**The publishing sector in Spain A report**

**2016**

Federación de Gremios de

Editores de España

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**Book domestic market**

Since 1989 the Federación de Gremios de Editores de España (FGEE) issues the Report “Comercio Interior del Libro en España” to publish the main annual indicators –including economic indicators- of the publishing sector; the report stresses the changes in the sector in the last years and the evolution of the domestic market. It contains data about publishing companies, turnover, distribution, rights, digital publishing, and so on.

The 28th edition of the domestic market report, carried on by Conecta Research & Consulting, presents data on publishing and turnover of private publishing houses in Spain affiliated to the FGEE for the year 2016; it appears that the change of tendency that started in 2014 is consolidated and evidences the beginning of the recovery of the book sector in Spain. Even with a reduced number of publishers affiliated, the employment grows a 0.6% in relation to 2015.

In 2016 81,496 titles have been published, 1.6% more than in 2015. On the contrary, the number of copies decreased by 0.5%: 224,054 million. The average print run is lower than in the previous year: 2,749 copies, 2.1 less than in 2015.

In 2016, 157,233 thousands of copies were sold; a 70.1% of the total of copies printed (68.9% in 2015). This gap of copies is either copies exported or returned.

In 2016 the publishing sector had a turnover of 2,317.20 million Euros; a 2.7% more than in 2015 (2,257.07 million Euros). The average price per copy was of 14.74 Euros compared with 14.52 Euros in 2015.

Breaking down the turnover by regions, Catalonia with 50.8% and Madrid, with a 42.4% represent the 93.2% of the total turnover.

Following are the main figures:

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|  | **2016** | **% 2016/2015** |
| Private affiliated publishers | **727** | **-6,2** |
| Employees (direct employment). | **12,608** | **0.6** |
| Published titles (including reprints) | **81,496** | **1.6** |
| Copies issued (thousands) | **224,054** | **-0.5** |
| Average print run (copies/title) | **2,749** | **-2.1** |
| Books on sale | **620,316** | **5.7** |
| Domestic market turnover (cover price) (mill. Euros) | **2,317.20** | **2.7** |
| Domestic market net revenue (mill. Euros) | **1,601.37** | **1.8** |
| Copies sold (thousands) | **157,233** | **1.2** |
| Average Price | **14.74** | **1.5** |

* Four subjects sum up to 79.4% of the global turnover: Fiction (19.3%), Teenage and Children (12.0%), Non-university Textbooks (34.1%) and Social Sciences and the Humanities (11.2%).
* The turnover for Literature was 447.34 million Euros in 2016. From these figure, fiction books were 90.5% of the turnover and 90.1 of the copies sold. Contemporary fiction has been 60.3% of the fiction turnover.
* The turnover of Teenage and Children in 2016 was 277.20 million, a 7.1% less than in 2015
* The increase of Non-university Textbooks turnover (856.04 million Euros) was a 3.1%.
* The turnover for Social Sciences and the Humanities has been 260.33 million Euros, a 9.6% more than in 2015.
* The turnover of STM and University books in 2016 was 103.01 million de Euros, a 8.0% more than in 2015.
* Self-help books, with a turnover of 119.05 million Euros had a decrease of 10.8% if compared with the previous year.
* General interest books had a turnover of 135.53 million Euros in 2016, a 0.6% more than in the previous year.
* Reference books with 40.65 million Euros decreased a 0.7%.
* Comic, with 60.23 million Euros, decreased its turnover by 7.0%.

As for the distribution channels:

* Bookshops and Bookstore Chains, with a share of 52.7% -more than half of turnover- of the distribution, are the main channel. The Bookshops had a turnover of 810.86 million Euros, a 2.9% more than in 2015. Bookstore Chains had a turnover of 410.75 million, a 3.0% more than in 2015.
* Hypermarkets sold books for 188.90 million Euros, an increase of 3.3% more than in 2015. The kiosks sales increased by 0.3% in relation to the previous year, totaling 80.26 million Euros.
* The sales to companies and institutions, with 347.95 million Euros and libraries sales, with 10.90 million Euros, increased by 2.1% and 0.5% respectively between 2015 and 2016.
* Credit sales and telephone sales increased by 2.7% last year (a total of 114.69 million Euros).
* With the exception of the mail order sale, the rest of distribution channels had a slight increase in regard to 2015.
* Summing up Bookshops, Bookstore Chains and Hypermarkets, the share of distribution increased by 6.5% in the last year.
* One more year the sales of Digital books increased, with a total of 117.19 million Euros; a share of 5.1% of the global turnover, a 1.5% more than in the previous year.

**Books Export**

The 25th edition of *Estudio del Comercio Exterior del Libro* (the second one published by the *Asociación de las Cámaras del Libro de España* formerly FEDECALI) contains mainly data on export from Spain but also includes data on rights and services sales of Spanish publishers; one more year the Spanish export of books is positive: the global book export in 2016 was of 571.77 million Euros, an increase of 3.5% in respect to 2015. Breaking down the figures by sectors, 375.24 corresponds to the publishing sector, 3.74% more than in 2015. The printing sector increased its export by 1.23%, totaling 199.52 million Euros.

The import was in 2016 of 201.32 million Euros, a decrease of 11.69% from 2015 (21 million less), mainly printing and co-editions works, newspapers and magazines. The amount of printing works produced in Far East countries increases by 0.50%. Almost 35% of our imports correspond to newspapers and magazines, and 44% are printing and co-editions works.

The trade balance was again positive, with an increase of 14.2% with regard to 2015 totaling 370.45 million Euros.

It should also be noted that the Spanish book sector has a strong presence in foreign markets. Spanish publishers have 84 subsidiaries worldwide whose sales figures are not included in export figures.

To these excellent figures must be added 75 million for the sale of rights and services, with a growth of 6.2% compared to 2015.

Europe and America continue to be the main markets in the Spanish book sector, with exports to European countries together of the publishing and graphic sectors, which increased by 6.3% with a recovery in the subsector of fascicles. The European Union continues to be the leading destination for exports from the book sector and the export of traditional books continues to perform well in the Americas.

This growth to European countries was driven by sales in the publishing sector, which grew by 9.46% to 181.68 million euros, and the printing sector, which grew by 190.34 million euros, 4.61% more than in 2015.

By countries, France, in Europe, with 171 million euros exported, and Mexico, in America, with 58.08 million euros exported - although in this market exports have been reduced in 2016-, are the first of the ranking. It should also be noted that the United Kingdom accounted for 57.29 million euros and Portugal for 56.90 million euros; it is also worth noting the recovery in Argentina's figures, after a few years of decline, which reached 31.78 million euros.

On the other hand, it should also be noted that the export of collectibles and kiosk products increased its turnover by 26.48%. Likewise, the export of Spanish teaching manuals for foreigners is maintained.

**Reading and book purchasing habits**

Between 2000 and 2012, the *Federación de Gremios de Editores de España*, with the collaboration of the *Ministerio de Educación, Cultura y Deporte*, had conducted a study every year on the patterns of buying and reading books that allowed us to monitor the state of reading and buying books in our country.

The modifications that the new technologies have produced in these patterns motivated the Federation to carry out in 2017 a new edition of the study *Hábitos de lectura y compra de libros en España*, in order to obtain complete information on the reading activity of Spaniards that allows the formulation and evaluation of reading policies and plans.

The percentage of book readers in Spain over 14 years of age has increased by 2.8% since 2012 to 65.8% of the population. This reduces the gap between us and the European average, which puts the percentage of readers in this age group at 70% of the population.

Taking into account only the population that reads in their free time, there is also a growth (0.6%), to reach 59.7%. In other words, 40.3% of the population never reads for leisure or almost never. On the other hand, the percentage of frequent readers (reading at least once a week) has increased since 2012 and already represent 47.7% of the population over 14 years old, although the number of readers reading every -or almost every- day has been reduced, from 31.2% to 29.9%.

**Reader Profile**

Book reading in leisure time remains higher among women (64.9 per cent) than among men (54.4 per cent). Reading books in leisure time decreases with age. Young people between 14 and 24 years of age are still the population group that reads most, however, there is a drop in the pattern among the population aged 25 to 34. Among the female population, the pattern recovers between 35 and 54 years of age. Since 2010, there has been a steady increase in book reading among the older population.

Likewise, 80.7% of the population with university studies states that they read, although there is a drop in the number of readers compared to 2012 (84.2%). There has also been a significant improvement in the reading rate of the primary school population over the last five years.

With regard to occupation, the student population is the group that reads most (75.7%). In addition, reading is falling among the employed population (61.5% in 2017 compared to 63.4% in 2012) and the unemployed population has a greater interest in reading, 63.2%. Book reading in leisure time improves in population groups with traditionally lower reading rates (housewives and retirees).

The study shows an increase in readership in all regions since 2011, except Extremadura. Madrid remains the region with the highest readership rate (71.4%), eleven points higher than the national average (59.7%).

For 74.6% of readers, the last book read was of Literature and 89.6% chose a book written in Spanish, 4.2% in Catalan and 3.5% in English.

**Reasons for not reading**

Lack of time remains the main argument of non-readers to explain their lack of habit (47.7%). 35.1% say they don't read because they either don't like it or are not interested in. Among those over 65, health or vision problems are the reasons for not reading in 30.9% of cases. In addition, 18.7% of the non-reading population indicated that they prefer to devote their leisure time to other types of entertainment.

**Reading on digital support**

76.3% of Spaniards over the age of fourteen read in digital format. The reading of books in digital format has increased significantly: from 11.7% in 2012 to 27.2% in 2017.

This increase in reading in digital format does not, however, translate into a parallel increase in total reading, suggesting a gradual shifting from paper to digital reading.

20% of the population already reads books in their spare time in digital format, 40.3% only read them on paper. 49.6% use the computer to read, although since 2012 there has been a drop in the use of this support. Tablet reading (32.8%) and the growth in mobile phone use as a reading medium (20.2%) stand out. Eighty per cent of digital books were obtained without paying for them and only 29.5 per cent obtain digital books by paying for them.

The reader of books in free time in digital format presents a characteristic profile: feminine, young and with greater educational level. In addition, he is a more intensive reader, reading 16.7 books a year compared to 11.6 for the paper reader.

**Book Purchase**

61.3% of Spaniards over 14 years old bought books in 2017 (increase of 55.4% compared to 2012), although they bought fewer books, 9.4 books on average compared to 10.3 in 2012. Fourteen per cent bought only textbooks, 18.8 per cent bought both textbooks and non-textbooks, and 28.5 per cent bought only non-textbooks.

Seven out of every ten books purchased (67.8%) were literature books. Of these, 62.9% were novels and children tales. There is also a growth in the purchase of children's and young people's books (8.2% compared to 3.9% in 2012) and practical books. On the other hand, Spanish is the language in which 89.9% of the books purchased were written.

Spaniards continue to prefer to go to bookstores to shop, 48.4% bought their last book in one of these stores. Buying through the Internet continues to grow and stands at 11.9%.

**Ranking of most read and purchased books**

*Patria*, by Fernando Aramburu; *El Guardián Invisible*, by Dolores Redondo; and *Los Pilares de la Tierra*, by Ken Follet, were the most widely read books in 2017. Patria also leads the ranking of the books most purchased, followed by *Cincuenta Sombras de Grey* and *Los Pilares de la Tierra*.

**Reading and children**

82.7 per cent of children under 9 years of age read or are regularly read to and 85.5 per cent of children between the ages of 6 and 9 read non-text books.

99.6% of children aged 10-14 and 92% of children and young people aged 15-18 are book readers. From the age of 15 onwards, the proportion of frequent readers has fallen, 54.8 per cent, compared with 78.9 per cent of children between the ages of 10 and 14. It is worth noting that 34% of adolescent readers read books in digital format (compared to 27% of adults).

90.5% of children between the ages of 10 and 14 read for school and in their free time. This figure falls to 77% among young people aged 15-18.

**Libraries**

Library or Mobile Library attendance has increased from 2012 by 1.8 percentage points to 31.9% of the population. This percentage increases to 36.8% of respondents who acknowledge that they are members of a library. Only 28.3% of users use them frequently. Library users go to them at 55.3% to borrow or return books on loan, followed by book consultation (25.8%) and study (27.5%).