



## **Spanish Audio Making Noise Around the World**

**Interview with  
Javier Celaya, dosdoce.com**

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**KENNEALLY:** The spoken-word industry is making noise in Spanish-language markets around the globe. Over the last five years, leading audio platforms have invested 50 million euros to develop the Spanish audio category, helping to create new audiences for authors and incremental revenue for publishers.

Welcome to CCC's podcast series. I'm Christopher Kenneally for Velocity of Content.

Industry analyst Javier Celaya, founder of dosdoce.com, has recently published the findings of a survey of Spanish audio from 2017 to 2022. This year, 2023, he suggests, will see the battle for listeners intensify. There will be new voices, new business models, and new players. Javier Celaya joins me now from Madrid. Welcome back to Velocity of Content.

**CELAYA:** Thank you, Chris. Thank you for having me.

**KENNEALLY:** Well, we're looking forward to speaking with you about this report, and the best place to start is with the numbers. So share them with us. Where does the Spanish audio market stand at the beginning of 2023? How many users, where are they, and how many programs and titles?

**CELAYA:** Actually, as you described, we've gone through a very fast-forward growth wave in the Spanish markets. Five years ago, there was basically nothing, whereas in other markets, like the UK or the US or even the Nordics, we had had audio growth in different formats – first, CDs, cassettes, and streaming. The Spanish markets, for different reasons, they never really embarked on the audio race. But in the last five years, there has been a tremendous growth. Basically, five years ago, there were less than 15 audio channels, meaning places where you can access audio content. Actually, Audible was not even present in the Spanish market. But now, in the last five years, all the different international platforms – the Audibles, the Storytels, the Podimos, Scribds, and the rest have come into the Spanish market. We have over 60 audio channels. We also have around 25,000 Spanish-speaking audiobooks, and we expect this year to have at the end of 2023 around



30,000 Spanish audiobooks available in the market. So as you can see from these figures, it's been a very fast-forward growth, as I said in the beginning.

KENNEALLY: Javier Celaya, your report covers developments in Spain, Latin America, and the US Hispanic market. That is hardly a monolithic audience. Does Spanish audio reflect the diversity of Spanish-language communities?

CELAYA: Yes, they do. Actually, although we all speak have the same language, we have different accents, and we have different cultural backgrounds. For example, in the US, your Hispanic community is basically made of a Mexican background and then Dominican Republic or Cuban, like in Miami. So in terms of content, Spanish from Spain audio content is narrated with this hard accent that I have, whereas the Latin American content is narrated with a Latin American accent, which is much more beautiful, much more musical. There is also publishers and platforms which are narrating in what we call Spanish neutral, which is Spanish like from Televisa and Univision that is not Mexican, it's not Colombian, it's not Spanish from Spain, but everyone understands that accent. So yeah, fortunately, it reflects the diversity of the different accents as well as the diversity of the different authors and content.

KENNEALLY: Spanish neutral – that's a bit like mid-Atlantic, that accent on television newscasts.

CELAYA: Actually, it comes from that. It comes from the film industry when they embarked on an international expansion. It's a cost issue. The ideal will be that you create the audio content in Spanish Mexican, Spanish Colombian, Spanish Argentinian, but that will be very costly for the publishers and the platforms. So they created this Spanish neutral, which as I said, it comes from the film industry, and they use it also on TV.

From a linguistic point of view, it's a huge aberration. It doesn't exist. It's something that linguists hate, and I understand why, because it simplifies the diversity that we were talking before. But from a cost perspective, it makes a lot of sense – especially the beginning of this growth phase. Maybe five years from now, we will have these different accents in the different countries.

KENNEALLY: Subscription services dominate the business landscape today for the Spanish-language audio market, Javier. You expect, though, important changes are to come. What differences will listeners see on their credit card statements, and will they hear anything different?

CELAYA: What we're seeing is that the Spanish markets have gone from the past, nothing, to the future, meaning unlimited services as the main audio channel. Whereas in the Anglo-



Saxon markets, you've been having credit-based subscription services, and also you have unit sales and some library sales, basically the dominant sales channel in the Spanish markets in Spain and Latin America is unlimited subscription services – all you get – with different pricing from 3.99 to 8.99, 9.99 are the most expensive ones.

We're seeing some of these platforms are introducing unlimited subscription services but with some frictions, meaning that for X amount of money, you will get X amount of listening hours, meaning if you listen more than 20 hours per month, then you will have to pay extra. If you listen more than 40 hours a month, then you will pay a premium service. I think that demonstrates that the Spanish markets are growing very rapidly into a mature scenario, meaning that users will be willing to pay for more of the service if they're going to get more content available in that service.

Also, what we most likely will start seeing – that this will be completely new in the market – as Netflix has done, adding advertising to the lower tier. In audio, we've seen advertising in radio. We have seen advertising in podcasting. It will not be surprising to also have some interruptions in the audiobook listening, and you will have some advertising, and you will be able to access a cheaper service without sacrificing access to content.

**KENNEALLY:** Spanish audio is popular with platforms familiar to English-language audiences, and there are distinctive local players as well. Do any of those stand out for you?

**CELAYA:** Yeah, as I said, the Audibles, the Spotifys, the big international players, are also here in the Spanish markets. We have the European players – the Storytels, Podimo – also very active in the Spanish markets. We have local players. Like in Spain, we have a platform called iVoox, and then in Mexico, you have another platform called Convoy. Or in Argentina, you have Leamos.

This mix of international, local, and European on one side provides more diversity for the publishing community. The big players, like Audible in the Anglo-Saxon market, which has a very dominant position – that doesn't take place in the Spanish market. It's more balanced. Of course, the international players have a bigger share of the market, but they don't have dominant positions as they have in the Anglo-Saxon. So I think it's good news that we have this diversity of audio channels. Also, for example, the library channel represents about 10% of the total sales for publishers, which also I think is a healthy sign that the public side of the service is also available in the market with a good market quota, and probably growing in the next few years more.

**KENNEALLY:** Will publishers remain content with the role of content suppliers for much longer?



CELAYA: I think they will still be one of the main content suppliers, but they will not be the dominant content supplier, because in this new digital age, we see more and more creators coming into the audio space. We see many creators coming, for example, from the podcast community. We also see a lot of creators coming from the radio community. And I think publishers – if they have an open mindset, they will go out to these different formats to acquire the IP of that content to bring it to their ecosystem, and they could transform that IP into an audiobook, and later on, it could be a book or it could be an ebook or whatever. We've also seen a lot of creation coming from the video games. Actually, we've seen also like in Hulu (sic), *The Last of Us* – the first expression of that series was a video game. This is very good news for us as consumers, as users of culture. I think for the publishing sector, they're going to have to be smarter in getting IP beyond the traditional sources that we had in the previous century.

KENNEALLY: What about competing with the platforms directly? Are they going to be happy with just being on Audible, or will they want their own platform?

CELAYA: I think this is something that we'll also see. Either you're a big, big player – a big five publishing house that you have a diversity of your catalog, and you can create your own channel in order to curate – this is the big challenge. How can I make my authors and my titles visible in these big platforms, like the Audibles and the Storytels? So having your own platform, having your own app, will basically guarantee more visibility of your authors. I think we'll see that from the big five, as they also have their own direct-to-consumer websites. Five years ago, a lot of them were reluctant to sell direct, and now, it's part of their e-commerce ecosystem.

Also, independent, niche vertical publishers – for example, children's publishers or suspense, true crime, thrillers – you can also create a community. You can also create an ecosystem, where if you're a heavy user of that kind of content, you will go to that app for that kind of content. This will make the whole sector even more diverse, and at the same time, to continue this double-digit growth that we're seeing in many markets.

KENNEALLY: Javier Celaya, how will machine-generated narration possibly disrupt the Spanish audio marketplace? And do Audible's terms, which forbid AI narration in the US, also apply in Spanish-language markets?

CELAYA: They do apply, and I think this is going to change everywhere – not only in the Spanish market, but also in the English-speaking markets, French-speaking markets, Italian markets. I think that AI – what it's going to do on one side – it's going to make the narration of audiobooks that they will never be narrated by a human being, because it will be too expensive. I'm talking about, for example, backlist titles. I'm talking about very



niche titles that the platform or the publisher knows that there's not a big audience. Saving a lot of money in the production of that content through AI will allow that content to see the light. So this is not that it's cannibalizing narrators' performance, because it will never have been done.

But I think what we also will see – professional narrators will have their own artificial voice that they will sell a license to studios to allow them to use their voice to be used in X number of titles, but they will be paid royalties for all those uses in different books. So there will be extra sources of revenue for the publishers and the narrators and the authors thanks to AI. I think at the beginning, we've all been very scared about the transformation of AI, but if you look into the business benefits, there's a lot of business benefits derived from AI.

KENNEALLY: Javier Celaya, thank you so much for joining me today on the program and telling us about the growth in the Spanish audio market.

CELAYA: It's been a pleasure. Thank you.

KENNEALLY: That's all for now. Our producer is Jeremy Brieske of Burst Marketing. You can subscribe to our program wherever you go for podcasts, and please do follow us on Twitter and on Facebook. You can also find Velocity of Content on YouTube as part of the CCC channel. I'm Christopher Kenneally. Goodbye.

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