

Report on the Spanish Publishing Sector

2008

Federation of Publishers'
Guilds of Spain

January 2010

Domestic Trade in Books

According to the report issued yearly by the Federation of Publishers' Guilds of Spain, domestic trade in books in Spain hovered around the following figures in 2008:

	Variation since 2007
- 858 private publishing companies belonging to guilds:	3.7%
- 15,742 direct employees	1.8%
- 72,982 titles published (including reprints)	3.5%
- 367.46 million copies published	2.8%
- Average run of 5,035 copies per title	-0.7%
- 393,012 active titles available	6.3%
- 240.66 million copies sold	-4.1%
- 3,185.50 million euro of domestic market revenue	2.0%

The number of titles published in 2008 (72,982) rose 3.5% over the previous fiscal year, the number of copies (367.46 million) rose 2.8% and the average run was 5,035 copies per title, 35 copies fewer than in 2007. Also a high percentage of these copies was sent out to the foreign market or returned, since 240.66 million copies (65%) were sold on the domestic market.

Overall revenue reached 3,185.50 million euro, 2.0% more than in the previous fiscal year.

The average price of books climbed from €12.45 in 2007 to €13.26 in 2008, because revenues increased more than the number of copies sold.

Since 2007 sales have gone up in non-university textbooks, primarily texts for non-compulsory and compulsory secondary school and primary school. There has also been a rise in comics, law, religion and literature. Revenues have decreased in science/technology, how-to books, general

information, dictionaries and encyclopaedias and, to a lesser extent, books for children and young adults.

	2004	2005	2006	2007	2008		2008/2007 Variation
	Million €				M€	%	
TOTAL	2,881.60	2,933.23	3,014.54	3,123.17	3,185.50	100.0	2.0
Literature	624.74	628.46	637.49	663.35	691.07	21.7	4.2
<i>Novels</i>	-	-	558.64	573.43	611.69	19.2	6.7
<i>Poetry, Plays</i>	-	-	34.48	34.00	30.07	0.9	-11.6
<i>Other Literature</i>	-	-	44.37	55.92	49.31	1.5	-11.8
Children and Young Adults	274.73	281.74	323.53	330.32	326.99	10.3	-1.0
Non-university Text	689.86	698.84	736.43	803.69	898.28	28.2	11.8
<i>Pre-school</i>	91.86	91.64	97.29	102.71	109.15	3.4	6.3
<i>Primary School</i>	239.98	253.68	285.81	311.92	362.03	11.4	16.1
<i>Compulsory Secondary School</i>	215.50	201.46	198.18	216.38	252.14	7.9	16.5
<i>Non-compulsory Secondary Sch.</i>	66.11	63.39	60.35	64.29	81.10	2.5	26.1
<i>Vocational Training</i>	16.39	15.58	13.42	17.83	13.78	0.4	-22.7
<i>Complementary Books/Materials</i>	60.02	73.09	81.39	90.56	80.09	2.5	-11.6
Science, Technology and University	227.10	189.45	162.29	175.78	158.32	5.0	-9.9
Total Social Sciences/Humanities	270.98	308.39	366.16	354.51	381.28	12.0	7.6
<i>Social Sciences and Humanities</i>	270.98	308.39	366.16	205.41	170.35	5.3	-17.2
<i>Law and Economics</i>	-	-	-	118.23	174.64	5.5	47.7
<i>Religion</i>	-	-	-	30.87	36.29	1.1	17.6
How-to Books	177.49	179.57	192.11	184.74	168.89	5.3	-8.6
General Information	203.72	211.84	248.64	281.36	260.22	8.2	-7.5
Dictionaries and Encyclopaedias	229.27	223.84	161.96	148.80	145.88	4.6	-2.0
Comics	96.65	98.78	83.03	77.05	84.87	2.7	10.1
Other	87.06	112.30	102.90	103.57	69.70	2.2	-32.7

By marketing channels, the 2008 domestic trade study showed that bookstores and bookstore chains remained the most common places for Spanish people to buy books, since 47% of revenues were channelled through these points of sale. Bookstores increased their revenues by 4.1% since fiscal year 2007 to 1,032 million euro, the highest this figure has been in the last five years. Bookstore chains earned a total of 481 million, 0.5% less than in 2007, but their revenues remained very similar to those of the last four years. News agencies failed to beat their revenue record of 272 million euro (set in 2007) and earned 243 million in 2008, down 16.6%, although in the last five years their revenue has risen 63.8%. Revenue from postal, club and credit sales declined.

	2004	2005	2006	2007	2008	2008/2007
Total revenue (million euro)	2,881.60	2,933.23	3,014.54	3,123.17	3,185.50	2.0
Bookstores	998.79	960.53	1,003.06	991.75	1,032.37	4.1
Bookstore Chains	417.31	471.53	462.66	483.47	481.29	-0.5
Hypermarkets	293.55	287.91	286.00	292.55	288.27	-1.5
News Agencies	148.24	156.47	170.60	272.08	242.76	-10.8
Companies and Institutions	238.62	250.88	278.43	304.37	331.63	9.0
Libraries	15.63	14.00	23.19	22.59	21.45	-5.1
Credit Sales	282.14	281.10	253.72	258.92	215.82	-16.6
Telephone Sales	105.78	92.19	91.30	77.08	78.44	1.8
Post	100.36	116.05	100.04	88.90	71.43	-19.6
Clubs	112.65	113.17	115.27	116.66	102.19	-12.4
Internet	24.95	24.26	20.48	20.52	20.12	-2.0
Subscriptions	37.06	33.35	49.41	77.48	105.35	36.0
Other Channels	106.52	131.80	160.36	116.80	194.38	66.4

Revenues from books in the pocket-book format were 196 million euro, 3.2% more than in 2007. The average price of pocket books was €6.80.

Two hundred and eight million euro were paid for copyrights and 34 million euro were earned by copyright sales.

If the revenue earned on book sales is added to copyright sales, the domestic market can be shown to have grown by 2.0% in 2008.

Foreign Trade in Books

The foreign trade study conducted every year by the Spanish Federation of Chambers of Books shows that Spanish book export figures are holding steady, despite the severe economic, financial and trade crisis shaking the sector. In addition, the study reaches the following conclusions:

- . America is still the fundamental market for exporters in the book sector.
- . There was an increase in traditional book exports to America (by 8.27%) as well as to Europe (10.23%).
- . There was considerable growth in exports of Spanish handbooks for non-Spaniards, the result of specific promotional activities run by the sector.
- . North America continues to stand firm as one of the most important markets for our books. Although direct export figures to North America declined appreciably, Spanish firms increased their presence in that market through shipments from Latin-American countries and indirect exports from China.
- . Despite the fact that in other areas Spanish book exports are much lower, they continue to grow in both Africa (+38.44%) and Asia (+3.12%).
- . The trade in publishing services continues to increase.
- . Import figures have risen slightly, due fundamentally to the increase in the number of printing jobs outsourced to countries in the Far East (45% of our imports are newspapers and magazines, and 26% are print jobs and coeditions).

. The trade balance of the book sector continues to be very positive, reaching nearly three hundred million euro in 2008.

. Although the 2008 world economic crisis caused the trade world to contract sharply, the book sector has held steady at figures similar to those of 2007. Exports took a slight decline of 1.61%, which contrasts with what happened in other sectors. The backdrop to trade was a very strong euro with respect to the American dollar, which made exports to America even more difficult.

. As for the nature of the products we exported, we can see that graphic products accounted for 35.75%. The remaining 64.25%, belonging to the text sector, was made up of 43.18% regular books, 18.13% books in instalments and news agency goods, and the rest (2.94%) was other products. Books were the most important graphic product, earning more than 124 million euro, which accounted for nearly 23% of the export total.

. Exports of books of publishing product rose in 2008 to 334.73 million euro. Of this figure, 310.46 million euro were exported by Spanish publishing houses directly or through distributors belonging to their publishing groups. The rest, 24.27 million euro, was exported by independent distributors and booksellers.

Of the total number of regular books and books by instalments exported by publishing houses, 31.88% could be classified as "books by instalments and news agency goods" and 68.12% as "books". The number of copies rose to more than 65 million (57.22% regular books and 42.78% books by instalments and news agency goods).

The subject most heavily exported in instalments in 2008 was general information, while in books the top subjects were social sciences (17.22%), literature (14.26%) and science/technology (13.51%).

As for the number of copies shipped, children and young adults (20.06%) and social sciences (19.08%) were the most heavily exported subjects, followed by literature (14.87%).

The average price was €5.64 for regular books and €3.53 for book instalments. By subject matter, the highest price was fetched by science and technology at €9.32 and the lowest by children and young adults at €3.50.

Publisher Exports by Subject 2008 (All Countries)

	Value			Copies		Price
	Euro	US\$	% Euro	Number	%	
Total	310,464,129	456,382,269	100.00	65,520,076	100.00	4.74
Books	211,476,494	310,870,446	68.12	37,493,811	57.22	5.64
Literature	30,161,748	44,337,770	14.26	5,575,125	14.87	5.41
Children and Young Adults	26,315,521	38,683,816	12.44	7,522,780	20.06	3.50
Non-university Education	25,002,810	36,754,131	11.82	3,896,472	10.39	6.42
Science/Technology	28,579,886	42,012,432	13.51	3,065,265	8.18	9.32
Social Sciences	36,416,505	53,532,262	17.22	7,152,075	19.08	5.09
Law and Economics	2,186,656	3,214,384	1.03	293,691	0.78	7.45
General Information	17,268,808	25,385,148	8.17	1,946,195	5.19	8.87
How-to	6,171,819	9,072,574	2.92	1,128,355	3.01	5.47
Religion	17,152,971	25,214,867	8.11	3,561,955	9.50	4.82
Dictionaries/Encyclopaedias	19,649,402	28,884,621	9.29	2,700,765	7.20	7.28
Comics	889,044	1,306,895	0.42	188,573	0.50	4.71
Other	1,681,324	2,471,546	0.80	462,560	1.23	3.63
Instalments/News Agency Goods	98,987,635	145,511,823	31.88	28,026,265	42.78	3.53

. Imports by the book sector in 2008 reached nearly 248 million euro. They comprised 52.12% books (129 million euro) and 45.62% periodicals (113 million euro); the other 2.26% was worth less than 6 million euro.

Imports grew by 1.72%. Asia was responsible for the 21.88% year-on-year increase of imports. Nevertheless, 72.93% of the products imported and 50.11% of all books imported came from Europe.

By subjects, in 2008 the book sector had over 129 million euro of imports, of which 50.94% were foreign books (65.8 million euro) and the remaining 49.06% were printing jobs/coeditions.

Book Imports by Subject 2008 (All Countries)

	Value			Copies		Price
	Euro	US\$	% Euro	Number	%	
Total	129,249,912	189,997,371	100.00	34,985,207	100.00	3.69
Foreign Books	65,842,557	96,788,559	50.94	7,705,941	22.03	8.54
Literature	5,941,142	8,733,479	9.02	713,722	9.26	8.32
Children and Young Adults	201,239	295,821	0.31	22,023	0.29	9.14
Non-university Education	1,344,440	1,976,327	2.04	146,428	1.90	9.18
Science/Technology	13,151,723	19,333,033	19.97	380,178	4.93	34.59
Social Sciences	30,817,004	45,300,996	46.80	4,766,166	61.85	6.47
General Information	8,844,809	13,001,869	13.43	886,552	11.50	9.98
How-to	1,978,392	2,908,236	3.00	251,640	3.27	7.86
Dictionaries/Encyclopaedias	313,022	460,142	0.48	20,083	0.26	15.59
Comics	655,410	963,453	1.00	74,163	0.96	8.84
Other	2,595,376	3,815,203	3.94	444,986	5.77	5.83
Printing Jobs - Coeditions	63,407,355	93,208,812	49.06	27,279,266	77.97	2.32

Book-reading and Book-buying Habits

Here are some of the conclusions of the study conducted each year by the Federation of Publishers' Guilds of Spain:

On book reading: Of the people age 14 and over who were surveyed, 54.6% declared themselves to be book readers in their spare time, with a book-reading frequency of at least once a quarter. Limiting the definition of "reader" only to those individuals for whom reading was a daily custom, 40.4% were readers.

Do you usually read books in your spare time?

FREQUENT READERS:	40.4%		
		Every day or almost every day:	25.6%
		Once or twice a week:	14.8%
OCCASIONAL READERS:	14.2%		
		Sometime during the month:	9.3%
		Sometime during the quarter:	4.9%
NON-READERS:	45.4%		
		Almost never:	14.0%
		Never:	31.4%

Moreover, men, people age 55 or more, people with no more than a primary school education, housewives, retirees and residents of towns with fewer than 50,000 inhabitants had a reading rate that was lower than the overall average.

As for the number of books read and the number of hours spent reading books per week, we have:

- Of the Spanish population age 14 and over, 59.1% read at least one book in 2008.
- This 59.1% read an average of 8.9 books. This average rose to 13.2 books per year amongst frequent readers (something over one book per month).
- Those readers who read at least weekly (frequent readers) spent an average of 5.6 hours per week reading books (about 48 minutes per day).

A high degree of readership concentration is observed, since half of all books (51.6%) were read by 20.2% of the readers.

The reading population preferred literary works. In terms of the subject of the last book read, 79.9% of readers read a book of literature (primarily novels and short stories). Those who read novels and short stories had preferences that veered toward historical novels, thrillers/mysteries and adventure novels.

Of the readers, 85.1% affirmed that they read primarily as a leisure activity or for fun, 8.9% said they read to improve themselves and 6.7% read for school (This reason rose to 21.6% amongst young adults age 14 to 24).

One out of every two readers bought the book he or she was reading at the time of the survey or the last book he or she had read. Next in line were borrowed books and gift books, which exhibited similar percentages; for approximately two out of every ten readers, the last book read came into the reader's hands in one of these ways.

The study inquired into the reasons why the people surveyed did not read more often. Lack of time (due to work or family) continued to be the main reason low-frequency readers gave for not reading more. This no doubt has to do with how people use their free time and how many activities there are that compete with reading.

On reading books to children: In 78.7% of Spanish homes where there were children under age six (13.2% of the homes in the sample), the children were read to. In addition, they were read to for an average of three hours a week (approximately 28 minutes a day).

In the homes having children age six to 13 (15.5% of all homes), 77.4% of the children in question read books other than textbooks, and they spent an average of 3.5 hours of their time per week (some 30 minutes a day) reading those books.

On book buying: Of the surveyed population, 55.8% bought books in the last year. Broken down by reader type, the figures show that 78.3% of frequent readers bought at least one book during the year, 67.5% of occasional readers did the same and only 32% of the non-readers bought at least one book (In the case of the non-readers, most of the books bought were textbooks).

In 81.6% of homes having children under age 14, books were bought (64.1% bought textbooks and 49.0% bought other kinds of books).

Purchases were primarily literature (76.6%), basically novels and short stories (93.5% of the literature purchased). The next subject matter of any weight in purchasing was the humanities and social sciences, with 10.9%. Historical novels (38.2%) were the most frequently purchased novels, followed by adventure novels (17.5%), science fiction or fantasy novels, thrillers/mysteries and romance novels.

The subject at issue in the book, other people's recommendations and the author were the three factors that most influenced book-purchasing decisions.

For 67.6% of purchasing readers, bookstores were where they regularly bought books other than textbooks, and one out of two (47.9%) made their last purchase in a bookstore. An interesting increase has been observed in recent years in the purchasing of books in bookstore chains (7.4% in 2006; 9.2% in 2007 and 10.4% in 2008) and over the Internet (0.6% in 2006; 1.1% in 2007 and 2.1% in 2008).

Of those surveyed, 8.6% age 14 or over bought at least one book, collection or instalment of a book at a news agent's stall, and they bought an average of 5.8 books in 2008.

Of the population age 14 or over, 29.9% purchased textbooks. This 29.9% of the buyers purchased an average of 7.4 textbooks during 2008. Textbooks were bought primarily at bookstores (70.4%), followed by schools or parents' associations with 11.0%.

On the environment where books are found:

Home libraries: In Spanish homes there was an average of 185 books per home. This average rose to 240 books in homes where there was a reader and fell to 94 books in homes where the person surveyed was a non-reader. By intervals, it was found that 8.1% of homes contained practically no books or fewer than ten; 33.1% had 11 to 50 books; 18.5% had 51 to 100 books and 46.2% had over 100 books.

Lending libraries: Over the last year 29.2% of the population entered a conventional library or mobile library (Of this 29.2%, eight out of ten were readers). Within the reading population, 42.5% entered some sort of library during 2008.

By ages, it is apparent that 62.2% of young adults age 14 to 24 and 35.1% of adults age 25 to 34 went to a library sometime.

Consulting or borrowing books was the main activity done in libraries (78.7%), followed by 28.3% of those surveyed who went to libraries to study or work and 11.7% that made use of audiovisuals (browsing the Internet or borrowing/consulting CDs or DVDs).

Book reading and other reading: The book-reading index was 54.6%; newspaper readers were 75.9%, magazine readers were 46.8% and 13.4% of the population read comics or graphic novels. On the other hand, 9.9% of the population never read anything in any kind of medium.

Reading and the Internet: It was found that 67.2% of homes had a computer, 57.6% had an Internet connection and 53.3% of the persons surveyed claimed to be Internet users. These percentages were higher amongst the reading population, where 81.1% had a computer, and 68.5% of readers were Internet users.

As regards reading and Internet use, there was 10.5% of the general population that read or downloaded literature over the Internet (12.6% amongst readers) and 9.2% participated in blogs or forums about books or literary topics (10.7% amongst readers). Of the Internet users, 11.2% purchased books on line (14.2% amongst readers and 3.7% amongst non-readers).

Reading and leisure: Spanish people devoted on average 2.2 hours a day to watching television. Of the people surveyed, 7.3% said they had watched some television programme having to do with books and 6.6% followed programmes of this type on the radio.

Amongst their preferred leisure-time activities, they cited, in this order: music, reading, cinema, sport, television and the Internet.

On reading by children (age 10 to 13): Two thousand and eight was the second year in which children age 10 to 13 were surveyed. Of the children surveyed, 85.3% declared that they were readers (84.5% in 2007). Of these child readers:

74.1% read books daily or weekly.

11.2% read sometime during the month or quarter.

Child readers read nine books on average in 2008 and devoted an average of 4.1 hours per week to reading (approximately 35 minutes per day).

Of the children, 56.2% affirmed that they read by their own choice, because they liked reading. The other 43.8% read because of school or because they were forced to (17.5%), or because they had been advised to read (26.3%).

Amongst the children age 10 to 13, the book-reading index was 85.3%; 37.6% read newspapers, 63.6% read magazines, 57.0% read comics and only 1.2% of these children never read anything.

Knister's "Kika Superbruja" books and J.K. Rowling's "Harry Potter" books were the books most read by children age 10 to 13. As happened the year before, there were some titles of a more adult nature cropping up amongst the books most read by these children, such as John Boyne's The Boy in the Striped Pyjamas.