

**REPORT ON THE
SPANISH PUBLISHING INDUSTRY
2010**

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. This report has become an imperative guide to the Spanish book trade and book industry, for they reflect the present state of an the trends observed in the publishing market and its main variables.

The key figures on the domestic book trade in Spain in 2010 are given in the table below.

	2009	2010	% 2010/2009
Nº empresas editoriales privadas y agremiadas	889	839	3,6
Empleados directos	14.240	13.864	- 9,5
Títulos editados	76.213	79.839	4,4
Miles de ejemplares producidos	329.831	302.631	-10,2
Tirada media	4.328	3.790	-14,0
Títulos vivos en oferta	414.727	439.991	5,5
Facturación comercio interior (PVP) (mill. de euros)	3.109,58	2.890,80	-2,4
Facturación neta comercio interior (mill. de euros)	1.953,97	1.822,22	-4,5
Miles de ejemplares vendidos	236.197	228.226	-1,7
Precios medios	13,17	12,67	-0,7

The spanish private publishing industry, organized themselves to any of the editors' associations that are part of the Federación de Gremios de Editores de España which is represented by 839 companies, the majority of whom billing less than 600,000 euros per year and employs direct to 13,864 people, being 17 the average number of employees (197 in editorials very large-large and 6 small); in addition, the average number of external partners in the year 2010 was 24 people.

During the year 2010 were published 79,839 titles (4,8 % more than in 2009) and 302, 6 million copies per title (538 less than in 2009). The print run average was 3.790 copies by title (538 less than in 2009)

The materials with the highest number of titles and copies were edited non-university Text, Literature and Child and Youth, which concentrated the 53,7% of the titles and 61% of the copies publishers.

The 78,8% of all the books were published in Spanish, a 12,9% in Catalan, a 1,8% in Basque, a 2,5% in Gallego and 4% in other languages.

A 34,6% of the publishers published in different support of the paper, being 70,5 million euros turnover of the digital edition (the 68,9% corresponded to Law and Economic Sciences).

In total, they have produced 11.748 titles in digital format (64,7% in PDF), were digitized 25.927 titles of the back-catalogue and were marketed 25.570 titles (68,1% in computers).

The 8,5% of the books sales published in digital format was direct from the publishers' website, the 80,2% through e-distributors, the 0,5% through bookstore and 10,8% by other channels.

In 2010 it produced 6.001 titles and 32,6 million copies of pocket books (7,5% of the total titles and 10,8% of the edited copies), with an print run average of 5.438 copies and 176.66 million euros in turnover. The number of sold copies was 24.6 million and their price average 7,17 euros.

By materials, Literature, with a 87,5% of the total, was the one that major volume of turnover. It was followed by general Dissemination (4,6%), Social Sciences and Humanities (2,9%) and practical Books (2,5%).

The offer of alive titles in catalogue grew 6,1% in 2010 regarding to the previous year to reach the figure number of 439.991. Emphasizes that the smaller publishing houses, with 194.634 titles, assume a 44,2% of the total (the medium publishing a 30,7% and the great-very large the 25,1%).

In 2010 the turnover figure number obtained by sales of books in the internal market, calculated to cover price, including VAT, was 2,890.80 million of euros (7% less in euros flow on 2009).

By deducting from the gross billing applied discounts and VAT, it is obtained net internal billing of 1,822.22 million of euros (6,7% less than in the previous year). And if this figure number added the 394.10 million of euros obtained from the sale of rights, it gets a net sales of 2,216.32 million of euros (2,092.97 million in 2009). Therefore, in 2010 there was a growth in net sales of a 5,9% as compared with the year 2009.

It was also sold 228.23 million copies (3,4% less than in the previous year) and the average price of the copy sold was 12,67 euros.

By companies, 53,2% of billing corresponded to 33 companies (12 very large - 43 %- and 21 large -20,2 %-) but only small companies increased their turnover respect to the year 2009 (9,4 %).

The 74,2% of billing corresponded to non-university Text (28,3%), Literature (22,3%), Social Sciences and Humanities (11,5%) and Children and Youth (12,1%).

Comics is the only matter that increased its turnover figure number. Dictionaries and encyclopedias, practical Books and general Divulgacion are those that suffered declines.

Bookshops and Bookstores were the major channels of books sales: a 51,8% of turnover was conducted through them. Bookshops billed 1,026.41 million of euros (0,4% less than in 2009) and Bookstores 471.98 million (1,7% less than the previous year).

For the purchase of author's rights, publishers paid 192.47 million of euros (182.33 for purchase of copyright; 5,13 for the purchase of other rights and 5,01 for translator's rights).

Export book trade

The Federación Española de Cámaras del Libro (FEDECALI) Developer, in the year 2010, the study of the foreign trade of book, which collects the export and import operations of goods by companies in the world of the book associated with the chambers of Catalonia, Basque Country and Madrid.

The figures number for the year 2010 yielded good data for the Spanish book sector since its total export was 457.792 million of euros, which represents an increase of 3,49% respect to the 2009, when there was a decline of 18,98%.

Imports totaled 224.6 million of euros, 4,63% less than 2009. Of them, the 45,24% corresponds to newspapers and magazines and the 28,54% to orders for printing and publications.

The trade balance of the book is very positive since it reached in 2010 more than 233 million of euros (42,19%).

The export amounted to 264.657 million (57,81%) and the graphic sector 193.135 million (42,19%).

Within the publishing sector, the 42,53% of the exports were books, the 13,30% fascicles and material from kiosk and 2,99% to other products; within the graph product, books are the most important part because they represent almost 26% of the total exported (118.964 million of euros).

It is significant that the export of collections and material from kiosk regained some of its turnover since it grew around 18% and it remained a notable growth in the export of manuals for teaching Spanish for foreigners.

It is also significant that between editorial product and graph product, almost 370 million of euros correspond to books (85% of the total exported).

America is the fundamental market for the export companies of the book's sector, and European Union is the main destination, with a 58,24%, so the export of editorial product to Europe supposed a 32,81%. In the case of Latin America, almost a 98% of the export figures number is editorial product, as well North America reinforced its position as one of the most important markets for Spanish books.

By countries, Mexico, Argentina and Brazil are the countries of America that the Spanish companies sold most. In the case of Europe, the largest importers of Spanish books are France and the United Kingdom, followed by Portugal.

Export of books, fascicle and material from kiosk carried out by the editors: increase a 6,78% compared to the year 2009 and rise to 239.02 million of euros (24,38% fascicles and material from kiosk, and 75,62% books); the number of copies was 59.7 million (48,97% fascicles and material from el kiosk, and 51,03% books).

The most exported books were the Social Sciences (17,16%), Literature (14,95%) and Scientific and Technical (13,47%); by number of copies, a 19,25% corresponded to books for children and youth, followed by the Social Sciences (17,29%) and Literature (16,68%). The price of the books was 5,93 euros and fascicles 1,99 euros.

For countries, the editors' export went fundamentally to America and Europe, which accumulate the 97,72% of total exports.

To America we exported by 157.9 million of euros (66,05% of the total) and 34.7 million of copies, with México as the main customer of the publishing Spanish products which garnered 28% of the exported value (although by number of copies it was surpassed by Argentina, with the 23,24%).

In Europe were exported 23.5 million of books and fascicles, with a value of 75.7 million of euros. Our main destination was France, with 27.1 million of euros (35,80% of the total) and 5,73% of the exported copies.

The consignments of books and fascicles to África rise to 3.56 billion of euros and 1.2 million of copies. By value of the exports, Morocco is the country that most Spanish books purchased (33,77%), although by number of sold copies was Cameroon (42,28 %). Note that the books of religion were the most exported in terms of value (22,57%); by number of copies, books for children and youth were reached 48,46%.

In Asia were exported books and fascicles by 1.29 million of euros and 230 thousand of copies. Japan was the destination of exports by value with a 26,59%; however, the 23,96% of the copies were for Philippines.

Finally, to Oceania we only exported books by something more than 598 thousand euros (79,330 copies), most of them to Australia (93,30% of the export).

Reading habit and book purchases

The study of Reading Habits and Book Purchase, since the year 2000, has been conducted by the Federación de Gremios de Editores de España to know the situation of reading and the book purchase in Spain, it throws for the year 2010 the data that are detailed below.

The 90,5% of the population aged 14 and more years old declares read in any type of material, format and support with a frequency at least quarterly, which indicates that a proportion of around 9% does not read anything in any kind of support.

A 78,1% read newspapers and a 60,3% read books, a 48,9% read magazines and a 14,5% read comics at least once a quarter. In addition, a 47,8% read in digital media.

Women had a major frequency of reading in books and magazines, while men register major percentage in newspapers, comics and digital support.

The percentage of readers decreases with the increasing age, with the exception of the newspapers, in that the highest percentage of readers is middle-age. Similarly, the level of studies completed and the rate of reading are directly proportional: the higher level of studies, major percentage of readers in all possible support.

Book reading habits: if we are referring specifically to the books reading, the percentage would be 60,3% which is distributed in the following manner:

- The 38,9% of the population aged 14 or more years read only in their free time.
- A 18,1% read for work and in their free time
- A 5,3% read on digital support
- The total that reads in their free time is 57,0% (43,7% are frequent readers of books in their free time, that is, they read at least a daily or weekly frequency; 13,3% are occasional readers who read books at least once a month or a quarter).
- The total who read for work or by studies is 21,5%.
- The average of books read in free time per year is 9,8

- Those who say that they do not read books in their free time, rarely or never represent a 43,0%.

By **sex**, the proportion of women who read books in their free time (61,6%) is higher than men (52,2%), though the average of read-books read per year is similar: 9.4 in men and 9.1 in women.

Regarding to **age**, readers in their free time are the 70,2% of young people from 14 to 24 years; this percentage ranged between 63,0% and 59,6% between 25 and 54 years, and decreases until the 52,0% when we talk about the group age from 55 to 64 years, and the 33,4% between 65 years and more.

The variable that determines the reading habits of the population is the **level of studies**. Between those who have completed university studies the percentage of readers is 83,6%; between those with secondary school education, the ratio is 61,0%; and between those who have primary studies, index of readers drops to the 32,4%, 51 points of difference with the undergraduates.

By **habitat**, the reading in populations greater than 1,000.000 inhabitants reaches 69,3% of the population from 14 years, while in those whom have until 10,000 inhabitants is 20 points less, and in those of 10,000 to 50,000 inhabitants 15 points less.

By **occupation**, students (76,1%) and those occupied (61,0%) read more, on the contrary retirees read less (40,0%) also housewives (47,8%).

The leisure-entertainment is the main reason for reading, being the novel the preferred matter.

The most reading **matter** by the Spanish in their free time is Literature (novel and short story). From the interviewed a 78,9% decide for it.

The main reason for not reading is the lack of time (51,4%), but between those older than 65 years, the problems of eyesight and health are very important factors (31,4%). A 26,0% of the readers of low intensity do not like to read, the percentage is higher between young people from 14 to 24 years.

Although the normal language of reading is the Spanish for the 93,1% of the population, a 52,9% of the readers read in two or more languages (the 41,1% remaining only read in one) regularly or occasionally. If we add the usual reading and occasional reading, 100% reads in Spanish, a 23,5% in English, a 17,9% in Catalan and a 8,1% in French.

Pocket format was the last book read for the 22,8% of the readers.

Digital reading: it is understood as reader at digital support the one who read at least quarterly, in a computer, a mobile phone, a handheld or an e-Reader. Almost half of the Spanish population from 14 or more years (47,8%) declare themselves readers in digital format.

Websites, blogs and forums are the most read things on a digital support (37,1%), followed by newspapers (30,7%). A 5,3% declare to read books in digital support and a 6,2% declare to read magazines.

A 42,4% declare to be a **frequent reader** in digital support. The presence of readers on a digital support is higher between men (53,9%) than between women (41,9%). By age rise 80% for the younger age group, from 14 to 24 years old, and is only 8,7% between those with 65 or more years. In addition, the 74,6% of the interviewee with university studies are readers on a digital support in front of the 21,1% between those who have primary studies.

Purchase of books: throughout the year 2010, the 56,2% of the Spanish population of 14 or more years, bought books including text, not text, with an average of 8,9 books non-text per buyer; a 40,7% of the interviewee has purchased non-text books and a 32,4 % has bought text books.

The purchase of not text books is major in the individuals with a highest level of studies, between those who have up to 54 years old, between the students and occupied and between those living in towns with more than 50,000 inhabitants.

The 73,3% of the buyers mentioned the bookshop as the **habitual place of purchase of non text books** and the 49,9% realized there their last purchase. Of the rest of the purchase's channels emphasize the great department stores, bookstores, hypermarkets and Círculo de Lectores.

Literature is the most purchased subject (71,8%), specially the novel (67,5%) and the main reason why they bought the last book was by leisure/entertainment (73,5%) and for gift (12,5%).

The subject matter of the book is the first to be taken into account to buy a book. It is followed by the author and the recommendation of a known or family. The price does not take into account as a first option, but increase the percentage to be placed in 5th position according to the total when we consider the 2nd and 3rd option.

Textbooks are purchased mainly in bookstores (70,1%), followed by schools and AMPAS (10,4%), hypermarkets (6,3%) and department stores (6,1%).

The average resources of books, without counting the text book, in Spanish people households is 212. The average obtained is influenced by the concentration of books that exist in a certain number of households: in almost four of every ten homes (40,8%) do not exceed the 50 copies of non-text books and in only three of every ten (32,2%) exceeded the 100 copies.

Libraries: the 29,1% of the Spanish of 14 and more years has gone to a library or mobile libraries in the last year. The assistance to the libraries is higher between the readers of books (41,4%) that between of those who are not considered readers (12,7%).

From the total of the interviewees who have gone to a library, the 27,5% have between 14 and 24 years old, and only the 6,3% have more than 65 years. According to the level of completed studies, 17,4% has basic studies or primary, the 45,8% has secondary school, and the 36,9% of the attendees have university studies.

Of the total of the interviewed, 19,5% attends at the libraries at least once a month, and 31,3% is inscribed in some library. The lack of time, followed by the lack of interest or lack of habit are the main reasons why Spanish do not come to any library.

The 87,7% of the population who has gone to a library, has done it to a public library and a 19,8% to a university one.

Between the activities that the assistants to the library realize, it emphasizes the use of the services of lending (53,2%), the consultation of book there or reading in room (39,8%) and the study or work with material of their own (26,4%). A 15,3% uses the library electronic resources (internet, lending of audiovisual, consultation/reading/hearing of audiovisual media).

Internet use: 60,2% of the Spanish population accedes to Internet at least once a quarter. One of every two (47,8%) connects all days or almost every day.

Between the users of internet a 46,8% reads press or digital magazines, a 24,8% participates in blogs and forums of any type, a 5,4% participates in forums or literary blogs and a 46,1% accedes to social networks. Also a 86,7% use e-mail.

Media consumption and leisure activities: the activities carried out in free time are headed by listening to music (87,0%), listen to the radio (83,8%), going out for dinners (70%) and watching DVD movies (60,2%). If we consider that a 57% declares read books in their free time, reading would be in fifth place.

The 100% of them read books (84,8% for studies and free time, and 15,2% only for studies), the 49,3% read magazines, a 41,3% read comics and a 32,3% read newspapers. The average of reading books in a year for children from 10 to 13 years old is 8,2 books.

The 54,4% of Spanish children between 10 and 13 years old declare to read in digital support. A 44,8% declare to read on digital support at least once a week, being frequent digital readers. In 78,1% of the households of these children, their parents also read, and a 82,4% have given books in the last year.