**Report on the**

**Spanish publishing sector**

**Year 2017**

Federación de Gremios de

Editores de España

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**Internal Book Trade**

In 2018, the Spanish Federation of Publishers' Guilds carried out the twenty-ninth edition of the study on Domestic Book Trade, which collects the publishing and turnover data of private -and affiliated- publishing companies in Spain, referring to fiscal year 2017. It reflects the current situation of the publishing market and the evolution and trends of the main indicators of the sector.

The data in the report, obtained through a systematic exploitation of the questionnaires sent by the publishers, yield this information:

-The global turnover figure for book sales in domestic trade and those variables related to the supply of books and their marketing.

-The employment data of the sector, the geographical distribution of the production and distribution of books, the language of edition, the edition in pocket format and in electronic format, the price of the books according to the subjects, the channels of commercialization and the global amount paid by author's rights.

The following are the main figures for the activity of the private and affiliated publishing sector in Spain in 2017:

|  |  |  |  |
| --- | --- | --- | --- |
|  | **2015** | **2016** | **2017** |
| Private -and affiliated- Publishers | 775 | 727 | **737** |
| Employees (direct employment) | 12.532 | 12.608 | **12.696** |
| Edited titles (including reprints) | 80.181 | 81.496 | **87.262** |
| Copies produced (thousands) | 225.277 | 224.054 | **240.220** |
| Average print run (copies/title) | 2.810 | 2.749 | **2.753** |
| Titles on sale | 586.811 | 620.316 | **656.080** |
| Internal market turnover (million Euros) | 2.257,07 | 2.317,20 | **2.319,36** |
| Net turnover internal market (million euros) | 1.573,44 | 1.601,37 | **1.658,82** |
| Copies sold (thousands) | 155.436 | 157.233 | **158.250** |
| Average prices | 14,52 | 14,74 | **14,66** |

The data for 2017 corroborate the change of trend observed since 2014, which announced the beginning of the recovery of the publishing sector in Spain. In 2017 both the number of jobs in the sector (0.7% more than in 2016) and the number of affiliated companies increased, from 727 in 2016 to 737 in 2017.

On the other hand, the sector published 87,262 titles, with an average print run of 2,753 copies per title. The Spanish publishing catalogue on sale totals 656,080 titles and in 2017 158.250 million copies were sold, 0.6% more than in 2016.

The overall turnover of the sector was 2,319.36 million euros; it remains in line with the previous year (+0.1%), and the average price per copy fell to 14.66 euros. In addition, it should be noted that turnover is mainly concentrated in the publishing houses of the guilds of Catalonia, with 50.8%, and Madrid, with 42.3%, both accounting for 93.1% of global turnover.

Regarding turnover by subject, 35.7% of the market share is generated by school books, followed by fiction with 19.5%. These are the two subjects with the highest quota. The combination of these two subjects together with children and juvenile (12.3%) and Social Sciences and Humanities (11.5%) reached 79.0% of the total turnover:

* Fiction had a turnover of 451.70 million euros in 2017. Within the subject Fiction, the genre Novel generates 90.2% both in turnover and in copies; in turn, the Contemporary Novel represents 60.0% of the total turnover of Novel.
* In 2017, children and young people had a total turnover of 286.17 million, 3.2% more than in 2016.
* School textbooks decreased their turnover by 3.2% with respect to the previous year, with a turnover of 828.81 million euros (although in the last 5 years this figure has increased by 14.1%).
* Social Sciences and Humanities had a turnover of 266.19 million, 2.2% more than the previous year.
* Scientific, Technical and University textbooks produces a turnover of 107.46 million euros, 4.3% more than in 2016.
* With a turnover of 123.03 million euros, Practical Books increased their turnover by 3.3% with respect to the previous year.
* Generalities invoices a total of 135.26 million euros in 2017, 0.2% less than in the previous year.
* In 2017, Dictionaries and Encyclopaedias had a total turnover of 39.85 million euros, 2.0% less than the previous year.
* Comic had a turnover of 62.76 million, 4.2% more than in 2016.

As for the marketing channels for books:

* Bookshops and Bookshop Chains continue to be the main channels for the sale of books, representing more than half of total turnover (52.8%). Bookshops, with a turnover of 813.71 million euros, increased their sales by 0.4% with respect to the previous year; Bookshop Chains had a turnover of 411.10 million euros, a stable figure with respect to 2016 (+0.1%).
* Hypermarkets had a turnover of189.39 million, 0.3% more than in 2016.
* Adding the three channels (Bookshops, Bookshop Chains and hypermarkets), these have increased their turnover by 0.3% in the last year.
* Both sales to Companies and Institutions (14.9%) and sales to Libraries (0.5%) fell between 2016 and 2017.
* Sales on credit plus telephone sales fell by 1.0% in the last year (although since 2013 turnover has increased by 4.5%).
* With the exception of Internet, the rest of direct sales channels decreased slightly with respect to 2016.
* One more year, sales increase through e-book channels. They represent 5.1% of total turnover and have increased by 1.6% with respect to the previous year and by 48.4% with respect to 2013.

On the other hand, it should be noted that sales of pocket books recovered in 2017, after the fall recorded in 2016. Turnover reached 91.88 million euros, a 1.2% increase. The number of titles published also increased by 2.9%, with a total of 4,602 titles.

**Foreign Trade in Books**

In 2018, the Association of Spanish Book Chambers carried out the twenty-sixth Study of Foreign Book Trade, in which, by 2017, total net exports amounted to 588.856 million euros, which is 2.99% more than the previous year (if we express it in dollars, this growth is 6.77%) and almost 8% more than in 2010, thanks to the good performance of the market of the Americas and the recovery of both the market for fascicles and kiosk material and the printing sector.

Most of this export comes from the publishing sector, 65.65% (386,593 million euros), most of which corresponds to books (89%, 343,063 million euros); although it is important to note that the printing sector contributes to growth with 34.35% (202,263 million euros), of which 68% also corresponds to books (137,047 million euros). In this way we have 480.100 million euros for book exports.

It is, without doubt, a growth that surprises because it should not be forgotten that the 202 subsidiaries present between the markets of the Americas and the European market produce a total value of 3,000 million euros.

To these figures must be added the 70 million sales of rights in foreign markets.

As for the destination of our exports, in 2017 the main one was the European Union, with 59.87% (352.547 million euros); of these, 45.90% corresponds to the publishing sector (161.819 million euros) and 54.10% refers to the printing sector (190.728 million euros), thus consolidating the situation of greatest weight of exports of printing companies in this area. However, in Latin America, 96.98% of the export figure (193.994 million euros) is a publishing product compared to 3.02% of printing product (6.037 million euros) as the Spanish printing industry has focused its action in the countries of the European Union and has also increased the export of the publishing sector to this area. 36.41% of exports went to the Americas as a whole.

By country, France bought for 172.470 million euros (74.804 million euros in the publishing sector and 97.766 million euros in the printing sector), followed by Mexico (64.169 million euros), the United Kingdom (61.997 million euros) and Argentina (56.529 million euros).

As we have already seen, the export of books as a publishing product amounted to 343.063 million euros in 2017. Of these, 330.64 million have been exported by Spanish publishers directly or through distributors belonging to their publishing groups (of which 45.49% correspond to fascicles and kiosk material and 54.51% to books). The rest, 12.42 million euros, has been made by independent distributors and booksellers.

In terms of the number of copies that publishers have sold directly, we have more than 75 million, of which 40.20% are books.

Focusing on the subjects of "books", the most exported subject was "Social Sciences" with 15.72%, followed by "Religion" with 15.45% and "Children and Youth " with 13.79%.

From the point of view of the copies sent, "Religion", 20.71%, " Children and Youth ", 15.84%, "Social Sciences", 15.28% and "Fiction", 14.98%, are the most exported subjects.

The average price of the books was 5.98 euros and of the fascicles 3.35 euros. By subject, the highest price was the "Technical Scientist", with 12.68 euros, and the lowest the "Religion" with 4.46 euros.

If we look at the increase in each subject, we see that, among the heaviest, "Fiction" has grown by 28.33%, "Scientific-Technical" by 17.66%, "Children and Youth" by 11.74% and "Religion" by 11.03%.

Four subjects, "Social Sciences", "Children and Youth ", "Fiction" and "Religion", accumulate something more than 58% of the total of "Books", as opposed to the year 2011 in which these same subjects represented almost 68%. These data show a lower concentration of exports in the most exported materials.

Publishers export to two main areas: the Americas and Europe. Between the two areas, they account for 98.16% of total exports. Our preferred destination is the Americas, with 188 million euros, which represents 56.93% of the total. A small increase can be seen with respect to 2016, as the percentage was 53.26% in that year.

The average cession price of shipments to Europe is higher than the corresponding price to shipments to the Americas. This unusual circumstance may be due to the low price of exports to Argentina.

As for imports, in 2017 they exceeded the figure of 192 million euros. Of this amount, book imports represent 67.49% of the total (almost 130 million euros), periodicals represent 31.09% (59.9 million euros) and other products only 1.42% (2.7 million euros).

It should be noted that only 51.03% of Europe's imports are books. In 2017, 46.54% of imports from Europe, almost 60 million euros, were periodicals, i.e. newspapers and magazines. The reason for this high figure lies in the existence of many Europeans living in Spain who demand these products. Also, of course, a part of this figure is related to scientific publications, but its specific weight is much less.

Compared to 2016, imports fell by 4.33%, mainly due to the fall in the market for periodicals in Europe (14.09%).

In summary, in 2017 the foreign trade of the Spanish book presented these characteristics:

* The export of the Book Sector increases by 2.99%.
* The Americas continue to be the fundamental market for publishing companies exporting books.
* The European Union continues to be the first destination for exports from the Book Sector.
* The export of traditional books continues to perform well in Europe.
* The export of collectables and kiosk material increased its turnover by 2.89%.
* The export of Spanish-teaching manuals to foreigners is maintained, as a result of the specific promotional actions carried out by the sector.
* North America continues to establish itself as one of the most important markets for our books. Even though direct export figures to this destination have suffered an appreciable decrease in the last decade, Spanish companies have increased their presence in this market through shipments from Latin American countries and indirect exports from China.
* The import figure is reduced by 4.33% due to the decrease in the import of newspapers and magazines. The number of printing orders placed in the Far East also fell by 7.28%.
* The commercial balance of the book sector continues to be very positive, reaching 396.25 million euros in 2017.

**Reading and Book Buying Habits**

**(Year 2018)**

The following are the results of the study "Habits for reading and buying books in Spain" carried out in 2018 by the company Conecta for the Federación de Gremios de Editores de España:

**READER INDEX**

* The total percentage of readers reaches 96.1% among the population aged 14 or over (they read some kind of material, in any format or medium, whether printed or digital, at least once a quarter). The total readership increases, and frequent readers stand at 93.1% (they read every week).
* The total reading of books continues to rise, in 2018 the reading of books for leisure in free time increases.
* After the increase observed in recent years, the percentage of readers who read books for work or study purposes remains stable.
* The reading of websites, blogs and online forums and the reading of press continues to grow, and the reading of magazines continues to decrease, consolidating the downward trend of recent years.

**BOOK READING IN FREE TIME**

* 61.8% of the population over the age of 14 read books in their free time (7.2 points more than 10 years ago). The great majority, eight out of ten are frequent readers, mainly increasing the number of readers who read every day or almost every day.
* 63% of book readers seek information and recommendations on new readings.
* 55% of readers have been given a book in the last year.
* Although the total percentage of readers is similar between men and women, women read more books, magazines and social networks, while men read more newspapers, comics, websites, blogs and online forums.
* In the case of books, women have a higher percentage of free time book readers than men in all age groups and educational levels. This decreases with increasing age or higher education.
* Except in newspapers and magazines, the number of readers decreases with age.
* There is a direct relationship between the level of completed studies and the ratio of readers, although in recent years there has been an increase in the percentage of readers among the population with primary studies.
* Madrid, Navarra and the Basque Country are the three regions with the highest number of readers of books in free time. Andalusia, the Canary Islands and Extremadura continue to be the regions with the lowest percentages.
* 92.4% of the population over 14 habitually read in Spanish and 44.5% habitually or occasionally read in two or more languages.

**READING IN DIGITAL FORMAT**

* The reading of digital content of any kind maintains the upward trend, going from 47.8% in 2010 to 78.4% today.
  + Virtually all, 76.5%, are frequent readers.
  + Books and press increase their reading in digital format.
  + In the last 8 years, readers of books in digital format have gone from 5.3% in 2010 to 28.7% in 2018.
  + In the case of the press, there is a gradual transfer from reading on paper to reading in digital.
* 61.8% of leisure time book readers:
  + 38.7% remain the exclusive paper reader.
  + 17.2% read both paper and digital books.
  + 6.0% read exclusively in digital format.
* Exclusive readers of digital books have a slightly more intensive reader profile than one who only reads on paper: they read and buy more books a year, they have more books at home, they also read -as well as books- more websites, blogs and forums, and they read more on public transport and in the open air.
* 26.3% of the books read were in digital format. However, most of these books, 79%, were obtained free of charge.

**AUDIOBOOKS**

* Only 2.5% of the population aged 14 or over listen to audiobooks at least quarterly. 1.1% do so on a weekly basis.

**ATTITUDES TOWARDS READING**

* Reading is perceived as an activity that "contributes to a more open and tolerant attitude", which is "an exciting and stimulating activity", which "helps to understand the world around us" and "makes us happier".
* 15 is the average age at which book readers consider their love of reading really began.
* Most readers believe that paper books will coexist with digital books, while 31.7% believe that in the future most books will be digital.

**BOOK BUYING HABITS**

* 62.4% of the Spanish population aged 14 or over have bought a book in the last 12 months, whether textbook or not. Both the proportion of buyers and the average number of books purchased increase slightly.
* In non-text books, the main purchasing channel continues to be the traditional bookshop, although Internet purchases continue to increase.
* As for textbooks, their purchase remains stable, with figures of around 31% for the last few years. Bookstores remained the channel most used to buy these books (57.9%, although it fell with respect to 2017).

**LIBRARY ACTIVITY**

* 31.2% of those interviewed have visited a library in the last year, a percentage in line with those registered in previous years.
* The number of users is maintained (in 2012 it was 30%) but there is a decrease in frequent users (35% in 2012 and 27% in 2018).
* The use of the book lending service is also reduced (59% in 2012 and 46% today).
* Libraries continue to be highly valued. On a scale of 0 to 10, users rate 8.1 out of 10.

**INITIATION TO READING** (UP TO 9 YEARS)

* In 3 out of 4 households with children under 6 years of age, these children are read, a percentage that decreases with respect to the previous year. 75% of parents report reading regularly to these children (83% in 2017). The average reading also drops and falls under 3 hours a week.
* Between the ages of 6 and 9, 85% of children habitually read non-text books, a figure similar to the one of 2017, although the average number of hours of reading is reduced from 4 to 3 hours per week.
* 40% of parents seek information and reading recommendations for their young children.

**TEENAGERS READING** (10 TO 18 YEARS)

* From the age of 10, reading plays a leading role, but there is a decrease as one moves towards coming of age:
  + Between the ages of 10 and 14, 71% are still frequent readers of books in their free time, while between the ages of 15 and 18 the proportion drops to 45%.
  + In addition to books, young people aged 15 to 18 are the segment with the highest number of readers of web pages or articles or long texts on social networks.
* From the age of 15 there is also less use of the library as a place to read or to obtain books, and those who come mainly go to study.
  + At this age, the role of the book as a gift and participation in activities related to reading in the school is also reduced.
* Virtually all teenagers (15 to 18 years old) read some kind of content on digital media, almost all on websites or social networks. In contrast, 20.7% are readers of books for leisure in digital format (compared with 27.1% of the adult population and 27% of young people aged 10 to 14).
* Young people perceive reading as an activity that "contributes to a more open and tolerant attitude", which is "an exciting and stimulating activity" and which "helps to understand the world around us".