

Report on the Spanish publishing industry

2009

Federación de Gremios de
Editores de España

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Domestic book trade

Every year, the Federación de Gremios de Editores de España prepares a report on domestic book sales in Spain. These reports, which have been perfected and enlarged over the years, have become an imperative guide to the Spanish book trade and book industry, for they reflect the present state of and the trends observed in the publishing market and its main variables.

The key figures on the domestic book trade in Spain in 2009 are given in the table below.

	2009	% 2009/2008
No. of private publishers		
with membership in associations	889	3.6
Direct jobs	14 240	- 9.5
No. of titles published	76 213	4.4
Copies printed (thous.)	329 831	-10.2
Mean print run	4 328	-14.0
Live titles on offer	414 727	5.5
Domestic turnover (retail price) (thous. euros)	3 109.58	-2.4
Net domestic turnover (thous. euros)	1 953.97	-4.5
Copies sold (thous.)	236 197	-1.7
Mean prices	13.17	-0.7

The major conclusions to be drawn from these data are set out below.

.Despite the increase in the number of publishers, employment was down by nearly 10 % from the preceding year.

.The number of titles published (76 213) rose by 4.4 %, the copies printed (329.83 million) declined by 10.2 % and the mean print run was 707 copies shorter than in 2008.

.Only 71.6 %, or 236.19 million, of the copies printed were sold on the domestic market. The rest were exported or returned.

.At 3 109.58 million euros, the overall turnover was down by 2.4 % from 2008.

.The mean price of books (13.17 euros) dipped by a mere 0.7 % compared to the preceding year.

.Turnover for books for children and young adults, popular science and fiction grew, and declined for dictionaries and encyclopaedias, social science and humanities, comic books, non-university text books and scientific and technical books.

.Very large companies saw their market share grow by 4 % over 2008, while large companies' share tumbled by 16.9 %. Barely any change was recorded for small and medium-sized publishers.

.Non-university text books accounted for 27.2 % of the market share, fiction for 22.9 %, children's and juvenile books for 11.3 % and social science and humanities 11.0 %. Together, these four groups totalled over two-thirds (72.3 %) of the global turnover.

.Novels accounted for 88.5 % of the turnover and 91.0 % of the fiction books sold. Contemporary novels had a particularly large market share.

.Children's and juvenile book sales came to 350.47 million euros, up 7.2 % from 2008.

.With sales of 844.45 million euros (27.2 % of the total turnover), non-university textbooks slid by 6.0 % from the preceding year.

.Social science and humanities book sales amounted to 340.80 million euros (down by 10.6 % from 2008). Sales of 154.94 million euros were recorded for scientific-technical and university books.

.Bookshops and chain bookstores continued to be the main outlets for books, with 48.6 % of the total (1.030 billion and 480 million euros, respectively), although bookshop sales dipped by 0.2 % and chain store turnover by 0.3 % from the preceding year. Hypermarket sales were up 10.2 % from 2008. Credit card, telephone, mail order, book club and Internet and subscription sales all slumped.

.Paperback sales (with a mean price of 6.97 euros), while down by 8 %, still accounted for:

- . 8 % of the titles published
- .10.8 % of the copies printed
- . 5.8 % of domestic turnover
- .11 % of the copies sold.

.The language distribution was 78.1 % in Spanish, 13.4 % in Catalanian, 2.1 % in Galician, 1.8 % in Basque and 4.6 % in others.

.Sales of digital books came to 51.25 million euros (1.64 % of the total turnover). In all, 5 960 titles were published in this format.

.Publishers paid 213.8 million euros in copyright fees and took in 139 million for sales of such fees.

Export book trade

Spain's three book chambers, located in Madrid, Catalonia and the Basque Country, include exporters among their membership, be they publishers, bookshops, distributors or printers. The three are grouped under the Federación Española de Cámaras del Libro (FEDECALI), an umbrella association that compiles statistics providing detailed information on Spanish book exports.

The key facts and figures for fiscal year 2009 are listed below.

.The net balance of trade for the Spanish book industry was 206.88 million euros.

. Exports amounted to 442.37 million euros (251.76 million euros in the publishing industry and 190.61 million in graphic arts), down 18.95 % from 2008, although the number of copies exported dropped less, by 15 %.

.By industry, publishing accounted for 57 % of the total exports and graphic arts the remaining 43 %. Books were the object of 95 % of the publishing industry sales and 62 % of the graphic arts sales.

.Europe continued to be the foremost export host, totalling 253.99 million euros, despite the 17.41 % slump in sales over the 2008 figure.

.While the value of book exports to Europe rose, the decline in the sale of collectibles constituted a drag on the total exports to the area.

.America consolidated its position as the second largest target for export sales with 175.42 million (-22.42 % since 2008), 171.68 million (-20.71 %) of which were attributed to publishers and only 3.74 million (-61.06 %) to graphic arts firms.

.Mexico was the primary host in America again in 2009, for a value of 50.08 million euros, and was the third ranking importer of Spanish books, after France and the United Kingdom, where exports came to 97.16 and 75.60 million euros, respectively.

.The United States strengthened its position as the fourth largest host in America, with sales of 13.41 million euros.

.Africa was the sole area where Spanish exports grew (19.96 %) yet another year, to a total of 10.06 million euros.

.Imports amounted to 235.49 million euros in 2009, slightly less than the 247.98 million recorded in 2008.

.By product, foreign press and magazines accounted for 45 % of the imports, printing and co-publishing for 30 % and foreign books for 23 %.

The following conclusions can be drawn from these figures.

.The fall in book industry exports, nearly 19 %, was an outcome of the present economic, financial and commercial crisis. Nonetheless, Spanish exporters successfully defended their market share despite the world-wide recession.

.America continued to be an essential market for book exporters.

.Exports of conventional books grew in Europe.

.Exports of collectibles and newsstand material plummeted by 50 %.

.Considerable growth was observed in exports of Spanish language manuals as a result of the specific promotional activities undertaken by the industry.

.North America continued to constitute one of the major markets for Spanish books. Despite the perceptible decline in direct exports to the area, Spanish companies have strengthened their presence in that market via shipments from Latin American countries and indirect exports from China.

.Import figures dipped slightly, although printing outsourced to countries in the Far East grew. Spanish imports consisted primarily of press and magazines (45.09 %) and outsourced printing and co-publishing (28.06 %).

.The book industry's balance of trade continued to be very favourable, amounting to over two hundred million euros in 2009.

Reading habits and book purchases

Since 2000, the Federación de Gremios de Editores de España has conducted a yearly survey by way of a "barometer", whose primary aim is to acquire an in-depth understanding of Spaniards' reading and book buying habits and the relationship between book reading, other types of cultural consumption and the use of new technologies.

The major conclusions drawn for 2009 are discussed below.

Book reading habits

.A total of 55.0 % of Spaniards over the age of 14 claimed to be book readers:

41.3 % read books daily or weekly: frequent readers

13.7 % read one book monthly or quarterly: occasional readers.

.A higher percentage of women (58.4 %) than men (51.5 %) said they were readers. Reading rates were highest in the 14 to 24 age group (70.5 %) and declined with age, steeply after the age of 65 (20.8 %). The percentage of readers was highest among university graduates (82.0 %).

.Frequent readers spent an average 6.2 hours a week reading. Prior to 2009, this figure had never exceeded 6 hours.

.Reading was highly concentrated: 18.9 % of readers read 53.5 % of the books, while 40.8 % of readers (who read from one to four books) read only 13.5 % of the total.

.The mean number of books read per person in the last year was 9.2.

.The category of the book most recently read was fiction (primarily novels and stories) for 81.2 % of the readers. The second ranking category was humanities and social science, with 13.5 %.

.Novel and story readers preferred historic novels and detective/mystery and action-adventure fiction.

.While 75.2 % claimed to read for leisure or entertainment, 5.7 % said they read to enhance their knowledge and 8.4 % for reasons of study.

.The books most read were: (the Spanish language versions of) John Boyne's *The Boy in the Striped Pyjamas*; Stieg Larsson's *Men Who Hate Women*; Ken Follet's *Pillars of the Earth*; Ildefonso Falcones' *Cathedral of the Sea*; Carlos Ruiz Zafón's *The Shadow of the Wind*; Stieg Larsson's *The Girl Who Dreamed of a Can of Gasoline and a Match*; Stephenie Meyer's *Twilight*; Ken Follet's *World without End*; and Dan Brown's *Angels and Demons* and *The Da Vinci Code*.

.Stieg Larsson was the author with the largest number of readers, followed by Ken Follett, Stephenie Meyer, Carlos Ruiz Zafón and Dan Brown.

.A total of 93.3 % of readers normally read in Spanish (usual language).

.Books were accessed primarily via purchase, although this figure declined from 54.0 % in 2007 to 48.0 % in 2009. The percentage received as a gift rose to 21.1 %, borrowing from friends and acquaintances came to 18.6 %, and library loans to 5.3 %.

.Lack of time was the determining factor for low reading rates. Nonetheless, 26.8 % of respondents said they did not like to read or preferred other types of entertainment.

Reading to minors

.In 78.7 % of Spanish households with children under the age of 6 (13.2 % of the households in the sample), adults read to the children an average of 3 hours weekly (approximately 28 minutes per day).

.In the 15.5 % of the households with children between the ages of 6 and 13, 77.4 % of these children read books other than text books and spent an average 3.5 hours weekly (around 30 minutes per day) reading.

.Respondents in the 25 % of the households with children under 14 claimed that some member of the family read with the children.

Book buying habits

.A total of 55.6 % of the respondents bought books over the last year, while 40.5 % bought non-text books and 31.7 % bought at least one text book in the last twelve months.

.The non-text book buyers purchased mainly fiction (79.9 %), primarily novels and stories (94.1 % of fiction books purchased). The next most popular subject matter, humanities and social science, accounted for 10.0 % of the purchases

.Historical novels (35.1 %) showed the highest sales, followed by action-adventure (20.8 %), detective/mystery (18.8 %) and science/fantasy fiction (15.8 %).

.The three criteria that weighed most in the decision to buy a book were the subject, third party recommendations and the author.

.Bookshops continued to be the usual place to buy non-text books (69.4 %), which were also bought in department stores (21.6 %), chain bookstores (16.1 %), readers' clubs (15.1 %) and hypermarkets (15.5 %).

.Around one quarter (25.1 %) of the non-text book buyers bought paperbacks. Paperbacks were more popular among young readers, university graduates, students and residents in cities with a population of over 500 000.

.At least one book, collection or collectible was bought in newsstands by 8.6 % of the respondents over the age of 14, who purchased an average of 5.5 books in 2009.

.A total of 31.7 % of the population 14 or over purchased text books, 7.6 on average.

.Text books were bought primarily in bookshops (66.4 %).

The book environment

.A large majority, 60.5 %, of the respondents, had fewer than 100 books in their homes, while 34.5 % had more than 100. The remaining 3.7 % did not specify the number.

.Over half (54.4 %) of the readers' households had over 100 books, compared to only 10.0 % in non-readers' homes. Consequently, the mean number of books in non-readers' households was 76, a significantly lower figure than the 296 in readers' homes.

.Less than one-third (27.9 %) of the respondents over the age of 14 had been in a library in the last year (41.1 % among readers). Of these, 86.7 % visited a public library and 17.6 % a university library.

.Respondents used libraries primarily to: borrow, return or consult books, read, study or work in the reading room. Thirteen per cent of library visitors used the audiovisual and Internet facilities.

.The main reasons adduced by respondents who had not been to a library in the last year were that they were uninterested or unaccustomed (38.5 %), were short of time (37.0 %) or had others means of accessing books (11.8 %).

Book and other types of reading. Total readers

.An overwhelming majority of the Spanish population (90.2 %) over 14 read books (55.0 %), newspapers (75.8 %), magazines (44.9 %) or comic books (14.0 %) or others.

Child readers (ages 10 to 13)

.Of the 10- to 13-year-old respondents, 91.2 % said they were readers (85.3 % in 2008 and 84.5 % in 2007). Of these child readers:

77.1 % read books daily or weekly

14.1 % read one book monthly or quarterly.

.Child readers read 8.6 books on average and devoted 3.9 hours weekly to reading (approximately 33 minutes a day).

.Most – 55.3 % – of the children claimed that they read on their own initiative. The remaining 44.7 % read because they had to/for school (23.9 %) or because they were advised to (20.8 %).

.Comic books were read by 53.2 % of the children aged 10 to 13: 64.3 % of the boys and 41.4 % of the girls.

.Over two-thirds – 68.8 % – of these children had been to the library at least once in the year, primarily to borrow or consult books (89.0 %) or to study or do course work (36.0 %).

.Eighty two per cent had an Internet connection at home, and 82.5 % of these were Internet users.

.The *Harry Potter*, *Twilight*, *Geronimo Stilton* and *Lilli the Witch* series were the books most popular with 10- to 13-year-olds. Surprisingly, other books geared more to adults, such as *The Boy with the Striped Pyjamas*, had also been read by children in this age group.

LIBER, International Book Fair

LIBER is the annual International Book Fair exclusively for professionals organised in Spain by the Federación de Gremios de Editores de España for the past 29 years.

LIBER alternates its venue between Madrid and Barcelona. Visitors include publishers, booksellers, distributors, librarians, authors, literary agents, teachers, graphic artists, multimedia professionals, service companies and book industry suppliers, and all of these sub-industries are also represented.

LIBER 2010, held in Barcelona on 29 and 30 September and 1 October 2010, attracted publishers and book industry professionals from around the world, with Puerto Rico as guest of honour. Over 50 activities, including prize ceremonies, meetings and seminars on content, promotion and new digital media, internationalisation and furtherance of reading through libraries, were on the agenda for the 2010 edition of the fair. For the first time, many of these activities were video recorded and can be viewed on the LIBER Community page (<http://www.iblny.tv/index.php?chan=176>).

LIBER 2011 will be held in Madrid on 5, 6 and 7 October, with the official inauguration on the evening of 4 October. Romania will be the guest of honour.