

Report on the Spanish Publishers Industry Year 2011

The Federation of Spanish Publishers Association

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Domestic book trade

In 23 editions, The Federation of Spanish Publishers Association has consolidated the study on the evolution of the domestic trade of the book in Spain. The summary of the survey data referring to 2011, showing a drop in sales of 4.1% for the year 2010 are as follows:

Private publishing and unionized companies:	840
Direct employees:	13.441
Published Titles:	83.258
Thousands of produced copies:	286.462
Average circulation:	3.441
Current titles on sale:	464.981
Turnover internal market (PVP) (millions of euros):	2.772,34
Net turnover internal market Turnover internal market	1.764,03
Thousands of sold copies:	199.814
Average prices	13.87

The number of publishing companies held for the year 2010 but the number of employees fell by 2.9%, similar to the previous year's decline, confirming the effects of the economic crisis is having on the publishing industry.

As for editing, in 2011 an increase of the published titles recorded but down the copies published and consequently the roll media. Many of these fish, or go abroad as export market, or are returned because the domestic market was sold only 69.8%

Regarding the number of global turnover, in 2011 there is reached a number of 2.772,34 million euros, 4.1% less than in the previous exercise. On the other hand, the average price for book is 13.87 euros (9.5% more than the previous year).

Except not college textbook, practical books and comics, all the matters suffer decreases in turnover, being dictionaries and encyclopedias, literature, technical and scientific university those who have more.

Regarding the size of the publishing houses, gain weight only large companies: the very large publishing houses get down 2,0 % its turnover, the big ones increases by 2.9%, the medians fell by 0,7 % and the small ones get down 0.2 %.

By Professional Associations federated, the turnover, except in Basque Country, suffers a general decrease; it increases the market share of Madrid (reaching 44.4%) and descends from Catalonia (48.1% of total), staying in the other cases. This way, two unions reach 92.5 % of the global turnover.

As for the turnover information for matters relating to the year 2011:

- Literature billed 550.83 million euros. Of this, 162.37 million are obtained from the sale of pocket books.
- Children and Youth register a decrease in its turnover of 3.7%, with a total number of 337.61 million.
- College text books increase its turnover up to reaching 868.01 million invoiced euros.

- Social Sciences and Humanities billed 316.43 million euros, 5.2% less than in the previous exercise.
- Scientific and technical university produces 133.67 million euros.
- Practical books increased its turnover by 17.9% compared to 2010 and reached 148.83 million euros billed.
- General spreading invoice of 212.31 million euros in 2011 (12% less than the previous year)
- Dictionaries and encyclopedias are the matters that suffer a major decrease (25.8% compared to 2010 but 56.6% regarding to the year 2007), giving 64.55 million euros billed.
- Comics invoices 94.40 million euros (10.8% increase over 2010)

Regarding the channels of commercialization of the books:

- The bookshops and bookstore chains are still the main sales channels, with more than half of total turnover (55.5%). Bookshops canalize a figure of 1056.38 million and increase its sales by 2.9% regarding the previous year and bookstore chains billed 481.42 million euros and increase their sales by 2% in 2011.
- A través de hipermercados se canalizan 274,14 millones de euros (5,4% menos que en 2010)
- Through hypermarkets there are canalized 274,140,000 euros (5.4% less than in 2010)

- Sales through kiosks amounted to 129.38 million euros (30.1% less than in 2010 and 52.4% compared to 2007)
- Sales to companies and institutions increase by 2.2% and the realized to libraries by 14.3% libraries.
- The sale to the final consumer gets down 18,8 % regarding to the year 2010 (47,2 % last five years)
- Regarding to 2010 increases the turnover of telephonic and Internet sale and gets down the email, credit sales, subscriptions and book clubs.

Export book trade

The nineteenth edition of the study of Spanish foreign trade book, produced by the Spanish Federation of Chambers Book, shows an increase of 10.65 % regarding to previous year, being the properly publishing sector the one that grows 29.06% opposite to a fall of the graphical sector of 14.58 %. Likewise, the positive balance of the Spanish trade balance increased by 14.37%.

This increase is mainly due to the recovery of the market of fascicles and material of kiosk in the European Union. Also, the efforts of the Spanish book industry to accede to new markets has contributed that its sales recovering the growth path in which it was before the beginning of the crisis.

In 2011 the export of the Spanish book industry amounted to 506.537 thousand euros. As for the products that are exported, the graphical represents 36.04% (164,983 thousand euros). The remaining 63.96% (341,554 thousand euros) belongs to the publishing industry and is shared between the 41.75% of the books (not fascicles), the 25.81% of the fascicles and material of kiosk and the rest (7.04%) correspondent to other products. Books are within the graphic product, the most important part, more than 89 million euros, representing almost 18% of total exports.

As for the number of book exports in 2011 it is 398,725 thousand euros (309,317 thousand are publishing books and 89,408 miles of the graphic sector).

Regarding to the destination of Spanish exports, the principal one is the European Union, with 62.31% and 315,642 thousand euros, followed by Latin America, with 31.77% and 160,949 thousand euros. By sector, the editorial exports to the European Union 160 088 thousand (50.72%) and the graph 155,554 thousand (49.28%), to Latin America editorial exports 156,395 thousand (97.17%) and the graph 4,554 thousand euros (2.83%)

By country, the exports of the books sector are directed to France, with 118,275 thousand euros (42,793 thousand corresponding to the publishing and graphical sector to 75,482), followed by the UK, with 64,043 thousand euros (19,274 thousand are of the publishing industry and 44,769 miles are graphic sector) and Mexico, with 52,650 thousand euros (50,046 thousand euros and 2,604 publishing product thousand in graphical product).

If we only look at the publishing industry, the country to which we export more is Mexico, followed by Italy (44,020 thousand euros) and France. As for the graphical sector, France, UK and Portugal are the countries occupying the top three of our exports.

Moreover, from 309.32 million euros export book publishing product, we have been exported 291.04 million by the Spanish publishers directly or through distributors belong to their publishing groups; the 18.28 million euros remaining were exported through independent distributors and booksellers.

Exported by the books editors, 59.40% are from books (for value of 172.864.211 Euros and 29.776.766 copies) and 40.60% to fascicles and material of kiosk (for value of 118.176.912 Euros and 36.988.895 copies). The above mentioned have had a growth of 102,76 % with regard to 2010.

As for the materials of books, the most exported has been social sciences (18.36%), followed by literature (15.17%) and technical scientist (12.82%). If you look at the number of copies received, child and youth (20.27%) followed by social sciences (17.57%) would be the most exported

Moreover, the imports realized by the sector of the book in the year amounted to 239 806 410 euros (53, 99% are books, periodicals to 45.65% and 0.35% for other products), which means that the commercial balance in the book industry remains very positive, reaching in 2011 over two hundred and sixty-six million euros.

Reading habit and book purchases

Since 2000, the Federation realizes the study of "Habits of reading and buying books in Spain." The most important results for the year 2011 are the following ones:

- 61.4% of the Spanish declares himself a reader of books. Also increases to 57.9% the percentage of population of Spain over 14 years old reading in their free time and up to 28.6% of the Spanish who reads all or almost every day
- The average of books read in 2011 increases up to 10.3 books opposite to 9.8 in 2010.
- The reader's profile in Spain is still the woman's college, young and urban woman, that prefers the novel, read in Castilian and does it for entertainment
- Madrid remains the community with readers' major index, followed by Basque Country and Cantabria. Among the less readers Castilla-La Mancha, Andalusia and Extremadura are located.

- The number of eBook readers already reaches 6.8% of Spanish aged 14 and 8% of the minors between 10 and 13 years.
- The number of persons with eReader increases 129% over 2010. 3.9% of the population has a digital reader.
- 73.1% of eBooks are downloaded read or downloaded free from the Internet, only 36.9% of the interviewed ones affirm to have paid for an eBook download.
- 82.9% of children between 10 and 13 read books in their free time, of which 75.1 does daily or weekly basis, percentage that gets down 0,4 points.
- Catalan and Murcia libraries receive the best valuation of its users. The average rating of libraries in Spain is remarkably high.
- "The time between seams" by Maria Dueñas is the most read book in 2011, while the Song of Ice and Fire saga by George RR Martin has been most bought.
- In infantile and juvenile literature, The Boy in the Striped Pajamas by John Boyne, and Harry Potter sagas, JK Rowling and Twilight of Stphenie Meyer, appear between the most read. Geronimo Stilton and Greg's Diary, the books most read between 10 to 13 years old children.

READERS RATE: 90.4% of the Spanish population of 14 ó more years affirms to read in any type of material, format and support (print or digital) with a frequency at least quarterly (total reading). Of these, 86,3 % reads with a frequency at least weekly (frequent readers).

The reading obtained rate remains stable in recent years and shows that around 10% of the target population does not read any material or support.

Reading material does not suffer many variations in the past three years. Thus, newspapers are the most read support with 77.6% followed by books (61.4%), magazines (46.3%) and, finally, comics (12.6%).

Are two different types of reading in the study; that one that is done in free time and that is motivated by work or studies.

- 41.3% of the reading population reads a book in their free time.
- The 3.5% of the reading population reads books just for work or studies.
- The 16.6% do so for two reasons.
- 38.6% declares not to read books.

READING BOOKS: 61.4% of the Spanish population of 14 ó more years affirms to read books in free time or work or studies (both paper and digital), 1.1 points above the percentage obtained in the year 2010. The average number of books among interviewed readers has been 10.3 (9.6 in 2010).

Women are those who more read books (7.4 percentage points above the male readers of books). No differences in reading for work or study between the sexes are appreciated.

For ages, are the youngest those who have a higher percentage of reading books. Information that would be related to the comparative one by occupation of the interviewed one, that is, they are the students those who more read books. As the population grows in age the percentages of book readers decrease up to 36.7% gathered in the interviewed ones of 65 years or more. The decrease is more pronounced when we refer to the reading for work or studies.

As for the reading according to the level of studies finished of the interviewed one, the university students are those who have the highest percentage in reading book (85,3 %).

DIGITAL READING: We consider digital media reader that one who reads at least a quarterly basis, in a computer, a mobile phone, a PDA or an E-Reader. Slightly more than half of Spanish aged 14 or more read on some digital support (52.7%)

In digital support reads on all websites, blogs and forums (42.4%) followed by digital media (34.9%) and magazines (7.4%).

Comparing this information with those collected in 2010 we observed that, although the growth of digital media readers is slow, every time there are more digital readers and the readers' increase in digital supports owes to the raise of the readers called frequent. Raise has been gradually giving since 2010 (the year in which is started considering the reading in digital media for the barometer).

They are the men those who read in this support in major measure (59.9% versus 45.6% for women). Sex produces marked differences in the digital reading that the reading in any format.

The young persons and the interviewed ones in intermediate ages are those who more use these supports as way of reading (from 14 to 45 years).

The percentage of interviewed that declare to have one e-book is 3,9 %. Although the percentage is still small, slowly reading e-book has and will be having more relevance. In comparative information between 2010 and 2011 we observed that the number of people who declare to have an e-book increased by 129%.

As for the numbers of read books by those who have an e-book, of every 14 books of average that they read in one year, 8 are in their electronic book. Of those who read books in e-book just downloaded Internet books paying 36.9%.

BUYING BOOKS: The 57.3% of Spanish aged 14 or older who purchased a book, both text and non-text, in the last 12 months (56.2% in 2010). Of these:

- 25.3% purchased books not only text.
- 15.7% purchased only textbooks.
- The 16.3% bought books and not text.

The average has been 9.6 books purchased; 1 book less than in 2010 (mean 10.6). That is, although the number of buyers has increased, decreases the number of books purchased. Thus, in the last act of buying an average of 1.4 books were purchased.

This trend also observed in the ranges of buying books. The number of buyers who have bought from 1 to 5 books increases to the detriment of those who have bought from 6 to 10 books.

They are those who have major level of studies those that more they buy.

Frequent readers are those who recorded the highest percentage of total buying books (76.2%) and the purchase of textbooks (64.1%).

CHILDREN READING: In Spanish households in which there under 6 years minors (12.1% of all households), reads to children in 78.9% of cases, with an average of 3 hours a week.

Children between 6 and 13 years (in 8.0% of households in Spain) read books in 84.7% of cases. On average they read 3 hours and 10 minutes a week.

83,2 % of the Spanish who live with children between 6 and 13 years of age affirms that in his house books are read by them..

The 100.0% of children between 10 and 13 read at least quarterly on any material, and format support. Of all children between 10 and 13 years, the 100.0% declares to read books for home work and studies, while 82.9% affirms to read books in his free time.

46.6% of these children declare themselves a reader in digital support, and 40.0% do so frequently (at least once a week). Exempting the reading of webs, blogs and forums (36.2%), newspapers (7.5%) and books (8.0%) are the type of material with a major percentage of readers in digital format.

Of 46.6% of the children who read in digital support, 77.7% use the computer, 15.9% use the phone or a PDA, and 4.1% used an eReader.

In 91,3 % of the cases, one affirms that in his colleges and institutes they organized activities concerning to the reading and, for these cases, 92.1% say they have participated in them. Also, 92.3% of children between 10 and 13 years affirm that in their school or college there is library. 81.5% attend it at least once a month, and 53.8% do so frequently (weekly). 67.0% of those who go to a library do it to take or return borrowed books, 45% for the books enquiry / reading room and 37.6% for study or class work.

81.1% of the children connects to Internet, of which 76.0% does it to sail and to look for information, and 53,0 % to use the services of instantaneous messenger company.