	LA REPUBBLICA	GRUPPO EDIT. ESPRESSO	449,238			1,466,441	14,562
2	CORRIERE DELLA SERA	RCS MEDIA GROUP	489,988			1,178,413	12,696
3	LA GAZZETTA DELLO SPORT	RCS MEDIA GROUP	327,962			505,293	3,745
4	IL SOLE 24 ORE	IL SOLE 24 ORE SPA	267,449			283,458	1,446
5	LA STAMPA	EDITRICE LA STAMPA	279,921			265,441	1,894
6	IL FATTO QUOTIDIANO	EDITORIALE IL FATTO	78,584			207,497	1,271
7	CORRIERE DELLO SPORT	CORRIERE DELLO SPORT SRL	190,631			215,257	1,434
8	TUTTOSPORT	NUOVA EDITORIALE SPORTIVA SRL	99,295			170,254	1,064
9	IL GIORNALE	SOCIETA' EUROPEA DI EDIZIONI	183,721			149,724	704
10	QUOTIDIANI ESPRESSO	FINEGIL EDITORIALE SPA				113,955	719
11	L'UNITA'	NUOVA INIZIATIVA EDITORIALE	44,450			105,791	706
12	QUOTIDIANO LIBERO	EDITORIALE LIBERO SRL	105,127			95,841	279
13	IL MESSAGGERO	CALTAGIRONE EDITORE	192,982			95,462	633
14	QUOTIDIANO.NET	MONRIF NETS SRL				75,863	424
15	IL MATTINO	CALTAGIRONE EDITORE	74,183			68,947	827
16	LEGGO	CALTAGIRONE EDITORE	1,050,000			53,392	372
17	UNIONE SARDA	L'UNIONE SARDA SPA	63,575			44,346	823
18	IL SECOLO XIX	SOC. EDIZIONI E PUBBLICAZIONI SPA	78,802			42,754	326
19	LA NAZIONE	POLIGRAFICI EDITORIALE SPA	117,111			32,195	105

	NEWSPAPER	PUBLISHING COMPANY / TITLE	AVERAGE CIRCULATION	UNIQUE MONTHLY VISITORS	MONTHLY PAGE VIEWS	UNIQUE DAILY VISITORS	DAILY PAGE VIEWS
20	IL RESTO DEL CARLINO	POLIGRAFICI EDITORIALE SPA	146,751			31,085	162
21	IL TEMPO	QUOTIDIANO IL TEMPO SRL	43,860			24,366	94
22	LA GAZZETTA DEL MEZZOGIORNO	EDISUD	38,784			24,104	104
23	IL FOGLIO	IL FOGLIO QUOTIDIANO				22,775	74
24	LA GAZZETTA DI PARMA	LA GAZZETTA DI PARMA SRL	40,114			20,119	115
25	L'ARENA	ATHESIS	46,087			18,200	148
26	LA SICILIA	DOMENICO SANFILIPPO EDITORE	56,976			16,167	79
27	GIORNALE DI SICILIA	EDITORIALE POLIGRAFICA	64,018			15,380	69
28	CITY	RCS MEDIA GROUP	840,000			15,201	93
29	IL RIFORMISTA	EDIZIONI RIFORMISTA				12,254	39
30	GAZZETTA DEL SUD	SOC. EDITRICE SICILIANA	46,442			10,805	38

Source:
ADS 2010 for circulation (except for free dailies Leggo and City). Audiweb, December 2010 for unique daily visitors and daily page views

6.d Internet subscribers and users

Number of Internet subscribers in (000) and Number of Internet users in (000)

	2006	2007	2008	2009	2010
Internet subscribers	11,778.4	12,199.1	11,283.3	12,300.0	13,400.0
Internet users	22,391.9	24,219.2	26,643.3	29,392.1	32,467.6

Source 6.d, 6.e:
ITU

6.e Broadband Internet

Number of broadband subscribers in (000)

	2006	2007	2008	2009	2010
Broadband subscribers	8,497.4	10,122.1	11,276.3	12,283.4	13,259.4

07. Advertising

7.aa Gross domestic product

Gross domestic product in current EUR (bln)

	2006	2007	2008	2009	2010
GDP	1,485.4	1,546.2	1,567.8	1,519.7	1,548.8

Source:
The World Bank

Comment:
GDP at purchaser's prices is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current local currency.

7.ab Gross domestic product per capita

Gross domestic product per capita in current USD (000)

	2006	2007	2008	2009	2010
GDP per capita	31.6	35.6	38.4	35.1	33.9

Source:
The World Bank

Comment:
GDP per capita is gross domestic product divided by midyear population. GDP is the sum of gross value added by all resident producers in the economy plus any product taxes and minus any subsidies not included in the value of the products. It is calculated without making deductions for depreciation of fabricated assets or for depletion and degradation of natural resources. Data are in current U.S. dollars.

7.ac Ad spend as a % of GDP

	2006	2007	2008	2009	2010
% of GDP	0.58	0.58	0.55	0.49	0.50

Source:
ZenithOptimedia

7.ba Advertising expenditure per medium

Advertising expenditure per medium in EUR (mln)

	2006	2007	2008	2009	2010
Press (Newspapers + Magazines)	2,828.0	2,911.7	2,690.2	2,103.5	2,013.3
- Newspapers	1,626.9	1,680.6	1,549.2	1,289.6	1,243.6
- Magazines	1,201.1	1,231.1	1,141.0	813.9	769.6
Television	4,704.5	4,760.9	4,701.9	4,224.7	4,478.1
Radio	521.8	563.5	575.3	531.3	572.2
Cinema	64.1	58.7	49.1	46.9	52.6
Outdoor	312.3	318.2	309.2	230.8	234.0
Internet	206.2	294.3	335.3	352.2	423.0
Below the line marketing					
Others					
Total	**8,636.8**	**8,907.3**	**8,661.0**	**7,489.4**	**7,773.3**

Source:
ZenithOptimedia

Comment:
1. After discounts
2. Includes agency commission
3. Excludes production costs
4. Includes some classified advertising
5. Magazines include newspaper supplements
6. Internet includes display/classified/search

7.c Advertising revenues

Advertising revenues in EUR (mln)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
A. Total dailies	**1,633.0**	**1,711.4**	**1,605.8**	**1,360.6**	**1,319.8**	**-19.2 %**	**-3.0 %**
A.1. Total paid-for dailies	1,563.0	1,623.0	1,525.0	1,302.2			
A.1.1 National paid-for dailies	1,035.0	1,085.0	1,035.0	822.3			
A.1.2 Regional and local paid-for dailies	528.0	538.0	490.0	479.5			
A.1 Total paid-for dailies							
A.1.3 Morning paid-for dailies							
A.1.4 Evening and afternoon paid-for dailies							
A.2 Total free dailies	70.0	88.4	80.8	58.4	52.0	-25.7 %	-11.0 %
B. Total non-dailies							
B.1 Total paid-for non-dailies							
B.2 Total free non-dailies							
C. Total Sundays							
C.1 Total paid-for Sundays							
C.2 Total free Sundays							

Source:
FIEG

Comment:
MILLIONS EUR

7.e Contribution of display, classified, insert and online advertising to total advertising revenue in (%)

	2006	2007	2008	2009	2010	2010/2006	2010/2009
Display	92.8	92.7	92.0	92.4	91.9	-1.0 %	-0.5 %
Classified	7.2	7.3	8.0	7.6	8.1	12.5 %	6.6 %
Inserts							
Online							
Other							
Total	100.0	100.0	100.0	100.0	100.0	0.0 %	0.0 %

Source:
FIEG

7.f Top newspaper advertising categories

Expenditure in EUR mln

	ADVERTISING SECTOR	EXPENDITURE
1	Clothing	82.881
2	Auto	78.525
3	Distribution channels	64.866
4	Finance/insurance	60.923
5	Professional services	52.622
6	Household	47.738
7	Personal objects	40.491
8	Media/publishing	39.004
9	Tourism/travel	37.273
10	Telecommunications	33.231

Source:
ZenithOptimedia

7.g Top newspaper advertisers

Expenditure in EUR (000)

	ADVERTISER	EXPENDITURE
1	Citizen	14,082
2	Vodafone	11,975
3	Ford	11,086
4	Chateau D'Ax	10,221
5	Media Market	10,186
6	Volkswagen	9,952
7	Scavolini	9,604
8	Sky	7,863
9	Telecom Italia	6,946
10	Toyota	6,924

Source:
ZenithOptimedia

08. Publishers and newspapers

8.a Top publishing companies

Total revenue in EUR (000), Total circulation in (000)

	PUBLISHING COMPANY	ULTIMATE PARENT COMPANY	TOTAL CIRCULATION	TOTAL REVENUE
1	RCS MEDIA GROUP		2,253*1	2,255,300
2	GRUPPO EDITORIALE L'ESPRESSO		891	885,000
3	IL SOLE 24 ORE	CONFINDUSTRIA	267,449	482,000
4	CALTAGIRONE EDITORE	GRUPPO CALTAGIRONE	1,434*2	248,846
5	POLIGRAFICI EDITORIALE	MONRIF SPA	1,232	239,981
6	EDITRICE LA STAMPA	GRUPPO FIAT	280	185,924
7	SOCIETA' ATHESIS		98	54*3
8	CORRIERE DELLO SPORT SRL		191	80*4
9	SOC. EUROPEA DI EDIZIONI SPA		184	64*5
10	EDITORIALE LIBERO SRL		105	37,559

***1**
Copies per day including paid and free circulation in Italy (812.000 + 840.000) and in Spain (601.000)

***2**
Paid circulation 384.273 (daily average); free circulation 1.050.000 (daily average)

***3**
2009

***4**
2009

***5**
2009

Source:
Companies information

8.ba Top paid-for dailies

Cover prices and ad rates in EUR; Circulation (Average daily in 000) and Readership (Average issue in 000)

	TITLE	FOUNDED (YEAR)	LANGUAGE	PUBLISHING COMPANY	ULTIMATE PARENT COMPANY	CIRCULATION	READERSHIP	FORM/
1	CORRIERE DELLA SERA	1,876	ITALIAN	RCS MEDIA GROUP		490	2,971	Rheinis
2	LA REPUBBLICA	1,976	ITALIAN	GRUPPO EDITORIALE L'ESPRESSO		449	3,290	Berline
3	LA GAZZETTA DELLO SPORT	1,896	ITALIAN	RCS MEDIA GROUP		328	4,320	Belgian
4	LA STAMPA	1,867	ITALIAN	EDITRICE LA STAMPA SPA	GRUPPO FIAT	280	2,093	Berline
5	IL SOLE 24 ORE	1,965	ITALIAN	IL SOLE 24 ORE SPA	CONFINDUSTRIA	267	1,143	Nordic
6	CORRIERE DELLO SPORT - STADIO	1,924	ITALIAN	CORRIERE DELLO SPORT SPA		191	1,646	Belgian
7	IL MESSAGGERO	1,878	ITALIAN	IL MESSAGGERO SPA	CALTAGIRONE EDIT.	193	1,410	Rheinis
8	IL GIORNALE	1,974	ITALIAN	SOC. EUROPEEA DI EDIZIONI SPA		184	767	Rheinis
9	IL RESTO DEL CARLINO	1,885	ITALIAN	POLIGRAFICI EDITORIALE SPA	MONRIF SPA	147	127	Tabloid
10	LA NAZIONE	1,859	ITALIAN	POLIGRAFICI EDITORIALE SPA	MONRIF SPA	117	865	Tabloid

***1**
Range 1.00 /1.50

***2**
Range 1.00 /1.50

8.bb Top free dailies

Cover prices and ad rates in EUR; Circulation (Average daily in 000) and Readership (Average issue in 000)

	TITLE	FOUNDED (YEAR)	LANGUAGE	PUBLISHING COMPANY	ULTIMATE PARENT COMPANY	CIRCULATION	READERSHIP	FORMAT	AVERAGE COVER PRICE
1	LEGGO	2,001	ITALIAN	CALTAGIRONE EDIT.		1,050.0	1780	Tabloid	
2	METRO	2,000	ITALIAN			850.0	1428	Tabloid	
3	CITY	2,001	ITALIAN	RCS MEDIA GROUP		840.0	1698	Tabloid	
4	DNEWS	2,008	ITALIAN			560.0	318	Tabloid	
5	E POLIS	2,006	ITALIAN			488.0		Tabloid	0.50

Source:

AUDIPRESS; FIEG from public sources

Comment:

At the beginning of 2011 the Court sentanced the publishing E Polis company in bankruptcy

09. Employment and salaries

9.a Employment

	2006	2007	2008	2009	2010	2010/2006	2010/2009
Total number of journalists	6,660	6,731	6,723	6,644	6,600	-0.9 %	-0.7 %
Number of full-time journalists	6,256	6,391	6,523	6,471			
Number of part-time journalists	404	340	200	173			
Total number of other employees	7,197	6,995	6,652	6,295	5,780	-19.7 %	-8.2 %
Total number of employees (journalists + others)	**13,857**	**13,726**	**13,375**	**12,939**	**12,380**	**-10.7 %**	**-4.3 %**

Source:
FIEG - FONDO CASELLA

11. Research

11. Research

Circulation is audited by:	ADS (*)
Readership is measured by:	AUDIPRESS (*)
Methodology:	3 quartely interviews. Universe: Adult population 14 + Sample size: 16.400
Print advertising revenue is measured by:	
Methodology:	
Digital advertising revenue is measured by	
Methodology:	
Digital audience is measured by:	Audiweb
Methodology:	
Digital advertising revenue is measured by:	
Methodology:	

12. Taxes

12. Taxes

	2009	2010
Standard VAT	20	20
Single copy sales	4	4
Subscription sales	4	4
Advertising	20	20
Newsprint	4	4
Composition	4	4
Plant	20	20
Other taxes		

Source:

FIEG

13. Subsidies

Are there subsidies for the purchase of newsprint?

Yes. Only for 2010.

Are loans granted at low rates for re-equipment or improving existing equipment?

No

Are there any direct subsidies?

Yes. Subsidies are granted only to newspapers and periodicals published by political parties or by cooperatives of journalists.

Source

FIEG

13.b Direct subsidies

(EUR, mln)

	2006	2007	2008	2009	2010
National currency	150.0	150.0	150.0	150.0	150.0

Source:
FIEG

Comment:
Direct subsidies are available only for newspapers and periodicals which are official organs of political parties in the Parliament or published by cooperatives of journalists.

15. Ownership

15.b Cross-media ownership restrictions

Sorry, no data available.

16. Contact

FIEG - Federazione Italiana Editori Giornali