

Report on the  
Spanish publishing sector  
Year 2020

Federation of Spanish Publishers' Guilds  
Publishers' Guilds of Spain

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## Domestic Book Trade

Since 1989, the Federación de Gremios de Editores de España has been carrying out the study Comercio Interior del Libro en España (Internal Book Trade in Spain), in order to gather the main annual indicators of the publishing sector and to know its fundamental figures.

The thirty-second edition of this report gathers data on publishing and turnover of private and affiliated publishing companies in Spain, referring to the 2020 financial year. It also attempts to reflect the current situation of the publishing market and the evolution and trends of the sector's main indicators.

Below is a summary of the data in the report, highlighting the main figures obtained from the activity of the private and aggregated publishing sector in Spain developed in 2020.

Private and aggregated publishing companies: 730

Employees (direct employment): 12,709

Titles published (TOTAL): 74,589

Titles published (PAPER): 50,698

Titles published (DIGITAL) 21,607 23,891 12.3 10.6

Copies produced (thousands): 181,292

Average print-run (copies/title): 3,576

Live titles on offer: 737,479

Domestic Market Turnover (PVP) (mill. Euros): 2,439.93

PAPER Turnover (Mills. Euros): 2,304.94

DIGITAL Turnover (Mills. €): 126.19

Copies sold (thousands): 164,450

These data reflect the fact that during the previous year the publishing houses have evolved and, depending on the indicators, this evolution has affected them in one way or another. The number of private and affiliated publishers has increased slightly by 8 publishers, representing an increase of 1.1% of the total. At the same time, the number of employees remained stable, although 45 jobs disappeared, which represents only 0.4% of the total.

In absolute numbers, the sector published 74,589 titles, 9.4% less than last year. While the number of titles published on paper fell by 16.5%, digital publishing saw an increase of 10.6%. Although in total numbers the digital edition is much smaller than the paper edition: 50,698 in paper versus 23,891 digital in 2020.

The number of copies produced fell by 21.0% to 181,292 in total numbers. The average print run also fell by 5.4% to 3,576 in 2020. However, titles on offer continue to increase for the third consecutive year reaching a rise of 3.6% over 2019, which means 737,479 live titles in catalog.

Turnover in the domestic market remains stable compared to 2019. This figure is marked by a rise in digital turnover of 5.9% and stability in paper turnover. Copies sold also reflect a slight rise of 1.4%.

The ratio between copies produced and copies sold stands at 90.7% of total copies produced (70.7% in 2019). The difference between copies produced and copies sold either go to the foreign market in the form of exports or are returned.

The overall turnover of the sector was €2,439.93 million, remaining in line with the previous year (€2,420.64 million in 2019); moreover, taking into account the data since 2013, a continuous upward trend in turnover can be observed. The average price per issue fell slightly to €14.84.

With regard to turnover by subject we find the following results:

- Non-university text: 31.4% of total turnover.
- Non-fiction: 29.3% of total sales.
- Adult fiction: 20.8% of total sales.
- Children and young people: 15.0% of total sales.
- Comics: 2.6% of total revenues.

This means that the two main subjects Non-university texts and Non-fiction account for 60.7% of the total turnover, more than half of it.

In terms of book marketing channels:

- Bookstores turnover 838.94 million and Bookstore chains turnover 453.59 million and continue to be the main book sales channels, representing slightly more than half of the total turnover, adding between them 1,292.53 million euros in 2020. The two channels maintain their turnover with respect to 2019.
- Internet suffers the biggest rise compared to 2019 with a 57.6% increase, from €26.39 million to €41.60 million.
- Companies and institutions turnover 357.34 million euros, slightly down on the previous year (- 0.9%).
- Hypermarkets totaled 204.47 million euros and had an increase of 2.8% in sales.
- The digital book channels totaled 126.19 million euros, maintaining a turnover figure higher than last year, up 5.9%.
- Kiosks achieve a total turnover in 2019 of 79.10 million euros, which is 0.9% less than in the previous year, following the same downward trend as in previous years.
- Credit sales remained stable with a similar result to last year.
- Subscriptions reached 68.49 million euros, up slightly by 0.8%.
- Book clubs, after a series of years of stable sales, fell by 3.6% to 44.16 million euros.

- Libraries closes the list of channels with the lowest turnover, reaching 10.59 million euros and falling 6.3% with respect to the previous year.

Turnover from paperback books continued its upward trend for yet another year, reaching 100.82 million euros, 6.5% more than the previous year. The number of copies sold was 13.48 million, 6.0% more than in 2019. The average price of books in this format was €7.48, 4 cents more compared to 2019 and the number of titles published in this format decreased compared to the previous year (-10.5%).

## Foreign book trade

The Association of Spanish Book Chambers carried out the twenty-ninth study of the Foreign Book Trade, a working instrument that reflects, in a reliable way, the importance of the book world in general and the publishing world in particular, in the presence of Spanish-language culture in foreign markets that is so little valued in Spain. Indeed, it is common knowledge that the publishing industry is one of the most internationalized sectors of the Spanish economy, in terms of intensity and age.

2020 was a strange year in which the pandemic situation due to the health crisis forced an almost total paralysis of foreign trade around the world for a quarter. This situation deepened trends that were perceived in the 2019 analysis. This is a prolongation of the reduction of exports and also of imports, although from the end of 2020 and the beginning of 2021 a very slow recovery process began.

Thus, we have that in 2020 exports reached the figure of 391.756 million euros, 26% less than in 2019. Likewise, and unlike 2019 where import grew, in 2020 this also decreased by 16.24%, so the final result in the trade balance remains highly positive, 286.533 million euros.

Export trends continue to reveal that the largest book market for Spain is America, the continent as a whole, and where we would highlight the position of the North American market, which continues to establish itself as one of the most important markets for our books, becoming for some subjects the second export destination.

The European Union is clearly in second place because it brings together both the export of publishers, which is increasingly growing, and the export of

graphics, which is concentrated on the European continent, thus becoming a key destination for the book sector, the former for graphics and the latter for publishers.

Imports come both from Europe, mainly books and magazines, and above all from China for printing orders, which are beginning to slow down.

It is also worth noting the minority but growing percentage of trade outside the Americas and Europe, which also reached 16.24%.

The export of Spanish language manuals for foreigners continued as a result of the specific promotional activities carried out by the sector.

Finally, it is also worth highlighting the significant increase in the sale of rights, almost two million euros, with English being the language to which most rights are sold, although the increase seems small given the average sale price, this means that the number of books for which rights are sold has increased.



# Reading Habits and Book Purchases

## (Year 2021)

The fundamental objective of the study "Reading Habits and Book Purchasing in Spain" is to learn about the reading behavior of Spaniards at the present time and to obtain information that facilitates the formulation and evaluation of reading policies and plans. Therefore, the study gathers information on:

- Reading in minors, both at home and at school, and in both children (up to 10 years old) and adolescents (from 10 to 18 years old).
- The reading index, to understand the incidence of reading in Spain and its evolution in terms of type of publication and format, distinguishing between books, comics, press, magazines, forums, etc.
- Reading habits, where additional information to the reading index is collected, of great value on the evolution of book reading (last book read, regular reading habits -language, places, devices-, reasons for not reading, etc.).
- Book purchasing habits, distinguishing between textbooks and non-textbooks, and paying attention to the acquisition of digital books, places of purchase, last book purchased, etc.
- Library activity as it allows us to know the state of reading in our country: use of libraries in the last year, type of library, frequency, etc.
- Attitudes towards reading, to delve into the social value given to reading and how the future of reading is perceived.

- Internet use, since the analysis of reading is inseparable from the study of other types of consumption.

On the other hand, the study also offers socio-demographic information (sex, age, type of household, marital status, educational level, employment status, occupation, social class) and on the technological and cultural equipment of the household (number of books, Internet connection, number of computers, tablets, etc.).

The following is a summary of the most outstanding results of the study on "Reading habits and book purchases in Spain" in 2021:

- 67.9% of the Spanish population reads books, 64.4% read books for leisure in their free time (maintaining the upward trend of recent years) and 21.2% read books for work or studies (declining). The average reading rate is 9.9 books per year.
- The number of frequent readers remained stable in 2021: 52.7% of the population read on a weekly basis. The occasional reader was 11.7%. 35.6% of the population continues not to read books, with a downward trend.
- The percentage of women who read books in their free time is significantly higher than that of men in all age groups (except for those over 65 years of age). This difference is greater among the population aged 55 to 64.
- The higher the level of educational attainment, the higher the proportion of leisure book readers. There is a greater increase in the reading rate of the population with higher levels of education: 85.9% of those with university studies read books in their leisure time.

- Madrid, the Basque Country, Navarre, Catalonia, La Rioja and Aragon are the autonomous communities with a higher-than-average ratio of leisure book readers. On the other hand, Asturias, Comunidad Valenciana, Baleares, Cantabria, Castilla y León, Galicia, Murcia, Castilla-La Mancha, Andalucía, Canarias, and Extremadura have readership values below the national average.
- Lack of time is the main reason why practically half of the occasional/non-readers do not read more frequently. One in four say that they do not read more because they do not like it and because they prefer to spend their time on other leisure activities.
- For 71.0% of the readers, the last book they read was a novel and short story (literature). 52.6% read in paper format (paperback), 28.8% in paperback format and 18.1% in digital format. 90% of the readers read the last book in Spanish and the remaining 10% in another language (mainly Catalan and English).
- The % of the population aged 14 and over who read books in digital format at least once a quarter (29.4% in 2021) has stabilized.
- The E-Reader (12.3%) and the tablet (10.7%) continue to be the most used devices among digital book readers (the use of the computer decreases after the increase of the previous year).
- Although the most common method of obtaining digital books is free downloading (60.3%), the number paying for e-books continues to increase (43.0% in 2021, 13.5 points more than 5 years ago).
- Although still with low figures, audiobook users are increasing (5.2% listen to audiobooks at least once a quarter, 2.5% do so weekly): the

number of audiobook users has doubled in the last 4 years (2.4% 2018 5.2% 2021).

- 63.1% of the Spanish population aged 14 and over have bought a book (text or non-text) in the last 12 months, a figure that has stabilized in the last 5 years.
- The percentage of those who bought a non-textbook book continues to increase (52.3%).
- Although the number of book buyers has decreased with respect to the previous year, the average number of books purchased has increased slightly: 10.1 books (4.1% more than in 2020).
- The usual purchase channel for non-textbooks continues to be the traditional bookstore. This is followed by the Internet and bookstore chains, which are increasing as the most common channels for purchasing books.
- After last year's decline, the number of visitors to libraries will rise slightly in 2021. The good rating of libraries is maintained, obtaining 8.2 out of 10.
- The percentage of households with children under 6 years of age in which children are read to increases to 75.9%. The time dedicated to reading by these children also increases by more than 20 minutes on average with respect to the previous year. On the other hand, the number of children aged 6 to 9 who read non-textbooks decreased (83.7%), although the average time spent reading did remain stable. That is, as age increases, the proportion of frequent readers of books in their free time decreases notably.