



# An Overview of the Audiobook Marketplace in Spain

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## Abstract

The general objective of this research is to analyze, through a descriptive methodology, the impact that audiobooks have on internal processes in the value chain of Spanish publishers. To this are added two more specific objectives related to answer the following questions: (a) how to include the agents of the audiobook in the publishing circuit?, and (b) is this new business model consolidated within the Spanish publishing sector? Through the analysis of the publishing circuit and the production flow chart, it is possible to observe not only the impact of the audiobook on the entire operational process of a publisher but the new actors in the publishing business scene. Based on the existing data on the audiobook business in Spain, the study concludes that today, the Spanish publishing sector has recently begun to perceive the economic potential of this sound format. The confinement by COVID-19 has led to a collateral effect on the production, marketing, and consumption of audiobooks, driven by the two large publishing groups that dominate the book market in Spain.

**Keywords** Audiobook · Book · Value chain · Publishing circuit · Production flow chart · Industry · Business model · Digitization · Publishing · Spain

## Introduction

In recent years, the publishing sector has seen its business model and value chain transformed due to its transition to digital publishing, either exclusively or in combination with the conventional paper edition [11]. Nonetheless, the academic debate about the digital transition within the publishing sector did not contemplate the analysis of the audiobook business model [10]. The reason for this lack of interest is that this type of publishing emerged as an external process unrelated to the publishing sector only used,

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as a product derived from the conventional paper format, to attend promptly to specific market niches [5]. However, by the very nature of their product, audiobook publishers have always been at the forefront of technological change: with reel tapes, compact cassettes, and discs, up to the new formats that emerged in the context of the digital age [10]. Audiobooks already represent a \$ 5 billion-a-year industry worldwide [2].

Although the publishing sector is taking advantage of the new technological context, it is evident that the traditional business model continues to occupy a significant space in the publishing activity [12]. The reasons behind that are: first, a relative fidelity to the paper format, and second, the book consumer does not perceive the translation of the work on paper into digital formats (e-book or audiobook) as perfect [6]. However, as new reader generations enter the book consumer market, it is feasible to expect a growing weight of the digital formats business, eroding the paper format. [17].

The general objective of this research is to analyze, through a descriptive methodology, the impact that audiobooks have on internal processes in the value chain of Spanish publishers. To this are added two more specific objectives: (a) how to include the agents of the audiobook in the publishing circuit?, and (b) is this new business model consolidated within the Spanish publishing sector?

The work is structured as follows: section two provides the theoretical framework for this research; the third section deals with the audiobook and its production flow; the fourth section analyzes the audio-publishing industry in Spain; finally, the fifth section summarizes the main conclusions.

## Theoretical Framework

Any search for competitive advantages or improvements in the efficiency of organizational processes must start from the strategic analysis of the value chain [14], but without losing sight of its integration in a broader context that facilitates the understanding of why organizations are more capable of innovating than others. Aspects such as the demand conditions, the conditions of the productive factors, the support capacity of the existing auxiliary industries, or the level of rivalry and hostility of the competition combined with the organization's structure and strategy are part of the environment of the organizational value chain to which it is in no way alien.

To derive the network of relationships existing in the book value chain—regardless of its format—it is necessary to previously consider the editorial production flowchart, shown in Fig. 1, to, from that point, understand the logic of linking with the remaining links in the book value chain [12].

Based on the above, Fig. 2 shows the main links that make up the publishing value chain for each possible format -paper, electronic and sound-, giving rise to a general production and distribution circuit from the book.

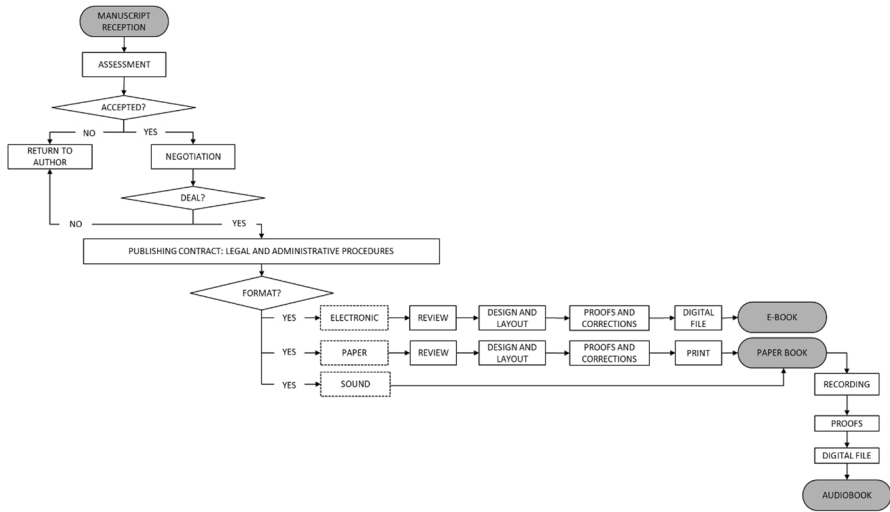


Fig. 1 Flow chart of the publishing production process. Source: Magadán and Rivas [11]

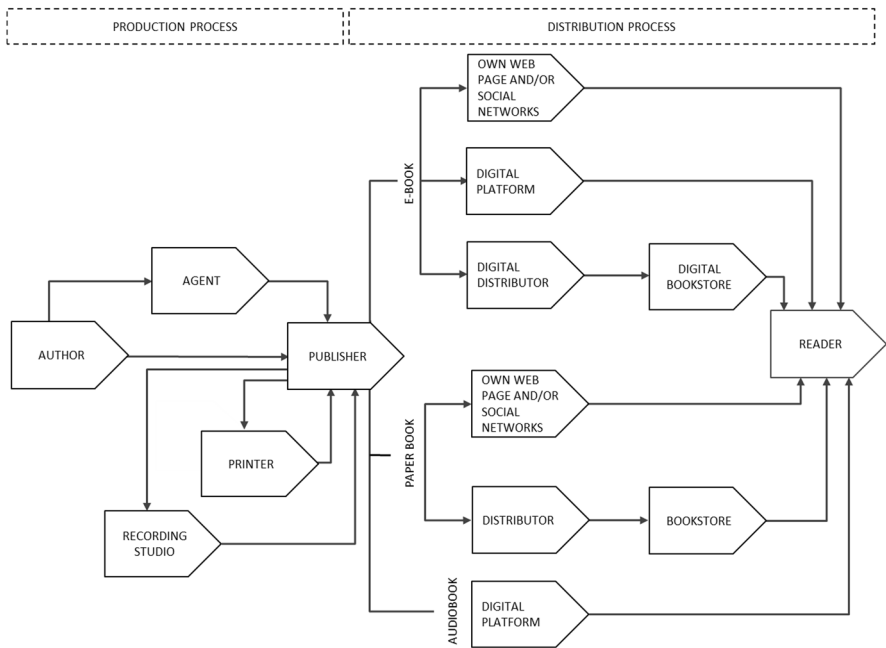


Fig. 2 Book production and distribution circuit. Source: Magadán and Rivas [11]

### The Audiobook: Concept and Processes

An audiobook is nothing more than the sound recording of a book: it is a book that can be listened to instead of reading and that can contain sound effects, such as

music or ambient sounds and whose narration can be carried out by the author himself, professional or amateur actors or even synthetic voices [10]. Historically, the audiobook emerged to allow access to the book to people who, for various reasons -mainly situations of temporary or permanent disability-, could not read books in paper format [13]. Yet today, the audiobook is open to a growing number of potential users, overcoming the traditional orientation of this format and guiding its use, not only in certain leisure moments where the audiobook can be complemented with another playful activity simultaneously given its adaptability to mobile devices but also in didactics and educational innovation is offering interesting results [1]. Furthermore, the trend is that audiobook users are younger compared to print book readers and their distribution by gender tends to be more balanced [10].

The appearance of podcasts in recent years and their popularity have modified content consumption habits [5]. Consumers of cultural products have become accustomed to content in sound format and have integrated it regularly into their day-to-day life, and as that was happening, audiobooks became an increasingly attractive format [13]. Indeed, digital audiobooks distributed over the Internet are experiencing what academic literature has described as an "audiobook revolution" or an "audiobook boom" in many countries around the world [10].

Although the audiobook has always been present in the publishing world in a collateral way, if not residual, now, with the new digital context, it has gained renewed strength in all publishing markets [12].

Three main aspects make the audiobook format very different from other types of digital publishing: the recording and editing processes, the recording location, and the narration style.

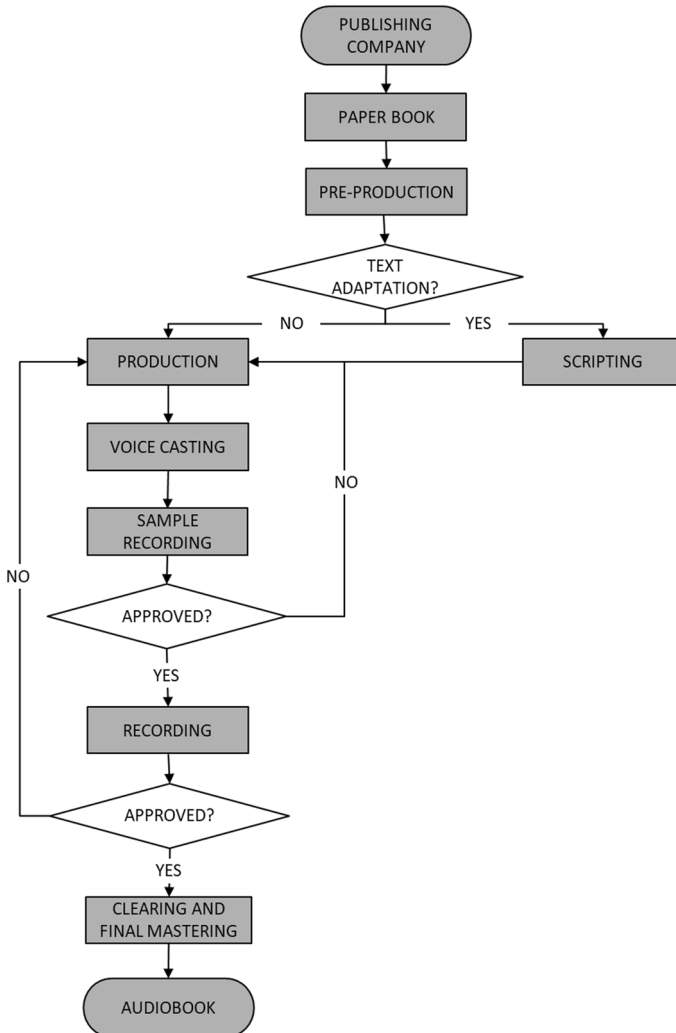
## The Recording and Editing Processes

The audiobook represents a significantly greater challenge for the publishing sector than the one operated in its value chain with the electronic book. The reason is that the transition from paper to digital format based on reading takes advantage of part of the internal processes involved in paper book production. However, with the audiobook, it is necessary to redefine these processes of the publishing organizations that integrate this new business model without disengaging from the previous formats.

Figure 3 synthetically presents the representative flow diagram of the audiobook production.

The flowchart starts either from a printed work or a manuscript not necessarily published as a paper book or e-book. The pre-production phase of the audiobook can be internalized within the publisher or externalized to another specialized organization, which evaluates whether the recording should conform to the literal content of the work or if, on the contrary, it is necessary a script for it. [15].

The typical problems in pre-production include handling strange texts and materials such as maps, illustrations, and footnotes in a way that allows for a fluid sound experience while accurately conveying the sense of the work [4].



**Fig. 3** Audiobook production flowchart. *Source:* Magadán y Rivas (2020)

After the previous stage, the audiobook is produced, carrying out a selection of voices that will intervene in it [15]. When selecting the narration team to voice the text, their decisions about pitch, voice, pacing, and emphasis can be decisive in whether a listener accepts or rejects the listening experience. Just as the voice conveys meaning, the tone, rhythm, and pauses do as well. The narrator's pauses transmit meanings like if words. The narration must flow harmoniously with the rhythm of the action in the text [4].

Next, the process shapes a demo or sample recording that, if approved, would allow the final recording of the file and apply the last cleaning and mastering treatment to, finally, obtain the final audiobook as a result.

In short, once all the elements of an audiobook are selected and recorded, the final production begins. Audiobook sound editing is a four-step process that starts by ordering all the text segments previously recorded and stored as individual files. Then technicians adjust the rhythm, erasing long pauses between text segments or strange noises in the foreground or background. As production nears the final stages, a team of editors confirms that spoken and written audio texts and printed books are a perfect match. Finally, technicians add music and sound effects and divide the whole text into tracks. On average, an hour of an audiobook takes approximately five and a half hours to produce [4].

The recording location should be in booths to avoid reverberation. Besides, the announcers or narrators must have a good reading rhythm, and it is crucial is the vocal ability to tackle recording sessions of at least two hours in a row and absolute control of mouth noises and other sound problems. Finally, they must have a variety of registers to interpret different characters in the same work and an interpretive level that is neither very marked as in dubbing nor very flat. Due to the long recording sessions, technicians acquire a significant role supporting the narrator, for example, fixing sound problems on the fly.

The style of narration is a significant part of the success of an audiobook: there is an ideal storytelling style speech for each genre of book, and if publishers do not consider it, the narration may not sum any added value to the audiobook. Publishers can evaluate different styles: deaf, partially voiced, fully voiced, or complete casting, among others. [13].

In addition to narrative style, many audiobooks contain music and other sound elements. Background music in audiobooks intends to enhance the feelings and pacing associated with the story or information conveyed. Music can: first, amplify the mood or level of intensity associated with a particular scene or event; second, underline the rhythm of narration and action and third, support the cultural significance of a text. Finally, music guides the listener through transitions, such as the beginnings and ends of chapters and changes in place and time or events in the story [4].

Let consider, for example, a novel of about one hundred thousand words to determine the total cost of an audiobook. Converting it to an audiobook would cost up to 4,000 and 5,000 euros [3]. In Spain, the cost structure behind an audiobook can range from 3,000 to 6,000 euros.

It is not easy for a medium or small publisher to record audiobooks: it requires time, investment, and a first-rate technological bet, so many platforms are assuming the production costs because they need content with which to attract new subscribers.

## The Audiobook in Spain

Everything that determines the future of the audiobook in Spain depends on the decisions made by the two large groups in this field: the leader, Grupo Planeta, and Penguin Random House Grupo Editorial (PRHGE). Together they account for 67.36% of the adult fiction market in Spain. Regarding audiobooks, both groups have opted for diametrically opposite strategies.

Penguin Random House Grupo Editorial launched its e-commerce web—penguinlibros.com—, where it sells, together with other content and formats, its audiobooks. Its digital catalog is also available on those channels and platforms that operate under a unitary download model, and this is the case for Amazon, Google Play, Apple, Kobo, Audioteka, and Audiolibros.com, among others.

Grupo Planeta continues to bet on the subscription format. It was a pioneer in launching Nubico, its subscription platform, in 2013, where Grupo Planeta has already migrated its contents and has allowed Planeta to reach non-Spanish-speaking third countries such as Finland, Denmark, Germany, Austria, Switzerland, the Netherlands, and Norway. Getting rid of Nubico will allow Planeta to focus on generating content since its core business is not the development of technological platforms. In June 2021, Nextory absorbed Nubico, but despite the agreement with Nextory, Planeta continues to sell its books on many other platforms such as Storytel, Kobo, Google Play, and iBooks, among others.

## Production

The growing commitment of authors, agents, and publishers to audiobooks, and the emergence in Spain of platforms, specialized in the commercialization of audiobooks coincides with the trend in other markets where this format has registered an increase in production. Figure 4 shows the number of titles available in sound format in Spain.

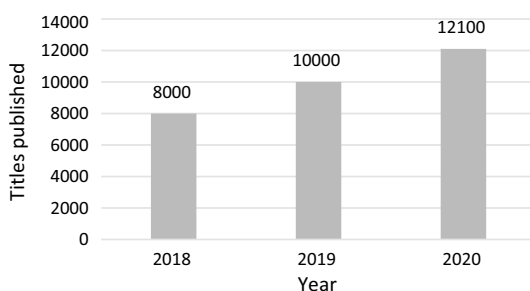
Everything seems to indicate that in 2021 another 2,300 new audiobooks will be produced and marketed, and we will approach the top of a total of 14,300 audiobooks in Spanish [2].

Unlike ebooks, fiction (narrative, literary, black) leads the audiobook market in Spain, followed by self-help and essays [2]. The pandemic has allowed easy access to new customers and content, such as the case of self-help books.

## Consumption

The landing in Spain of large international platforms at the end of the last decade did not presage such an overwhelming success, even though there was already a radio tradition and podcasts were beginning to become a gap, capturing readers who previously did not consider themselves audiobook consumers.

**Fig. 4** Number of titles available in audiobooks. *Source:* own elaboration from Bookwire [2]



In recent years, the main reasons people listen to audiobooks are to enjoy themselves and stimulate the brain [16]. The use of audiobooks can offer a different level of mobility (compared to traditional reading practices), which can be more seasonal [17]. Therefore, well-established daily routines, such as housework, exercise, and leisure activities, can be combined with audiobooks. Listening simultaneously with other activities can be a way to take advantage of time already occupied, such as on the go [10].

In Spain, men (58%) consume more audiobooks than women (42%), and the degree of urbanization does not influence the frequency of audiobook consumption. On the other hand, the most popular playback devices in Spain are smartphones and tablets, used by 81%; secondly, smart speakers (22%), while CDs (6%) have little relevance (Gerstung, 2021). 69% of audiobook readers listen to them in their own home, the majority for relaxing but also during housework (32%), falling asleep (31%), or cooking (22%); 52% also do it while traveling, either on public transport (27%), while walking (26%), on vacation (21%), when exercising (20%) and 16% in the queue from the supermarket (Gerstung, 2021).

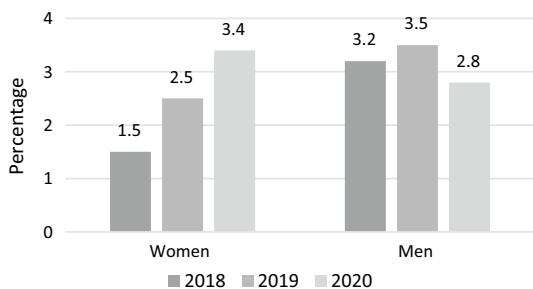
The motivations are very varied, but a large majority of audiobook users think that thanks to audiobooks can enjoy more titles for which they would not have time otherwise. Three-quarters of audiobook readers in Spain believe that they entertain, educate, help to relax, and make waiting times more productive (Gerstung, 2021).

The average number of audiobook fans in the five largest nations of the European Union is 45%. Spain leads the ranking with a wide margin, 55%, followed by Italy with 46%, the United Kingdom (45%) and Germany (42%). In France, on the other hand, only 37% of the population consumes these products (Gerstung, 2021).

Regarding the profile of audiobook readers, when segmenting them by gender, it is striking to observe that, compared to other formats such as paper or electronic, where women read more than men, in the case of audiobooks, men lead the use of this format (see Fig. 5). Perhaps being able to reconcile audio reading with other activities (for example, sports or commuting to work, among others) has been a significant underlying factor for the success of audiobooks among men, who are less close to paper because it requires more concentration and pause.

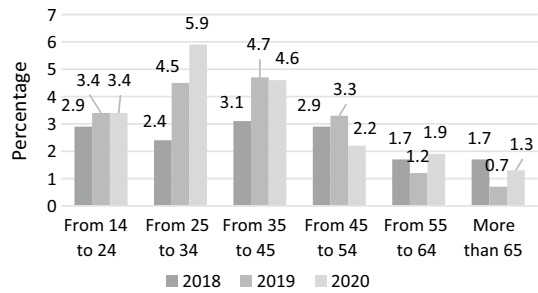
Concerning the analysis of the profile of audiobook readers from the perspective of age, the audio format is penetrating with acceptance among young and

**Fig. 5** Audiobook Spanish market segmentation by gender. [7–9] Source: own elaboration from FGEE





**Fig. 6** Audiobook Spanish market segmentation by age. [7–9] Source: own elaboration from FGEE



middle-aged segments (see Fig. 6). These data probably reflect a correlation between age groups and acceptance of technologies and applications. For instance, millennial and post-millennial generations are more digital than others before them.

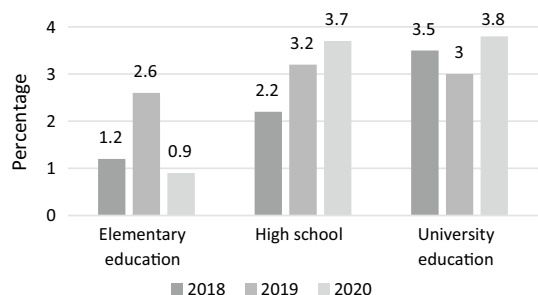
Finally, readers of intermediate and higher educational levels lead the use of audiobooks (see Fig. 7). The data show the connection between training and the consumption of culture, but this link becomes more evident when people consuming culture do it in an environment that requires a previously acquired familiarity at training levels that use digital tools.

## Commercialization

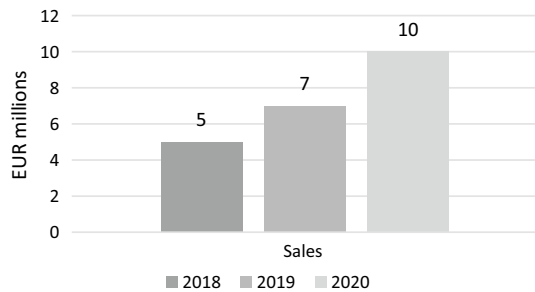
Unit sales of audiobooks in Spanish (Spain, Latin America, and the USA) grew up to 111% in 2020 compared to the previous year, so the audio-publishing business in Spain follows an upward path in sales. The sales revenue of audiobooks in Spanish (including sales in Spain and Latin America) in 2020 amounted to 10 million euros [2]. Figure 8 shows the annual turnover of the Spanish audiobook market in 2018 and 2020.

However, there has been a decrease in market share from 14 to 12% in the unit sale or à la carte model due to several reasons. On the one hand, in a change in consumer habits towards subscription models in any of its areas, caused by confinement, and, on the other hand, the launch in autumn of two new subscription platforms (Audible and Podimo) in Spain that has boosted the market by attracting many

**Fig. 7** Audiobook Spanish market segmentation by training. [7–9] Source: own elaboration from FGEE



**Fig. 8** Evolution of sales revenue of audiobooks in Spanish between 2018 and 2020 (in millions of euros). *Source:* own elaboration from Bookwire [2]



readers to this consumer model. In addition, the high retail price of audiobooks also does not help to promote unit sales in Spain [2].

In this context, sales of audiobooks on flat-subscription platforms grew by 132% in 2020 compared to the previous year. These sales represent 81% of total digital audiobook sales in 2020, a slightly lower ratio than the year before. Also, subscription platforms that only allow the consumption of one audiobook per month (better known as credit-subscription) gained market share in 2020, specifically a 3.5% increase in market share compared to 2019, due to the general growth of the audiobook market.

In summary, based on the aforementioned, subscription platforms such as Storytel, Audible, Scribd, Kobo, and Podimo are the leading channel of commercialization of audiobooks in Spain, followed, in second place, by the unit sales channels such as Google Play or Apple Books, and libraries in third place.

## Conclusions

This research aimed, as a general objective, to study the impact that audiobooks have on the internal processes in the value chain of the Spanish publishers that produce them, and as specific objectives, to answer the following questions: a) how to include the agents of the audiobook in the publishing circuit?, and b) is this new business model consolidated within the Spanish publishing sector?

Regarding the impact of audiobooks on the internal processes in the editorial value chain, they have entered the digital publishing force very quickly, changing the game rules very quickly. Audiobooks have moved from the periphery to the center of digital publishing, overtaking e-books in market penetration in less time. The technical circumstances of audiobook production are different from those of paper and e-books but like those of the music and podcast industries, giving rise to new players in the book value chain. The traditional form of book distribution also changes with the appearance of new means of distribution, which causes the emergence of new actors in the value chain. New relationships emerge through audiobook publishing, and consequently, roles change, and the field of digital publishing increases in complexity and challenges existing cultural value hierarchies.

Concerning the inclusion of the agents of the audiobook in the publishing circuit, analyzing both this and the production flowchart carried out, it is observed, not only

the impact of the audiobook on the entire operational process of a publishing house but also the emergence of new agents on the audiobook business scene. The technological characteristics of the production and use of audiobooks are fundamentally different from analog and digitally printed books, but they are very similar to those used in the music sector. Therefore, the publishing sector can learn a lot from the recent history of the digital music industry, which has faced the challenges of copyright, infinite digital copies, or the logic of global streaming services, among others.

Regarding the consolidation of this business model in the Spanish publishing sector, it is necessary to consider the following reflections.

First, audiobooks are disrupting traditional publishing structures, as the audiobook industry is clashing with the traditional publishing industry in terms of technological and cultural values, which could explain the hesitancy towards this medium by small publishers. Audiobooks are fundamentally different from printed books, but their existence still depends on the institutionalized circuit of the book made up of authors, publishers, bookstores, libraries, etc.

Second, audiobooks are a game-changer for today's digital publishing. The use and sales of audiobooks have grown globally during the last decade, and the Spanish publishing sector has recently begun to perceive the economic potential of this sound format. The audiobook has gone from a peripheral by-product of the printed book to a relevant player in the general book circuit. The improvement of technology, the growing introduction of tablets and smartphones, the development of digital distribution through subscription systems of many aggregators, and the appearance of audiobook sales platforms favor its popularity.

Third, given the strategies proposed by the leading Spanish publishing groups, a future can be envisaged that is committed to a hybrid model of coexistence between the subscription model and the unit download model. Whether market share was to tilt in favor of subscription models, then the industry would transform like what music has undergone: publishers would not be able to sustain their businesses as they do now.

If the subscription platforms do not pay more, it will be difficult for the publisher and the author to continue doing their work, and, finally, subscription platforms would end up generating content on their own.

Finally, in fourth place, the confinement and launch last autumn of two new subscription platforms (Audible and Podimo) in Spain have boosted a market that had not yet taken off in terms of production due to the high cost of audiobooks. There is a before and after the pandemic in the Spanish publishing sector that throughout 2021 has sold the highest number of books in the last decade, which has led to a collateral effect on the production, marketing, and consumption of audiobooks, promoted by the two large publishing groups that occupy a large part of the book market in Spain (Planeta and Penguin Random House Grupo Editorial).

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