

**Report on the
Spanish Publishers Industry
Year 2012**

The Federation of Spanish Publishers Association

January 2013

Domestic book trade

The information of the study on the domestic book trade elaborated in Spain in 2013 and referred to the economic exercise of 2012 offer the following main figures of the activity of the private publishing sector and unionized in Spain:

Private publishing and unionized companies	816
Direct employees	12.689
Edited titles (included reprintings)	79.175
Thousands of produced copies	280.251
Average circulation	3.540
Current titles on sale	490.757
Turnover internal market (PVP) (millions of euros)	2.471,49
Net turnover internal market	1.688,07
Thousands of sold copies	170.237
Average prices	14,52

Regarding the year 2011, there are 24 publishers less and the number of employees fell by 5.6%. Also the published titles fell by 4.9% and the copies 2.2%, and many of the copies, or go to the foreign market as exports or are returned as the internal market has only 60.7% sold. In terms of turnover in 2012 is 10.9% lower than the previous year. On the average price, an increase of 4.7% over the previous year occurs.

By subject, in 2012 we have 78.3% of the turnover in the domestic market were obtained from four subjects: Literature, Infantile and juvenile, not university text and social sciences.

- Literature Matter bill 566,03 million euros, corresponding 126.35 million to the sale of books of pocket.
- Infant and juvenile matters bill 296,250,000 (12.4% less than in 2011)
- The non-university text books, with 803.18 million euros billed fell by 7.4% over the previous year.
- For social sciences and humanities there have been billed 269.04 million euros (15% less than in 2011)

According to the languages of edition, it is published in Castilian 77.9% of titles, in Catalan / Valencian 12.6%, 2.3% in Galician, Basque and 1.9% and in other languages 5,3 %.

Regarding pocket's book in 2012 there is a decrease in all magnitudes, emphasizing the turnover, which fell by 23.2% over the previous year. The books in this format assumed: 6.1% of the published titles, 10.8% of the published copies, 5.7% of turnover in domestic trade and 11.4% of the sold. Also referring to the literature matter, this one represents 37.4% of the sold copies and 22.3% of turnover.

On the digital edition, in 2012 35.545 titles are edited in digital format (11.86% less than in 2011) and there are digitized 97,139 (19.67% more than the previous year). Additionally, 54,714 (5.21% more than in 2011) are the titles commercialized in digital format and 74,254 thousand euros is billing for sale of books in this format (2.31% more than in the previous year).-

The major distribution channel for books in digital format is marketed through e- distributors (70.7%), with 52,485 thousand euros.

Moreover, in 2012 the publishers realize payments for copyright for a total of 179.9 million euros and 71.4 million euros for sales of rights.

As for the channels of commercialization of the books: bookstores and bookstore chains channeled more than half of global turnover (54.7%):

- The bookshops, with a turnover of 927.61 million euros, decreasing by 12.2% compared to 2011.
- The chain bookstores billed 425,740,000 (11.6% less than in 2011)
- Through hypermarkets books are sold by value 248.37 million euros (9.4% less than in 2011) and through kiosks 103.43 million euros (20.1% less than the previous year)

Export book trade

Twenty years ago the Spanish Federation of Book's Chambers began publishing "The Export Book Trade" with the purpose of enriching and spreading the information that was available at that time referred to the operations of export and import of goods realized by companies of the world of books associated with the Chambers.

The study on the export trade of the book shows that 2012 was a good year. In this sense, merchandise exports totaled 527.343 million euros, representing an increase of 4.11%, of which 360.721 million euros related to the publishing industry, with an increase of 5.61% regarding the previous year, being largely responsible for the total growth of the sector provided that the export of the graphical sector is 166.622 million euros, an increase of 0.99%. Of the total growth, the book world, with 407.107 million euros, accounts the majority of exports.

In a special way is necessary to emphasize that the exports to the American continent, with a strong presence of Spanish book, have a growth of 12.14%. The other major destination of Spanish exports is Europe, for countries, France and the UK are those who more are exported in this continent. Mexico and Argentina, followed by the United States, Chile and Colombia, are our biggest destinations in the Americas.

On the other hand, as imports are 228 million euros, of which 42% correspond to newspapers and magazines and only 21% for books, and the rest are orders for printing and co-publications it is necessary to highlight once again that again the balance of the commercial scale is favorable, realizing the book industry a positive contribution to the Spanish economy.

Por tanto, el estudio del comercio exterior del libro del año 2012 revela:

Therefore, the study of the exterior book trade in 2012 reveals:

- The export of the book sector grows 4.11%.
- America continues being the fundamental market for the publishers of the book export sector.
- The EU is the main destination for exports in the book industry.
- The export of collectibles and kiosk material recovers its turnover previous to the fall of 2009.
- The export of manuals of Spanish for foreigners is maintained.
- North America continues to consolidate itself as one of the most important markets for our books.
- Import figure is reduced, -4.66%, mainly due to falling sales of newspapers and periodic publications. It increases the number of orders of press realized 11.23%.
- The commercial balance in the book industry continues being very positive, reaching in 2012 almost three hundred million euros.

Reading habit and book purchases

The Federation realizes this study since 2000 to obtain continuous information on all aspects of the reading to the habits of reading of the Spanish population.

Principal result that throws Barometer of Reading Habits and Purchase of Books corresponding to the year 2012 is the percentage of book readers in Spain over 14 years increases in this year up to 63% of the population.

Moreover, if we consider only the population who affirms to read in their free time, regardless of reading for study or work, we also observed an increase of 1.2 percentage points to stand at 59, 1%. In addition, the percentage of frequent readers increases, those who read at least once a week and represents 47.2% of the population over 14 years. Note that the percentage of readers who read all or most days increased 2.6 points compared to 2011.

Reader's Profile: The increase in leisure readers occurs in almost all age groups, except for the population between 35 and 44 years that stays flat. Spanish between 14 and 24 years continue being the group of age with major percentage of reading population

By sex, women read more in their free time than men, 64.1% versus 54%, a difference of 10 points. Difference is greater between 25 and 54 years. It is from the age of 55 where the distances between the percentages of readers of different sexes diminish.

Another factor that determines the reading habit is the level of education. 84.2% of the population with university studies declares themselves reading. Also the occupation, while an increase in the Barometer readers in all types of occupation is observed, the retired population and stopping which is registering higher growth, 5.7 points and 5.6 points respectively.

In addition, the most populated cities concentrate the highest percentage of reading population. 71.7% of residents of cities of over one million inhabitants compared to 49.8% of the cities up to 10,000 inhabitants.

This way, the reader's profile in Spain remains of a woman with university studies, young and urban that prefers the novel, read in Castilian and does it for entertainment.

Madrid es la región con mayor índice de población lectora, con un 71,3%, doce puntos más que la media nacional (59,1%). Junto a ella, otras cinco comunidades autónomas presentan cifras superiores a la media: Cantabria (61,5%), País Vasco (60,6%), Aragón (60,3%), Navarra (59,5%), Cataluña (59,3%) y La Rioja (59,1%).

Reading by Autonomous Communities: The Barometer reflects an increase in the percentage of readers in all the Autonomous Communities. Madrid is the region with the highest reading population, with 71.3% twelve points higher than the national average (59.1%). Beside Madrid five other regions have higher average figures: Cantabria (61.5%), Basque Country (60.6%), Aragón (60.3%), Navarra (59.5%), Catalonia (59.3%) and La Rioja (59.1%).

Conversely, Extremadura and Murcia are the regions with with readers' minor index (54.2%), followed by Asturias (54.3%) and Castile-La Mancha (54.4%). The rest of communities do not reach the average index reading: Baleares (59.1%), Canary Islands (57.1%), Valencia (56.8%), Castile y León (56.5%), Galicia (55, 2%) and Andalusia (55.1%).

Reading's habits: The majority of the readers, 83.9% attend to the reading as entertaining. This percentage is something major between the women and the major ones of 25 years. 11% read to improve their cultural level and 7% for study.

Almost all readers over 14 years usually read at home (97.3%). Also, there is a 16.8 % that do well in public transport, especially in Madrid, where the percentage of readers who practiced reading in these places reaches 35%. 11.9% also read outdoors, especially in the Canary Islands, Navarra, Castile-La Mancha and Valencia. The Barometer indicates that 47.8 % of the readers read in two or more languages . The Castilian is the usual language of reading for 92.6% of the readers. 3.9% lee only in Catalan or Valencian, and 3.4 only in other languages. If we add the usual casual reading, all the readers does in Castilian (100 %), 23.7 % also read English, 18.6 % in Catalan or Valencian (percentage increases to 74,5% in Catalonia, 44,1% in Balearic and 39.6 % in the Valencian Community), a 7.7% reading in French, 4.2% in Galician 4.2% (percentage rises to 61.6 % in Galicia) and 2% in Basque 2% (35 % in the Basque Country and Navarra 13.2%). The number of readers who read in the regional languages in their respective regions increases.

42.5% of the reading population bought the last book read, 21.1% gave it away. It lent in 27.3% of cases. 9.5% was borrowed from a library.

The most read books are, the saga "Millennium" by Stieg Larson, heads the ranking of most widely read books, followed by the saga "Fifty Shades" by E.L. James and "The Pillars of the Earth" by Ken Follett. In fourth place it is "The time between seams" by Maria Duenas.

The ranking of most read books of infantile and juvenile is headed by the saga "Twilight" of Stephenie Meyer, followed by "The Boy in the Striped Pajamas" by John Boyne, and the saga "Harry Potter" by JK Rowling . "The Little Prince", by Antoine de Saint-Exupery, appears in the fourth place.

Hay que señalar, además, que un 20,9% de la población no lectora apunta que prefiere dedicar su tiempo a otro tipo de entretenimiento.

Reasons for not reading: Lack of time is still the main reason for non-readers to explain their lack of reading habit (48.8%), especially between the population with ages understood between 25 and 54 years. 29.9% argues that do not read because they do not like or are not interested, reason not to read for 47.4% of young non-readers aged 14 to 24 years. Between the major ones of 65 years, health reasons or vision problems is the main reason for not reading in 28.9% of cases. It should also be noted that 20.9% of non-reading population suggests that prefers to dedicate their time to other type of entertainment.

Reading on digital support: The number of readers in digital support overcomes the half of the major 14-year-old Spanish population (58 %), 5,3 % more than in 2011.

If we focus on the readers of books in this format, since 2010, the percentage has increased by 6.4 points, up to 11.7% of the population. The Spanish continue using digital devices to consult websites, forums and blogs (46.9%) and reading newspapers (38.0%).

The computer remains the support most used for digital reading (55.8%). However the reading in e-Reader has multiplied for five from 2010, 6.6% versus 1.3%. It should also be noted that the percentage of interviewed who have an eReader already comes 9.7% (3.9% in 2011). If we refer to the device they use, but has increased in all cases, the increase has been major in those supports that are not thought only for the reading (tablets and smartphones) while e-readers except the Kindle's case diminish their participation.

Los lectores entrevistados que adquirieron libros digitales señalaron que sólo pagan 4,5 libros de cada 10 que leen. Los otros 5,5 los consiguen gratuitamente.

Between the readers of electronic books the forms of access are diverse. 64.4% of the interviewed use a free download. 37.9% affirms to obtain eBooks through family or friends. A 32% internet download books paying (4.9 points less than in 2011). The interviewed readers who acquired digital book indicated that they only pay 4.5 out of 10 books they read. The other 5.5 they get for free.

Unlike what happens in the reading paper format, 65.6% of the male readers read on digital support versus 50.4% of women. By age, the most marked difference, 70 points, occurs among the young people from 14 to 24 years (88.6%) and those over 65 years (18.9%), although the distance the distance diminishes for the increase of 8,3 points that has taken place in the most major population compared to 2011.

Purchase of books: As reflected in the Barometer data, 55.4% of Spanish bought books throughout 2012, 1.9 points less than the previous year. 15.1% bought textbooks only, 16.4% buy textbooks and no text, while 23.9% bought non text books. The average number of books purchased in 2011 was 10.3 books. However, if we refer not only to the text books, which were purchased by 40.3% of Spanish people (1.3% less than in 2011), the average number of books purchased by these was 9.1.

Madrid is the Autonomous Community with highest percentage of non-text book buyers (48.3%). The region with the highest average number of books purchased is Asturias, 10.9%, however the percentage of buyers (36.2%) is below the national average.

The matter most bought (69.2%) is literature, mainly novels and short stories (94.5%), something that has not changed in last years. These books are followed, far behind, those of the subjects of humanities and social sciences (13.4%) and infantile and juvenile (3.9%), the only subject that grows.

Castilian is the language in which they were written 88.3% of books purchased. 5.4% was written in Catalan, which represents an increase of 1.4 points compared to 2011. In Catalonia, this number rises up to 28,1 %.

In addition, it is necessary to indicate that for the 30.3% of the buyers, the last book acquired is a pocket copy, 6.3 points more than in 2011.

As for places to book's acquisition, bookshops continue being the favorite places to shop for 65.8% of the buyers, in fact 46.8% of them realizes their last purchase in one of them. Bookstore chains (22.6%), department stores (20.3%), hypermarkets (12.4%) and reader's club (11.4%), follow them in their preferences. Note that the department stores and hypermarkets lose weight as habitual places to buy books.

The sagas "Fifty Shades" by E. L. James, "A Song of Ice and Fire" by George RR Martin and "The Hunger Games" by Suzanne Collins, have been the most purchased books in 2012.

Reading and minors from 10 to 13 years: All children from 10 to 13 years read at least once a quarter. 100% read books, 47% magazines, 36.3% comics and 26.3% newspapers. By sex, girls prefer to read magazines (51.5%), boys are choose comics (50.8%) and newspapers (34.1%).

100% of children from 10 to 13 years read for "studies". However, the percentage of them who read during their leisure time is 84.6%, and 77.2% do so frequently, daily or weekly. These percentages have increased compared to 2011 (82.9% and 75.1% respectively)

In addition, 50.5% of children read in digital format, of that 45.7% do so frequently. However, only 13.1% read books. They choose websites, blogs and forums. When reading books 48.5% prefer the computer. The 5.4% of consulted children affirmed to have an eBook.

El 95% afirma que sus padres les leían cuando eran pequeños. Además, el 96,3% de los niños lectores dice que sus profesores les animan a leer, y el 91,1% asegura que en sus colegios se realizan actividades en torno a la lectura y el libro. El 91,6% señala que ha participado en ellas.

The 80.7% of children ensures that their parents read regularly at home and 90.7% who purchased them or given away books in the last year. The 95% affirm that their parents read to them when they were little. In addition, the 96.3% of children say that their teachers encourage them to read, and 91.1% said that reading activities are conducted in their schools. 91.6% say they have participated in them.

Geronimo Stilton books of Elisabetta Dami, Harry Potter Saga, JK Rowling and The Diary of Greg of Jeff Kinney are the most read books by children between 10 and 13 years old.