

University Students: Buying Behavior of Books and Illegal Copy Market

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Abstract

This Thesis, with the aim to obtain a Master's degree in Marketing, pretend to characterize the sector of publishing and selling books and understand their importance to Portuguese economic and social context.

The book market can be characterized as been a market in a concentration process:

- On the one hand, in the Book Edition, the acquisition of companies and constitution of big groups like *Leya*, *Babel* and *Porto Editora* groups.
- On the other hand, in the Book Retail, the growth of the chain FNAC, the reinforcement of *Sonae*, with the beginning of the book sales in the *Worten* stores and the acquisition of *Bertrand* by the *Porto Editora* group.

However, the Retail is still fragmented because exists a big diversity of point of sales, such as bookstores, hypermarkets and large specialized surfaces, post services and so on.

The data collected from Banco de Portugal and INE have a problem that difficult the real analysis of the sector. This difficulty comes from the sales between edition companies, the incorrect classification of the enterprises in CAE (Classificação das Actividades Económicas), no inclusion of big chains (e.g. FNAC) and large surfaces in CAE, being classifying as no specialized retail. So, the GfK panel seems more adequate.

In this context, at the GfK sales are added the INE sales and are obtain a sales value of 260 million Euros of bookstores and large surfaces, which should be added a value between 50 and 80 million Euros, from other ways of sales such as sites, direct sales to colleges, companies or libraries and to other stores that sell books (e.g. pet shops).

In the last years, were a growth of point of sales, due to, mostly, the entrance of *Worten* in book market, that in 2009 accounted 880 point of sales. Regarding the technical books, the categories of books associated to this market registered a turnover of 14,7 million Euros, in 2011, which represents a fall of 5,5% when compared with 2010.

Were realized a questionnaire to University Education students, that allow to notice that books appear as been the 3rd source of global information, after the greasy/slides and own notes. Besides, in the academic year 2010-2011, the students purchased 2,1 books, photocopied 2,9 books and downloaded illegally 0,7 books.

A clusters analysis of students behavior shows clearly the existence of 4 distinct segments, here designed by:

- “Originals” (21%): students that prefer original books, but they also use photocopied books
- “Sliders” (20%): students that use preferentially greasy/slides. Is also the group that most use originals and less the photocopied.
- “Photocopiers” (45%): students that use a lot photocopies and given little use to the originals.
- “Mixed” (14%): students that are in an mixed position. Use different types of materials.

Only 3% of the students state the copyrights law is unknown, while near 90% of the sample said that the reasons to photocopy are the low price (68%) or to be indifferent to the copyrights law (22%).

Each student will have photocopied, in average, books in the amount of 105,9€, being this value much more superior in Lisbon and Porto (125€) when compared with other cities (95,4€), in the academic year 2010-2011.

The illegal copy, in the supply side is made in two different ways: the “copy centers” that allow illicit copies, that already achieve 510 point of sales; and the availability of the book contents in Internet sites, that have proliferated in the last years.

With the identification of the number of photocopied books and illegal downloads done by the higher education students, is actually possible to estimate the turnover amputated to the sector due to the illegal practices and the consequently loss of revenues for State.

Therefore, exists an amputated value of sales and among the different agents in the chain estimated in 115,9 million Euros and a loss of revenues from taxes for State in 11,35 million Euros.

As happened in other countries, like Spain and France, is imperative that Portugal adopt, and specially, apply a strong legislation against the illegal copy, with the closing of that kind of “copy centers” and block the access to downloads sites.

The popularization of e-books and e-readers put some challenges and difficulties to the sector, but also some opportunities when well explored the potentialities of the multimedia and the power of the Portuguese language around the world.

The companies of the books sector should bet in new strategic options, such as:

- Customer re-orientation, leaving totally the traditional strategy of “produce” books and sell it.
- Adopt a posture of pedagogy and sensitivity in relation with client, namely against illegal copy (photocopies or downloads)
- The Editors should develop the real format of e-books, in a global way, in order to get all the space of Portuguese speakers, developing multimedia functions.
- Bet in a blended communication, to take advantages from the digital communication and the physical one

Keywords: Books, College students, Illegal copy, E-books

Resumo

Esta Tese, com o objectivo de obter o grau de Mestre em Marketing, pretende caracterizar o mercado de Edição e Comercialização de Livros e perceber a sua importância no contexto socioeconómico Português.

O Mercado livreiro pode ser caracterizado como sendo um Mercado num processo de concentração:

- Por um lado, na Edição de livros, a aquisição de empresas e a constituição de grandes grupos, como por exemplo os grupos Leya, Babel e Porto Editora.
- Por outro lado, na Venda a Retalho de Livros, o crescimento da cadeia FNAC, o reforço da Sonae, com o início da venda de livros nas lojas Worten e a aquisição da Bertrand pelo grupo Porto Editora.

Contudo, o Retalho encontra-se ainda fragmentado, porque existe uma grande diversidade de pontos de venda, como livrarias, hipermercados, grandes superfícies especializadas, estações de correios, entre outras.

As informações recolhidas no Banco de Portugal e INE apresentam um problema que dificulta a análise real do sector. Esta dificuldade resulta das vendas entre empresas, da incorrecta classificação das empresas nas CAE (Classificação das Actividades Económicas), e da não inclusão no setor de grandes empresas (ex: FNAC) e as grandes superfícies, por estarem classificadas como empresas de comércio não especializado. Assim, o painel GfK parece mais adequado.

Neste contexto, às vendas da GfK são adicionadas as vendas do INE e é obtido o valor de vendas de 260 milhões de Euros em livrarias e grandes superfícies, ao qual deve ser adicionado um valor entre 50 e 80 milhões de Euros, pertencentes a outras formas de vendas como sites, vendas directas a colégios, empresas e bibliotecas e outras lojas que vendem livros (ex: lojas de animais).

Nos últimos anos, houve um aumento de pontos de venda, devido, maioritariamente, à entrada da Worten no mercado do livro, que em 2009 contabilizava 880 pontos de venda. Acerca dos livros técnicos, esta categoria registou um volume de vendas de 14,7 milhões de Euros, em 2011, o que representa uma queda de 5,5% quando comparado com 2010.

Foi realizado um questionário aos estudantes do Ensino Superior que permitiu aperceber que os livros aparecem como 3ª fonte de informação global, depois das sebatas/slides e dos apontamentos próprios. Além disso, no ano lectivo 2010/2011, os estudantes compraram 2,1 livros, fotocopiaram 2,9 livros e fizeram downloads ilegais de 0,7 livros.

Uma análise de *clusters* do comportamento dos estudantes deixou clara a existência de quatro segmentos aqui designados por:

- Os “originais” (21%) – estudantes que preferem livros originais;
- Os “slidistas” (20%) – estudantes que recorrem sobretudo a sebatas/slides;
- Os “fotocopieiros” (45%) – estudantes que recorrem repetidamente à fotocópia de livros;
- Os “mistos” (14%) – estudantes que se encontram numa posição intermédia, e que tanto compram livros como utilizam sebatas ou fotocopiam livros

Apenas 3% dos estudantes afirmaram não conhecer a lei dos direitos de autor, enquanto quase 90% da amostra disseram que as razões para fotocopiar são o baixo preço (68%) e a indiferença perante a lei (22%).

Cada estudante terá fotocopiado, em média, livros no valor de 105,9€, sendo este valor muito superior em Lisboa e Porto (125€) quando comparado com outras cidades (95,4€), no ano lectivo 2010-2011.

A cópia ilegal, na óptica da oferta, é feita em 2 vertentes diferentes: as casas de fotocópias que permitem cópias ilícitas, que já ascendem a 510 lojas; e a disponibilização de conteúdos dos livros em sites da Internet, que têm proliferado nos últimos anos.

Com a identificação do número de livros fotocopiados e dos downloads ilegais feitos pelos estudantes do Ensino Superior, é possível estimar o volume de vendas amputado ao sector devido às práticas ilegais e consequente perdas de receitas para o Estado.

Existe, portanto, um valor de vendas amputado entre os diferentes intervenientes da cadeia estimado em 115,9 milhões de Euros e uma perda de receitas para o Estado de 11,35 milhões de Euros.

Tal como aconteceu em outros países, como Espanha e França, é imperativo que Portugal adopte e especialmente que aplique uma legislação forte contra a cópia ilegal,

com o encerramento de casas de fotocópias que pratiquem este ilícito e bloqueando o acesso aos *sites de downloads*.

A popularização dos e-books e e-readers coloca alguns desafios e dificuldades ao sector, mas também algumas oportunidades quando bem exploradas as potencialidades da multimédia e o poder da Língua Portuguesa pelo mundo.

As empresas portuguesas do setor devem, assim, apostar em novos eixos de orientação estratégicos e em novas apostas, de onde se destacam:

- Reorientação para o cliente, em particular no caso das editoras, abandonando de vez a convencional ótica de simples produção e venda de livros;
- Adoção de uma postura pedagógica de sensibilização dos leitores, sobretudo os mais jovens, contra a cópia e os *downloads* ilegais, envolvendo, para tal, líderes de opinião, designadamente jovens escritores e jornalistas;
- No caso dos editores, aposta em formatos de *ebooks* multimédia de livros técnicos à escala global, de forma a abarcar todos os mercados de língua portuguesa;
- Aposta inequívoca numa nova comunicação *blended*, aproveitando as potencialidades da integração da comunicação digital com a física.

Palavras-chave: Livros, Estudantes do Ensino Superior, Cópia Ilegal, *E-books*

Index

Agradecimentos	ii
Abstract.....	iii
Resumo	vi
List of Images	xii
List of Tables	xiv
Background.....	1
0.1.Objectives	1
0.2.Structure.....	1
0.3.Purpose of Research.....	2
1.Literature Review	3
1.1 The importance of New Technologies in Book Market	3
1.3.Consumer’s Buying Behaviour.....	11
2. Research Design	13
2.1.Market characterization	13
2.2 The negative impact of illegal copy in the sector	13
2.2.1 The negative impact in the supply side	13
2.2.2. The negative impact in the demand side	13
2.3.Impacts in sector beyond Edition.....	15
2.4. Challenges in the sector for the next years (2012-1015)	15
3. Market Characterization	16
3.1. Book Market Organization	16
3.2. The Weight of Sector in Portuguese Economy.....	20
3.2.1. The turnover in Edition and Retail in Book Market.....	20
3.2.2. The number of companies in Edition and Retail in book sector.....	21
3.2.3. The Evolution of Indicators from Edition and Specialized Book Retail	23
3.3. Comparative analysis of Book Edition, Specialized Book Retail and Portugal .	24
3.3.1. The turnover of Book Edition, Specialized Book Retail and Portugal	24
3.3.2. Comparative analysis of imports/exports among Book Edition, Specialized Book Retail and Portugal	25
3.3.3. Comparative analysis of GVA among Book Edition, Book Retail and Portugal	26

3.3.4. Comparative analysis of Return of Equity among Book Edition, Specialized Book Retail and Portugal	26
3.3.5. Comparative analysis of Asset's Rotation among Book Edition, Specialized Book Retail and Portugal	27
3.3.6. Comparative analysis of Average Collection Period (ACP) and Average Payment Period (APP) among Book Edition, Specialized Book Retail and Portugal	28
3.3.7. Employment	29
3.3.8. Taxes Paid	30
3.4. Books for University Education.....	31
4. Impact of the Illegal Copy on the Demand Side	33
4.1. The importance of the information's sources to University students	33
4.2. Personal Management of budget for books and others school materials.....	35
4.3. Access way to University Education Books	35
4.4. The Preference of Locals to buy books.....	38
4.5. The Average Price of Technical Books	40
4.6. Frequency of use and Preference of study materials	42
4.7. Reasons to buy University Education Books.....	44
4.8. Use of photocopies among University Education Books	45
4.8.1. Reasons to prefer photocopied books.....	45
4.8.2. Methods commonly used to make photocopies	47
4.8.3. Level of satisfaction with the photocopies	49
4.9. Segmentation of students according the frequency of school materials used.....	50
4.10. Assessment of the behavior of students at the rules governing the copying of documents	51
4.11 Ranking of the value on the books photocopied by courses	52
5. Impact of the Illegal Copy on the Supply Side.....	54
5.1. "The copy centers"	54
5.1.1. The methods of "copy centers"	55
5.1.2. The geographical repartition of "copy centers"	56
5.2. The illegal sites	57
6. The impacts of illegal copy in the sector	58
6.1. The Turnover Amputated in Book Edition and Retail.....	58
6.2. The Turnover Amputated Upstream the Edition	59
6.3. The Loss of Revenues of State due to Illegal Copy	61

7. Challenges and Ideas for the years 2012-2015	62
7.1. The situation in Other Countries.....	62
7.2. The Impact of E-books	63
7.3. Changes in Portuguese macro-environment that affect the sector.....	64
7.3.1. Reactions of the society against illegal copy	64
7.3.2. The Development of Technical E-books.....	65
7.3.3. New spaces of Leisure- Revitalization of cities centers.....	65
7.4. Responses from companies.....	68
7.4.1. Customer re-orientation.....	69
7.4.2. Pedagogical and sensitization campaigns	69
7.4.3. The Opportunities of e-books in a Global Way	70
7.4.4. A Blended Communication	71
Conclusion.....	72
Limitations.....	73
Bibliography	74
Attachments	76
Attachment 1- List of Identities interviewed	76
Attachment 2- List of Edition Companies for Higher Education	76
Attachment 3- List of Identities that commercialize books for Higher Education	77
Attachment 4- List of companies studied by GfK	78
Attachment 5- Questionnaire to Higher Education Students.....	78

List of Images

Image 1.1: The important sector of book market.....	4
Image 1.2: The 5 stages of Kotler and Keller’s buying model.....	11
Image 1. 3: The 7 stages of Blackwell, Engel and Miniard’s Model.....	12
Image 3.1. The players in book market.....	16
Image 3.2.: The evolution of sales in book’s Edition (millions of Euros).....	20
Image 3.3.: Evolution of book sales in retail (millions of Euros) in bookstores and large surfaces.....	21
Image 3.4. The evolution of number of Edition companies.....	22
Image 3.5. The Evolution of the number of Book Retail Shops.....	22
Image 3.6.- Average value of Turnover per company of CAE 47.610 and CAE 58.110.....	25
Image 3.7. The Evolution of variations of Imports/Exports of CAE 47.610 and CAE 58.110.....	25
Image 3.8. GVA per employee in CAE 47.610 and CAE 58.110.....	26
Image 3.9. Return on Equity of CAE 47.610 and CAE 58.110.....	27
Image 3.10. Asset’s rotation of CAE 47.610 and CAE 58.110.....	28
Image 3.11. The ACP and APP of CAE 47.610 and 58.110.....	28
Image 3.12. Evolution of the number of people employed in CAE 46.710 and 58.110.....	29
Image 3.13. The evolution of qualifications of people employed in CAE 47.610 and CAE 58.110.....	29
Image 3.14. Other taxes paid by CAE 47.610 and CAE 58.110.....	30
Image 3.15. Income Taxes paid for CAE 46.710 and CAE 58.110.....	31

Image 3.16- Evolution of number of University Education books bought for each student.....	32
Image 4.1. Personal Management of budget for books and others school materials....	35
Image 4.2. Access Way to book in University Education.....	36
Image 4.3. Frequency of use of study materials, by courses.....	43
Image 4.4. Satisfaction with the quality of photocopies.....	50
Image 4.5. Segmentation of students according their practices of use of originals and photocopies.....	51
Image 6.1. The weight of the agents upstream the Edition, in supply chain of Edition companies, in University Education Books.....	60
Image 7.1. Ad of book chain Tzomet Sfarim.....	70

List of Tables

Table 1.1: Safari Tech books online in relation to printed books.....	7
Table 1.2: Use of Safari Tech Online Books to support learning.....	8
Table 2.1.: Number of college students, divided by courses, in 2009/2010.....	14
Table 2.2: Sample Characterization (number of students).....	15
Table 3.1. Evolution of new books launched or imported.....	19
Table 3.2. Evolution of Growth Rate of the Indicators of CAE 58.110- Book Edition	23
Table 3.3. Evolution of Growth Rate of the Indicators of CAE 47.610- Specialized Book Retail.....	24
Table 3.4. Qualifications of employees in book sector.....	30
Table 3.5. Evolution of sales, in units and value, of High Education Books’.....	32
Table 4.1. Importance of sources in information search.....	33
Table 4.2. The Importance of sources in information search, by courses.....	34
Table 4.3. The importance of sources of information by type of city.....	34
Table 4.4 Ways of access to books for students, by courses.....	37
Table 4.5. Ways of access to books, by type of city.....	37
Table 4.6. Use and preference of students in locals of purchase books.....	38
Table 4.7. Qualitative reasons to the preference of locals of purchase books in Higher Education	39
Table 4.8. Preference of locals of purchase books in Higher Education students, by course.....	39
Table 4.9. Preference of locals of purchase books in Higher Education students, by type of city.....	40

Table 4.10. Average Price of Higher Education books by courses and the gap against National Average.....	41
Table 4.11. Average Price of Higher Education books, by type of city, and the gap against National Average.....	42
Table 4.12. Frequency of Use and Preference of study materials.....	42
Table 4.13. Frequency of use of study materials, by type of city.....	43
Table 4.14. Reasons for purchase original textbooks for Higher Education.....	44
Table 4.15- Reasons to purchase High Education books, by courses.....	45
Table 4.16- Reasons to purchase Higher Education books, by type of city.....	45
Table 4.17. Reasons to prefer photocopied books.....	46
Table 4.18 Reasons to prefer photocopied books, by courses.....	46
Table 4.19. Reasons to prefer photocopied books, by type of city.....	47
Table 4.20. Methods of photocopy frequently used.....	48
Table 4.21- Methods of photocopy frequently used, by courses.....	49
Table 4.22- Methods of photocopy frequently used, by type of city.....	49
Table 4.23- Behave of Higher Education Students concerning the prohibition law to photocopy books.....	51
Table 4.24. Behave of Higher Education Students concerning the prohibition law to photocopy books, by courses.....	52
Table 4.25 Behave of Higher Education Students concerning the prohibition law to photocopy books.....	52
Table 4.26. Ranking of the value of photocopied books, by courses.....	53
Table 4.27- Ranking of the value of photocopied books, by type of city.....	53
Table 5.1.Indicators of photocopy companies.....	54

Table 5.2.- Geographical repartition of “copy centers” that make illegal copy.....	57
Table 6.1. The Impact of photocopies in Higher Education books in Retail.....	58
Table 6.2. The impact of illegal downloads of Higher Education books in Retail.....	58
Table 6.3. Impact of illegal duplication of Higher Education Books in Retail.....	59
Table 6.4. . Impact of illegal duplication of Higher Education Books in Edition.....	59
Table 6.5. Estimates of the division of weight of sales in Higher Education Books (foreign, translated and Portuguese authors).....	59
Table 6.6. Estimates of turnover amputated by illegal copies in Higher Education Books, upstream the Edition.....	60
Table 6.7. Losses of taxes paid to State, due to Illegal Copy (photocopy and downloads) of Books in Higher Education, in 2010.....	61
Table 7.1. Qualitative SWOT analysis of book sector- Strengths and Weaknesses (regarding the problem of illegal copy).....	66
Table 7.2. Qualitative SWOT analysis of book sector - Opportunities and Threats (regarding the problem of illegal copy).....	67

Background

0.1.Objectives

This report is a part of a project developed by GIEM-ISCTE to APEL (*Associação Portuguesa dos Editores e Livreiros*) and has as main goal to give information about Portuguese book's market, characterizing the sector of publishing and selling books and understand their importance to Portuguese economic and social context. Besides, is crucial identify the negative impact of technical books' illegal copy, in Portugal.

The main objectives are, mostly, determine the dimension of the publishing and selling books in a lot of economic indicators as Gross Value Added, Turnover, value of imports and exports, employment and, finally, taxes paid.

Also, pretends to evaluate the impact of illegal copy of books, on the one hand, according the demand side through the impact by geographical area and for type of course. On the other hand, according the supply side by the total number, dimension and localization of copy centers whose illegal copy is a current practice.

As was said before, this study is about the supply side where are, beyond the bookstores and the publisher companies, the writers, the graphics companies and other services providers like transportation, warehousing, and so on.

On the opposite, the demand side, was essentially done by the students from universities and professional schools. There is where illegal copy steals a big portion of the publishing and selling books' business. The illegal copy amputates a great part of sector results, therefore has a negative impact in taxes, employment and suppliers.

The illegal copy has been ascertained in different types of city, which means, metropolis, cities with universities and cities with polytechnics. It is divided through the kind of courses of college students (Arts, Economy and Business Administration, Education, Engineering, Health and Social Protection, Law, Sciences, Social Sciences and others).

0.2.Structure

According to the report structure, first of all is the Literature Revision, where is exposed some models designed to understand what is happening and changing in book market due to new technologies (e.g. ebooks), the importance of Corporate Reputation in

Publishing and Selling books companies to enhance the number of clients and some theories about the consumer's buying behavior.

On the second chapter is explained the research design, because the methodologies and the tools used are different along the different phases of the project. The third one characterize the book market, describing their distribution and organization. The next chapters are about the impacts of illegal copy in the book business, according to the supply side (chapter 4), demand side (chapter 5) and finally according a global perspective in the all supply chain (chapter 6).

In the end, the seventh chapter is related with the conclusions on the project and some ideas and challenges for the future. As the final point, are the bibliography and the relevant attachments to the project.

0.3.Purpose of Research

University students are an important percentage of Portuguese population. This number has been growing through the years. In 2006, Portugal had 367.312 University students and in 2011 this number was 396.268 students, according to GPEARI-MCTES(*Gabinete de Planeamento, Estratégia, Avaliação e Relações Internacionais* from *Ministério da Ciência, Tecnologia e Ensino Superior*).

In order to have success during their academic lives, students choose to acquire knowledge throw books, slides from classes and greasy. However, in the last years, the number of technical books sold in Portugal has been decreasing a lot. The main reason of this is the exponential appearance of copy centers who allow the illegal copy of partial or total technical books.

This way, students prefer to do illegal copy instead of to buy the books. The price is lower and doesn't exist any kind of legal supervision, so nobody gets in danger (neither the students nor the copy centers). It is a parallel economy very harmful for publishing sector and bookstores, because they have been losing thousands of Euros along the years.

In this thesis, the final purpose is to understand the market and find solutions to help the publishing sector and bookstores to get better results, create a new mind set through college students in order to change their behavior and increase the supervision in the copy centers who allow illegal copy.

1.Literature Review

The Literature Review for the substantiation of the proposed study was based on the following main areas: The Importance of New Technologies in Book Market and some theories about the Consumer's Buying Behavior.

1.1 The importance of New Technologies in Book Market

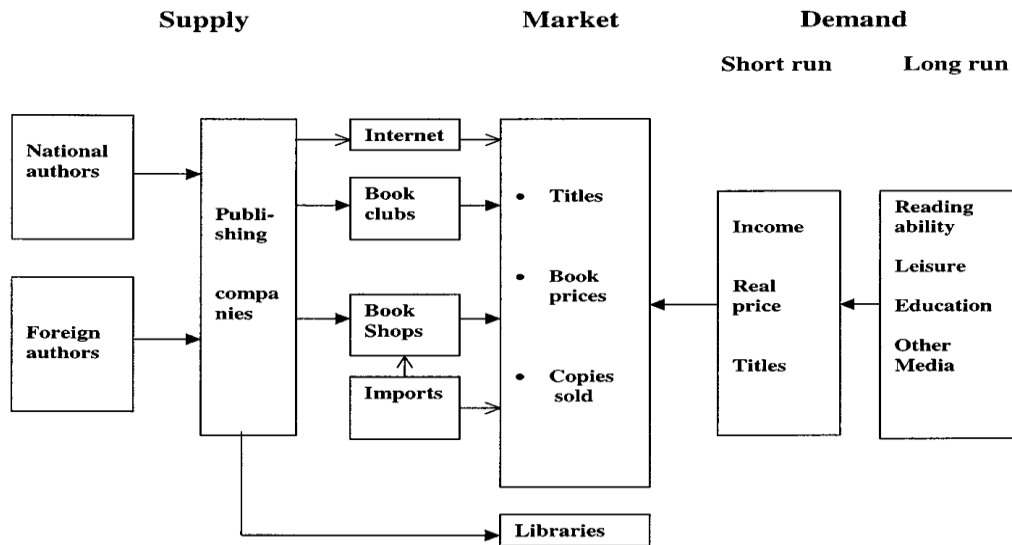
The book market is changing due to the new technologies that actually exist. The publishing act is become easier because the type of technology has growth through the years, which contribute to an exponential growth of the number of the published books and less costs per book.

Hjorth-Andersen, Chr (2000) designed a model for the Danish book market, but he believe that the structure is similar to other countries. The model is divided in different sectors. On the one hand, we have the supply where we can find the national and foreign authors, the publishing companies and the means to buy the books such as Internet, Books clubs, Book shops and Imports. On the other hand we have the demand that is divided in two segments (*Long run and Short Run*). (image 1.1.)

The first segment is about issues that don't change very much from year to year. It takes long time to change. Unlike, short run is much more easy to measure each year, because is about issues that change a lot from year to year.

The Long run factors' are the reading ability of the population (some people can technically read but in fact they are unable to read a book); education level (higher education makes people read more); leisure (is the most difficult item to characterize, because is hard to evaluate the amount of leisure available in a population. It's also the less important factor) and finally alternative goods (people may prefer newspapers and magazines instead books and specially prefer the electronic media such as video and television). The Short Run is influenced by the real book prices, real income, and the number of titles.

Image 1.1: The important sector of book market



Source: "A model of the Danish Book Market" (2000)

The challenge that the sector actually faces is related with the appearance of e-books, the e-learning technologies and the space that tools occupy in society, specially among students.

Regarding **Thomas, Maria Augusta** (2000) when a librarian arguing that need space to expand always appears the argument that with the digitalization the society will be paperless and the actual vision of libraries will be obsolete. If the total library collection would be digitalized it fits on a credit card.

However, the transition to a digital library will go slower than expected. It is explained, in part, due to publishers' concerns about copyrights .

The appearance of e-books makes also changes in copyrights models and contracts. **Williams, Emily** (2011) said that "is hard to predict what shape the business will take in the years to come". Actually, the market is facing two different challenges: on the one hand the fast-changing from physical to technological marketplace and on the other hand the specific complications from images rights.

On the subject of the change from physical to technological, the standard book contract about the copyright isn't anymore adequate, because formerly a book deal was just about the hardcover, paper, the bookshop and the library. Nowadays, everything is different, but have been taken the firsts steps to make a good transition to digital market .

Some publishers consider e-books as been just one more right to carve out like audio-books, for instance, to sell to the print publisher or to sell directly to a digital house. However, other publishers believe that e-books force to re-think all the contract for books in all shapes and forms.

Regarding the image issue, images are intellectual property subject to copyright as well. Sometimes the deal is that the text cannot be separated from images, but also exist the hypothesis of buying a bundle of images separately. The significance that images play in a book depends the type of book it is. Obviously, images are much more important in cooking, gardening, crafts and design books than in non-fiction book or novel. The more importance images have, more important the rights questions are.

According to **Healy, David Gerard et al (2005)** the universities invest increasingly in high technology to their libraries instead of buying books, because they state that electronic platforms are complementary to the traditional learning approaches.

With the decrease of printed books is very important to understand what are the aspects that consumers value most in e-books and what are the features of an ideal e-book. **Chong, Pei Fen et al (2009)** concluded that the use facility of navigation and exploration is the feature most valuable. However, the overall impression is dependent on the appearance of the e-book.

The same authors state that some universities already have e-books and the major reason of dissatisfaction is the usability (less user friend interfaces) and unsatisfactory design.

Snowhill, Lucia (2001) state that electronic books will change the learning behavior and academic research, because e-books have content always accessible. It can be read on PCs or other kind of portable book readers, in any place or time. It possible to carry a lot of titles at once portable reader and consequently build a personal library.

The author developed a study about academic use of e-books. The study consists on a survey to 15 large academic libraries that already provide access to e-books for their students and 4 UC campuses with e-books projects. The most important elements to

study are the content, Software and Hardware Standards and Protocols, Digital Rights Management, Access, Archiving, Privacy, the Market and Pricing and finally the Enhancements and Ideal E-book Features.

In the end of study, the conclusion is that e-books market isn't viable and sustainable yet. It still needs "considerable development of standards, technologies and pricing models". Also, the technologies for reading and using electronic books aren't good enough for the long text format.

For libraries, exist concerns about having adequate rights to support the open scholarly communication, so isn't clear if libraries can replace printed books with e-books or not in the future .

According to **Cox, John (2004)**, while online journals are strongly established as been an essential resource for libraries and their users, electronic books aren't. The primacy of information source still is the print book mostly. (table 1.1.)

So, their investigation group decided to recommend "a one-year subscription to an e-books service" to understand users preferences. The technology used was *Safari Tech Books Online*.

Definitely, users find information faster in e-books than in printed books. The main reason to justify it is the easiness to search individually and collectively. Despite the great preference for electronic books, users said that is harder to read online. The continued improvements in technology screens isn't already satisfactory, so few users prefer to read printed instead of reading it on the screen.

However, this preference for printed doesn't mean equally a strong predisposition to print materials rather to read directly through the screen. Only 51% of respondents usually print materials. The first factor to explain why the printing activity is lower than expected is sometimes users don't need to print because they just look for specific questions with brief and factual answers that don't justify the print. Another reason is that print has costs associated and a huge part of e-books users are students that consider too expensive to print all chapters they need.

Safari Tech Books Online has a lot of qualities, specially in terms of access, quality of content and facility of use, but respondents steel choose printed books first. Only a low percentage (15,7%) prefer e-books. It's also interesting that neutral vote had a very significant percentage (44,9%), which means clearly people aren't totally made up to e-books yet. The universities and libraries have a crucial role in promoting electronic books.

The major reason for printed books preferences is related with the “lack of enjoyment in reading from a screen”. The survey also indicates that reading experience should be improved in order to people be willing to read electronic books.

Table 1.1: Safari Tech books online in relation to printed books

	Disagree Strongly	Disagree	Neutral	Agree	Agree Strongly	Don't Know
It takes longer to find information in <i>Safari</i> than in a printed book	14%	57.5%	14%	8.1%	5.9%	0.5%
It is easier to read an electronic book in <i>Safari</i> than in print	17.2%	46.2%	21.5%	9.7%	3.8%	1.6%
I usually print rather than read on screen	6.5%	26.3%	15.6%	29%	22.6%	0%
I prefer <i>Safari</i> to printed books on my subject	11.4%	27.6%	44.9%	13.5%	2.2%	0.5%

Source: “E-books: Challenges and Opportunities” (2004)

Besides, **Cox, John (2004)** also explain that users have a strong need to use printed books in addition to electronic ones (table 1.2.). In libraries, the most appreciate attributes of electronic books are the search ability and physical convenience, because users noted the convenience of don't leave the computer to consult a book and it's always available unlike the printed books (may be out on loan).

The major positive of Safari Tech Online Books is the time saved in users' opinion. Consequently, almost unanimous, 98% of respondents want the subscription continuation. In addition, they would like to have more electronic books available, because “e-books can support the academic mission effectively, saving time and adding value”.

Table 1.2: Use of Safari Tech Online Books to support learning

	Disagree Strongly	Disagree	Neutral	Agree	Agree Strongly	Don't Know
I need to use printed books in addition to <i>Safari</i>	1.1%	4.9%	9.9%	56.6%	26.9%	0.5%
I use a wider range of books in <i>Safari</i> than I would consult in the Library	5.9%	23.8%	18.9%	40%	10.3%	1.1%
I usually only need to consult one chapter	1.6%	26.9%	21%	43%	7%	0.5%
Access to <i>Safari</i> has improved my work	0.5%	4.3%	26.5%	53%	14.1%	1.6%
<i>Safari</i> has saved me time	1.1%	5.4%	13.4%	59.1%	19.4%	1.6%
<i>Safari</i> has saved me buying a book	1.6%	11.9%	16.2%	35.7%	31.9%	2.7%
I would be interested in other electronic book services besides <i>Safari</i>	0.5%	2.2%	8.6%	43.5%	43.5%	1.6%

Source: "E-books: Challenges and Opportunities (2004)"

The Digital Publishing in Europe is in a different stage as the one in America. In USA, electronic books has been registered annual growths among 1,5% and 5% annually, however the situation isn't the same in European countries.

Mussinelli, Cristina (2010) in her article state that in Germany the e-book market is less than 1% of total book market. In Italy, the situation is worst, because in 2009 the e-book market share was only 0,03% and 0,1% in the next year. This situation is very similar to the Spanish one; in Spain electronic books represent 1,3% of the overall market. Finally, the last country studied was France, where only 1% of sales are made by digital books.

Although the low percentages of sales in Europe, the author knows with the major availability of reading devices (smartphones, pc's, tablets) better conditions are creating for the development of e-book market. Also, with the more applications for e-books may help the electronic books market grow faster than expected.

Carreiro, Erin (2010) explored the effects of the new technologies and digital devices in electronic books and publishing industry as well.

With the wide range of possible devices to read e-books some people claim that printed books will die and only will exist digital books. The study confirm that is not truth, e-books are "another supplementary option to paper books rather than a replacement".

They are only a revitalization of the industry and open a world of opportunities and challenges.

E-books usually are preferred instead of printed books due to their features, as “search and cross reference functions, hypertext links, bookmarks, annotations, highlights, multimedia objects and interactive tools”.

The devices for reading e-books aren't widespread yet, it means that e-books readers aren't already evident to general public in everyday life, but it is growing popularity faster and becoming more prevalent.

With this change in publishing industry, the supply chain become shorter and consequently faster. The costs associated proportionally will be less too, which means major margins to publishers and authors and lower prices to final consumers.

However, the great challenge in this new era of publishing industry is related with the copyrights and the war against piracy. In the article are described some cases of books that less than 24 hours after the launch was available a free version to download.

The approaches to prevent this phenomenon are usually the encryption and the compression, or both. That methods prevent consumers to share e-books among them.

Another option was created by the publishing community in order to protect their assets in digital environment, called Digital Object Identifier (DOI), Digital asset Management (DAM) and Digital Right Management (DRM) . DOI, DAM and DRM are able to protect the intellectual property in the digital environment throughout an identification system.

Finally, the author can demystify the 5 myths about e-books:

- Myth 1: E-books represent a new idea that has failed: E-books are in a growth process, they operate a revolution in publishing market, create a new way to read and can combat the illiteracy
- Myth 2: E-books are easily defined: It isn't true, because e-books don't have already a definitive definition. Technologies will evolve among the years , so doesn't make sense to have a fix definition.
- Myth 3: E-books and printed books are competing media: A lot of studies conclude that “at least for now, the printed books will live alongside the e-book”

- Myth 4: E-books are expensive: Besides the user friend side of electronic books, the price can be lower than a printed book due to the changes in the supply chain.
- Myth 5: E-books are a passing fad: Nobody knows the future, but every day emerge new technologies. Electronic books design a new way to read and have great potential to alter reading habits and experiences.

Armstrong, Chris and Lonsdale, Ray (2005) developed a study about the challenges that e-books collections will face in United Kingdom libraries. The methodology of the study was ten focus group with university students, specially from three different areas: business and management, engineering and health and medicine.

This national study concluded that textbooks are the primary choice, but the ones which are recommended. The second choice are the academic monographs for engineering and health students. They consider scholarly monographs an important format for e-publishing.

The respondents also indicate a lack of availability of a complete range of titles for any given course and some insecurity about the quality of the e-books. Besides, they feel a poor design in free e-books and poor ergonomic of reading on screen.

Regarding the factors that influence the acquisition of e-books the three key factors are “the course reading lists; high borrowing/use; and multiple paper copies”. During the all focus group exist the suspicion that e-books should be cheaper than a printed book. Another conclusion is that reading from screen isn’t popular among students, so the usual practice is to print the texts and read those later.

To finish, the authors understand that the academic librarians don’t feel safe about their knowledge of the emerging electronic books market and the users’ needs. It reinforce the important role of human resources in the selection process, access and use of e-books.

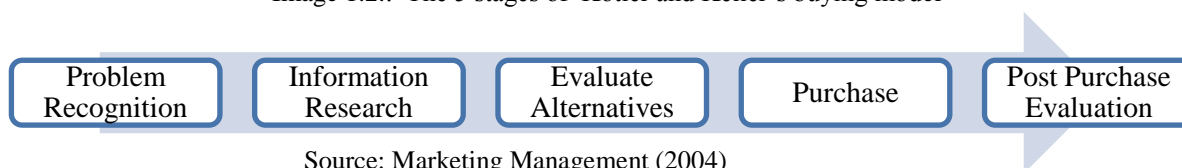
Valente, Colleen et al (2009) go further and state that the adaption of libraries to e-books is much more than to have the equipment needed. Is also necessary to teach the human resources in order to clarify and help properly the users.

1.3.Consumer's Buying Behaviour

With the decreasing of books purchase, specially among University Students (see topic 3.4.) is imperative to understand how are the behavior of consumers when they have to make a decision to buy something. That's why the consumer's buying behavior theories are a so important part in this thesis.

Regarding the buying behavior of consumers, **Kotler and Kelly (2004)** define a process with 5 different stages, but the consumer don't have necessarily to go throughout all the steps. (image 1.2.)

Image 1.2.: The 5 stages of Kotler and Keller's buying model



Source: Marketing Management (2004)

Kotler and Keller (2004) state that the buying behavior is influenced by cultural, social ,personal and psychological factors. The factors with major importance are the cultural ones.

Culture is divided into subcultures such as nationalities, religion, races and geographic location. The way to act in one part of Globe isn't necessarily the same in another location. Social factors are the ones whose are related with the group references like family, social roles and status. People feel the need to belong in some group and it condition the buying behavior. The age, sex, occupation, self image, personality and lifestyle are personal factors that are also important in the buying decisions. Finally, the psychological factors are related with the internal motivation, perception, learning and memory.

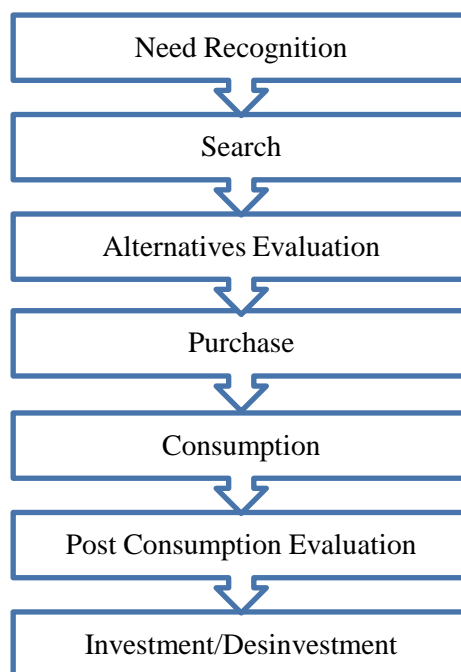
Minor and Mowen (2003) also built a model where the decision making has 5 stages: Problem Recognition; Search; Alternatives Evaluation; Choice; Post purchase evaluation. The main differences form Kotler and Keller's model are the factors that will influence the consumers in their decisions.

Regarding **Minor and Mowen (2003)** the personal and environmental issues have weight in the buying decisions, specially the difficulty of the problem, the knowledge of

the consumer about the problem, the characteristics of consumer and the characteristics of situation.

Another model of buying behavior was designed by **Blackwell, Engel and Miniard (2005)**. For them, the purchase process has 7 stages (Need recognition; Search; Alternative Evaluation; Purchase; Consumption; Post-Consumption Evaluation; Investment/desinvestment) and each step can influence the next stage or the whole process of purchasing. (image 1.3.)

Image 1. 3.: The 7 stages of Blackwell, Engel and Miniard's Model



Source: "Consumer Behavior" (2005)

The authors also divided in 3 different group the variables that influence the process of decision making about purchase. They are:

- Individual Differences: demography, values and personality, financial resources, knowledge and so on.
- Environmental Influence: Culture, social class, family, etc
- Psychological Processes: Information processing, attention, attitudes, learning behavior.

2. Research Design

In the next points will be explained the type of methodology used along the different phases of the project.

2.1. Market characterization

First, was collected data near some well known statistical sources as INE (*Instituto Nacional de Estatística*) and BP (*Banco de Portugal*). That data was relevant to determine the most important indicators about the book market.

Also in this phase, were done 16 qualitative interviews with some top managers from this sector. (see attachment 1). The main objective was to understand the organization of the business for the national and international books.

Besides that, with the data collected in the statistical research, was pretended to know the essential economical indicators (Gross Present Value, Turnover, Value of Imports and Exports, Employment and Taxes paid).

2.2 The negative impact of illegal copy in the sector

2.2.1 The negative impact in the supply side

To identify the impact in the supply side were made some interviews to book shops owners about their perception of illegal activity near their shops, in order to identify the number of illegal copy centers.

This information was matched with the same information collected from students in the same geographical area.

2.2.2. The negative impact in the demand side

In this step were realized two focus group with eight students each one, to talk about the practices of illegal copy. The meetings were in Lisbon in Aveiro, because the objective was to study a city where a big portion of the student population was away from home.

Besides that, were realized face questionnaires to college students, all over the country. The main purpose was related the characterization of the illegal copy. It pretends to explain how are the practices related with the copy of books- volume of photocopied books, number of illicit copies done each year and the place where the copies were done.

The questionnaires were made to 884 students from different courses (Arts, Economy and Business Administration, Education, Engineering, Health and Social Protection, Law, Sciences, Social Sciences and others) and in 7 different Portuguese cities (Lisboa, Porto, Coimbra, Aveiro, Faro, Leiria e Viseu).

All the data collected was treated by the software SPSS (*Statistical Package for the Social Sciences*).

Sample Characterization

The universe of University students was defined according the most recent information available from GPEARI (*Gabinete de Planeamento, Estratégia, Avaliação e Relações Internacionais* from Ministério da Ciência, Tecnologia e Ensino Superior), which include the number of students enrolled in University Education in the academic year 2009/2010. (table 2.1)

Table 2.1.: Number of University students, divided by courses, n 2009/2010

Courses	Number
Education	20.750
Arts and Humanities	34.187
Social Sciences, Commerce and Law	121.926
Sciences, Mathematics and Informatics	28.076
Engineering, Manufacturing Industry and Construction	84.677
Health	62.528
Services	24.459
TOTAL	383.627

Source: Ministério da Ciência, Tecnologia e Ensino Superior

The sample was defined according the weight each course have in the total of the students, in different regions of Portugal (table 2.2.). The match cannot be perfect because the terminology used by *Ministério da Ciência, Tecnologia e Ensino Superior* is very old and not used anymore (e.g. use the term “commerce” instead of “Economy and Business Administration”).

Table 2.2: Sample Characterization (number of students)

Courses	Total	Big cities		Other cities				
		Lisboa	Porto	Coimbra	Aveiro	Faro	Viseu	Leiria
Arts	44	22	10	6	2	1	0	3
Sciences	64	30	15	10	5	4	0	0
Social Sciences	92	47	18	10	6	3	2	6
Law	74	38	26	10	0	0	0	0
Education	55	18	4	7	4	2	5	15
Engineering	207	87	53	27	16	7	8	9
Economy and Business Administration	157	75	38	22	8	5	4	5
Letters	52	32	9	6	1	1	0	3
Health	139	47	51	20	5	6	7	3
Total	884	396	224	118	47	29	26	44

Source: Made by the author

Were made 884 questionnaires, which 70% were in Lisbon and Porto, the others 30% were made in the others 5 cities (Coimbra, Aveiro, Faro, Viseu e Leiria). This sample allows to obtain results with a margin of error of 3.3% for a confidence interval of 95%.

2.3. Impacts in sector beyond Edition

In the step where was determined the impacts in sector beyond Edition were realized 12 interviews to top managers from Edition Companies, in order to understand what how many and what kind of suppliers the Edition Companies have, the volume of business and their perception about the evolution in the sector and the challenges for the future.

In addition, was made desk research to determine the economic impact in the sector (less revenues), in the employment and in taxes paid.

2.4. Challenges in the sector for the next years (2012-1015)

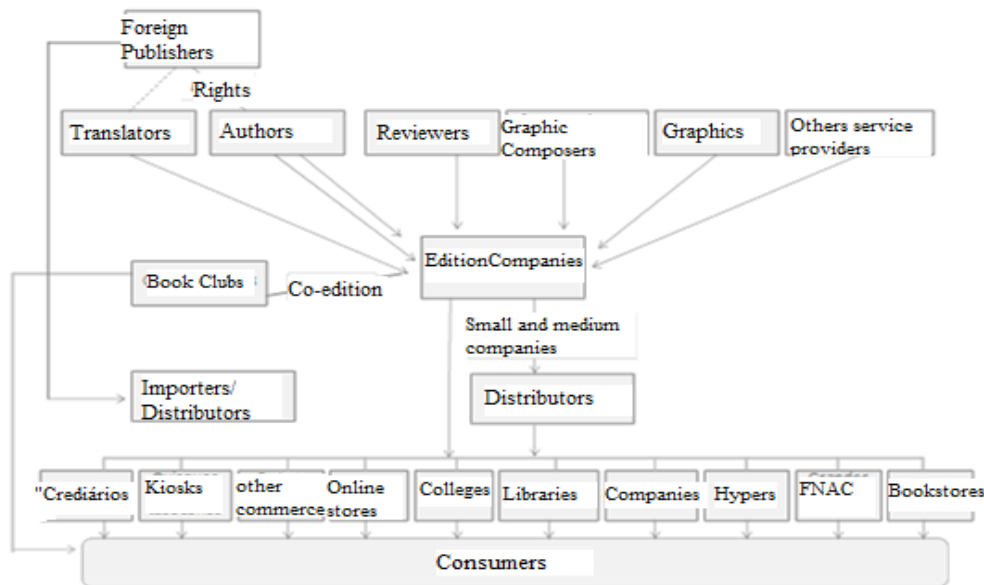
In this final phase, was done a SWOT analysis to define the big challenges for the sector to the next years. All the proposal result from the examination of behavioral dimensions of consumers, with the special attention to the changes from the access to digital world and proliferation of Internet and social networks.

3. Market Characterization

3.1. Book Market Organization

In the book market are a lot of players with different roles. The image 3.1. explains the connections among the different players in the market.

Image 3.1. The players in book market



Source: Done by the author

The Edition Companies are the main force of the industry, in Portugal, because they are the ones who decided if a book will be published or not.

The market upstream the Editors are organized on this way for the Portuguese books:

- Authors
- Book's Reviewers- this function can be done inside the company or can be done outsourcing
- Design Composers- usually, this function is done outsourcing
- Graphics- It can have two different business models. In some cases, its required only the service without the paper (it's often choose for the big Edition Companies). The other model is to require the service and the paper
- Other services providers such as bind companies, when this function isn't done inside the company or promoting activities related with the book's promotion.

With the books from foreign authors published in Portugal, have to be considered some another specificities:

- The rights for Publish in Portugal, that are acquired for a Portuguese Edition Company to a foreign one. Sometimes, exist an intermediary between the two companies. The author, usually, receives a percentage from the amount paid to the foreign editor.
- The existence of a interpreter to translate the book to Portuguese language.

Regarding the books directly imported, the agents stated previously don't exist in Portugal (only in the origin market). Can exist a distributor/importer in some cases.

In Portugal, also exist a special case that are the book clubs. The most known is *Círculo de Leitores* that do his own editions or make some co-editions with the Editors, and sell the books through his own network, usually supported by a catalogue.

Concerning the market downstream the Edition exist a fewer players:

- Wholesalers- that represent exclusively one Edition Company. This agent are actually less used, only the medium and small edition companies required this service, because the big companies usually have their own distribution.
- Retailers with physical shops- they sell directly to final consumer. They can have a lot of formats such as small book shops, big chains of bookstores (e.g. *Almedina or Bertrand*), big chains of companies that sell a several products (e.g. *FNAC or Worten*) and also hypermarkets (e.g. *Continente or Auchan*).
- Online selling- with sites that can belong to the edition company (e.g. *MediaBooks or Wook*) or to the retailer (*FNAC, Worten, Bisturi*).
- Schools and others educational establishments that buy the books directly to the edition companies and sell to their students.
- Some establishments in different types of commerce that sell books in their stores such as pets shops or tourism shops
- Kiosks and stationeries, specially in collectable products
- “*Crediários*”- It's a way to sell on credit big collections, done by personal selling. It represents a very small portion of market, due to Internet proliferation and less sales of encyclopedias
- Some organizations, mostly for gifts (e.g. pharmaceutical industry) or libraries

The Publishing Market

Actually the market is concentrated on two big groups: *Porto Editora* and *Leya*.

This two groups are the strongest on the scholar books (until the mandatory education, that in Portugal is until 12^o degree), however they diversify their activities downstream and already have sales directly to the final consumer.

Porto Editora includes upstream the *Bloco Gráfica* (an arts graphics and multimedia activities company). Besides, they have a lot of different other brand such as *Lisboa Editora*, *Areal Editores*, *Ideias de Ler* e *Albatroz* and finally, downstream, the virtual shop, *Wook*.

Internationally, *Porto Editora* has companies in Mozambique and Angola, called *Plural Mozambique* and *Plural Angola*.

In 2010, *Porto Editora* did another acquisition to Bertelsman Group, with the *Bertrand* Editors (with the seals *Pergaminho*, *Quetzal*, *Temas e Debates* and *ArtePlural Edições*), *Bertrand* distribution and their physical shops. In addition, also the Book Club, *Círculo de Leitores*, was also acquired.

On the other hand, *Leya Group* has a very strong presence in scholar market, having a few brands (*Texto*, *Asa*, *Gailivro*, *Novagaia*, *Sebenta*). They have a general other brands too (*Academia do Livro*, *BIS*, *Caderno*, *Caminho*, *Casa das Letras*, *Dom Quixote*, *Estrela Polar*, *Livros d'Hoje*, *Lua de Papel*, *Oficina do Livro*, *Quinta Essência* and *Teorema*).

Regarding downstream actions, the group acquired 6 own stores, eleven book stores in partnership along the national territory and a virtual shop, the *MediaBooks*.

Worldwide, *Leya* has activities in Portuguese-speaking countries (Brazil, Angola and Mozambique).

Besides the 2 big groups, are another ones with small significance and different approaches:

- The group *Civilização*, that is present on the market for over a century with graphic and edition activities. This grupo is where belong the book chains *Bulhosa* and *Leitura*, since 2005.

- The group *Babel*, that have the seals *Verbo*, *Ulisseia* e *Arcádia* and others. They are also present in Brazil.

In addition, in Portuguese market, also exist 2 bid Edition Companies- *Presença* and *Gradiva*.

This big market concentration and the global crisis make that the number of new titles launched in Portuguese market from national and foreign authors decreased 55% in three years. (table 3.1.)

Table 3.1. Evolution of new books launched or imported

Year	Number of New Books	Growth Rate
2007	4.555	
2008	4.163	-8,6%
2009	2.361	-43,3%
2010	2.809	+19%
2011	2.033	-27,6%

Source: GfK

Regarding the Edition Companies for Higher Education, it can be divided in two different groups: (see all companies in attachment 2)

- 24 traditional Edition Companies such as Almedina, Coimbra Editora, Lidel group and Sílabo;
- 19 academic edition companies, associated to 11 universities and 8 faculties;

Bookseller retail

There are 3 different players in bookseller retail, namely:

- *FNAC*- that have 17 shops in the country, which is the major sales area from a single company.
- Bookstores chain *Bertand*
- *Sonae* Group, where belong the hypermarkets *Continente*, the *Worten* stores, that have a book space since 2008 and the virtual store *Book.it*, launched in 2007.

Also in the commercialization of books for Higher Education books are 3 big agents responsible for a big portion of the sales: (see all companies in attachment 3)

- The distributor and importer *Dinternal*
- A very small number of “*Crediários*”
- Approximately 40 specialized bookstores, with particular highlight to 10 stores of *Almedina*, 10 stores of *Bisturi* e 5 shops of *Coimbra Editora*.

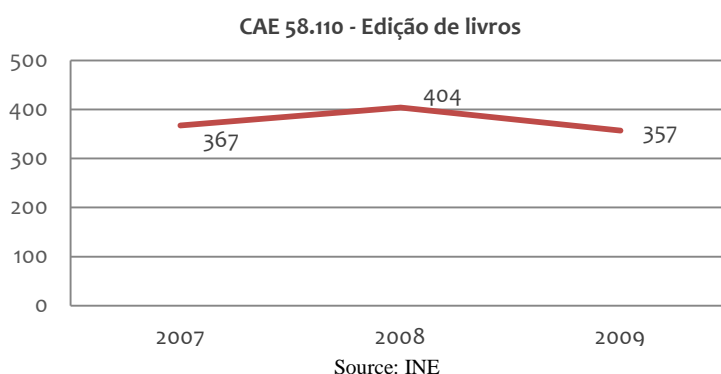
3.2. The Weight of Sector in Portuguese Economy

To study this topic is necessary to divide the Book Market in 2 different segments. On the one hand, the Edition and on the other hand, the Retail. For the first one, the data was collected in INE (*Instituto Nacional de Estatística*) and BP (*Banco de Portugal*). For the second one, besides the 2 sources stated previously, also collected data in Gfk.

3.2.1. The turnover in Edition and Retail in Book Market

According to INE, there was a growth in sales, in 2008, of Edition Companies.

Image 3.2: The evolution of sales in book’s Edition (millions of euros)



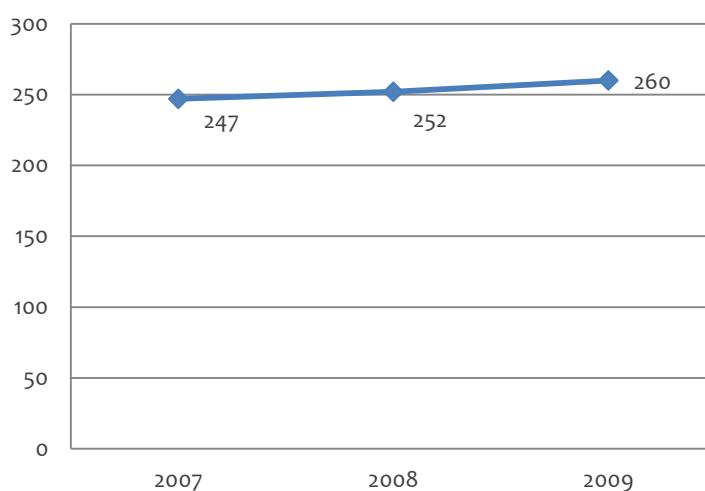
Concerning the retail, the CAE 47.610 only allow to identify the sales in stores specialized in books. This way, the real number of sales is conditioned due to main factors:

- The biggest players in the market (FNAC and hypermarkets) are registered as “retail don’t specified”
- The existence of multiple channels to sell directly to consumer, as explained previously in image 3.1.

So, in this study, was considered the retail's sales the ones done by bookstores and large surfaces calculated by GfK Company such as *FNAC*, *Hypermarkets*, *Staples*, *Worten* and *El Corte Inglés* (all the entities studied by GfK can be consulted in attachment 4).

This way, can be stated that the sales in book retail growth in 2008 (+2%) and 2009 (+3,2%), in all segments. The calculations were done in real prices, so the growth was practically null.

Image 3.3.: Evolution of book sales in retail (millions of Euros) in bookstores and large surfaces



Source: INE and GfK

In the image 3.3., the market value was calculated by INE data regarding bookstores and GfK information concerning large surfaces (doesn't include scholar books).

However, this numbers aren't real because they don't have in consideration some other establishments where books are sold as well like Sites, Books Club, namely *Círculo de Leitores*, Scholar books, other kind of establishments that also sell books (pet shops and tourism shops, for instance), kiosks and stationeries, sales directly to companies and libraries.

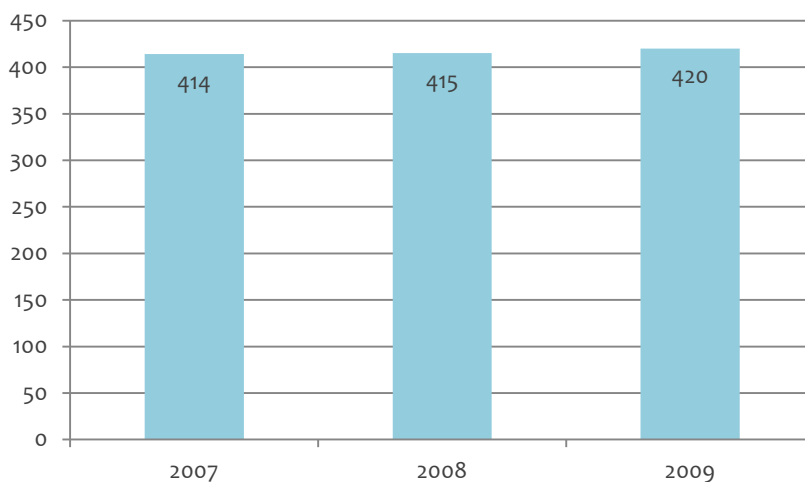
The sales of the concepts above are possible to estimate in 50 to 80 millions of Euros, which means that the real retail market should value between 310 a 340 million Euros annually.

3.2.2. The number of companies in Edition and Retail in book sector

To calculate the number of companies that operate tin this sector was used the same criteria from the item 3.2.1. (The turnover in Edition and Retail in Book Market)

The number of Edition companies is stable among the years (image 3.4.), but the number of enterprises belonging to this CAE is, according to the specialists, extremely higher than desirable.

Image 3.4 The evolution of number of Edition companies



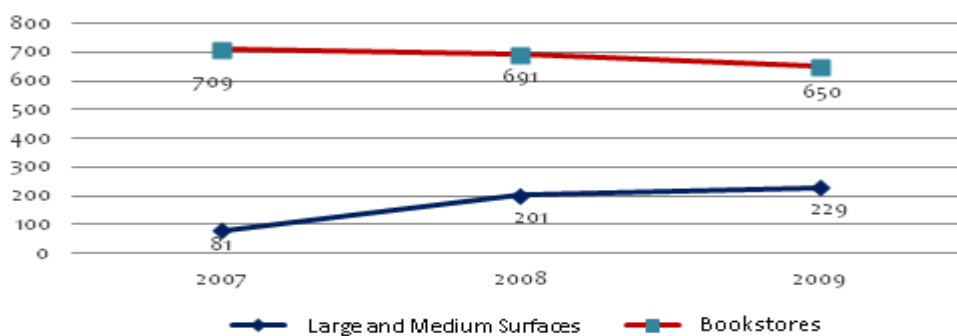
Source:INE

On the other hand, the number of establishments that sell books increase expressively in 2008, explained by the appearance of new large surfaces and the introduction of bookstore space in *Worten* stores in 2008. (image 3.5).

To the calculation was considered that one independent store corresponds to a shop. In the years 2007, 2008 e 2009, were added respectively 50, 55 e 60 shops from bookstores chains.

Out of the calculations was the shops from *Pingo Doce*, that already sell books since 2008, but has a restrict gamma and with no significance.

Image 3.5. The Evolution of the number of Book Retail Shops



Source: INE and companies' data

3.2.3. The Evolution of Indicators from Edition and Specialized Book Retail

To this topic was collected information from IES (*Informação Empresarial Simplificada*) and BP (*Banco de Portugal*). In BP, the information was organized through 2 different economic activities codes: CAE 58.110- Book Edition and CAE 47.610 Specialized Book Retail.

Were collected indicators that best characterize the book market such as turnover, the number of companies, the number of employees, imports and exports, Gross Value Added and Net Income, for a 4 years horizon. (table 3.2.).

Table 3.2.Evolution of Growth Rate of the Indicators of CAE 58.110- Book Edition

Indicators	2006-7	2007-8	2008-9	2009-10	2010
Turnover (euros) (Average Value)	-1,0%	20,9%	-11,6%	-50,1%	477.774
Nº of companies (absolute value)	-0,3%	7,0%	-6,9%	12,0%	337
Nº of employees (average value)	-12,5%	0,0%	0,0%	-33,3%	4
Imports (euros) (absolute value)	-4,6%	-5,3%	-29,5%	-12,8%	14.585. 886
Exports (euros) (absolute value)	50,5%	-6,9%	-13,2%	16,0%	13.326. 139
GVA (euros) (average value)	1,3%	7,6%	0,1%	-48,3%	146.126
Net Income (euros) (Average Value)	52,2%	-29,9%	19,1%	-55,2%	9.085

Source: Banco de Portugal

Can be stated that in Book Edition subsector have a high number of small companies, which corresponded, in 2009, a 1 million Euros approximately of turnover and an average of 7 employees.

Table 3.3. Evolution of the Growth Rate of the Indicators of CAE 47.610- Specialized Book Retail

Indicators	2006/7	2007/8	2008/9	2009/10	2010
Turnover (euros) (average value)	2,9%	0,2%	7,2%	-9,0%	428.021
Nº of companies (valor absoluto)	-0,7%	-0,7%	-5,0%	9,8%	292
Nº of employees (average value)	0,0%	0,0%	0,0%	0,0%	5
Imports (euros) (absolute value)	15,4%	-3,6%	-33,3%	-46,0%	2.539.98 1
Exports (euros) (absolute value)	82,8%	-61,7%	1247,7%	-48,5%	1.172.87 7
GVA (euros) (average value)	17,3%	-4,1%	14,5%	-18,8%	76.244
Net Income (euros) (average value)	-71,0%	190,0%	-51,9%	128,8%	-14.646

Source: Banco de Portugal

On the other hand, the indicators of Specialized Book Retail (table 3.3) show that is a subsector with small companies, turnover below 0,5 millions, with negatives net incomes and an average of 5 employees.

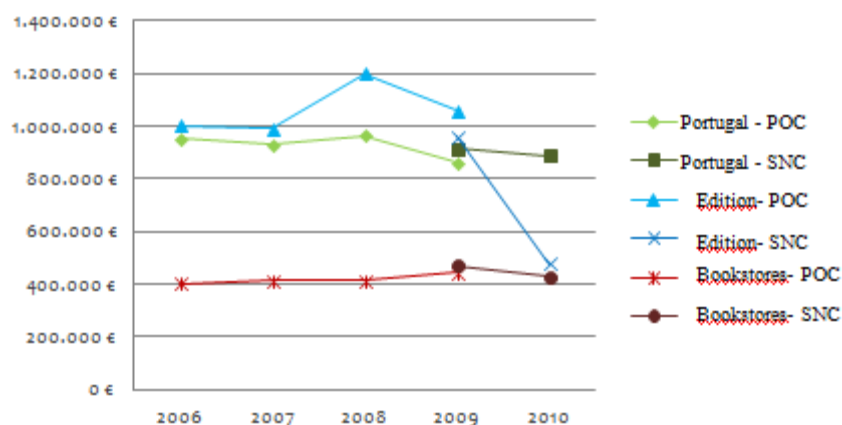
3.3. Comparative analysis of Book Edition, Specialized Book Retail and Portugal

In this topic were analyzed some indicators regarding the average volume of book edition, the sales in specialises book retail stores and about the Portuguese companies, generally.

3.3.1. The turnover of Book Edition, Specialized Book Retail and Portugal

When are compared the performance of Book Edition companies and Specialized Book Retail with the global performance of the country, can be stated that the turnover of Book Edition is than the national one. On the opposite, the turnover of Specialized book Retail is less than half of the national value.

Image 3.6- Average value of Turnover per company of CAE 47.610 and CAE 58.110



Source: Banco de Portugal

Note: In Portugal, was an alteration of the account system, in 2009, from POC- *Plano Oficial de Contas* to SNC- *Sistema de Normalização Contabilística*. This way, are presented the 2 values in these year to understand perfectly the evolution.

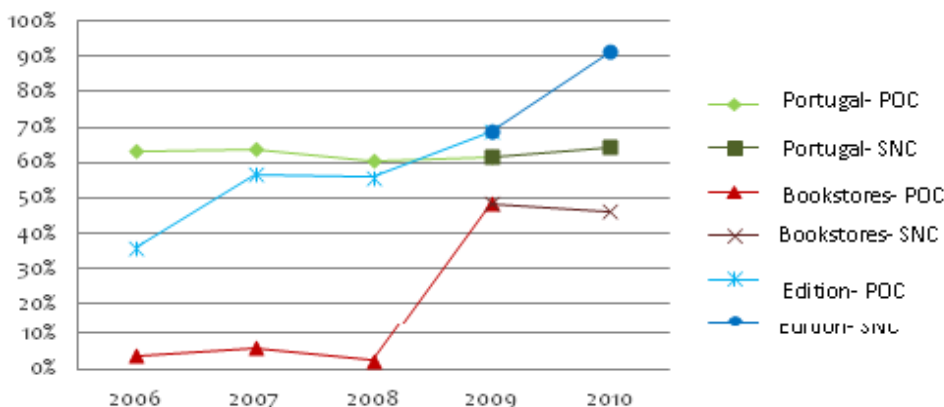
3.3.2. Comparative analysis of imports/exports among Book Edition, Specialized Book Retail and Portugal

In the period 2006-2008 the exports of books only represented between 2% to 6% of imports in bookstores. However, in 2009, verified an exponential increase of the exports, that were more than 40% of imports in these year. (image 3.7)

Regarding Book Edition, the tendency is to a gradual increase of exports, that in 2009, represented more than 60% of imports. (image 3.7)

Is also important to highlight that the values of CAE's represent the total value of imports and exports, which means that isn't only books. The Edition companies could sell paper or semi-finished products.

Image 3.7. The Evolution of the variations of Imports/Exports of CAE 47.610 and CAE 58.110



Source: Banco de Portugal

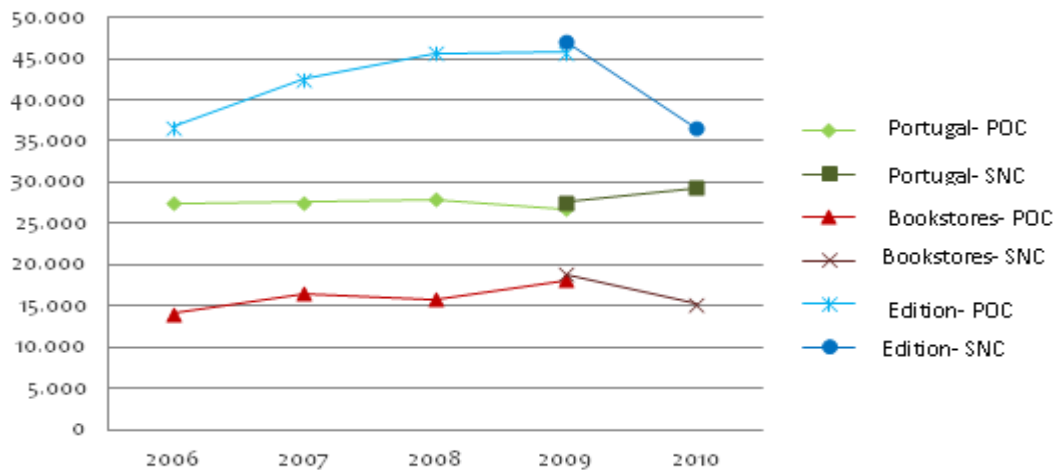
Note: In Portugal, was an alteration of the account system, in 2009, from POC- *Plano Oficial de Contas* to SNC- *Sistema de Normalização Contabilística*. This way, are presented the 2 values in these year to understand perfectly the evolution

3.3.3. Comparative analysis of GVA among Book Edition, Book Retail and Portugal

The GVA's analysis showed that the value added per employee follow the same tendency as the turnover for company. (image 3.8.)

The great highlight in this topic goes to Book Edition, that is significantly above from national values and registered an increase between 2006 and 2009.

Image 3.8. GVA per employee in CAE 47.610 and CAE 58.110 (2006-2010)



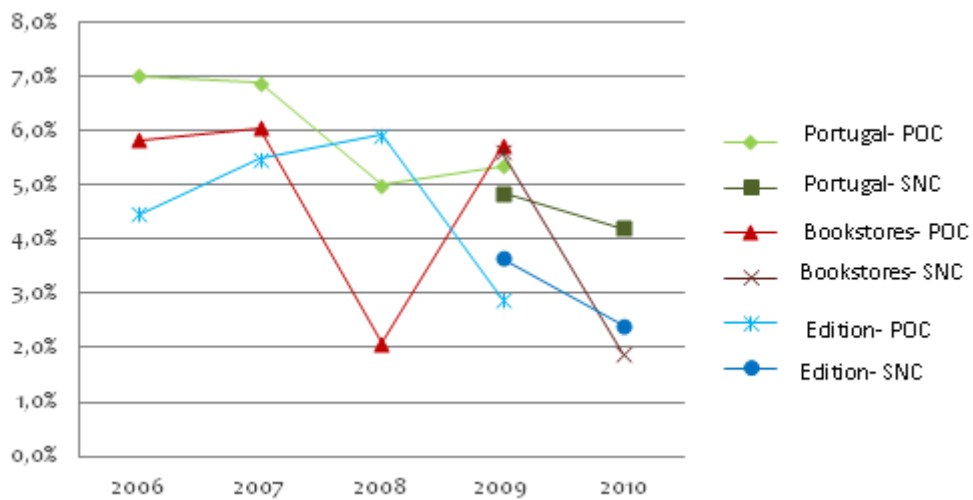
Source: Banco de Portugal

Note: In Portugal, was an alteration of the account system, in 2009, from POC- *Plano Oficial de Contas* to SNC- *Sistema de Normalização Contabilística*. This way, are presented the 2 values in these year to understand perfectly the evolution

3.3.4. Comparative analysis of Return of Equity among Book Edition, Specialized Book Retail and Portugal

Unlike what succeed with turnover and GVA, the Return on Equity (ROI) allow to verify that the specify book retail has a better performance than book edition. In both cases, the performance is lower than the national average. (image 3.9).

Image 3.9. Return on Equity of CAE 47.610 and CAE 58.110



Source: Banco de Portugal

Note: In Portugal, was an alteration of the account system, in 2009, from POC- *Plano Oficial de Contas* to SNC- *Sistema de Normalização Contabilística*. This way, are presented the 2 values in these year to understand perfectly the evolution.

However, the Specialized Book Retail suffered a big decrease in 2008 and the same happened for Book Edition in the period 2008-2010.

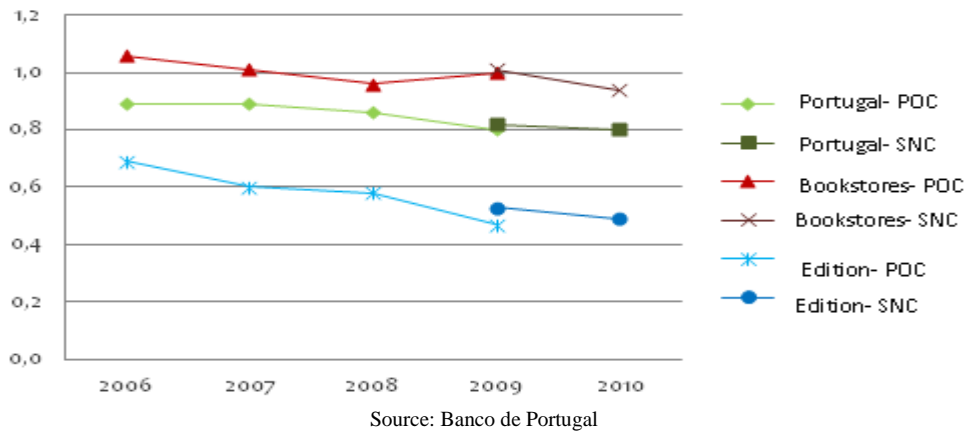
In the table 3.2, the net income of 2009 has a negative value while in the image 3.10 the ROI has a positive value, which is explained by the different methodologies used.

3.3.5. Comparative analysis of Asset's Rotation among Book Edition, Specialized Book Retail and Portugal

The asset's rotation of Book Edition is longest when compared to the national one.

This weak asset's rotation for Edition Companies results from the degradation of stocks in a warehouse. In bookstores, the situation is better because a part of them use the assignment, so they don't need to maintain the books they don't sell. (image 3.10.)

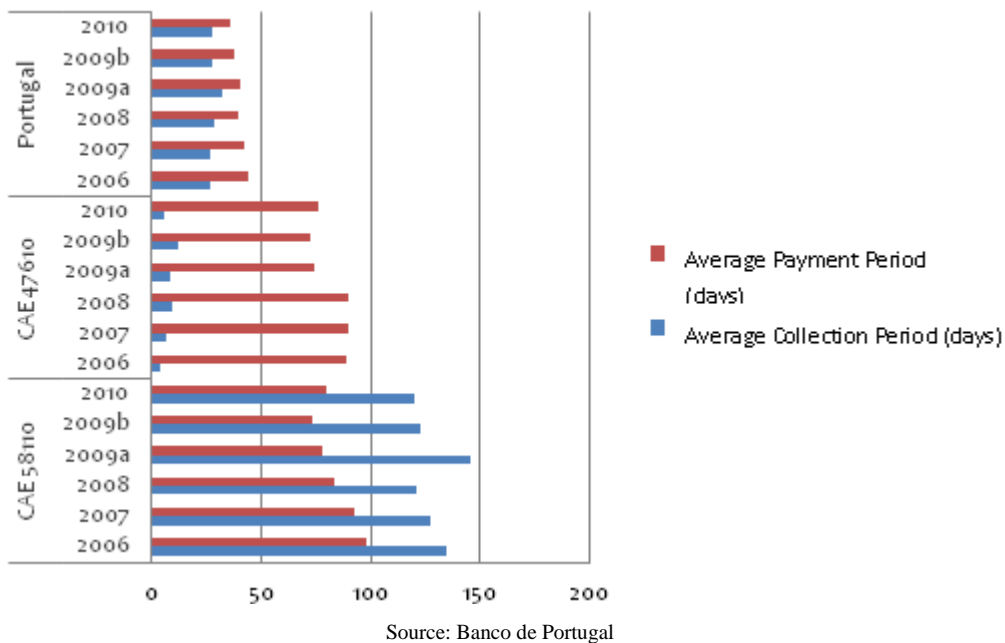
Image 3.10. Asset's rotation of CAE 47.610 and CAE 58.110



Note: In Portugal, was an alteration of the account system, in 2009, from POC- *Plano Oficial de Contas* to SNC- *Sistema de Normalização Contabilística*. This way, are presented the 2 values in these year to understand perfectly the evolution.

3.3.6. Comparative analysis of Average Collection Period (ACP) and Average Payment Period (APP) among Book Edition, Specialized Book Retail and Portugal
 Regarding the Average collection Period of Retail, it is very close to zero, because they work directly with the final consumer. On the other hand, the Average Payment Period of Edition and Retail companies is notoriously above from the national average. (image 3.11.)

Image 3.11 The ACP and APP of CAE 47.610 and 58.110



Note: 2009a – Information with POC, 2009b- Information with SNC

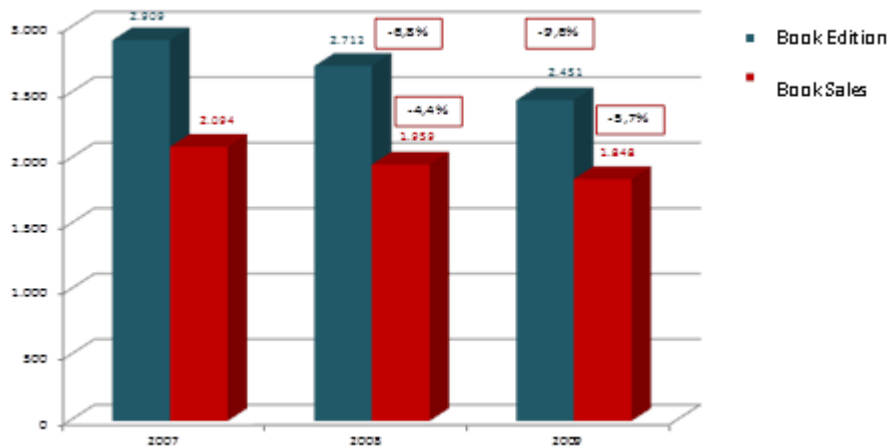
The gap between editors' ACP and retailers' APP can be explained by the existence of other type of direct customer of editors, such as distributors in medium and small

companies or hypermarkets in big companies that have Average Payment period much more extended.

3.3.7. Employment

The number of people employed in Book Market was been decreasing, with special concern in book edition, where the decrease is more sharp, with a fall around 9,6% in 2009 when compared with the previous year.

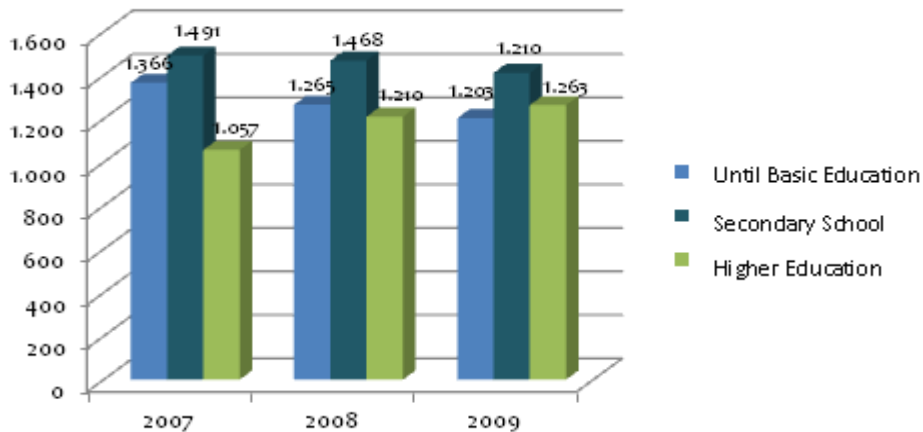
Image 3.12. Evolution of the number of people employed in CAE 46.710 and 58.110



Source: GEP

The qualifications of people employed in Book Sector suffered a positive evolution of more qualified staff (with higher education) that changed from 27% to 33% only in one year. (image 3.13)

Image 3.13. The evolution of qualifications of people employed in CAE 47.610 and CAE 58.110



Source: GEP

The people with qualifications until primary school are only 33% of total, much lower than the national average (63,2%), but the number of employees with high education in Book market is more than the double of the national average. (table 3.4.)

Table 3.4. Qualifications of employees in book sector

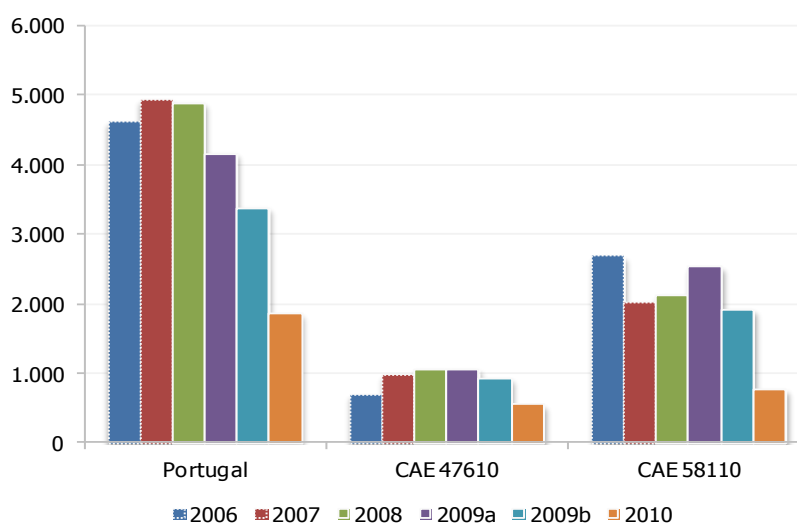
Qualifications	Qualifications of employees	National Average
Until Primary school	31%	63,2%
Secondary School	36.4%	21,60%
High Education	32.6%	15,20%

Source: GEP

3.3.8. Taxes Paid

Concerning the taxes paid, the Book Edition have 2 different situations: on the one hand, low payments of taxes beyond the Income Tax, what can be explained by the Value Added Tax (VAT) were been 5%, which is a very low value in the country. On the other hand, payments above the national average in IRC. (image 3.14 and image 3.15)

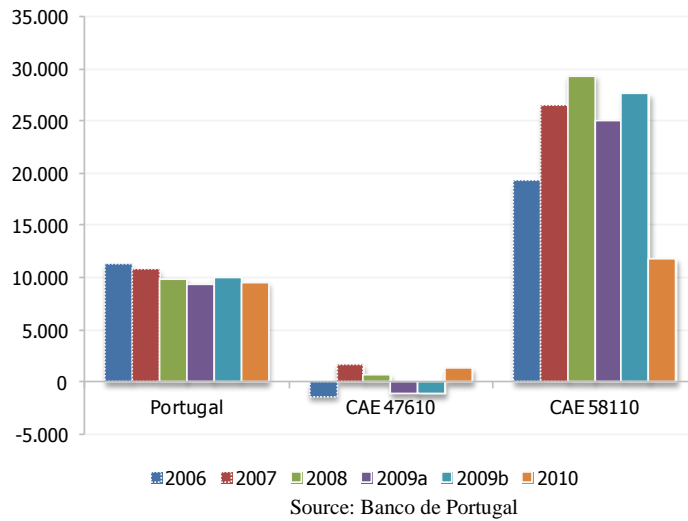
Image 3.14. Other taxes paid by CAE 47.610 and CAE 58.110



Source: Banco de Portugal

Note: 2009a – Information with POC, 2009b- Information with SNC

Image 3.15. Income Taxes paid for CAE 46.710 and CAE 58.110



Note: 2009a – Information with POC, 2009b- Information with SNC

In the Specialized Book Retail the values of other taxes are low, which is justify with the explanations about VAT presented previously. The theoretical negative Income Tax is consequence of taxes with low significance.

This situation isn't a reflection of reality because the taxes payment is made by each company, doesn't exist any compensation between the ones that paid Income Tax and the others.

3.4. Books for University Education

It's hard to characterize the market of University Education book's because the consumers of this type of book are very diversify. Aren't only the college students, but also professionals and some curious people about that theme.

The methodology used here was the identification of book's categories most used in Higher Education, according to GfK.

GfK data (that doesn't include the independent bookstores) shows that after a great increase in 2008 (+21,2%), happened decreases in the years later -3,3%, in 2009, -0,3% in 2010 and -5,5% in 2011. (table 3.5).

From the areas of study, the ones that have more weight are Law, Social Sciences and Management. All together, in 2011, represents more than 81% of the whole areas.

Regarding Value, the weight of the areas maintains. Law represents almost an half of the total (43%), consequence of the units sold and also because have an average price high (24€), only overcome by Health (31€) and Engineering (28€).

The areas with low significance in turnover are Health (4%) and Engineering (2%). It happens because in both areas exist a lot of specialized bookstores and direct sales, which are not account for Gfk panel.

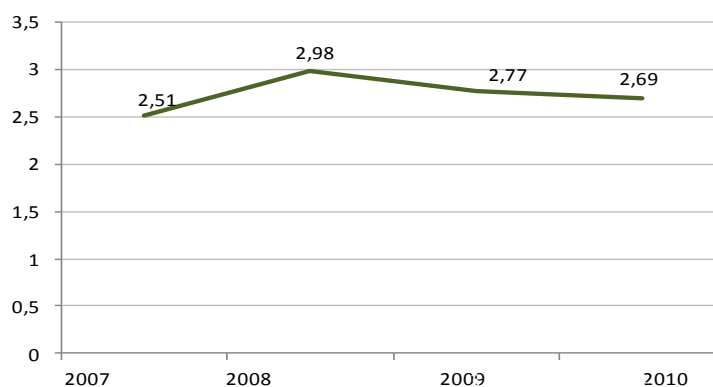
Table 3.5. Evolution of sales, in units and value, of University Education Books?

Areas	2007		2008		2009		2010		2011	
	Units	Average Price	Units	Average Price	Units	Average Price	Units	Average Price	Units	Average Price
Law	248.860	21	302.596	22	346.059	23	342.389	23	345.731	24
Social Sciences*	330.338	15	439.623	14	317.536	16	282.523	16	283.573	15
Management, Marketing and Advertising	232.774	21	252.823	21	230.883	20	215.755	19	195.429	19
Economy	45.118	22	42.569	22	61.831	19	98.331	15	119.253	14
Health	37.256	40	55.599	32	47.147	34	64.543	28	42.634	21
Engineering	26.796	27	29.390	27	28.340	28	28.708	27	23.371	28
Total book market for High Education	921.142	18,9	1.122.600	18,8	1.031.796	19,8	1.032.249	19,8	1.009.991	19,1
Total book market for High Education (millions of euros)	17,4		21,1		20,5		20,4		19,3	
Growth Rate (in value)	-		21,2%		-3,3%		-0,3%		-5,5%	
Total Book market in units and average price (€)	13.561.247	11,21	13.590.709	11,53	14.310.694	11,74	14.566.044	11,61	14.661.775	11,19

Source: GfK

This research can be depth analyzing the average number of books buying for the University students. It allow to conclude that the number of books bought for each student is clearly decreasing. (image 3.16)

Image 3.16- Evolution of number of University Education books bought for each student



Source: GfK and Ministério do Ensino Superior

4. Impact of the Illegal Copy on the Demand Side

In this topic beyond the conclusions of the questionnaires done to a sample of 884 college students (attachment 5), are presented also some comments from the focus group meetings realized.

Were analyzed, sequentially, the main topics:

- The importance of the information's sources to college students
- Personal budget management for books and others school materials
- Access ways to University Education Books
- Frequency of use and preference of study materials
- Reasons to buy textbooks
- Use of photocopies for University Education students
- Segmentation of students according the frequency of school materials used
- Assessment of the behavior of students at the rules governing the copying of documents
- Ranking of the value on the books photocopied by course

4.1. The importance of the information's sources to University students

Students have a lot sources to used when they study. Books aren't by far the first student's choice. (table 4.1)

Table 4.1. Importance of sources in information search

Source	Average Position	Top2 (percentage)
<i>Internet</i>	3,3	31,3
Books	3,0	39,8
Greasy/slides	2,2	65,4
Own notes	2,8	45,5
Friends notes	3,6	20,6
Others	5,1	11,9

Legend: Classification 1- Source of information more important, Classification 6- Source of information less important

Note: Top2- Percentage of respondents that indicate the source of information as the first or second preferred

It's easy to verify that the first preference of students when they have to study are the greasy/slides (with a 2,2 position in a 1 to 6 scale). Greasy/slides are followed by the own notes and books.

On the Top2 of preferences highlight again the greasy/slides and own notes, with 65,4% and 45, 5%, respectively, of the respondents' choices.

When the same analysis was done by course another aspects gain relevance, such as: (table 4.2.)

- Internet is a relevant source of information for Arts and Letters students.
- Books are specially used in Law
- While the friends' notes don't have the preference in any course, the greasy/slides have an highlight position as first option in 5 courses: Sciences, Social Sciences, Engineering, Economy and Business Administration and Health
- Own notes are the main source of information for Education and Letters students

Table 4.2. The Importance of sources in information search, by courses

Source	Total	Arts	Sciences	Social Sciences	Law	Education	Engineering	Economy and B.A.	Letters	Health
<i>Internet</i>	3,3	2,6	3,4	3,0	4,2	3,4	3,0	3,8	2,6	3,6
Books	3,0	2,6	3,1	2,9	1,6	3,1	3,6	3,1	3,0	2,6
<i>greasy/slides</i>	2,2	2,9	1,9	2,6	3,0	2,4	2,0	2,0	3,0	1,7
Own Notes	2,8	2,9	3,0	2,7	2,6	2,3	2,9	2,8	2,6	3,1
Friends Notes	3,6	4,0	3,7	3,9	3,6	3,7	3,5	3,4	3,9	3,8

The importance of sources of information divided by the type of city follow the same trends, doesn't exist great news.

Table 4.3. The importance of sources of information by type of city

Source	Total	Big metropolis	Other cities
<i>Internet</i>	3,3	3,5	3,0
Books	3,0	2,9	3,0
<i>Greasy/slides</i>	2,2	2,2	2,4
Own notes	2,8	2,8	2,9
Friends notes	3,6	3,6	3,7

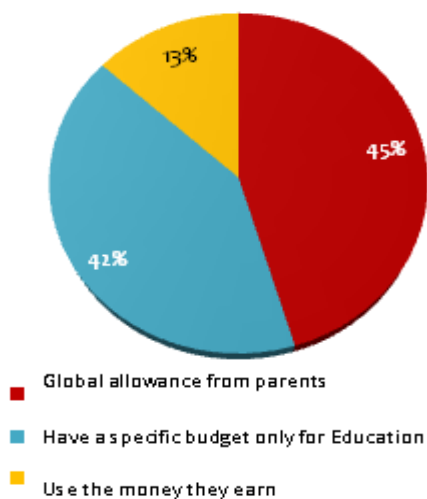
The greasy/slides win in all situations, with special focus in Lisbon and Porto. Besides that, the major difference between metropolis and other cities is in the Internet use, with 3% and 3,5%, respectively.

4.2. Personal Management of budget for books and others school materials

To understand clearly the way students manage their personal budget for books and others school materials were created 3 main options: Receive a global allowance from parents; Have a specific budget only for Education; Use the money they earn.

The image 4.1. explain the distribution of the students through the options available.

Image 4.1. Personal Management of budget for books and others school materials



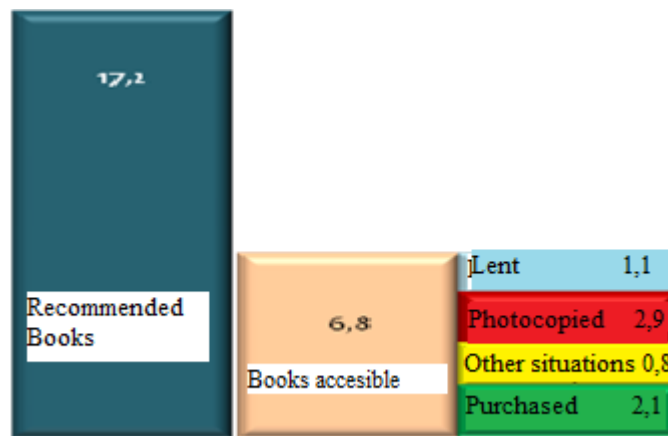
45% of the respondents that participated in the study stated to receive a global allowance from parents, where they retire a portion for books and other materials. A similar percentage (42%) have a specific budget only to waste in Education.

Finally, a small percentage- just 13%- of respondents buy books with the money they earn with a professional activity.

4.3. Access way to University Education Books

The analysis to the way of access to textbooks from students leave no doubt. From the 17,2 books recommended by teachers, in average, annually, students only access to 6,2. (image 4.2.)

Image 4.2. Access Way to book in Higher Education



Of 6,8 books accessed, 2,1 were bought, 2,9 are photocopied, 2,1 are lent and 0,8 corresponded to other situations. Usually, the overwhelming majority, of “other situations” correspond to downloads.

“It’s usual to borrow books to do photocopies or stay with it during the semester.”

5th year Engineering Student, Focus Group, Aveiro 2011

Obviously, this numbers are below the real numbers. Students have the conscious that photocopies are an illegal act, so some of them have afraid to admit their behave. This is an opinion is corroborated for various authors of technical books that consider the number too low.

Regarding the type of courses, the students from Education are the ones with more recommended books, while the Law students have most books purchased, with the major ratio between recommended and accessed (12 books accessed in 18 recommended).

Photocopies are more valuable in Social Sciences, Law and Education. There are the areas where the values of photocopies done are higher.

Arts is the field of study where the practice of photocopy is less used for the students. (table 4.4.)

Table 4.4 Ways of access to books for students, by courses

	Total	Arts	Sciences	Social Sciences	Law	Education	Engineering	Economy and B.A.	Letters	Health
Number of books recommend	17,2	11,8	15,9	15,5	17,7	23,6	15,8	15,9	20,1	20,5
Number of books that had access	6,8	5,3	6,1	7,7	12,1	10,3	4,7	6,7	7,5	6,0
Number of book purchased	2,1	1,6	0,9	2,0	5,5	3,1	1,2	2,2	2,8	1,8
Number of books lend	1,1	1,4	1,6	0,8	2,1	2,2	0,7	0,9	0,9	0,8
Number of book photocopied	2,9	2,1	2,8	3,7	4,1	4,2	1,7	3,1	3,0	2,9
Other situations	0,8	0,3	0,7	1,1	0,5	0,8	1,2	0,5	0,8	0,5

Although they don't photocopy a lot, the Engineering students are known to use the digital means.

“On the first year, some people buy books, but later work the copy centers and articles in online magazines”

5th year Engineering student, Focus Group, Aveiro, 2011

Regarding the type of cities, it doesn't present any kind of surprise. The big metropolis and the other cities have the same behavior as the one verified in the global analysis. (table 4.5.)

Table 4.5. Ways of access to books, by type of city

Ways of access	Total	Big Metropolis	Other cities
Number of books recommended	17,2	17,1	17,3
Number of books that had access	6,8	6,6	7,3
Number of books purchased	2,1	2,2	1,8
Number of books lend	1,1	1,2	0,9
Number of books photocopied	2,9	2,6	3,5
Other situations	0,8	0,6	1,0

Out of the big metropolis, Lisbon and Porto, the number of photocopies is bigger. It can be explained by the low purchase power of populations and also because exist a major number of students away from home with a global allowance from their parents.

4.4. The Preference of Locals to buy books

The point of sales where students most buy their textbooks are also object of analysis in this study. The table 4.6 explains shows the use and preference of respondents regarding the purchase of books.

Table 4.6. Use and preference of students in locals of purchase books

Locals of purchase	Most used (percentage)	Preferred (percentage)
Large chain of bookstores	60,4	47,3
University Bookstore	41,7	31,4
Small bookstores	20,4	12,1
Sites/ Internet	14,7	8,0
Faculty colleagues	0,9	0,6
Others	1,7	0,6

Note: Multiple choice answer

The Large chain of bookstores are clearly the most used and the preferred of students. More than 60% admit to use this kind of store and almost an half of sample (47,3%) choose this stores as the first option.

The University bookstore are the second choice in the ranking of students preferences, with a wide difference to small bookstores.

The online sell doesn't meet the students preference, only 14,7% admit to use it and just 8,0% state that Internet is their preference.

Finally, the purchase to faculty colleagues isn't an habit among students, because less than 1% of sample choose this hypothesis.

The reasons that support this choices are led mainly to the low price. More than 42% of respondents state that the price is a decisive factor when they have to choose the local of purchase.

“In Online purchases I prefer sites with low prices or promotions and with a safety deliver.”

PhD Engineering student, Focus group, Lisbon 2011

The other reasons presented are the variety and the geographical accessibility, in second and third place, respectively, with 32,4% and 24,9%. (table 4.7)

Table 4.7. Qualitative reasons to the preference of locals of purchase books in University Education students

Reasons (qualitatives)	Percentages
Discounts/prices	42,3%
Availability/ offer	32,4%
Accessibility	24,9%
Localization/Proximity	8,6%
Service	3,3%
Others	5,4%

According the fields of study, the students from Arts, Social Sciences, Education, Economy and Business Administration choose preferentially the large chain of bookstores.

The university bookstore are the point of sales preferred from Sciences, Engineering and Health. Health students also have a great preference for small bookstores, with 36% of responses- a value much more significant than the global average, that is only 12,2%.

The purchase of books through Internet has a strong incidence in Letters students. 20,6% of Letters students state that is their favorite way to purchase books for University Education. (table 4.8)

Table 4.8. Preference of locals of purchase books in University students, by course

Locals of purchase	Total	Arts	Sciences	Social Sciences	Law	Education	Engineering	Economy and B.A.	Letters	Health
Large chain Bookstores	47,2%	77,3%	38,5%	67,2%	51,6%	62,2%	40,4%	55,4%	52,9%	14,6%
University bookstore	31,5%	13,6%	42,3%	15,5%	41,9%	18,9%	46,8%	25,0%	17,6%	38,2%
Small bookstores	12,2%	0,0%	7,7%	10,3%	4,8%	8,1%	4,3%	10,7%	8,8%	36,0%
Sites/ internet	8,1%	9,1%	11,5%	6,9%	1,6%	10,8%	6,4%	7,1%	20,6%	9,0%
Faculty colleagues	0,6%	0,0%	0,0%	0,0%	0,0%	0,0%	1,1%	0,9%	0,0%	1,1%
Others	0,6%	0,0%	0,0%	0,0%	0,0%	0,0%	1,1%	0,9%	0,0%	1,1%

The analysis of the point of sales preference for university education books, by the type of city reveals complementary aspects to the ones presented previously. (table 4.9.)

Table 4.9. Preference of locals of purchase books in University students, by type of city

Locals of purchase	Total	Big metropolis	Other cities
Large chain bookstores	47,3%	45,4%	52,5%
University bookstore	31,4%	34,0%	24,1%
Small bookstores	12,1%	12,9%	9,9%
Sites/ Internet	8,0%	6,6%	12,1%
Faculty colleagues	0,6%	0,5%	0,7%
Others	0,6%	0,5%	0,7%

Can be concluded that the preference for large chain bookstores, such as Bertrand, is bigger out of the big cities (52.5% against 45,4% in Lisbon and Porto).

However, the University bookstores are most used in Big metropolis, just like the small bookstores that have a bigger incidence in this urban centers.

“Here, the book’s purchase is done mostly in University bookstore”

2nd year Master student of Languages and business relations, Focus Group,
Aveiro. 2011

Also, the purchase of technical books through Internet is done with more expression out of the big cities, which is explained by the less point of sales in small cities.

4.5. The Average Price of Technical Books

Regarding the price of book for Higher Education, it is different according the field of study. The table 4.10 allow to compare the prices by courses to the national average and to conclude some aspects such as:

- The average of a book recommend to Higher education courses is high (36,50€), which contribute in a big part the average value of Sciences Books (11€ superior than the national average), and particularly the Health books that cost almost more 80% than the national average (64,60€)

- Letters, Education and Social Sciences are the courses where the technical books are cheaper.
- From the 9 fields of study analyzed, 7 presented values inferior to the national average

Table 4.10. Average Price of University Education books by courses and the gap against National Average

Courses	Average Price	Gap against National Average
National	36,50 €	
Arts	28,90 €	-7,60 €
Sciences	47,40 €	+11,00 €
Social Sciences	26,90 €	-9,50 €
Law	34,00 €	-2,50 €
Education	23,00 €	-13,40 €
Engineering	35,10 €	-1,30 €
Economy and B.A.	30,90 €	-5,50 €
Letters	21,00 €	-15,50 €
Health	64,60 €	+28,20 €

On the topic 3.4. is referred an average price for higher Education books of 19,10€, by GfK.

Despite known that the big differential is in Health books, that GfK analysis doesn't cover on totally and also that the GfK sales integrate small divulgation books, it is notorious that the College students have a higher perception of technical book's price than the reality. It explains, in part, the increase of the photocopies done.

Besides, on this scope, a bookseller interviewed said that “students appear on the bookstore with photocopied books and when questioned about the price they pay for photocopies and the price of the book they are surprised with the difference be, sometimes, so small”.

The price of books, analyzed by the type of cities, reveals that the price of technical books in big metropolis is superior than the national average, but the differential isn't significant. (table 4.11)

As the average price of books is similar in all country, the small differential can be explained by the recommendations of professors in Lisbon and Porto that recommend books lightly more expensive.

Table 4.11. Average Price of University Education books, by type of city, and the gap against National Average

	Average Price	Gap against National Average
National	36,50 €	
Big metropolis	36,70 €	0,20 €
Other cities	35,70 €	-0,80 €

4.6. Frequency of use and Preference of study materials

Beyond the purchase of books, this study try to understand the habits of utilization of books (originals and photocopied) and other study materials. The table 4.12 explains the results about this theme.

Table 4.12. Frequency of Use and Preference of study materials

	Degree of use	Preference
Originals Books	2,9	34%
Photocopied Books	3,1	16%
Gresay/slides	4,0	45%
Indifferent		5%

Legend: 1- Never use; 5- Use always

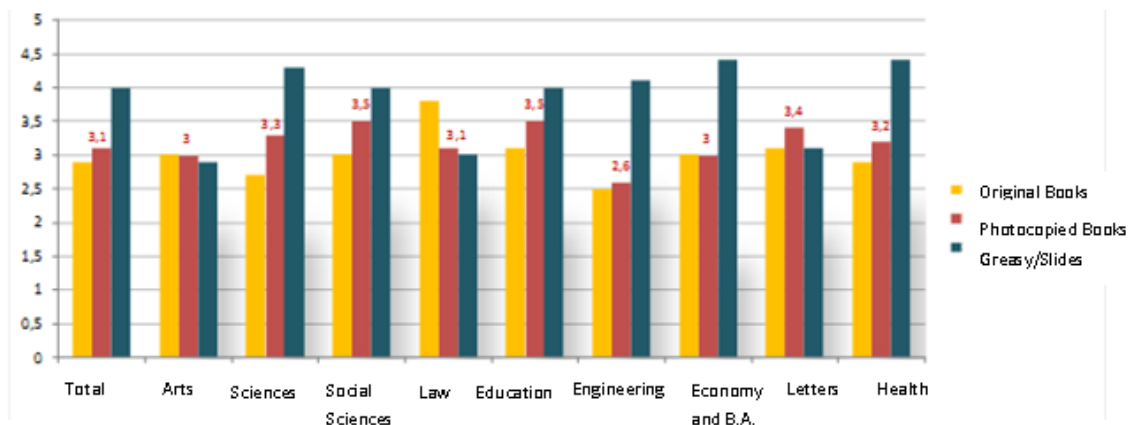
Note: Preference- Percentage of respondents that choose this option as the first

There are some discrepancies between the degree of use and the preference of study materials. In a scale from 1 to 5, photocopied books have 3,1 of degree of use, but only 16% of respondents state to prefer this option, which indicate some reasons behind this choice, such as the price or the need to take the book to the classes (e.g. Law).

Originals books are the preference of 34% of respondents, below of the 45% of preference for greasy/slides, provided by teachers. This type of material had 4 points in 5 possible.

The image 4.3. explains the preference of students about materials of study, divided by courses.

Image 4.3. Frequency of use of study materials, by courses



Note: 1- Never use; 5- Use always

The image above illustrates some aspects that need highlight, namely:

- The original books are mainly use by Law students
- The practice of photocopy books is higher in Social Sciences, Education and Letters (between 3,4 and 3.5 in a 1 to 5 scale), paradoxically the fields of study where the price of books is lower (table 4.10), but also where professors recommend more books (table 4.4).
- In engineering is where the practice of photocopy books is inferior. However, 2,6 in 5 possible isn't a value negligible, because is also the area where the access of book is lower (table 4.4.)
- Generally, the areas where greasy/slides are the courses where students less use the originals books.

The frequency of use of study materials by the type of city doesn't present big differences, like happened in previous situations. Nevertheless, the other cities have bigger values for greasy/slides and photocopied books. (table 4.13)

Table 4.13. Frequency of use of study materials, by type of city

	Total	Big metropolis	Other cities
Originals Books	2,9	2,9	2,8
Photocopied Books	3,1	3,0	3,3
Greasy/slides	4,0	4,0	4,1

Note: 1. Never use; 5. Use always.

4.7. Reasons to buy University Education Books

An important aspect regarding the purchase of books is to understand the motivation of students in buy books or prefer the photocopies.

This way, were identified the reasons that, in opposite to photocopies, make students to purchase original books. (table 4.14)

Table 4.14. Reasons for purchase original textbooks for University Education

Reasons for purchase	Percentage
I think I'll need it later	57,8%
It's a reference book	46,9%
Like/prefer to have the originals	28,0%
Was cheap	12,4%
Professor doesn't accept copies in the class	7,7%
Other	11,8%

Note: Multiple choice answer

The answers are clear: almost 58% of respondents state that buy books because they think will need them later. Being a reference book in the area is a good catalyst too (46,9%).

On the other hand, a “forced preference” for original books is when the professor doesn't accept photocopies in the class, which happen in almost 8% of the cases.

The pattern of reasons to purchase original book is similar to the national average (table 4.15), with some differences:

- In Arts, the topic “Like/prefer to have the originals” has 45,5% of the responses, what can be explained by the quality of pictures and drawings.
- In Social Sciences, exists the same number of students (55,2%) answering “I think I'll need it later” and “It's a reference book”
- Exists an high percentage (21%) of answers “professor doesn't accept copies in the class” among Law students.
- Finally, in Letters, the first option is “Like/prefer to have the originals”

Table 4.15- Reasons to purchase University Education books, by courses

Reasons for purchase	Total	Arts	Sciences	Social Sciences	Law	Education	Engineering	Economy and B.A.	Letters	Health
I think I'll need it later	57,8%	50,0%	65,4%	55,2%	56,5%	67,6%	53,8%	57,7%	44,1%	66,3%
It's a reference book	46,9%	40,9%	38,5%	55,2%	51,6%	64,9%	36,6%	41,4%	38,2%	56,2%
Like/prefer to have the originals	28,0%	45,5%	23,1%	19,0%	25,8%	21,6%	21,5%	32,4%	47,1%	28,1%
Was cheap	12,4%	4,5%	23,1%	15,5%	1,6%	13,5%	16,1%	14,4%	14,7%	9,0%
Professor doesn't accept copies in the class	7,7%	0,0%	3,8%	1,7%	21,0%	13,5%	4,3%	14,4%	2,9%	0,0%

Note: Multiple choice answer

When the analysis by type of city is done, highlight some aspects, namely the fact that the reason “It’s a reference book” have a strong expression in big metropolis, while the factor price/cheap being more important in other cities.

Table 4.16- Reasons to purchase University Education books, by type of city

Reasons for purchase	Total	Big metropolis	Other cities
I think I'll need it later	57,8%	58,7%	55,3%
It's a reference book	46,9%	48,7%	41,8%
Like/prefer to have the originals	28,0%	26,8%	31,2%
Was cheap	12,4%	10,7%	17,0%
Professor doesn't accept copies in the class	7,7%	7,1%	9,2%

Note: Multiple choice answer

4.8. Use of photocopies among University Education Books

This topic has the main objective of detail the practice of use photocopied books and is divided in 3 different items: reasons to prefer photocopied books, the methods commonly used to make the copies and the level of satisfaction with the photocopies done.

4.8.1. Reasons to prefer photocopied books

Regarding the reasons that drive students to photocopies the price is the critical factor, pointed by 87,5% of the sample. The other reasons don't have the same highlight as the price. (table 4.17)

Table 4.17. Reasons to prefer photocopied books

Preference reasons	Percentage
Price	87,5%
Little use given to book	33,2%
Ease of access	13,3%
Recurrent practice between friends	9,7%
No available	8,4%
Others	7,9%

Note: Multiple Choice Answer

The scarce use given to book is also an important factor presented with 33,2% of answers. The factor “No available” is the less important, with only 8,4% of the sample.

“Is a necessary evil, essentially for financial issues”

3rd year Engineering student, Focus Group, Lisbon 2011

The price still be the first reason presented in all areas, when analyzed it by courses. The values that differ a lot from the national average are the Arts students that give an high importance to “ease of access” (31,6%) and the high value in Letters of “No available” books (21,1%).

In Sciences no available books doesn’t justify photocopies and in Arts is the ease of photocopy that determines the choice of do copies.

Table 4.18 Reasons to prefer photocopied books, by courses

Preference Reasons	Total	Artes	Ciências	Ciências Sociais	Direito	Educação	Engenharia	Gestão e Economia	Letras	Saúde
Price	87,5%	84,2%	98,2%	92,7%	78,1%	83,0%	90,6%	86,5%	65,8%	90,9%
Little use given to book	33,2%	26,3%	15,8%	34,1%	29,7%	42,6%	27,3%	40,5%	31,6%	41,3%
Ease to access	13,3%	31,6%	8,8%	14,6%	14,1%	12,8%	11,5%	12,7%	23,7%	8,3%
Pratice between friends	9,7%	5,3%	10,5%	15,9%	6,3%	8,5%	8,6%	13,5%	10,5%	5,8%
No available	8,4%	10,5%	0,0%	4,9%	9,4%	14,9%	5,8%	12,7%	21,1%	5,8%

Note: Multiple choice answer

“One of the reasons to photocopy books is the constant downgrade of Law books”

Master Law student, Focus Group, Lisbon, 2011

Regarding big metropolis and small cities the differences are scarce. On this scope, the importance given to price as the main factor to photocopy books is similar in big cities and in others. (table 4.19)

The “ease of access” and the “recurrent practice between friends are more verified in Lisbon and Porto.

Table 4.19. Reasons to prefer photocopied books, by type of city

Preference Reasons	Total	Big metropolis	Other cities
Price	87,5%	87,2%	88,4%
Little use given to book	33,2%	34,2%	30,7%
Ease of access	13,3%	12,3%	16,1%
Recurrent practice between friends	9,7%	8,0%	14,1%
No available	8,4%	9,3%	6,0%

Note: Multiple Choice Answer

4.8.2. Methods commonly used to make photocopies

The method more used by higher education students to make photocopies of original books is leave the book in the copy center and go get the copies in the next day. 58% of the respondents said that already used it and 40% go further and elect it as their preference. (table 4.20)

More than 41% of the sample state already have used the digitalization of book belongs to the store, which makes the process simple and faster. On the other hand, 30% of the students already have used digitalized books that circulate among friends and colleagues.

The existence of books already digitalized is a practice more common increasingly. The ease of access to this photocopies can compromise seriously the book industry.

Table 4.20. Methods of photocopy frequently used

Method	Percentage of use	Method more frequent (percentage)
Copy at home	19,2%	7,4%
Copy at store	28,8%	16,1%
Leave the book in the copy center and go get the copies in the next day	57,9%	40,4%
The book is already digitalized in the store, doesn't need to leave the book	41,0%	23,2%
The book exist in digital format and circulate between friends	30,0%	11,3%
Others	2,1%	1,6%

Note: Multiple Choice Answer

Legend: Percentage of use- percentage of respondents that already used the method; Method more frequent- percentage of respondents that use more frequent the method

As can be seen in table 4.21, the patter of copies is common in all courses, with special predominance of the method “Leave the book in the copy center and go get the copies in the next day”.

The main difference against the national average are mainly:

- The importance of “copy at home” in Social Sciences, Education and Letters, the courses where the average of book prices is lower, but the number of recommended books is higher
- The great percentage of respondents from Law, Health and Economy and Business Administration that prefer to make copies with the method “The book is already digitalized in the store, doesn't need to leave the book”
- The high percentage of books already digitalized and circulating among friends in Arts and Engineering students.

Table 4.21- Methods of photocopy frequently used, by courses

Methods	Total	Arts	Sciences	Social Sciences	Law	Education	Engineering	Economy and B.A.	Letters	Health
Copy at home	19,2%	10,7%	7,9%	7,5%	1,9%	12,2%	9,8%	4,0%	16,1%	5,8%
Copy at store	28,8%	17,9%	10,5%	26,9%	9,4%	26,8%	16,7%	13,9%	25,8%	8,7%
Leave the book in the copy center and go get the copies in the next day	57,9%	32,1%	44,7%	32,8%	49,1%	46,3%	38,2%	42,6%	29,0%	41,7%
The book is already digitalized in the store, doesn't need to leave the book	41,0%	14,3%	21,1%	19,4%	37,7%	7,3%	9,8%	32,7%	16,1%	34,0%
The book exist in digital format and circulate between friends	30,0%	25,0%	15,8%	10,4%	1,9%	7,3%	22,5%	5,0%	6,5%	9,7%
Others	2,1%	0,0%	0,0%	3,0%	0,0%	0,0%	2,9%	2,0%	6,5%	0,0%

Regarding the type of city, the major difference is that the digitalization is lower in small cities. (table 4.22)

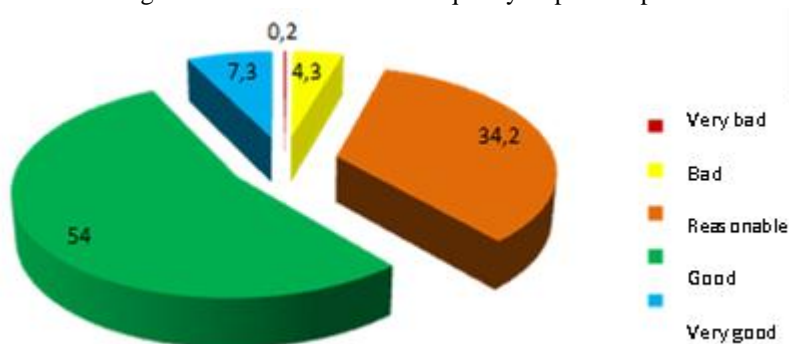
Table 4.22- Methods of photocopy frequently used, by type of city

Methods	Total	Big Metropolis	Other cities
Copy at home	7,4%	7,4%	7,5%
Copy at store	16,1%	14,8%	18,8%
Leave the book in the copy center and go get the copies in the next day	40,4%	34,3%	52,7%
The book is already digitalized in the store, doesn't need to leave the book	23,2%	28,8%	11,8%
The book exist in digital format and circulate between friends	11,3%	12,9%	8,1%
Others	1,6%	1,8%	1,1%

4.8.3. Level of satisfaction with the photocopies

In this study was also important try to understand if the students are satisfy with the quality of the photocopies. The image 4.3. presents the results.

Image 4.4. Satisfaction with the quality of photocopies



Note: Likert Scale- 1 Very bad; 5-Very good

Is notorious that the photocopies are globally evaluated as been good. More than a half of the sample characterize the photocopies this way, while 34,2% state that the quality is reasonable.

Only 4,5% of the respondents said that the quality is bad or very bad. So, the quality of photocopies is well perceived by the students, which contributes to the maintain the practice of photocopy books and other study materials.

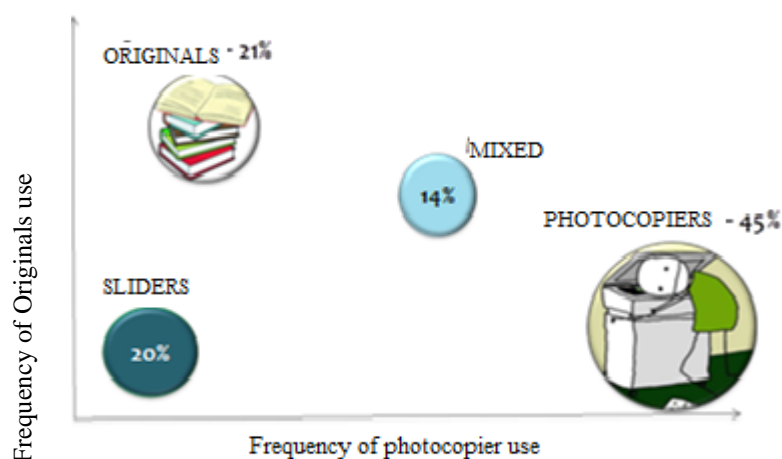
4.9. Segmentation of students according the frequency of school materials used

In global terms, and complementarily to the data presented in table 4.12, the image 4.4. illustrates a cluster analysis about the behave of students regarding the use of photocopies or original books.

This analysis allow to build 4 different categories of students, that were baptized according their characteristics, that show their behave and the dimension of circle reveals their importance:

- “Originals” (21%): students that prefer original books, but they also use photocopied books
- “Sliders” (20%): students that use preferentially greasy/slides. Is also the group that most use originals and less the photocopied.
- “Photocopiers” (45%): students that use a lot photocopies and given little use to the originals.
- “Mixed” (14%): students that are in an mixed position. Use different types of materials.

Image 4.5. Segmentation of students according their practices of use of originals and photocopies



4.10. Assessment of the behavior of students at the rules governing the copying of documents

According to the students, and in a spontaneous way, the practice of photocopies can be explained by the low price. (table 4.23)

Table 4.23- Behave of University Education Students concerning the prohibition law to photocopy books

Reason of behave	Percentage
Lower Price	68,9%
Indifferent to the Law	21,7%
Respect for copyrights	6,1%
Little supervision	3,5%
Didn't know the Law	3,0%
Others	6,2%

Just 6% of the sample defend the copyrights, while almost 70% state have known about the law, but still make photocopies because it's cheaper than buy an original. This behave is similar to 21,7% of the respondents that state be indifferent to the law.

Only 3% don't have knowledge about the Law, however the other part that know the law don't respect it anyway.

The same analysis done by course shows that lower price is the mains factor that justify the photocopies, as well. A particular highlight goes to Social Sciences and Engineering, with 79% and 74%, above the national average (68,9%). (table 4.24)

Table 4.24. Behave of University Education Students concerning the prohibition law to photocopy books, by courses

Reasons of Behavior	Total	Arts	Sciences	Social Sciences	Law	Education	Engineering	Economy and B.A.	Letters	Health
Lower Price	68,9%	59,1%	66,7%	79,1%	68,1%	61,1%	74,2%	66,4%	54,0%	70,1%
Indifferent to the Law	21,7%	36,4%	17,5%	23,1%	18,8%	27,8%	18,2%	22,1%	22,0%	21,6%
Respect for copyrights	6,1%	2,3%	9,5%	6,6%	10,1%	5,6%	3,5%	4,0%	10,0%	8,2%
Small Supervision	3,5%	15,9%	0,0%	0,0%	1,4%	0,0%	3,5%	4,1%	2,0%	1,5%
Didn't know the Law	3,0%	2,3%	6,3%	0,0%	5,8%	5,6%	3,5%	8,0%	0,0%	0,7%
Others	6,2%	6,8%	7,9%	3,3%	2,9%	7,4%	5,1%	5,4%	16,0%	7,5%

With no surprise, is in Law and Letters that the respect for copyrights is bigger, however the value is inexpressive.

Arts, Engineering, Economy and Business Administration don't feel sensitive about the copyrights theme, with very scarce values.

Surprisingly, in Law, there are 5,8% that state don't know the law!

The table 4.25 shows how the behave of college students is divided through the type of city, where can be concluded that the differences between metropolis and small centers are low, as seen previously on other topics.

Table 4.25 Behave of University Education Students concerning the prohibition law to photocopy books

Reason of behavior	Total	Big Metropolis	Other cities
Lower Price	68,9%	68%	72%
Indifferent to the Law	21,7%	22%	20%
Respect for copyrights	6,1%	7%	5%
Small supervision	3,5%	4%	2%
Didn't know the Law	3,0%	3%	3%
Others	6,2%	6%	7%

4.11 Ranking of the value on the books photocopied by courses

This final topic of this chapter, approach the value of photocopied books, by courses. It allows to understand how many euros are illegally "deviate" from the book industry, each year. (table 4.26)

Table 4.26. Ranking of the value of photocopied books, by courses

Courses	Value of photocopied books	Diferential against national average
National Average	105,90 €	
Arts	60,70 €	-45,20 €
Sciences	132,70 €	26,80 €
Social Sciences	99,50 €	-6,40 €
Law	139,40 €	33,50 €
Education	96,60 €	-9,30 €
Engineering	59,70 €	-46,20 €
Economy and Business Administration	95,80 €	-10,10 €
Letters	63,00 €	-42,90 €
Health	187,30 €	81,40 €

Nationally, the value “deviate” from the industry is 105,9€ per student, being this value truly superior in Sciences, Law and specially in Health, where the difference is almost more 77% than the national average.

The ranking of the value of photocopied books according the type of cities doesn't bring any kind of surprise or big highlights (table 4.27).

As can be seen, the value of photocopied books is clearly higher in small cities, with 3,5 photocopied books against 2,6 in big metropolis.

Table 4.27- Ranking of the value of photocopied books, by type of city

Type of city	Value of photocopied books	Diferential against National Average
National Average	105,90 €	
Big metropolis	95,40 €	-10,50 €
Other cities	125,00 €	19,10 €

5. Impact of the Illegal Copy on the Supply Side

The illegal copy on the supply is done mostly in 2 ways:

- The illegal stores and copy center that allow to photocopy books
- The availability of book's contents in Internet sites

The first way already has 2 decades of life, but in the last 3 years have been growing and now the proportions are alarming. The second way is much more recent, however its damage are worst.

5.1. "The copy centers"

This way of copy documents still is most usual. It was born in the 80's with the proliferation of photocopiers, which makes to appearance a lot of this store in University or on their surroundings.

In 90's, this practices almost disappeared with some strong supervision and actions from Universities, that after some years of inactivity banned this activities inside faculties.

The digitalization of book, in the last decade, bring a new outbreak that become several in the last 2 years.

According to INE data (CAE 82.190) were in Portugal approximately 691 point of sales of photocopies, which corresponds to a turnover of 36,9 millions of euros (table 5.1.).

The decreasing of the number of companies, cannot correspond to a decrease of point of sales, because is possible to happen a phenomenon called concentration, which corresponds a major number of point of sales for each company.

Table 5.1. Indicators of photocopy companies

	2007	2008	2009
Turnover (millions of euros)	41,30	37,00	36,90
Number of companies	1.032	670	691
Number of employees	1.327	967	997
Taxes (without Income Tax and liquidated VAT) (euros)	122.256	62.010	59.573

Source:INE

The average value of sales for each company of “copy centers” is 53.400€ annually, which means, 4.450€ per month and 171€ daily. It seems a too low value according the reality of the market.

5.1.1. The methods of “copy centers”

Initially the practices of “copy centers” are with an employee or self-service from the student, but nowadays is a new era: the print-on demand era.

The “copy centers” digitalized the books and now they are available through a catalogue, supported by a data base that allow to sell the illicit product based on various “entrees”:

- Author’s name
- University’s name and course
- Name of the book
- Images of the book’s cover to the students that don’t know the identification elements of the book

It show that is an illegal business highly sophisticated that compromise a lot of intervenient in book industry, such as:

- Authors
- Translators/ Reviewers/ Pagers
- Graphics
- Other suppliers
- Edition companies
- Distributors
- Bookstores

In some subjects from some courses this situation achieve 100% of illegal copy.

“ To take the book borrowed from library to “copy center” , they said me that title don’t already have, so asked me the course, the subject and if the book was adopted. Later, told me to leave the book and to get it on the next day, to when my colleagues go there next time already have the book digitalized and don’t have to wait.”

Languages, Culture and Literature Master Student, Focus Group, Lisbon 2011

To escape to the scarce supervision done by IGAC- *Inspecção Geral das Atividades Culturais*- are used diverse and sophisticated methods:

- Servers, with the contents out of the “store open to the public”, that, at first sight, isn’t possible to find anything in the store.
- Save the photocopied books in trucks near to the “stores open to the public” that makes no proves inside the store
- Deliver of books to students in small quantities, avoiding this way signals of massification

However, with the small supervision of IGAC, this procedures seems excessive. In 2011, ASAE- *Autoridade de Segurança Alimentar e Económica*- made 2 national operations to fight this illegal business, but the results were frustrating due to the difficulty to detect this kind of malpractices.

5.1.2. The geographical repartition of “copy centers”

It’s hard to calculate the exact number of stores that make illegal copy, but according to a study done by APEL- *Associação Portuguesa de Editores e Livreiros*- exist at least 510 point of sales, being a higher number plausible.

The “copy centers” can be divided in 2 types:

- The ones that digitalized the contents, creating a data base, in a clearly economies of scale optic, because to print the copies just need to access the file and print it (total or partially)
- The copy centers that makes copies only from books

The firsts have a strong impact and were disseminated in the last years like a “plague”, going unpunished . They are localized, naturally, inside and near universities.

The major concentration of this stores are, obviously, in Lisbon and Porto, but the phenomenon is spread over the country, according to APEL’s data. (table 5.2)

Table 5.2.- Geographical repartition of “copy centers” that make illegal copy

District	Number of “copy centres”
Aveiro	16
Beja	6
Braga	24
Bragança	8
Castelo Branco	18
Coimbra	49
Faro	18
Guarda	8
Leiria	20
Lisboa	133
Portalegre	5
Porto	111
Santarém	9
Setúbal	20
Viana do Castelo	9
Vila Real	11
Viseu	14
R. A. Açores	9
R.A. Madeira	10
TOTAL	510

Source: APEL

5.2. The illegal sites

In the last 3 years, emerged some illegal sites that also digitalized the contents of the books making them available according 2 business models:

- Payment, by the user, of a small value to have immediate and total access of the pirated contents of thousands books housed in the site. E.g. AllShares
- Free access from users, having the site only the revenues of advertising. E.g. FreeTech Books

This practice of illegal copy is even more devastator, since is perceived as been cheaper: totally free if only be seen in the computer or almost free when the print is done, most of the time at home or offices and don't exist an immediate payment as in the case of copy centers. According to an experienced book editor, this practice has a brutal impact:

“One of our bestseller, with various editions along one decade, and about 1500 to 2000 units sold annually (and certainty various photocopied) changed to 400 units sold in 2011, while in 2 illegal sites the book appears with 19.928 downloads in 1 site and 2.778 in other.”

6. The impacts of illegal copy in the sector

As was said before, it's hard to define exactly the impacts that illegal copy has in the different agents of the chain.

In this chapter are presented the estimates of this study about the impacts of this illicit practices of book's duplication.

6.1. The Turnover Amputated in Book Edition and Retail

According to the methodology presented in chapter 2, the estimates of this study, to the demand side are sustained by the calculation of the number of photocopied books and their correspondent cost of cover in the point of sales on the academic year 2010/2011. (table 6.1.)

Table 6.1. The Impact of photocopies in University Education books in Retail

Number of University Education students	390.000
Number of books photocopied by each student	2,9
Total of books photocopied annually	1.131.000
Average price of each book duplicated	36,50 €
Turnover amputated to University education book sales due to illegal photocopies	41,2 Millions €

The same line of thought was applied to the downloads done in sites, however the difficulty is significantly bigger. (table 6.2.)

Table 6.2. The impact of illegal downloads of University Education books in Retail

Number of University Education students	390.000
Number of downloads done by each student	0,7
Total of books of which are print digitalized copies annually	273.000
Average price of each book duplicated	36,50 €
Turnover amputated to University education book sales due to illegal downloads	9,96 Millions €

In short, the table 6.3. illustrates the total turnover lost in illegal duplication of books, through the different methods.

Table 6.3. Impact of illegal duplication of University Education Books in Retail

University Education Books			
On the demand side (value “deviated” illegally)		On the supply side	
photocopies	41,25 millions €	“Copy centers”	510 stores
downloads	9,96 millions €		

Considering the average margins belonging to the distribution (distributors and stores), which is near 50% in technical books, can be account the impact of book’s duplication in Edition. (table 6.4.)

Table 6.4. . Impact of illegal duplication of University Education Books in Edition

University Education Books	
On the demand side (value “deviated” illegally)	
photocopies	20,63 millions €
downloads	4,98 millions €

6.2. The Turnover Amputated Upstream the Edition

The determination of the turnover amputated upstream the Edition needs some assumptions regarding the weight of foreign books, translate books and book from Portuguese authors. In the sales of books in Portugal was considerate the opinion of some editors and specially booksellers. (table 6.5.)

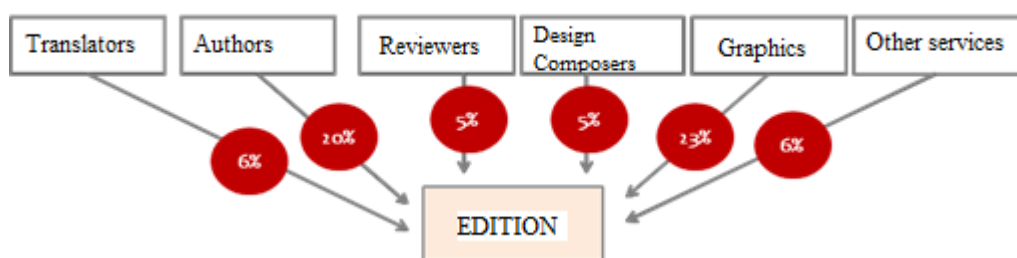
Table 6.5. Estimates of the division of weight of sales in University Education Books (foreign, translated and Portuguese authors)

Foreign Books	15%
Books of foreign authors translated and edited in Portugal	25%
Books of portuguese authors	60%

Source: Book Editors and Booksellers opinions

To obtain the weight of different agents in the chain were collected information with the managers of the major Portuguese edition companies (image 6.1.). With the estimate of the division of weight of sales in University Education Books (table 6.6.) is possible to calculate the amount of money that is deviated upstream the Book Edition, annually. (table 6.7.)

Image 6.1. The weight of the agents upstream the Edition, in supply chain of Edition companies, in University Education Books



Source: Interviews with managers of Edition companies

Note: the percentage is calculated on the selling price of the Edition company, that is 50% of the selling price to the public and refers only to external costs of Edition companies

Table 6.6. Estimates of turnover amputated by illegal copies in University Education Books, upstream the Edition

Agents Upstream	Turnover amputated in University Education book edition (millions €)	Percentage of value of sales involved	Edition companies turnover that are involved (millions €)	Percentage of incorporation of sales of the edition companies that intervenes in situation	Total amount amputated (millions €)
Translators (1)	25,62	25	6,41	6	0,38
Portuguese authors (2)		60	15,37	20	3,07
Reviewers (3)		80	20,50	5	1,02
Design Composers (4)		77	19,73	5	0,99
Graphics (5)		85	21,78	23	5,01
Others service providers (6)		50	12,81	6	0,77
TOTAL					10,86

Notes: (1) Translators: Assumption- 25% of turnover corresponding to translated books (2) Portuguese Authors: Assumption- 60% of turnover corresponding to Portuguese books (3) Reviewers: Assumption- 80% of reviews are done outside the edition company (4) Design Composers: Assumption- 90% of graphic aspects, in Portugal, are done outside the company (5) Graphics: Assumption- 100% of this job is done outside the company, this 30% is awarded with paper and 70% without it (6) Others service providers: Assumption- an half uses other providers

The total amount amputated by the illegal copies in University Education books is 10,86 millions Euros, affecting hundreds of companies and thousands of people, who usually are liberal workers such as authors, translators and reviewers.

6.3. The Loss of Revenues of State due to Illegal Copy

Is obvious that with losses along the book value chain, since retail until authors, the State lose as well, with a breaking in taxes paid (Income Tax, Value Added Tax and others).

The calculation of the losses only can be done with some assumption, that are questionable, but are believed be the best way to calculate approximately the negative impact of this situation. (table 6.8.)

Table 6.7. Losses of taxes paid to State, due to Illegal Copy (photocopy and downloads) of Books in University Education, in 2010

Agents	Turnover amputated by illegal copy (million €)	Percentage of Income tax in turnover	Loss of Income Tax for State (millions €)	Percentage of other taxes in turnover	Loss of other taxes for State (million €)	Tax Loss (without Income tax) (million €)
Retailers	63,57	0,32	0,20	0,13	0,08	0,29
Editors	35,50	2,89	1,03	0,20	0,07	1,10
Others agents in the chain	16,45	1,08	0,18	0,21	0,03	0,21
TOTAL	115,53		1,41		0,18	1,60

Source: Banco de Portugal (values of 2009)

Assumptions: (1) the weight of taxes in technical books is similar to the average of the book (2) Maintenance of the taxes weight in companies even if the sales increased (3) Other agents in the chain with the same taxes as national average

Isn't possible to calculate the exact value of VAT, but as the total chain is affected can be considered a rate of 6% for a part of national component and that liquidates VAT at least an half of turnover of the sector, which means a loss of 9,75 million of Euros (325 millions of sales x 50% x 6% of VAT).

In short, is possible to estimate a loss of 11,35 million of Euros in taxes for State. This estimate is made in a minimalistic version, because an increase in sales means an increase in Income Taxes, respectively.

To this value should be added the contributions for Social Security, that comes from the need to have more employees in the sector.

7. Challenges and Ideas for the years 2012-2015

The period 2012-2015 will be an important period for the sector, because the changes in the external environment impose to the companies the need to reinvent itself to give new answers to the market.

Exist an undeniable and urgent necessity of revision to code of copyright as happened in Spain and France and in copyrights law, that has a proposal to be discuss in Assembly of Republic.

On the one hand, the legislation against the illegal duplication of books tend to normalize or to control de digitalization. On the other hand, the popularization of electronic books will increase and change the situation.

In this chapter, are analyzed what is going on about the illegal duplication in other countries, the electronic books and an examination to the Portuguese context.

7.1. The situation in Other Countries

The debate about the copyrights is an actual subject worldwide. In various European Countries, such as Spain and Italy, the issue concerning the photocopies and illegal downloads are very limited, thanks to an strong supervision from the authorities.

In European Union, the copyrights law was born in a try to harmonize the law of the different Member state. Is composed by a lot of directions that Member-states are obliged to do in their own countries, decided by the European Court of Justice and European Court of First Instance.

The implementation of copyrights' law has been controversy. Traditionally, the copyrights' law vary in the different member-states, but the Globalization affected this logic and now all the countries have the same copyright problem.

Recently, in Spain, the Spanish Government approved a law that provides the closing of file-sharing sites in an attempt to fight against downloading copyrighted content. This way, the new code don't go against the users, but against the service providers that violate the intellectual property by the supply of illegal content, either by supply of intermediary services.

7.2. The Impact of E-books

The publishing industry has suffered, in the last years, a big revolution along its value chain: some people state that is biggest revolution in the sector since Gutenberg created the Press in 1520. One of the major responsible for this revolution are the electronic books, usually known as E-book.

In a begging stage, the e-book changes totally the market and the national and international edition companies were completely caught unawares. Some edition companies, still wait to better understand the truly dimension of this product success to take action and define the adequate business model.

Some of the changes implicit in the e-book's arrival have been a headache to edition companies: the question of digital copyrights, the images copyrights, news and different business models, the question of piracy and another unforeseen make that the companies act with careful and slowness.

However, in the United States of America, the growth of e-book is undeniable, being an obvious and increasing phenomenon of popularity among the students and readers.

According to *Association of American Publishers*, between 2010 and 2011, the use of e-books sold growth 169,4%, which means 164, 1 million dollars, at the same time that the physical books decrease the sales in 24,8%, less 441,7 million dollars.

Analyzing the weight of e-books in American Edition Industry, noticed that it acquires and increasing importance, representing 8,32% of total sales of the market, based on *Association of American Publishers'* data.

Challenges and Opportunities

The majority of the Edition Companies state that e-books are like physical books concerning the copyrights issue, which means have a primary inherent right to the acquisition. On the other hand, some authors and agents see the e-books as a parallel business and consider the copyrights for physical books one issue and the copyrights for e-books another issue, creating some problems to Edition Companies.

Images Copyrights

The images rights can be a serious problem for the companies that want to digitalize books already printed and launched previously, because the companies don't buy the rights of that images to be used in an e-book.

The integration of that images in e-books without having a contract reviewed and renegotiable is a question in discussion.

Price of e-books

In consumers' perception is easy to understand the costs and the purchase price of one printed book, but regarding e-books due to their intangibility makes that consumers, sometimes, have a wrong perception of e-book prices. Consumers perceived the e-book as having a high price.

7.3. Changes in Portuguese macro-environment that affect the sector

With the situation in Portugal and comparing with other countries, is expected that in a near future, the ASAE with the cooperation of APEL realize a strong supervision action that oblige to law enforcement.

The principals emergent changes in the sector, specially regarding the books duplication, can be motivated by a lot of trends:

- Reactions of the society against the illegal copy (photocopies and digitalization of books) with an adequate supervision from authorities
- Proliferation and use of real e-books, with multiple multimedia options, specially in technical books
- Revitalization of the centers of Portuguese cities, as a result of the changes in the law of lease with an inevitable impact in the demand and supply for leisure.

7.3.1. Reactions of the society against illegal copy

The debate near the public opinion about this theme and the practices done in other countries will influence inevitably Portugal and the actual situation will change.

In 2011 already emerged some signals that the situation of inaction against the illegal copy is changing, that highlight some actions:

- The constitution of a Commission Against The Illegal Copy inside APEL, constituted by editors and booksellers related with technical books
- Entered in scene, for the first time, of ASAE as supervision entity with major capacity instead of IGAC
- Studies about the sector such as this one
- The importance given to illegal copy in the first Book Congress realized in October 2011, in Azores.

7.3.2. The Development of Technical E-books

The e-books allow a lot of multimedia function, that are much more important in technical books, it will change completely the reading experience.

However this multimedia function is pretty costly and only is viable in projects with some dimension to amortize the fixed costs.

7.3.3. New spaces of Leisure- Revitalization of cities centers

Is expected that the reaction of the civil society against illegal copy change, with time, as a result of education and sensitization. Is also expected, that Edition companies will include progressively the electronic book in their business models. However, the revitalization of the cities isn't easy to obtain.

The Portuguese cities' centers are mostly decaying, with old buildings, older population, empty houses, antique commerce without capability to capture the attention of the consumers that prefer the convenience of the shopping centers.

In the cases that exist a strong public intervention, such as Guimarães and Funchal, the cities gain another soul, which attract much more population and visitants.

This urban renovation bring, naturally, more consumers as consequence of new ways of commerce, more related with fashion and leisure, that is conducive to the book commerce.

According to the economic situation, don't are expected big changes in the cities, but the new law of the lease can contribute decidedly to the urban renovation, opening a new way for leisure spaces, where books have a decision role.

In short, are made a qualitative SWOT analysis (table 7.1. and 7.2.) to the book sector, to 2015, to indicate a few strategic orientations for the future of the sector.

Regarding the illegal copy, the book sector as the phonographic sector are the most affected by the impact of the new technologies. Besides, the people –specially the younger- see with difficulty that the copyrights be applied to intellectual property because they are used to do free copies.

Table 7.1. Qualitative SWOT analysis of book sector – Strengths and Weaknesses (regarding the problem of illegal copy)

Strengths	Evaluation of the impact			Weaknesses	Evaluation of the impact		
	Weak	Med.	Strong		Weak	Med.	Strong
Sector with potential aggregation of opinion leaders- authors			X	Passivity of the sector against the low supervision			X
The product “book” is recognized as essential in knowledge		X		Small critical mass of many operators		X	
				Weak financial situation of many companies		X	

Table 7.2. Qualitative SWOT analysis of book sector - Opportunities and Threats (regarding the problem of illegal copy)

Opportunities	Evaluation of the Impact			Probability of occurrence			Threats	Evaluation of the Impact			Probability of occurrence		
	W	M	S	W	M	S		W	M	S	W	M	S
Popularization of e-books			X			X	Legislation low protective of authors and editors		X		X		
Potential of digital communication		X			X		Monitoring of illegal copying ineffective			X		X	
New leisure spaces in the city centers		X			X		Installed conviction that there is no intellectual property theft			X		X	
Globalization of international sensitive campaigns related to copyrights	X				X		Illegal Downloads			X		X	
Legislative <i>Benchmarking</i> with other markets(e.g. France)			X		X		Popularization of illegal photocopy		X		X		
							Other ways of entertainment						X
							Unfavorable economic situation		X			X	

Legend: W- Weak

M- Medium

S- Strong

The unfavorable economic situation affects transversely all the segments of population. Isn't a problem exclusively Portuguese but works as a catalyst to prefer the illegal copy instead of buying a book.

It also is a catalyst in Higher Education, due to the increase of the fees, the families try to manage the personal budget acquiring digitalized books instead of buying a new one.

However, the major threat comes from the authorities that make very weak supervision, don't making the law be done and also the passivity of the sector about this issue.

Nonetheless, is expected that an active actuation of APEL and the companies of the sector near the legislative power and supervision authorities, ally to a sensitization of the population help to minimize the damages of the illegal copy in book market.

In this context, is expected that, in 2015, the growing neutralization of this threats, just like happen in other countries, make possible the recuperation of the book sector from the unfavorable situation that is in actually.

7.4. Responses from companies

According the alterations of the macro-environment the companies have to be able to respond adequately. The Portuguese companies in book sector can intervene in various aspects, such as:

- Customer re-orientation, leaving totally the traditional strategy of “produce” books and sell it.
- Adopt a posture of pedagogy and sensitivity in relation with client, namely against illegal copy (photocopies or downloads)
- The Editors should develop the real format of e-books, in a global way, in order to get all the space of Portuguese speakers, developing multimedia functions.
- Bet in a blended communication, to take advantages from the digital communication and the physical one.

In a synthetic way, all the items are explained below.

7.4.1. Customer re-orientation

The traditional model of book market is still based in a presence of one editor, that after read one book and feel “in love” about it, decide that it has potential to be edited and after, to be purchased.

The consequences of this traditional business model are obvious: a huge number of book edited annually, a large stock of books not sold in a warehouse, high prices to can support the rotation of stocks of various years, bookstores don't specialized that want to sell all kind of type of books and also a lower interaction between the point of sales and other spaces of leisure.

The client re-orientation makes that be done in function of the real number of potential buyers and not only about the personal tastes of the editor. This way, the stock of the books and their price will decrease, betting in more flexible runs and re-editions customized. The popularization of e-books will strengthen naturally this re-orientation.

Concerning the bookstores, will be necessary the creation of diverse formations to correspond adequately to the client's needs: Thematic Bookstores, with deep and specialized assortment; Multimedia Spaces, with multimedia offers.

7.4.2. Pedagogical and sensitization campaigns

Against the threats of illegal copies, by photocopies and more recently with illegal downloads, that increased with the growth of tablets popularity, is necessary that the Portuguese editors and booksellers start a journey together with the objective of being in the *media* to defense their point of view.

This journey should involve also another intervenient like the authors, that often have a social and active voice in social communication and blogs. In necessary to have the authors that can convince the younger readers.

The sensitizations campaigns in diverse channels and supports are also good tool to attract the masses to this causes. The image 7.1 are an example of one advertising campaign of one Israelite book chain, which refers the use of social networks as an alternative to reading, using a logotype very similar from the logo of the most known social network, making a good pun.

Image 7.1. Ad of book chain [Tzomet Sfarim](#)



Despite the way be long and hard, the book sector don't should easy up and enforce their rights. The destiny of book sector can be different of the music sector, because there are some differences that can be advantageous:

- The book market is specially a market of language, so the question of illegal downloads is restrictive;
- The materialization of the print book- physical and tangible- still be very important for a large percentage of consumers, mostly for the ones who don't be *digital natives* (the consumers that didn't born in the 90's).

In the latter case, the ideal and utopian situation will be that consumers of books, in a situation of illegal duplication, rebel against the offenders and denunciate them to the authors, edition companies and authorities.

7.4.3. The Opportunities of e-books in a Global Way

The develop of e-books will be also an opportunity for the markets of Portuguese language. The editors can, this way, achieve easily markets like Brazil, the African countries of Portuguese speakers like Angola, Mozambique, Cape Verde and São Tomé e Príncipe, the communities of emigrants and all the Portuguese speakers around the world.

The Portuguese language was spread and popularized by the Brazilians and attract actually an increasing number of interested.

Regarding the technical books, the truly e-books and not the usual PDF's of physical books have great advantages, because they allow to associate to the book with all the virtues of a multimedia experience.

From the point of view of the knowledge, the richness of associate a text to hyperligations, videos, animated schemes and photos that allow a reading formatted to the reading change completely the reading experience.

As be natural, a multimedia tool needs a huge investment that only can beneficiate of economies of scale if the vision and the actuation will be global.

The brake to this development are related with the development of new technologies and the afraid of piracy.

7.4.4. A Blended Communication

The digital challenges are excellent opportunities for blended campaigns, having a physical and digital components, taking advantage from the potential of multimedia for consumers and potential readers, just like for the editors and booksellers.

Integrating the communication in physical means with the digital, a blended strategy ease the creation of data base of book consumers, segmenting it for tastes and consuming habits.

When good use, this segmentation allow companies of edition and sales of books to reach the consumers with lower communication budgets than with only physical communication.

Digital communication is a path with a great exploring potential, since take benefits of the social networks, making the readers as the promoters of the books. Being a catalyst of emotions, the books is a great product for recommendation.

In short, the use of digital tools- aspect that brought serious threats to the sector that are import to neutralize or minimize at least- originate, as well, new opportunities that be catch for the ones who can see them not only weaknesses, but also strengths.

"The species that survive are not the strongest but the one that best fit " By Charles Darwin

Conclusion

In this report was tried to quantify the impact of illegal practices of books according to the supply and demand points of view, knowing that practices usually happened mostly in University Education.

To the estimates for the illegal copy in the demand side, were done 884 face questionnaires to University students throughout the national territory.

This questionnaire was about the number of book duplicated in the last academic year (2010/2011) and the average price of technical books in each course and type of city.

The first conclusion are that the students usually received a global allowance from parents to buy their books and others study materials. Also, they prefer to acquire the books in large chain of bookstores (e.g. FNAC, Bertrand) , followed by the University Bookstores

Letters, Education and Social Sciences are the courses where the technical books are cheaper. On the other hand, Sciences and Health have the technical books more expensive, with more 11€ and 22€, respectively, of the national average

The practice of photocopy books is higher in Social Sciences, Education and Letters, paradoxically the fields of study where the price of books is lower but also where professors recommend more books.

Law is the course where are more purchase of original books. The reason most presented to buy a original book was “I think I’ll need it later”. However the price was stated was the big reason to photocopy books, with more than 80% of student referring this.

Some students still said that they are indifferent to copyright law.

Generally, the students are satisfied with photocopies, classifying it as being “good”. The method more often used to make the copies are the one where the student leave the book in the copy center and go get the copies in the next day, but already exist a huge number of copy centers that have the book digitalized previously and don’t need to take the book.

In the supply side, were analyzed 2 different views:

- The number and the national coverage of stores that make illegal copies, where Lisbon and Porto are, obviously, the cities with more “copy centers” with this practices.
- The illegal sites where is possible to do downloads that emerged in the last 3 years, becoming very dangerous due to the perceived sensation of free, catching a lot of students.

Also in the supply side, was tried to understand the impacts in the sectors upstream the edition, with some personal interviews, which proves that all the agents like authors, translators, reviewers and so on are affected with the practice of book’s duplication.

Finally, were discussed the importance of e-books, that are the great revolution in the book sector, and how to potentiate their features to attract more consumers.

Besides, were build a SWOT analysis of book sector to facing the challenges to the period 2012-1015, in order to exceed this negative phase and be successful in the future.

Limitations

It’s hard to predict exactly the amount of sales of Book’s Edition through CAE 58.110, because some Edition Companies resell to other Edition Companies, that work as distributors, and happens a sales duplication.

Along the years this problem has been discussed and registering a lot of changes but isn’t yet clear enough.

There are also some limitations in calculate the amounts for Book Retail, through CAE 47.610: The big players in the markets (FNAC and hypermarkets) are classified as “retail commerce no specialized”, so they don’t belong to the CAE 47.610. Another limitation are related with the existence of multiple channels to sell books to consumers and don’t are all of them present in the CAE 47.610.

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Electronic Consultation:

- www.apel.pt
- <http://www.dges.mctes.pt/DGES/pt>
- <http://www.gpeari.mctes.pt/>

Attachments

Attachment 1- List of Identities interviewed

- » Alêtheia;
- » Babel;
- » Bertrand;
- » Bisturi;
- » Civilização/Bulhosa;
- » FNAC;
- » Gradiva;
- » Guanabara;
- » Lello;
- » Leya;
- » Lidel;
- » Lusodidacta;
- » Porto Editora;
- » Presença;
- » Publindústria;
- » Sílabo.

Attachment 2- List of Edition Companies for Higher Education

Traditional Edition Companies (24)	Academic Edition Companies (19)
Almedina	Faculdade de Arquitetura do Porto
Áreas	Faculdade de Motricidade Humana
Coimbra Editora	FEUP
Coisas de Ler	Imprensa da Universidade de Coimbra
Edições 70	Instituto de Ciências Sociais
Escolar Editora	Instituto Piaget
FCA	ISCSP
Fim de Século	ISPA

Fundação Calouste Gulbenkian	IST Press
INCM	Universidade Aberta
Lidel	Universidade Autónoma
LivPsic	Universidade de Aveiro
Livros Horizonte	Universidade Católica
Lusodidacta	Universidade Fernando Pessoa
Ministério da Educação	Universidade Lusíada
Monitor	Universidade Lusófona
Principia	Universidade do Minho
Psicosoma	Universidade do Porto
Publindústria	UTAD
Rei dos Livros	
Quid Júris	
Sílabo	
Verlag Dashöfer	
Vida Económica	

Source: APEL's Commission against illegal copying

Attachment 3- List of Identities that commercialize books for Higher Education

Bookstores (12)	Distributers/ Importers(6)	“Crediários” (3)
Almedina	Dinternal	Lusodidacta
Associação de Estudantes do ISEG	Grupo A	Prata de Oliveira
Bisturi	Marka	Saudiforma
Livraria Científica-Médica	Nova Guanabara	
Coimbra Editora	Prata & Rodrigues	
Escolar Editora	LIDEL	
Livraria José Alves		
Livromédica		

Livpsic		
Quidjuris		
Serviços Sociais Universidade de Aveiro		
Universidade Católica		

Source: APEL's Commission against illegal copying

Attachment 4- List of companies studied by GfK

Bookstores and Others (19)	<i>Mass merchandisers (9)</i>
Almedina	Auchan
Americana	Continente
Barata	Continente Bom Dia
Bertrand	Continente Modelo
Book House	E. Leclerc
Book it	EcoMarché
Bulhosa	InterMarché
El Corte Inglés	Netto
Fnac	Pingo Doce
Leya	
Livrarias Leya	
Leitura	
Media Markt	
Presse Linha	
Pretexto	
Staples	
Toys "R" Us	
Vobis	
Worten	

Source: GfK

Attachment 5- Questionnaire to Higher Education Students

Equipa de inquirição:Entrevistador: _____ / _____ Data de inquirição: _____
Verificador interno: _____ Data de verificação: _____

LER: Bom dia/Boa tarde. O meu nome é _____, colaboro com o GIEM, Centro de Estudos do ISCTE-Instituto Universitário de Lisboa, e estamos a realizar um estudo sobre o comportamento de procura de informação e de compra e gostava de lhe pedir a SUA AJUDA. Asseguro-lhe desde já que se trata de um estudo estritamente anónimo e confidencial e irei precisar apenas de alguns minutos. Podemos contar com a sua AJUDA? MUITO OBRIGADO desde já!

0.1 No ano lectivo de 2010/2011 já frequentou a Universidade?Não (1) → Terminar e agradecer Sim (2) → Realiza questionário**0.2 Nesse ano lectivo de 2010/2011 quantas cadeiras frequentou?**

Número de cadeiras: _____

A. Modelos de Procura de Informação**A.1: Para efeitos de estudo, ordene, sff, as principais fontes de informação que utiliza de 1 - a mais importante até 6 - a menos importante.**

	1	2	3	4	5	6
a) Internet						
b) Livros						
c) "Sebentas"/slides do professor						
d) Apontamentos de amigos						
e) Apontamentos próprios						
f) Outros						

(no caso de responder Outros) → Quais?: _____

A.2: No caso dos livros de estudo (todos os livros necessários no âmbito escolar), costuma procurar informações em sites de livrarias/editoras?Não (1) Sim (2) Quais: _____**A.3: Costuma procurar informações em sites de livrarias/editoras?**Não (1) Sim (2) Quais: _____**B. Padrões de Comportamento****B.1: Como é que normalmente faz com a compra de livros e outros materiais: tem um orçamento global para os gastos com a escola; ou pede dinheiro à parte aos seus pais para livros e outros materiais?**Orçamento Global (1)Dinheiro à parte (2)Compro com o dinheiro que ganho (3)**B.2: Em 2010/11, em quantas cadeiras existia uma "sebenta"/slides disponibilizados pelo professor?**

B.3: Em 2010/11, das cadeiras que frequentou, aproximadamente em quantas... quantos livros de estudo terá comprado ?

B.3.a. Tinha livro(s) de estudo recomendado(s): _____

B.3.b. Teve acesso a um exemplar desse(s) livro(s) de estudo recomendado(s) para estudar a partir dele(s): _____

B.3.c. Dos livros de estudo a que teve acesso, quantos:

B.3.c1: Conseguiu comprar: _____

B.3.c2: Foram emprestados (originais): _____

B.3.c3: Teve acesso a cópias: _____

B.3.c4: Outras situações?: _____ → Que outras situações: _____

B.4.: Dos livros que comprou no ano lectivo passado, qual foi o preço médio de 1 livro de estudo ?

_____ euros

B.5.a: Qual é a frequência com que utilizou os seguintes materiais para estudar durante o ano lectivo passado?

B.5.b: De uma forma geral, como é preferido estudar? utilizando livros (originais ou fotocopiados) ou sebatas/apontamentos?

	Nunca (1)	Algumas vezes (2)	Metade das vezes (3)	A maior parte das vezes (4)	Sempre (5)	Preferência (B.5.b)
a) Livros originais						(1)
b) Livros fotocopiados						(2)
c) "Sebatas"/slides do professor						(3)
d) É indiferente						(4)

B.6.: Em 2010/11 quantos livros precisou de fotocopiar?

B.7.: No caso dos livros que comprou, porque é que os comprou em vez de os fotocopiar (pergunta a ser feita só a quem fez fotocópias) ? (resposta múltipla)

- a) Acho que vou precisar mais tarde
- b) É um livro de referência
- c) Foi barato
- d) O professor não aceita fotocópias nas aulas
- e) Gosto/Prefiro ter os originais
- f) Outra Qual ? _____

B.8.: Quando tem de imprimir materiais para efeitos de estudo, imprime habitualmente a preto e branco ou a cores?

- Preto e Branco
- Cores

B. 9: Relativamente à compra de livros de estudo onde os comprou, durante o ano lectivo que passou? Assinale todos os aplicáveis (se indicar sites, procurar em que sites comprou!)

B.10: Onde prefere comprar? Porquê?

	Comprou (B.9)	→	Preferência (B.10.a)	→	Porque prefere esse local? (B.10.b)
a) Grandes Cadeias de livrarias (Fnac, Bertrand, Bulhosa)			(1)		
b) Livraria da Universidade			(2)		
c) Pequenas livrarias (livrarias de rua)			(3)		
d) Colegas de Faculdade			(4)		
e) Sites/Internet			(5)		
→ Quais?: _____					
e) Outros			(6)		
→ Que outros locais: _____					

B. 11: Que motivos o levam a preferir a fotocópia à compra de um livro de estudo? (resposta múltipla)

- a) Preço
- b) Pouco uso dado ao livro/ necessita apenas de uma parte do livro
- c) Livro esgotado
- d) Facilidade de acesso
- e) Prática recorrente entre amigos/ colegas
- f) Outros motivos → Quais?: _____

B.12.a: Que métodos utiliza ou já utilizou para a cópia de livros?

B.12.b: E desses, qual é o que utiliza mais frequentemente?

	Utiliza ou já utilizou (B.12.a)	→	Utiliza mais frequentemente (B.12.b)
a) Cópia pelo próprio (em casa ou através de familiar)			(1)
b) Cópia pelo próprio (em loja ou biblioteca)			(2)
c) Deixar de um dia para o outro a fotocopiar em estabelecimento			(3)
d) O livro já se encontra scannado na loja e não é necessário levar o livro			(4)
e) O livro existe em formato digital, sendo transferido entre amigos/ colegas			(5)
f) Outro			(6)

→ Qual?: _____

B.13.: Como avalia o interesse dos livros, que lhe são propostos como livros de estudo de referência pelos professores de 1 a 5?

- Muito Pouco Interesse (1)
Pouco Interesse (2)
Razoável (3)
Interessante (4)
Muito Interessante (5)

B.14.: Em termos de fotocópia, como avalia a sua satisfação com a qualidade das fotocópias dos livros de estudo que fez para estudar durante o último ano lectivo, de 1 a 5?

- Muito Má (1)
Má (2)
Razoável (3)
Boa (4)
Muito Boa (5)

B.15.: Na sua opinião, como avalia o comportamento dos estudantes do ensino superior face à lei que proíbe a cópia integral de livros? Porquê?

C. Impacto Digital

C.1.: Alguma vez adquiriu um e-book?

Não (1) Sim (2) → De que tipo (de estudo, aventura, ficção, técnico, etc): _____

C.2.: Tenciona adquirir um e-book durante o próximo ano?

Não (1) Sim (2)

C.3.: Que motivos o levariam a preferir um e-book em detrimento do livro físico?

D. Caracterização do inquirido e controle da amostra

D1. Nome : _____ **D2. Telefone/Telemóvel:** _____

D3. Universidade/Faculdade: _____

D4. Idade: _____

D5. Sexo: Feminino (1) Masculino (2)

D6. Área de Estudo

- Artes (1)
- Ciências (Matemática e Físico-Naturais) (2)
- Ciências Sociais (3)
- Direito (4)
- Educação (5)
- Engenharias (6)
- Gestão e Economia (7)
- Letras (8)
- Saúde e Protecção Social (9)

D7. Curso

D8. Ano

- 1º (1)
- 2º (2)
- 3º (3)
- 4º (4)
- Mestrado(5)
- Doutoramento (6)

D9. Quantas pessoas tem o seu agregado familiar? : _____**D10. Rendimento líquido mensal do agregado familiar**

- | | | |
|---|---|---|
| <input type="checkbox"/> Até 500€ (1) | <input type="checkbox"/> De 1501€ a 2000€ (4) | <input type="checkbox"/> De 3001€ a 4000€ (7) |
| <input type="checkbox"/> De 500€ a 1000€ (2) | <input type="checkbox"/> De 2001€ a 2500€ (5) | <input type="checkbox"/> De 4001€ a 5000€ (8) |
| <input type="checkbox"/> De 1001€ a 1500€ (3) | <input type="checkbox"/> De 3501€ a 3000€ (6) | <input type="checkbox"/> Mais de 5001€ (9) |

D11. E qual é a situação laboral da pessoa que mais contribui para o rendimento do lar? _____**Patrão/Trabalhador por conta própria**

- Agricultor (1)
- Comerciante (2)
- Industrial (3)
- Dono de Empresa de Serviços (4)
- Profissão Liberal (5)

Trabalhador por conta de outrem

- Forças Armadas (6)
- Dirigente/ Gestor/ Quadro Superior (7)
- Prof. Intelectuais Científicas (8) (Inclui professores)
- Quadro Médio (9)
- Operário (10)
- Empregado do Comércio/Vendedor (11)
- Empregado Administrativo (12)

Outras Situações

- Desempregado (13)
- Estudante (14)
- Pensionista/ Reformado (15)
- Dona de Casa (16)
- Outra (17) Qual? ____

