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The United States, a promising market for Spanish-language publishing

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Topic: Analysis of the Spanish-language publishing market in the United States

Abstract: The aim of this paper is to analyze the evolution and future perspectives of the Spanish-speaking market in the United States with regard to publishing, one of the most important cultural industries.

Keywords: Publishing, Books, Spanish Language, Publishing Market

Introduction

The United States is among the countries with the greatest number of Spanish speakers. Along with other considerations, the sixty million Hispanics residing in the country constitute an attractive market for a variety of industries, including

those which can be denominated as cultural. The aim of this paper is precisely to analyze the evolution and future perspectives of the Spanish-speaking market in the United States with regard to one of the most important cultural industries; i.e. publishing.

The structure followed here is a simple one. The first two sections trace the historical evolution of the Spanish-language publishing market in the US since the 19th century. The third deals with its most recent phase, that of the great change undergone by this market in the final years of the 20th century and the first decades of the 21st.

The Spanish-language publishing market in the US in the late 19th and early 20th centuries

The final decades of the 19th century would see the rise of the United States as an economic power on an international scale. The publishing industry of the emerging nation was likewise one of the world's most thriving. One contemporary testimony, by a Spanish diplomat, is particularly expressive on this point: "The development of the book industry is at the same level as the country's other industries. It is immense, selling all that is most important of the world's

production in the same gigantic proportions that characterize other aspects of the life of these people”.¹

Did this “gigantic” publishing industry also serve the country’s domestic market of Spanish speakers or was it concerned only with English-language publications? In this initial period, we can observe a curious paradox. US publishers were producing books in Spanish that were then exported and sold in Latin America. The US company Appleton, for example, which specialized in technical works, manuals and reference books, would build a strong market in Latin America with its books on mathematics, mechanics, chemistry and engineering. In Cuba, American Book and Cía would cover a great part of that country’s demand for textbooks.² In the same way, Misión Pedagógica Americana would both sell and donate teaching materials for schools, becoming an active agent of scholarization in many Latin American countries. El Salvador and Panama, for example, would import most of their school textbooks from the United States. In the latter, thanks to government agreements, US publishers had what was practically a monopoly on the sale of books to centers of learning, and would be in charge of the translating and printing of all of the teaching materials needed.³

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¹ In answer to a questionnaire on the Spanish-language book in the United States. Foreign Affairs Section, Box 1274, Archivo General de la Administración (Alcalá de Henares, Madrid).

² In answer to a questionnaire on the Spanish-language book in Cuba, 1922. Foreign Affairs Section, Box 1273, Archivo General de la Administración (Alcalá de Henares, Madrid).

³ In answer to a questionnaire on the Spanish-language book in Panama, 1923. Foreign Affairs Section, Box 1274, Archivo General de la Administración (Alcalá de Henares, Madrid).

However, although the powerful US publishing industry exported books in Spanish, its own domestic market for Spanish-language books was dominated by foreign publishers, mainly Mexican and Spanish. Such books entered the country through customs ports along the Mexican border, or through the port of New York. Only books written in English were subject to customs duties. The entry of Spanish-language books into the US is well documented in the official records of the Bureau of Foreign and Domestic Commerce.

	1913	1918	1919	1920	1921
<i>Principal suppliers:</i>					
England	3.424.307	1.421.561	2.342.195	3.227.145	2.323.700
Germany	1.430.276		173.149	541.638	676.213
France	657.224	214.948	433.156	620.676	443.595
Canada	210.797	120.888	174.797	267.557	182.085
<i>Spanish-speaking countries:</i>					
Spain	24.536	31.316	37.584	133.607	54.120
Mexico	12.571	3.718	6.918	3.631	110.729
Argentina	397	978	897	3.067	4.380
Costa Rica	55				
Guatemala	95				
Nicaragua	10				
Panama	790				
Chile	49	105	3.370	577	1.720
Colombia	1	58	150	310	90
Ecuador	496	75			
Peru	14.712	147	337	253	25
Uruguay	75		192	90	
Venezuela	1.174	60	72	277	438

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Table 1. Origin of books imported into the United States (in dollars)⁴

⁴ Source: The author's own elaboration, from consular records kept in boxes 1273, 1274 and 1275 in the Foreign Affairs section of the Archivo General de la Administración (Alcalá de Henares, Madrid).

All of the sources consulted agree in noting that the Spanish-language market in the US was quite limited in the early decades of the 20th century. Testimonies from that period provide qualitative information on this market and the strategies used by publishers to conquer it. Such testimonies reveal a heterogeneous market with three principal centers: Texas, New Orleans and New York, three very different settings within the same country.⁵ The humble origins of Spanish-speaking residents in Texas would lead to the highest sales of books being in the category of what may be referred to as the “dime novel”. While the dime-novel genre accounted for most book sales, we also find a regular consumption of dictionaries, as well as books on the sciences and arts, religion, Mexican history and, above all, the occult. Spanish-language textbooks were imported mostly from Mexico and from France, as books from Spain were poorly-received. In New Orleans, published works were generally American, although translations of English and, to a lesser extent, French authors, especially for sale within the state of Louisiana, could also be found.

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Documentary sources from this period show that books from Spain had disappeared almost completely and that the market in general was greatly reduced. In both Texas and New Orleans, the books themselves came from Spain and from Mexico. The geographic proximity of the US’s southern neighbour enabled book dealers to buy in small orders that could be renewed easily in a

⁵ In answer to a questionnaire on the Spanish-language book in the United States. Foreign Affairs Section, Box 1274, Archivo General de la Administración (Alcalá de Henares, Madrid).

matter of days. Publication in Spanish on US soil was an uncommon activity, often limited to simply reprinting works from Mexico and Spain.

New York was a different case altogether, with aspects derived from the city's character of modernity and cosmopolitanism. Foreign-language literature was largely consumed by the city's middle and upper classes, and in the early 20th century, the city's Spanish-language book market was marked by a great growth potential, even if it faced strong international competition. In 1922, the Spanish consul in New York described the competitiveness in this segment of the market in the following terms:

“All of the ‘British’ publishing houses have branches in New York, which use American facilities to publish the most important British works. The identity of the language and the natural mastery of British writers give great authority to these books. This is followed by the German book, especially in the technical area. Both British and German works are sold in general bookshops. French and Italian books are also popular, but less so. Books in Spanish are beginning to be read with interest, in conjunction with the diffusion of official Spanish-language instruction. (...) The Spanish book has a moderately strong market in this Republic and this may be improved even further. It would require a better organization of accredited Spanish publishers, advertising and great care in the selection of products. The public that reads and will continue to read Spanish-language books is to some degree an intellectual one. There are around 3,000

teachers of Spanish in North America who buy and read books in Spanish (...). This is the foundation of our market”.⁶

As we can observe, the Spanish-language book market was highly polarized in this first period. On the one hand, demand came from Hispanics residing in the country, generally with low purchasing power. On the other, there was also a smaller public with a higher cultural and economic level. These two types of consumers would condition the strategies of publishers, the selection of titles, advertising, pricing and distribution. In Texas and New Orleans, areas in which consumers were predominately of the first type, advertising was done in the local press, with catalogues and price lists sent to Spanish-speaking residents. In New York, however, books in Spanish were sold in the leading general bookstores, such as Bretano’s (on 5th Avenue), which featured a Spanish-language section. There were also bookstores dedicated exclusively to selling books in Spanish, such as Zabala or Maurin, both of which enjoyed a certain reputation and sales volume. The principal customers of these stores were teachers and students of Spanish. However, there also existed a small market within the city’s enclaves of Spanish-speaking *braceros* (manual laborers) for books sold at newsstands. Here one could find, for example, books published by the Spanish houses Maucci and Sempere or postcard reproductions of Spanish art. This public (less cultured and

⁶ In answer to a questionnaire on the Spanish-language book in the United States. Foreign Affairs Section, Box 1274, Archivo General de la Administración (Alcalá de Henares, Madrid).

with less buying power) was also served by Spanish-language bookstores like the Librería del Lago or the Librería de P. Gómez.⁷

The middle decades of the 20th century: a paradigm shift in the publishing sector

In the mid-20th century, the international publishing sector would be completely transformed. In reality, two parallel phenomena would occur: an increase in supply and a progressive geographic concentration. What were variables that determined these phenomena? In the case of geographic concentration, it was the extraordinary development of the book industry in a certain number of countries, most notably the United States, Great Britain, the Netherlands, France, the Federal Republic of Germany, Italy, Japan, the USSR, mainland China and India. In 1954, some 5 billion books were produced and these ten countries were responsible for three quarters of the total figure. In 1970, four out of every five titles published came from an even more reduced number of countries. Added together, the outputs of Europe, Japan, the United States and the USSR, would account for nearly 80% of all the books published in one year.⁸ Throughout all of the period analyzed, the US and the USSR were the two great publishing centers.

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⁷ In answer to a questionnaire on the Spanish-language book in the United States. Foreign Affairs Section, Box 1274, Archivo General de la Administración (Alcalá de Henares, Madrid).

⁸ Data taken from the *UNESCO Statistical Yearbook*, as published in *Courier*, July 1972, pp. 12-15.

These two conflicting poles of the Cold War years would be the source, in number of titles published, of close to 30% of worldwide production.

The increase in publishing output was clearly motivated by a spectacular increase in demand. This phenomenon was particularly intense in the United States. There are three explanations for the striking growth of the publishing sector from 1937 to 1975: the population boom; changes in the educational system; and a rise in per capita income. Let us examine some statistics that support this affirmation. In 1965, the educational system included some 41 million students. This would rise to 63 million by the end of the same decade. In contrast, the number of students had remained stable at 28 million from the 1930s until 1950 (Lacy 1967). An increase in the length of compulsory schooling and the explosive growth of universities were the conditioning factors behind this increase. Similarly, US per capita income went from 7,010 dollars in 1940 to 16,284 dollars in 1975, while the population rose from 132,637,000 to 215,973,000 in the same period.⁹ Increases in government spending and educational assistance were also significant. From the beginning of the 1960s, total spending for primary, secondary and higher education rose from 23.1 billion dollars to 33.5 billion at the end of the decade.¹⁰ These circumstances would trigger a cultural explosion, one which brought more and more of the population to museums, theatres, concerts... and books. Indeed, the resulting increase in

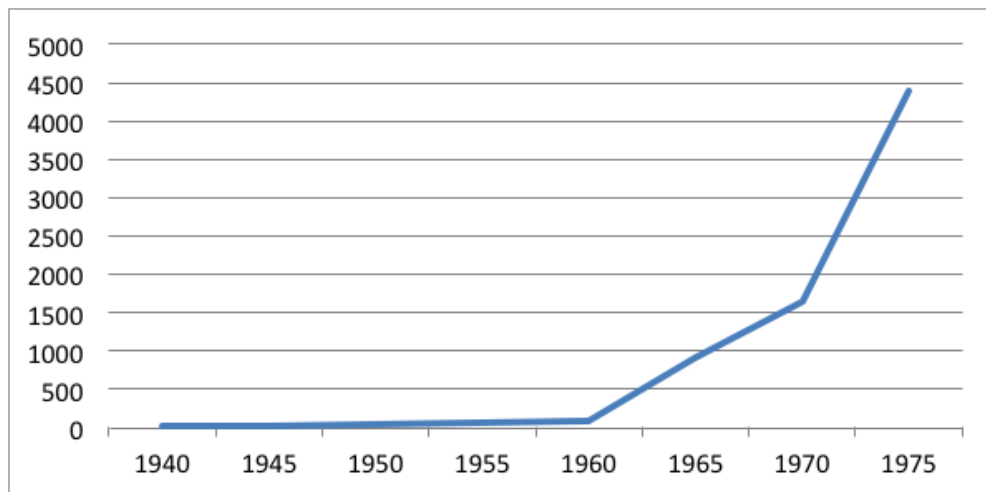
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⁹ Data in constant dollars. Figures taken from Angus Maddison, available at the project website: <http://www.ggdcc.net/maddison/oriindex.htm>.

¹⁰ *Publishers Weekly*, Nov. 5, 1962, p. 56.

demand would do much to stimulate the growth of the country’s privately-owned publishing industry. Before the Second World War, no book had sold more than 100,000 copies; by 1965, sales of over a million copies for one title were not uncommon.¹¹

Despite its position as the world’s foremost publishing power, the enormous size of its market led to the United States also becoming a leading importer of foreign books, mostly from Europe. Great Britain, France, Germany and the Netherlands all exported a large part of their production to the American giant. Meanwhile, the demand for books in Spanish was fulfilled by Spain, Argentina and Mexico, who also found the US to be a valued client. Spanish export figures since the 1950s, illustrate the country’s positive evolution as foreign client:



Graphic 1. Book exports from Spain to the United States (1940-1975) (in tons)¹²

¹¹ *Courier*, Sept. 1965, p. 11.

¹² Source: Estadística General del Comercio Exterior de España (General Statistics for Spanish Foreign Trade), 1935-1975.

The increase in Spanish-language books imported from Spain, Argentina and Mexico, would be accompanied by another interesting phenomenon. Spanish-language literature began to be translated into English and sold in the United States. The publishing house New Directions, founded in 1936 by James Laughlin, was a pioneer in this activity. It began by publishing translations of the work of Federico García Lorca for the English-speaking market. From the 1960s to the present, the company has gone on to publish such notable Spanish-language authors as Octavio Paz, Pablo Neruda, Nicanor Parra and Camilo José Cela. The company also managed to establish fluid relationships with the Spanish-speaking world of letters, notably with such figures as the Argentinean intellectual Victoria Ocampo and Spain's Jaime Salinas, son of the poet Pedro Salinas and at the time director of the prestigious Catalanian publishing house Seix Barral.¹³

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The phenomenon of translating works written in Spanish into English was accentuated with the explosion of the “Latin American boom”, a literary movement spearheaded by a group of young Latin American novelists: Peru's Mario Vargas Llosa, Argentina's Julio Cortázar, Mexico's Carlos Fuentes and Colombia's Gabriel García Márquez. It was a new type of literature that would achieve great success in Europe and the United States. In the US, high critical acclaim, awards and constant references in publications such as *The New York*

¹³ In the middle years of the 20th century, the Catalanian company stood at the forefront of avant-garde literature in Spanish.

Times and *The New Yorker* would further boost the sales of these authors, and the image of Spanish-language literature in general.

This massive influx of Hispanic works and authors into the United States was driven by still another element which burst onto the publishing scene in the 1960s: the literary agent. Two such agents, the Spaniard Carmen Balcells and the US agency Brant & Brant (founded in 1912) were crucial to this process. They exploited the boom and its media repercussions to incorporate their clients into US publishing circles, in the process becoming key figures in the diffusion of Spanish-language literature in the United States. The first novels of Mario Vargas Llosa and Gabriel García Márquez would thus be published in the US by the important publishing house Harper & Row. Works such as *La casa verde*, *Conversación en la catedral* and, of course, *Cien años de soledad* were sold in both English and Spanish in the US market. Mexican author Carlos Fuentes would see his work published by the prestigious Farrar, Straus and Giroux. The Argentinean companies Emecé and Sudamerica, together with Spain's Seix Barral, would distribute much of the output of the boom writers. The companies already mentioned (Harper & Row, New Directions, Farrar, Straus and Giroux), along with Pantheon Books, New American Library and Grove Press, would do the same with the English versions of these works.

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The growth of the Spanish-language publishing market in the United States in the final decades of the 20th century

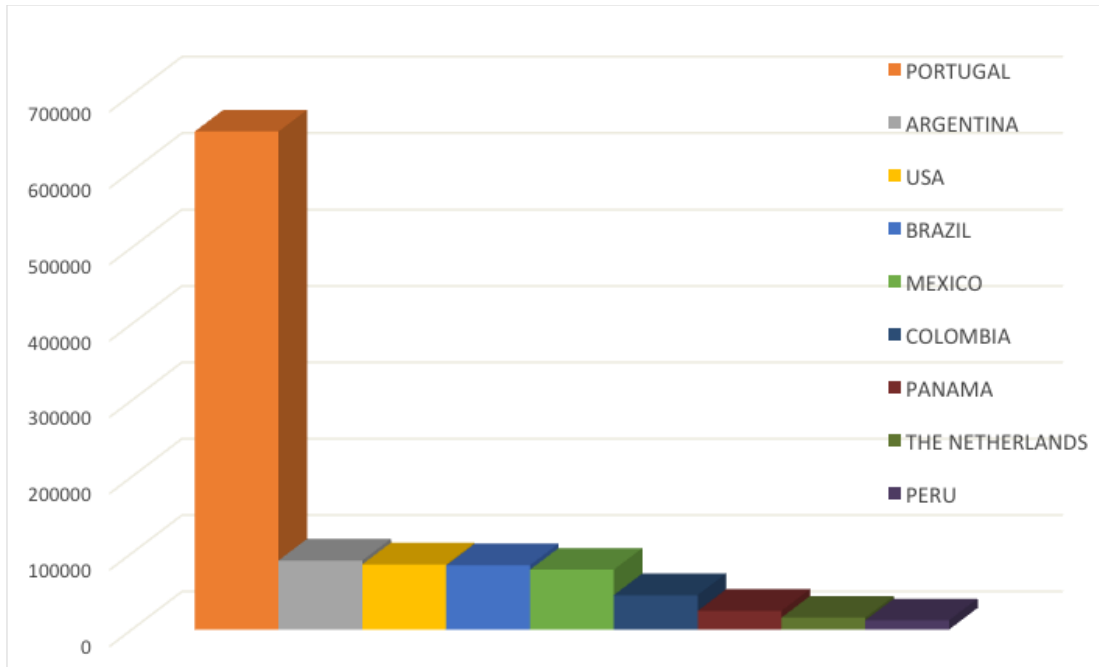
The US market, which earlier had functioned as a discreet importer, was transformed in the 1990s as the Spanish-speaking segment of the population dramatically increased. Statistics show that by 2015 this segment had risen to some 57 million; that is to say, 17.8% of the total population, making the United States one of the countries in the world with the largest number of Spanish speakers (Steinmetz y Moreno Fernández 2015). The perspectives are promising, given that this figure is expected to double to almost 106 million by the year 2050 and to 119 million by 2060 (Steinmetz y Moreno Fernández 2015). The Hispanic population, the greatest concentration of which is found in the states of California, Texas, Florida, New York and Illinois, is in fact the country's largest minority and one of those with the highest growth rate (Steinmetz y Moreno Fernández 2015). The strength of this segment has made itself felt in the communications media, in both conventional and online cybermedia platforms. The trend is reflected in some of the available statistics. In June and July of 2013, for example, the television network Univision, which broadcasts exclusively in Spanish, surpassed the English-language networks (FOX, NBC, CBS, ABC) in audience ratings in the 18-to-49-year-old age group (Lacorte y Suárez García 2016). The report "Cibermedios hispanos en los Estados Unidos", published by Observatorio Cervantes, indicates that of the 50 states

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which make up the country only 12 have no daily Spanish-language or bilingual newspaper (González Tosat 2016).

Increased demand would encourage publishers in Spanish-speaking countries to prioritize the United States within their internationalization strategies. From 1996 to 2006, sales of Spanish-language books in the US went from 18 to 23.1 million euros (Villar Morán 2008). Expectations for the future are even more optimistic. Indeed, the growth rate stands at 6% annually, double the average for the country's general publishing sector. The major centers of Spanish-language publishing –Spain, Mexico, Argentina and Colombia– all export part of their production to the United States. Spain, one of the ten leaders in publishing worldwide, counts the US as one its main clients. By export statistics alone, the US is a principal destination for Spanish-produced books, after Mexico, Argentina, Colombia and France. It is also one of the main recipients of Spanish direct investment, as shown in the table below.

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Graphic 2. Leading recipient countries of Spanish direct investment in the European and American book sectors, 1993-2013 (in thousands of euros)¹⁴

The majority of Spanish-language books sold in the US are published and printed outside the country and enter the market through importation. If we examine data from 2003, we find that, of the 350 million dollars in revenue in this particular market, approximately 300 million came from imports, with the rest from US production (Ediciona n. d.). Larry Bennet, Vice-president of Spanish Materials and Printing On-demand for the distributor Baker & Taylor, would affirm that in the year 2008 the supply of Spanish-language books in the United States had three clear origins: “...in the first place, books imported from Spain; in the second, Hispano-American products; and, finally, domestic production” (Ediciona n. d.).

¹⁴ Source: the author’s own elaboration based on data from ICEX, DataInVex.

This sales strategy has undergone changes in the past decade due to modifications in the euro/dollar relationship (hindering book imports from Europe), and so some Spanish publishers serving the US market have decided either to open their own subsidiaries in the country or export from their Latin American subsidiaries. This decision does not depend on publisher size, but rather on other factors, such as sales volume in the US and the dimensions (in staff and resources) of their Latin American offices. In the year 2001, there were barely 5 publishers with a subsidiary in the United States. In 2012, there were 12 (Ávila Álvarez 2002; Observatorio del Libro y la Lectura 2013). Other publishers have chosen to use a distributor to effect sales in this market. The distributor Panoplia de Libros, for example, distributes works by small and medium-sized companies such as Periférica, Minúscula, Hiperión and Nórdica Libros. Urano Publishing, founded in 2004, acts as distributor for companies like Urano, Tusquets, Obelisco or Roca.

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The two great Spanish publishing groups have an important presence in the US market. Planeta had, until 2008, a branch in Miami which it closed that year and transferred the management of its US activities to its subsidiary in Mexico City (Ediciona n. d.). The Santillana company, however, has invested in its own US subsidiary (Santillana USA Publishing) through which it does a large volume of business in textbooks and Spanish-as-a-second-language materials. Other Spanish-language publishers with a presence in this market include the

Catalonian group Océano and the Mexican publishing house Fondo de Cultura Económica.

In September of 2000, the trade journal *Publisher's Weekly* addressed the transformation of the market in an article entitled “Spanish-Language Publishing in U.S. Nears Critical Mass”. The article explained that the Hispanic consumer segment constituted 10% of the US publishing sector, as well as reflected an increase in the number of agents hoping to occupy this promising niche. Tina Jordan, vice-president of the Association of American Publishers, would acknowledge that “many of the largest publishing houses in the United States have been desirous of an entry into the Spanish-language book market thanks to the increase in the Spanish-speaking population, whose growth rate is one of the highest in the country” (Edición n. d.). Some US publishers have created specialized companies to serve the Spanish-language market. This is the case of: Rayo, now HarperCollins Español, a company owned by HarperCollins; Vintage Español, founded by the Random House Group in 1994; Lectorum, belonging to Scholastics; and Simon and Schuster’s Atria. Books in Spanish are also published by MacMillan’s Priddy Books and by the Houghton Mifflin Company. Celebra, created by Penguin, publishes books in English by well-known Spanish literary figures. And, of course, smaller companies have appeared which publish in Spanish or in both Spanish and English, such as Jorge Pinto Books, Cervantes Publishing or Raven Tree Press.

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The growth of the Hispanic market did not only bring about the creation of new publishing companies. Bookspan would establish Mosaico, a book club specializing in Spanish-language publications. Two magazines, *Críticas* (published in English by the Reed Elsevier Group) and *Tinta Fresca* (in Spanish) were dedicated to reviews of Spanish-language books. The bookstore chains Barnes & Noble and Borders, two of the country's most important distributors, made room on their shelves for special sections of books in Spanish. Latin American Book Source, SBD Spanish Book Distributor and Santa Fé Books now distribute Spanish-language books, while Latin American Books specializes in academic publications in Spanish. Bilingual Books and Ideal Foreign Books, for their part, figure among the leading importers of Spanish-language books to the United States.

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What kind of books do Hispanic readers buy? The books in greatest demand are those in the categories of general fiction, children's books, textbooks and other scholastic materials, as well as technical, scientific, religious, reference and self-help publications (Ávila Álvarez 2002; Observatorio del Libro y la Lectura 2013). Among the most popular books are the great best-sellers by well-known Spanish-language authors. Figures such as Mario Vargas Llosa, Gabriel García Márquez, Roberto Bolaño, Isabel Allende and Ildefonso Falcones have achieved substantial sales in the United States. Their works are marketed almost exclusively by the large publishing groups. In 2008, of the market's ten best-selling titles, four were published by Spanish publishing houses. These were: *La sombra del viento*, by

Carlos Ruiz Zafón (Planeta); *Cien años de soledad*, by Gabriel García Márquez (Alfaguara); *Agua para elefantes*, by Sara Gruen (Alfaguara); and *Hija de la memoria*, by Kim Edwards (RBA) (Europa Press 2006. In July and August of 2016, according to the Nielsen company, the best-selling books have been: *Cajas de Cartón / The Circuit: Stories from the Life of a Migrant Child*, by Francisco Jiménez (Houghton Mifflin); two works by Sandra Cisneros, *La casa en Mango Street / House on Mango Street* and *¿Has visto a María? / Have you seen Mary?* (Vintage Español); two works by Paulo Coelho, *El Alquimista / The Alchemist* and *Adulterio / Adultery* (HarperCollins Español); *Cien años de soledad / One Hundred Years of Solitude*, by Gabriel García Márquez (Vintage Books USA); *Harry Potter y la piedra filosofal / Harry Potter and the Philosopher's Stone*, by J. K. Rowling (Salamandra); *El amante japonés / The Japanese Lover*, by Isabel Allende (Vintage Español); *Santa Biblia Reina Valera 1909 / Holy Bible NIV 1909* (Barbour Publishing); *Avancemos!: Cuaderno de Practica / Avancemos!: Student Workbook* (Houghton Mifflin).

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Demographic growth, an increase in the use of Spanish and the prestige of such literature have spurred the teaching of Spanish as a second language. This has led to an immediate demand in this area and a promise of even greater demand in the future. In 2013, the number of students learning Spanish surpassed that of all other languages combined by nearly 20,000 enrollments. In that year, the total number of Spanish students rose to 790,756, while the number of students studying French, German and Chinese totaled 197,757, 86,700 and 61,055,

respectively (Lacorte y Suárez-García 2016). Spanish courses are now offered by the great majority of educational institutions (technical schools, commercial colleges and universities) 91.4%, to be precise (Lacorte y Suárez-García 2016). This is an especially positive fact in a society which is generally quite reluctant to learn other languages. Indeed, it is calculated that only about 9% of US citizens can speak a second language. Two-thirds of students graduating from high school do so without ever having taken a single foreign-language course, while fewer than 8% of graduating university students have taken such a course. Academic works in Spanish for universities thus comprise an even smaller and more specialized market. Nevertheless, it is also true that, since the 1970s, there has been a growing interest in Hispanic culture, its literature and its other forms of artistic expression, and this has resulted in a proliferation of departments focused on these type of studies at US universities.

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Some institutions have tried to encourage the consumption of Spanish-language books in the United States. Perhaps the most important of these is America Reads Spanish, created by the Instituto Español de Comercio Exterior (ICEX) and the Federación de Gremios de Editores de España (FGEE). Its aim is “to increase the use and reading of our language through thousands of libraries, schools and bookstores in the US”.¹⁵ They collaborate with the American Library Association, the Spanish daily newspaper *ABC*, the American Association of Teachers of Spanish and Portuguese, the Barahona Center at California State University San

¹⁵ Institutional website.

Marcos, CELESA (Spanish Books Export Center), Barnes & Noble, the Fundación Germán Sánchez Ruipérez, SBD Spanish Book Distributor and the Instituto Cervantes.

Let us turn now to some of the difficulties which exist for foreign publishers who wish to conquer the Hispanic market. Objectively speaking, the cultural distance is not as great as one might suppose. There is no linguistic difference, as this market is Spanish-speaking rather than English-speaking, the market normally served by foreign publishing houses. The Hispanic reader in the United States is a consumer with tastes similar to those of the Latin American consumer, as many Spanish speakers are in fact immigrants. In the case of the United States, local competition and distribution difficulties, in a country whose retail channels are controlled by the domestic publishing giants, are the two major obstacles for Spanish publishers hoping to their market shares. As Patricia Arancibia explains it, “the United States is a mega-market with many more sectors and distribution channels than Spain or Latin America. There is an impressive number of publishers, distributors and book outlets operating in a variety of sectors: commercial, libraries, special sales, B2B, institutional, professional, educational, religious, academic, department stores, to name only a few. This carries with it a great deal of specialization and segmentation on the part of the professionals and companies working in these sectors in any language. The Spanish-language book market is in itself a segment, but it is not a monolithic one; rather, it crosses into all the others” (Edición n. d.).

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To overcome these difficulties, some publishers have chosen to establish strategic alliances with rival companies. Planeta, for example, signed an agreement with HarperCollins in 2006 to co-publish nine titles per year. The works, chosen from Planeta's bestsellers, would be produced, published and distributed in the United States by the subsidiary company Rayo (Europa Press 2006). On many occasions, such agreements, aimed at increasing a company's presence in the Spanish-language market, have obliged publishing groups to unify their strategies both within and outside the United States by considering the linguistic area as being above political divisions. This is the case of Random House, which has designed an agreement between its subsidiaries Vintage Español (which serves the US population) and Random House Mondadori (which covers Spanish-language publishing in Spain and Latin America) to introduce titles published in other countries into the United States.

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The Hispanic population of the United States, then, is vast and still growing. However, when it comes to presenting an attractive market for publishers, it has two significant drawbacks: income level and educational level. While Hispanic students constitute around 25% of students in US public schools, they show a very high dropout rate, above that of other ethnic groups. Even so, the outlook is optimistic, as the number of students in primary and secondary education has been rising for the past fifteen years (Steinmetz y Moreno Fernández 2015). In 2012, 6.8% of students enrolled in US universities were of Hispanic origin

(Lacorte y Suárez-García 2016). A parallel evolution has occurred in income for the Hispanic population, whose purchasing power rose by 461% from 1990 to 2015 (Steinmetz y Moreno Fernández 2015). The Hispanic market in the US seems, therefore, to be continually growing, both demographically and as a consumer force.

It is important to point out, however, that not all Hispanics are consumers of Spanish-language cultural products. The statistics show that 76% of the Hispanics who live in the United States and speak Spanish fluently are in fact bilingual. This bilingualism is widespread among the most recent, US-born, generations. The country's Hispanic residents present a variety of profiles, with very different levels of ability and competence in the language. There exists the risk, therefore, that they will eventually stop both using the language and consuming Spanish-language cultural products. Such a scenario seems unlikely, however. 75% of the Hispanic population in the United States still use the language, and 95% consider it important that future generations speak it correctly (Steinmetz y Moreno Fernández 2015).

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So far, the arrival of the digital age has presented the publishing industry with its greatest challenge to date. The future of the book lies no longer in the bookstores, and so distribution systems need to be expanded to include the Internet. What is more, the strategies followed by publishers must take into account the “millennials”, a generation born at the turn of the new century who

from their earliest years have been familiar with new technologies and digital environments. The advent of the electronic book has also marked a turning point in the strategies of generalist publishers. The growing affordability of e-readers has been perhaps an even more important factor. Amazon would lead the way in this when in 2007 it launched its Kindle e-reader, which has become the undisputed world leader in this market. After the Kindle came the Nook, created for the bookstore chain Barnes & Noble, Google's Android, and, in 2010, the Apple iPad. In parallel to the development of the e-reader market has been the growth of the virtual online bookstore, led by three major protagonists: Amazon; Google eBooks; and Apple's iBooks. Revenue from this particular line of business is still relatively small, however, to judge from the data in the following table:

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Country	Percentage of ebooks in 2013	Amazon market share for ebooks	Principal local <i>online</i> distributor	Market share of local distributor	Most popular e-readers
United States	13%*	67%	Barnes & Noble	12%	Kindle, Nook
United Kingdom	11.5%*	79%	Waterstone	3.3%	Apple (16%), Kobo (10.4%)
Germany	5%	43%	Tolino Alliance	37%	Apple (15%)
France	1.1%	no data	no data		no data
Spain	3% al 5%	40%	Casa del Libro, El Corte Inglés, Fnac	no data	Apple (40%)
The Netherlands	1%	no data	BOL	50%-75%	no data
Sweden	1%	no data	Adlibris		

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Table 2. Indicators of digital publishing diffusion, 2013¹⁶

The digital revolution in publishing is a process which is underway now, but of slower progression than one might think. English-speaking countries seem to be in the lead in this area. Spanish-language publishing in the United States, however, has been slow to join the digital publishing movement, mainly due to the income level of its market. As Jaime de Pablos, of Vintage Español, expressed it in 2010: “We also publish all of our titles in electronic format, but this market is

¹⁶ Data for 2012. Source: Author’s own elaboration from data by Rüdiger Wischenbart (2014): *Drawing the Global Map of Publishing Markets*, International Publishers Association (IPA).

slower than its English-speaking counterpart. Sales figures for this format are still far from reaching even 10% of total sales” (Aguilar 2012).

Although the process is still evolving, publishers are already anticipating a profound transformation of the industry, one which goes far beyond a simple change in the reading medium itself. The great advantage of digitalization is a reduction in warehousing costs, as well as increased access to many types of texts, including older literary and reference works. That is to say, it enables production costs to be lowered at the same time that access is improved across a wide geographical area. It does not, however, free the publisher from his main concerns; i.e. that of having a text to sell, knowing how to localize, and delivering the desired product to the customer. On the downside, the great problem of the digital world is pirating. The younger generation has become used to obtaining cultural products without paying, and publishers have seen how illegal downloading has taken a considerable percentage of business from the music and film industries. At the same time, developing efficient measures for controlling such practices seems to be quite difficult indeed.

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In terms of marketing, the Internet is providing a new stage for the customer-publisher relationship. Publishing companies must now gauge the digital habits of Hispanic reader groups, their patterns of Internet use and the reference websites they usually consult. Such information is crucial in giving visibility to new publishing products. The web furthermore facilitates the use of advertising

platforms, with blogs, online magazines and even celebrity websites providing a perfect environment for advertising which is directed expressly at potential customers according to their particular tastes.

Conclusion

All in all, just as at the end of the 19th century, the Spanish-language book market in the United States is notable for its heterogeneity. Its rich diversity thus poses an obstacle for companies wishing to conquer it. While it is clear that the demand exists, for the supply to match it these companies need to clearly define the type of customer they want to reach. It is therefore necessary to study consumer interests, needs, purchasing power and buying habits. According to the type of cultural product being offered, whether mainstream, academic or scholastic, the publisher must also choose the most appropriate distribution channel and marketing strategy. Especially in regard to the last two areas, the Internet holds a wealth of new possibilities.

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