

**Report on the  
Spanish publishing sector  
Year 2019**

Federation of Spanish Publishers' Guilds  
Publishers' Guilds of Spain

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## **Domestic Book Trade**

Since 1989, the Federation has been carrying out a study to report on the evolution experienced in the domestic trade (production and turnover of the sector, the book marketing chain, etc.) and also to reflect the changes in the sector in recent years. Thus, in 2020 a new edition of the study was carried out, number 31, to find out what was in 2019 the structure of the publishing sector and the evolution that its main magnitudes have had.

The most important result of the study is that the publishing sector grew by 2.4% in 2019, thus adding its sixth consecutive year of growth to place its turnover at 2,420.64 million euros. All publishing sub-segments increased their turnover: Fiction (+1.8%), Children's and Young Adult (+2.9%), textbooks (3.3%), non-fiction (+1.8%), comics, comic books and graphic novels (+0.5%).

Likewise, digital books recorded a slight rise in turnover to 119.13 million euros, 0.1% more than in 2018. There was a 12.3% increase in the number of titles published compared to 2018, to 21,607.

Publishing output of paper titles reached 82,347 titles (60,740 in paper and 21,607 in digital): up 8.1% on the previous year (6.6% more in paper and 12.3% more in digital format). The average print run increased slightly, by 0.4%, to 3,779 copies per title. The average price was 14.15 euros.

Sales of paperbacks continued to grow, reaching 94.66 million euros, with an increase in the number of titles published and copies sold.

Bookstores and bookstore chains were once again the main book distribution channels, accounting for 53.4% of sales. Internet sales also grew.

On the other hand, the sector published a total of 82,347 titles, of which 60,740 were on paper and 21,607 in electronic format. This represents a recovery of 8.1% in terms of publishing.

The number of copies produced increased by 7.1% over the previous year, reaching 229,515 copies. The average print run barely changed compared to 2018 (3,762 in 2018 - 3,779 in 2019).

In 2019, 162,852 million copies were sold, it follows the slight upward trend observed in previous years, with respect to 2018 it has been 0.8%. The ratio between copies produced and copies sold stood at 70.7% of total copies produced (75.1% in 2018). The difference between copies produced and copies sold went to the foreign market in the form of exports or were returned.

The overall turnover of the sector was €2,420.64 million, remains in line with the previous year (€2,363.90 million in 2018).

Unlike last year where the average price fell to €13.95, this year it rose slightly to an average of €14.15 per copy sold.

With regard to turnover by subject, we found the following results:

- Non-university text: 33.9% of total turnover (819.84 million euros), up 3.3% on the previous year, with Primary Education being the most important sub-subject with 14.4% of total turnover.

- Non-fiction: 29.3% of total sales. This subject grew the most compared to 2018 (by 1.8%) totaling €709.31 million.

- Adult fiction: 20.5% of total turnover: €496.78 million in 2019 (+1.8% than the previous year).

- Children's and juvenile: 12.9% of total turnover, with 312.18 million, up from the previous fiscal year (+2.9%).

- Comics: 2.6% of total sales (62.99 million euros), with no significant variations with respect to the previous year.

This means that the two main areas Non-university texts and Non-fiction accounted for 63.2% of total sales, more than half of total sales, and that four areas accounted for 96.6% of sales: adult fiction, 20.5%, children's and young people's fiction, 13.3%, non-university texts, 34.2%, and non-fiction, 29.3%.

In terms of book marketing channels:

- Bookstores (843.59 million) and bookstore chains (451.00 million), continued to be the main book sales channels, accounting for slightly more than half of the total turnover (53.5%), totaling between them 1,294.59 million euros in 2019. Bookstores, increased their turnover compared to 2018 by 1.4% and bookstore chains raised their turnover by 6.9% being the channel with the second highest percentage increase, after the Internet.

- Companies and institutions invoiced 360.47 million euros, up 1.9% compared to 2018.

- Hypermarkets totaled 198.89 million euros and a 2.2% increase in sales.

- Digital book channels totaled €119.13 million, maintaining a turnover figure very similar to last year (+0.1%).

- Kiosks invoiced a total of €79.78 million in 2019, down -1.3% on the previous year, being the channel with the biggest drop.
- Credit sales fell by -0.3% to €76.80 million.
- Subscriptions reached 67.95 million euros, down -0.9%.
- Book Clubs remained stable at 45.80 million euros (-0.2% year-on-year).
- Internet increased for another year, at 26.39 million euros, and was the channel that increased the most (+7.6%).
- Libraries was the channel with the lowest turnover, at 11.30 million euros, but was up 1.6% on the previous year.

Sales of paperback books continued their upward trend that began in 2017, following the drop recorded in 2016. Turnover reached €94.66 million, up 1.4% on the previous year. The number of copies sold was 12.72 million copies, 2.6% more than in 2018. The average price of books in this format was €7.44, down 9 cents compared to 2018. The number of titles published in this format also increased (by 2.2%), reaching a total of 4,766 titles.

## **Foreign Book Trade**

In 2020, the Association of Spanish Book Chambers carried out the twenty-eighth study of the Foreign Book Trade, a working tool that reflects the importance of the book world in general and the publishing world in particular in the presence of Spanish-language culture in foreign markets as it is common knowledge that the publishing industry is one of the most internationalized sectors of the Spanish economy, in intensity and in age.

2019 was a peculiar year, with a bad start for exports and a slow but steady correction, especially, in the second half of the year, when our main market, America, noticed the halt in world trade. Despite this, export reached more than 529 million euros, although it decreased compared to 2018, and, although import was somewhat higher than in 2018, mainly due to the increase in printing orders to China, the traditional positive contribution to the trade balance was more than maintained, with almost 312 million euros.

It should be noted that although exports were down, the competitiveness of our publishers in coping with the various economic conjunctures led to lower average assignment prices in many markets.

On the other hand, the sale of rights by publishers remained stable at around 70 - 71 million euros, with English being the language to which most rights were sold.

The most noteworthy data from the study are as follows:

- Book exports fell for the first time in the last three years.
  
- Imports increased by 24.86% due to the contribution of printing orders from China.
  
- However, the contribution to the trade balance remained highly positive, with some 311.974 million euros, due to the dynamism of the Spanish book sector.
  
- America continued to be the fundamental market for exporting publishing companies in the book sector.
  
- The fall in exports, which has its cause in the slowdown in world trade, which affected Ibero-America, has a part of the explanation in the sharp drop in Argentina, after a magnificent 2018, and which has its cause in the general uncertainty due to the political change and the economic crisis.
  
- The European Union was once again a key destination for the book sector, the first for graphics and the second for publishers.
  
- The export of collectibles and newsstand material increased its turnover by 28.39%.
  
- The export of Spanish language manuals for foreigners was maintained, as a result of the specific promotional actions carried out by the sector.
  
- North America continued to establish itself as one of the most important markets for our books. Although direct exports to this destination have declined significantly over the last decade, Spanish companies have increased their presence in this market through shipments from Latin American countries and indirect exports from China.

Book exports of publishing products amounted to 354.79 million euros in 2019. Of these, 334.21 million were exported by Spanish publishers directly or through distributors belonging to their publishing groups. The rest, €20.58 million, was made by independent distributors and booksellers.

In any case, the figure for publishers represents 94.20% of the total number of books.



# **Reading Habits and Book Purchases**

## **(Year 2020)**

The main objective of the study of "Reading and Book Buying Habits in Spain" in the year 2020 that is carried out every year by the Federation of Publishers' Guilds of Spain is to know the reading behavior of Spaniards and its main conclusion is that the percentage of book readers continues with an upward trend and that the confinement raised the historical maximum of frequent book readers: 68.8% of Spaniards over the age of 14 read books throughout 2020; 64% have reading as a leisure activity, in their free time and 23.1% read for work or studies.

### **READER RATIO**

- The total percentage of readers aged 14 and over stands at 95.7% (reading some type of material, in any format or medium, at least once a quarter).
- The percentage of book readers continues to rise. Magazine readership is down, while newspaper readership is up, as is the use of social networks, websites, blogs and forums.
- There is a higher proportion of newspaper readers, web, blog and forum readers and comic readers among men, while women are more magazine readers and more assiduous readers of social networks.
- With the exception of magazines, the percentage of readers, in any medium, drops after the age of 55.
- Regardless of the type of reading, there is a direct relationship between the level of studies completed and the ratio of readers.
- A total of 96.8% of readers are frequent readers (they read every week).

- 57.2% of the population are frequent readers of books.
- 99.7% of the population aged 14 years or older usually read in Spanish, 21.0% usually read in English and 20.6% in Catalan or Valencian. Some 46.1% of readers read regularly or occasionally in two or more languages.
- 64.0% read books for leisure in their free time and for the third consecutive year the percentage of those who read for reasons of work or studies fell (23.1%). A higher proportion of women read books in their free time and among men the proportion of those who read books for study or work is higher.

### **READING BOOKS DURING LEISURE TIME**

- The percentage of readers in their free time continues to rise, reaching 64.0%. The vast majority, 82.3%, are frequent readers, with an upward trend. This growth is due to the increase in the number of those who read every day or almost every day.
- Some 36% of the population continues not to read books, although this is a downward trend in recent years.
- Madrid, the Basque Country, Navarre, Catalonia, La Rioja and Aragon are the Autonomous Communities with a higher-than-average ratio of leisure book readers. The Communities of Extremadura, the Canary Islands, Andalusia and Extremadura continue to be those with the lowest values. All the Communities have increased their percentage of leisure book readers.
- Lack of time is the main reason why half of the occasional readers/non-readers do not read more frequently, although 30% of non-readers state that they do not like to read.
- For 73.6% of readers, the subject of the last book they read was novels and short stories (literature).
- One out of two readers did so in paper format (paperback), 32.8% in paperback format and 18.0% in digital format.

## **DIGITAL READING**

- Reading in digital format continues the upward trend. A total of 82.1% of respondents aged 14 and over read in digital format, and this type of reading has grown by 34.3% in the last 10 years.
- Practically all digital readers (80.1%) are frequent readers (at least once a week).
- Books, press, social networks and websites, blogs and forums increase their reading in digital format. This increase does not translate into a parallel increase in total reading, which points to an increase in digital reading, without leaving aside paper.
- The cell phone remains the most used device for reading in digital format. This support has increased for another year, reaching 70.3%.
- The E-Reader is mainly used for reading books.
- 30.3% of the population aged 14 and over read books in digital format at least once a quarter. Free downloading continues to be the most common method for obtaining digital books and the upward trend of respondents who pay for e-books continues (39.8%) and the percentage who get them through friends/relatives (43.7%) remains the same.
- Of the 64.0% of readers of books in their free time: 34.3% remain exclusive readers of paper; 20.8% read both paper and digital books; and 8.9% read exclusively in digital format.
- Exclusive readers of digital books present a slightly more intensive reader profile than those who only read on paper: they read and buy more books per year, in addition to books, they read more newspapers, social networks, websites, blogs and forums; and they are younger and with a higher level of education.

## **BOOK BUYING HABITS**

- 64.2% of Spaniards aged 14 and over have bought a book in the last 12 months. Although the number of buyers has increased with respect to the previous year (62.6% in 2019- 64.2% in 2020), the average number of books purchased has decreased (11.5 books in 2019- 9.7 books in 2020).

- Non-textbook purchases continue to trend upward to 51.7% in 2020, with an average of 8.3 books purchased in the past year (8.4 in 2019). The traditional bookstore continues to be the main purchase channel for these books although those made through the Internet continue to grow, reaching 24.6% in 2020.
- The percentage of textbook buyers drops slightly to 31.9%; the average number of books purchased also falls to 7.8. By far, bookstores remain the most used channel for purchasing these books (55.5%).

### **ACTIVITY IN LIBRARIES**

- 23.2% of those interviewed have visited a library in the last year. As expected, the number of visitors to libraries fell in 2020 due to the pandemic.
- The good rating of libraries is maintained, obtaining the same score as the previous year, 8.3 out of 10.

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

- . The percentage of households with children under 6 years old in which children are read to drops again to figures similar to 2018 although the time spent reading to these minors increases by more than 20 minutes on average compared to the previous year.
- 88.8% of children aged 6 to 9 read non-text books, slightly higher than the previous year; the average reading time in this case remains stable.

### **READING AMONG ADOLESCENTS (10 TO 18 YEARS OLD)**

- Reading in adolescents is more common than among the population aged 15 to 18 years; they are the segment with the highest number of readers of web pages or long texts on social networks and comics. From the age of 15 onwards, frequent readers of books in their free time are notably reduced; between the ages of 10 and 14, 79.8% are still frequent readers of books in their free time; between the ages of 15 and 18 the proportion drops to 50.3%.
- Practically all adolescents (15 to 18 years old) read some type of content in digital support, almost all on websites or social networks. On the other hand, 19.0% are leisure readers of books in digital format.

## **THE ROLE OF BOOKS AND READING DURING THE PERIOD OF CONFINEMENT**

During the confinement by Covid-19 between March and June, the number of frequent book readers increased to 57% of the population and read on average 90 minutes more than they did the previous year; women and those under 35 years of age took advantage to read more than before. Eighty-two percent of those interviewed said that reading books during confinement brought them entertainment, tranquility, relaxation, positive mood and joy.