



BNC RESEARCH

Listen Up: Audiobook Use in **Canada**



3.2015

PREPARED BY BOOKNET CANADA STAFF



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CANADA**

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Introduction

More than ever before, Canadians are finding an increasing number of ways to access audiobooks – subscription, rental, purchase, and borrowing from the library are all ways to access new content. Digital formats have revolutionized the marketing and availability of audiobooks, allowing quick and easy access to various models of renting or subscribing, while libraries also make free digital content easily available through third-party systems such as OverDrive.

Audiobook use in the United States has been on the rise with The Association of American Publishers (AAP) reporting, in the first half of 2014, that “downloadable audiobooks continued to be the fastest growing format with a 26% growth over the same period in 2013”.¹

With audiobooks being more accessible than ever, we started to wonder how Canadian readers are primarily accessing content; are they going digital or sticking to their CD roots? How often are they accessing audiobooks? Are consumers able to find all the audiobook content they want? And what is their primary motivation for seeking out audiobooks over other formats?

This survey was limited to Canadians who had listened to a minimum of one audiobook in the past 12 months. Four hundred participants completed the survey, which was conducted online and is statistically representative of the Canadian population. Respondents were English-speaking residents of Canada, aged 18 years or older.

¹ Hoffelder, Nate. “AAP Reports eBook, Audiobook Sales Up in First Part of 2014” <http://the-digital-reader.com/2014/10/28/aap-reports-ebook-audiobook-sales-first-part-2014/> (October 28, 2014).

Highlights

- Most audiobook users expect their use to either stay the same or increase.
- Women (57%) are notably more likely than men (43%) to be audiobook users.
- The majority of listeners (76%) prefer to access audiobook content through digital download.
- The ability to multitask while listening to audiobooks is the primary reason users opt for this format.
- Many audiobook users are interested in using audiobook content as a repeat performance, with 36% of respondents saying they either “always” or “often” listen to audiobooks that they previously read.
- 19% of audiobook users find out about books at their library, as compared to only 4.4% for buyers of print books.
- The majority of respondents are open to the possibility of purchasing a print book that is bundled with an audiobook or ebook.

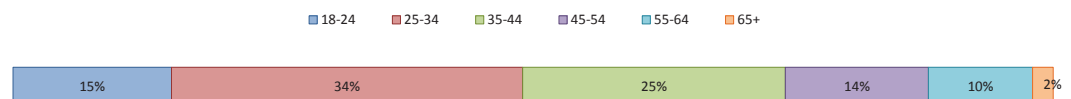
Who's Reading Audiobooks

Women (57%) are notably more likely than men (43%) to be audiobook users. When looking at age, the demographics skew on the younger side with the majority of users falling in the 25-34 age span (34%), followed by 25% in the 35-44 range. Audiobook users tend to be married, without children, and well educated.

The average audiobook user is:

- Female
- Between the ages of 25 and 34
- Living with a household income from \$50,000 to \$75,000 per year
- Married or living with their significant other
- Does not have children
- Has a university degree

USERS BY AGE



Question: Did you listen to an audiobook in the last year?

Crosstab question: What age bracket do you fall into? Please select one.

(N= 400)

The genders are fairly evenly split when it comes to acquiring audiobooks. Both tend to have similar habits when it comes to purchasing from an online retailer or physical store, or downloading from a torrent or download website. Women predominantly get their books from the public library (16% as compared to 9% for men), whereas men and women both predominantly opt for free legal online downloads (both at 13%). There is, however, a notable discrepancy in the genders when it comes to using subscription or rental services, where women access 10% of the time and men access 4%.

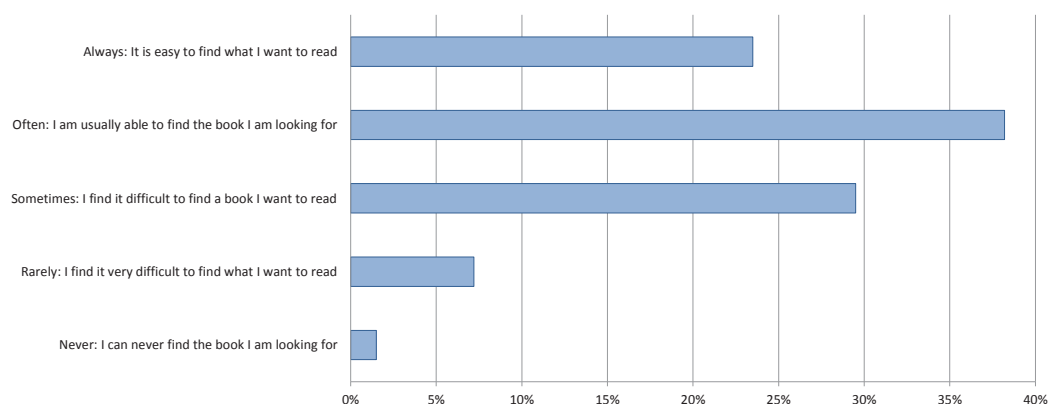
Audiobook Discoverability

24%
of respondents said
it's "easy" to find an
audiobook they want,
while 30% find
it "difficult"

Obviously, there is a greater amount of book content available in print so, when discussing audiobooks, one important consideration is whether people are able to find the content they want. When specifically asked if respondents were able to find the books they want in audiobook format, almost a quarter (24%) said they can easily find what they are after and 38% said they can often find what they are looking for. Conversely, 30% said they find it difficult to find content and 9% said they can "rarely" or "never" find an audiobook they want.

Anecdotally, BookNet Canada has had discussions with librarians who have mentioned a need for more Canadian content in audiobooks. To explore this a bit further, we reviewed the number of audiobook records in BiblioShare, BookNet Canada's bibliographic database. BiblioShare has over 1.1 million active records, 21,650 of which are listed as audiobooks (this includes both physical formats and items marked as digital download). Of these audiobook records, only 398 are listed as having a Canadian contributor. While this isn't an exact science, it does seem like there is a notable absence of Canadian titles in audiobook format. Canadian publishers are very well represented in BiblioShare, and most Canadian publishers are submitting the marker for Canadian authorship.

AVAILABILITY – HOW OFTEN LISTENERS ARE ABLE TO FIND AUDIOBOOKS



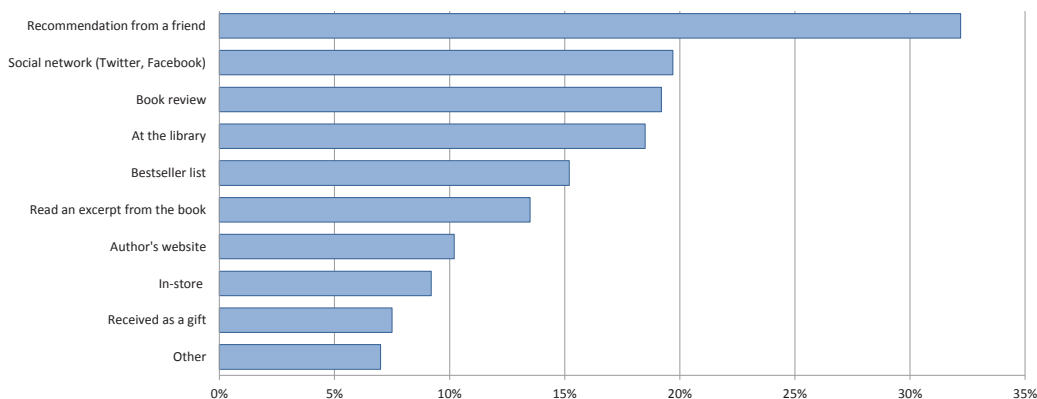
Question: How often are you able to find the books that you want in audiobook format?
(N=400)

When it comes to discoverability, the majority of audiobook readers (32%) found content through a recommendation from a friend, followed by 20% finding it through social media. In previous consumer studies conducted by BookNet Canada, which explored book-buying behaviour, we found a few differences in awareness between books and audiobooks:

- Notably, 67% of audiobook users discover content through in-person recommendations (i.e., recommendation from a friend, book club, gift, etc.) (67%), whereas only 46% of print book purchases result from such recommendations.
- 19% of audiobook users find out about books at their library, as compared to only 4.4% for buyers of print books.
- More print book buyers find out about books in-store (20%) as compared to 9% for audiobook users.

It is important to point out here that the book buyer study focused on book purchases rather than where somebody obtained the last book they read, so these comparisons may be impacted by the differences between locating books in a store versus a library or other location.

DISCOVERABILITY – HOW LISTENERS FOUND OUT ABOUT THEIR LAST AUDIOBOOK



Question: How did you find out about the last audiobook that you listened to? (select up to 3)
(N=610)

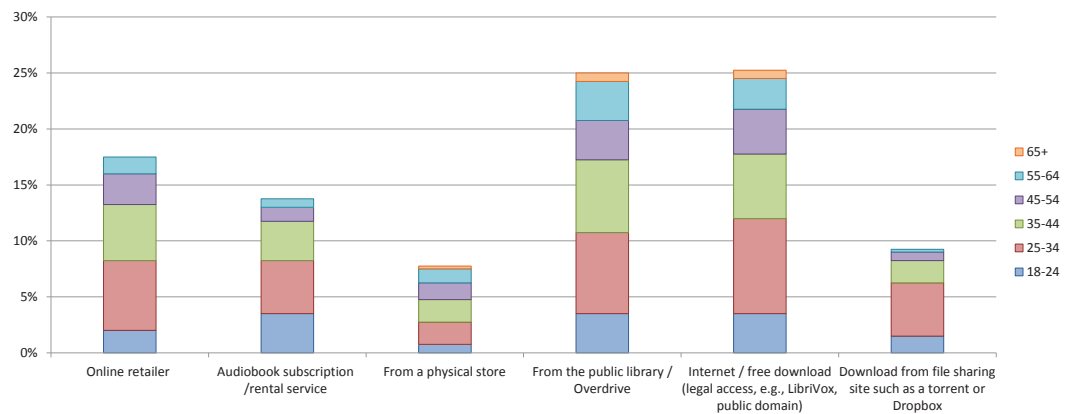
Acquiring Audiobooks

The bulk of audiobooks are being downloaded for free, through either the public library or public domain websites

The bulk of audiobooks are being acquired for free, through either the public library (25%) or through legal online/public domain titles (25%). 26% of audiobook acquisitions are purchases. Interestingly, 97% of respondents said they have purchased an audiobook.

Younger respondents, those in the 18-24 age bracket, tend to go for free access to audiobooks, preferring library access or free downloads, whereas those in the 25-34 age bracket are the most likely to purchase an audiobook.

ACQUISITION – WHERE LISTENERS FIND MOST OF THEIR AUDIOBOOKS



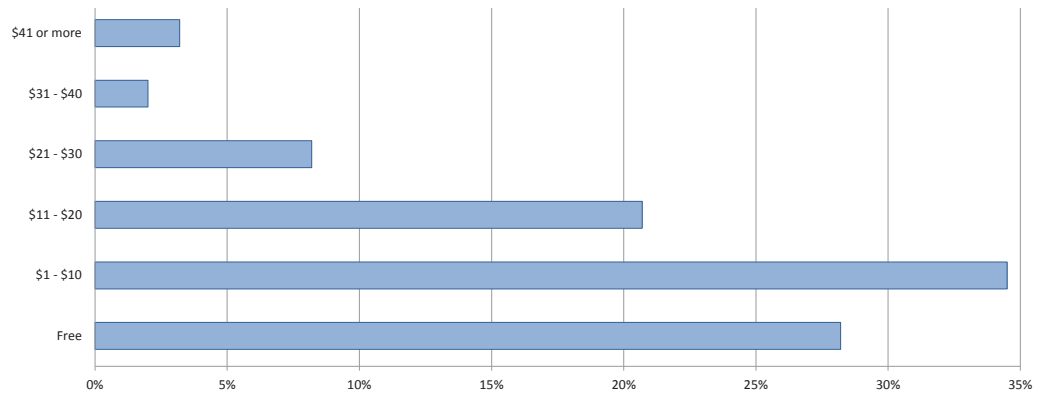
Question: How do you acquire most of your audiobooks?

Crosstab question: What age bracket do you fall into? Please select one.

(N=400)

When it comes to paying for audiobooks, the majority of paid purchases (56%) were \$20 or less, with 28% being free. “Free” would apply for anybody obtaining content through a library, public domain online streaming, or, potentially, illegal download.

COST – HOW MUCH LISTENERS PAID FOR THEIR LAST AUDIOBOOK



Question: How much did you pay for your last audiobook?
(N=400)

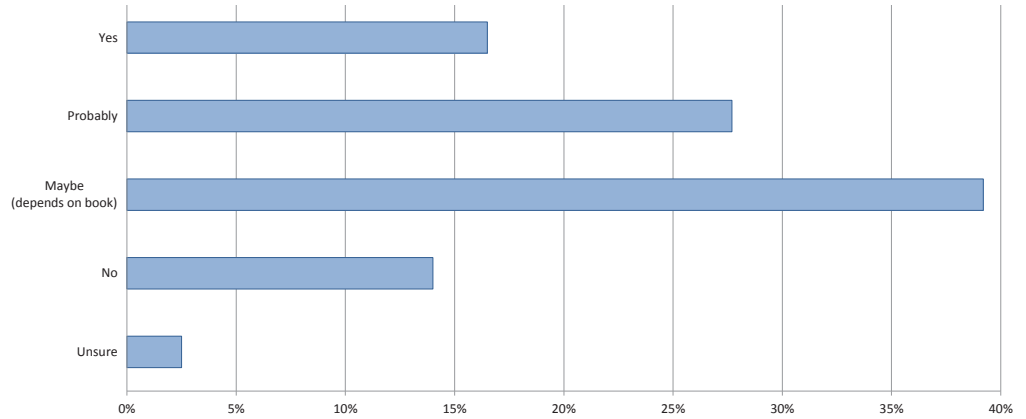
Audiobook listeners are open to the possibility of purchasing a print book that's bundled with the audiobook or ebook

The majority of respondents are open to the possibility of purchasing a print book that is bundled with an audiobook or ebook. As graphed below, it seems that many audiobook users are interested in using audiobook content as a repeat performance, with 36% of respondents saying they either always or often listen to audiobooks that they previously read. This could provide a unique opportunity for publishers bundling print books with digital books.

36%

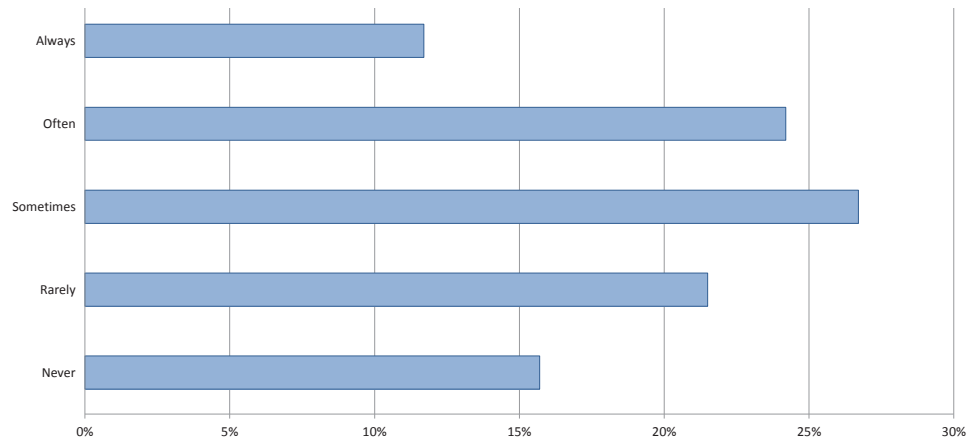
of respondents either
“always” or “often” listen
to audiobooks they have
previously read

BUNDLING – LIKELIHOOD OF LISTENERS SPENDING MORE ON PRINT + DIGITAL BUNDLES



Question: Would you spend slightly more on a print book if it came bundled with an audiobook or ebook?
(N=400)

REPEAT LISTENING – HOW OFTEN AUDIOBOOK CONSUMERS LISTEN TO BOOKS THEY HAVE PREVIOUSLY READ

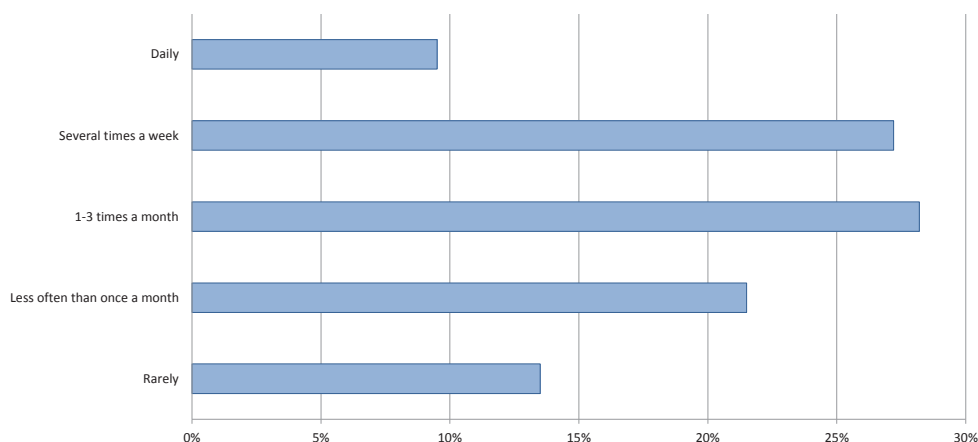


Question: Do you tend to listen to books that you have previously read?
(N=400)

Audiobook Use

We found that the majority of audiobook users tend to be moderate to occasional users, listening either several times a week (27%) or between one and three times a month (28%). Only 14% tend to rarely listen to audiobooks.

FREQUENCY OF LISTENING – HOW OFTEN CONSUMERS LISTEN TO AUDIOBOOKS



Question: How often do you listen to audiobooks?
(N=400)

As part of the March 2015 Tech Forum conference presented by BookNet Canada, we conducted a leisure time study that looked at the overall behaviour of Canadians (not limited to book buyers, readers, audiobook users, etc.). From this larger sample group, we asked several questions related to the consumption of audiobooks that are of interest to this report.

Though the following numbers will differ slightly from those above, they hold true where the majority of respondents, regardless of format, tend to consume content either multiple times a week or with a lower frequency of once every few months or a couple of times per month.

OVERALL BOOK CONSUMPTION – HOW OFTEN RESPONDENTS CONSUME BOOK CONTENT, BY FORMAT

	Read print books	Read ebooks	Listen to audiobooks
Daily	19%	17%	10%
Several times a week	24%	22%	18%
Weekly	12%	11%	9%
1-3 times per month	22%	22%	21%
Less often than once per month	21%	23%	32%
Rarely	3%	6%	10%

(N=633)

Among respondents who listen to audiobooks daily (with a limited number of respondents), most tend to listen for 1-3 hours.

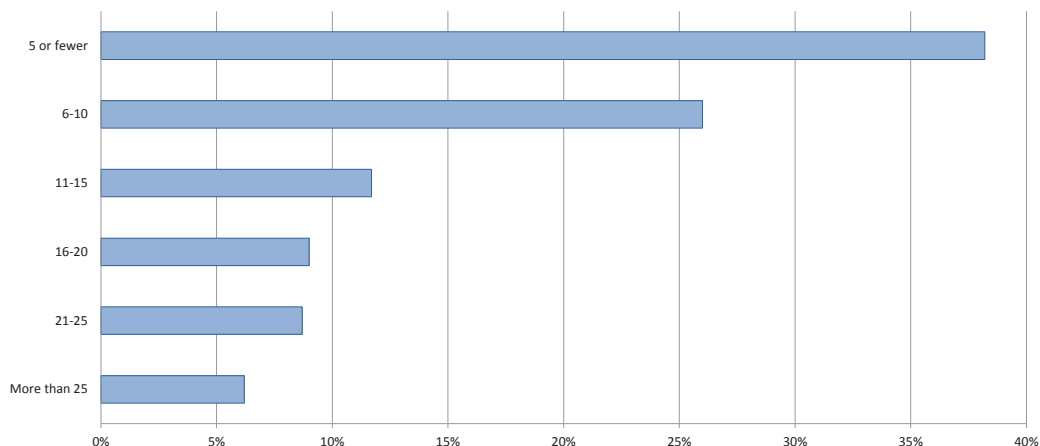
HABITS OF DAILY LISTENERS – HOW MUCH TIME DAILY AUDIOBOOK LISTENERS SPEND CONSUMING BOOK CONTENT, BY FORMAT

	Reading print books	Reading ebooks	Reading on mobile phone	Listening to audiobooks
Less than 1 hour per day	28%	34%	57%	35%
1-3 hours per day	61%	59%	33%	47%
More than 3 hours per day	11%	7%	10%	18%

(N=17)

The majority of respondents are consuming one, or less than one, audiobook every two months, with 38% listening to five or fewer in a year, and 26% listening to between six and ten in a year.

LEVEL OF CONSUMPTION – HOW MANY AUDIOBOOKS USERS LISTENED TO IN THE LAST YEAR

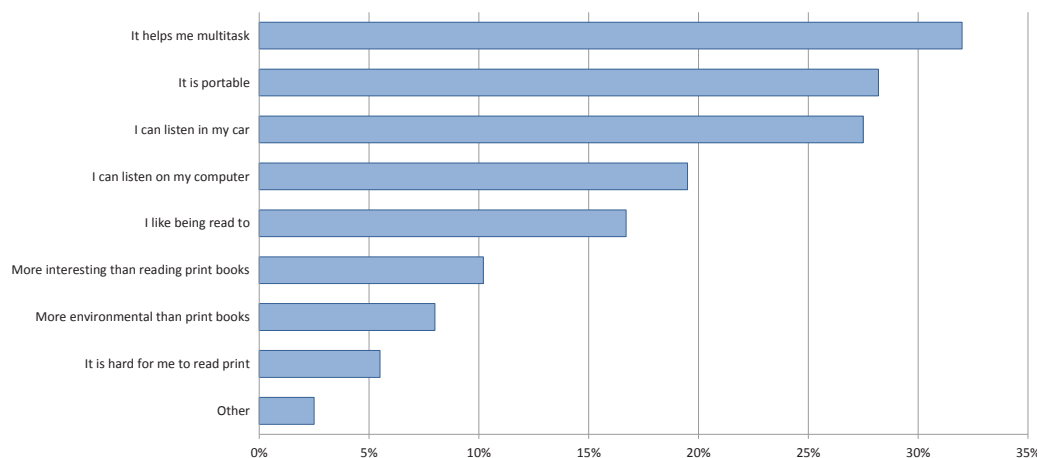


Question: Approximately how many audiobooks did you listen to this year?
(N=400)

The ability to multitask while listening is the main reason users opt for audiobooks

The ability to be on-the-go and multitask while listening to audiobooks is the primary reason users opt for this format. Women, twice as much as men, note that the ability to multitask is one of the primary reasons they use audiobooks (14% women, 7% men) whereas men tend to like listening from their computer (8% men, 5% women). Qualities such as portability, difficulty in reading print, or listening in a car are equally liked between genders.

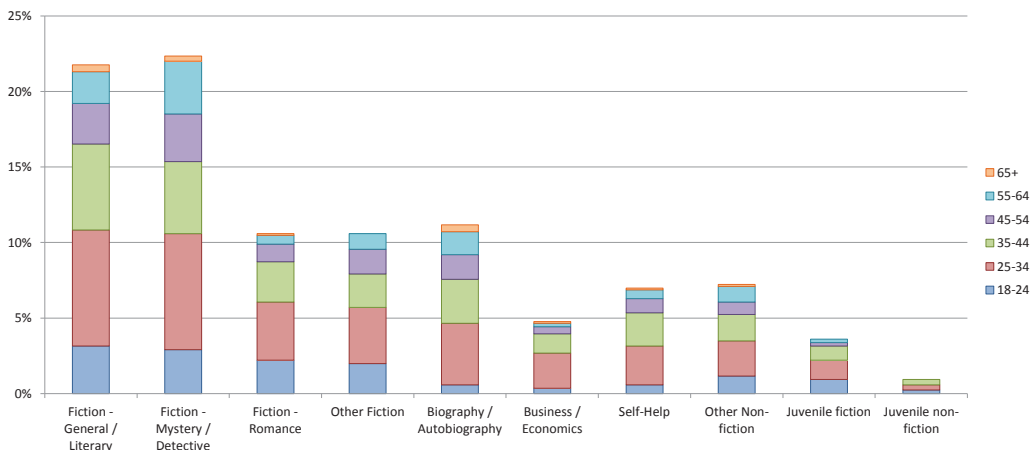
ADVANTAGES – WHY LISTENERS PREFER AUDIOBOOKS



Question: Why do you choose audiobook format over other formats? (select top 2)
(N=601)

Respondents were able to select all of the genres they listen to in audiobook format. Perhaps unsurprisingly, Fiction use was much higher than Non-Fiction, with Mystery/Detective topping the list (48%), closely followed by General Literary Fiction (47%). For Non-Fiction, the biggest category was Biography (24%), followed by Self-Help (15%). Juvenile had low responses, with 10% listening to Juvenile titles. The Juvenile numbers may be under-reported due to the fact that only adults were surveyed.

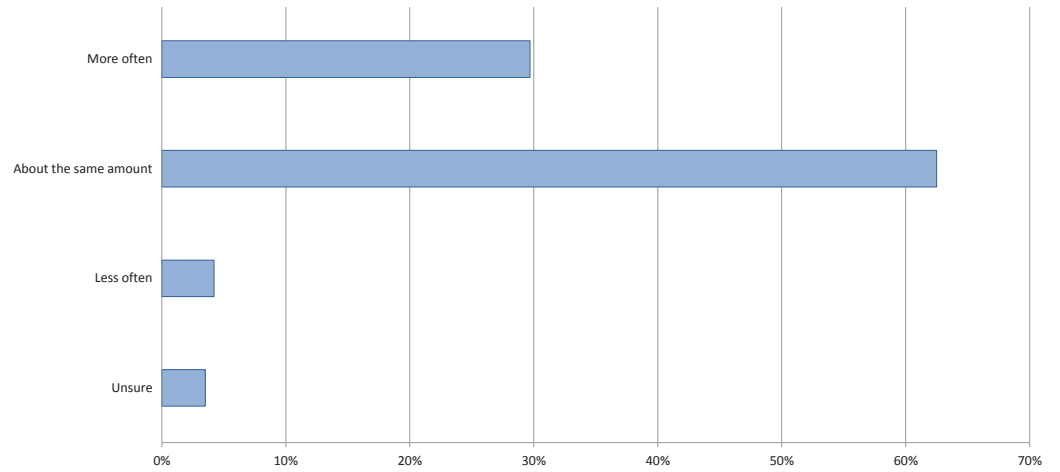
FAVOURITE SUBJECTS – WHICH SUBJECTS LISTENERS PREFER



Question: What subjects do you primarily listen to in audiobook format? (select all that apply)
Crosstab question: What age bracket do you fall into? (select 1)
(N=859)

Most audiobook users expect their use to either stay the same or increase.

FUTURE USE – LISTENERS’ EXPECTATIONS FOR FUTURE AUDIOBOOK USE

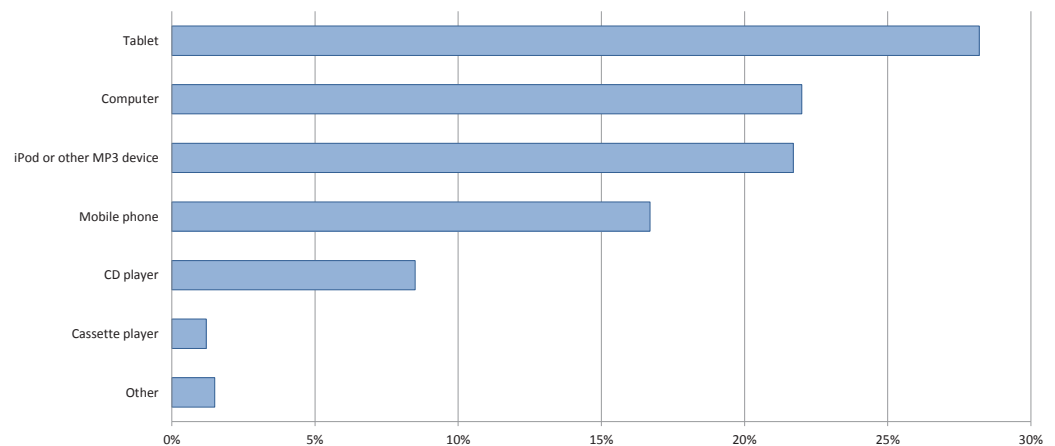


Question: In the near future, do you expect to listen to audiobooks?
(N=400)

Audiobook Technology

When it comes to the technology people are using to access audiobook content, the majority by far (28%) are using tablets. Perhaps surprisingly, and less intuitive to the “on- the- go” benefit of audiobooks, the next biggest group (22%) uses computers. Just under 9% are using a CD player, but some of this may be due to the prevalence of listening in the car.

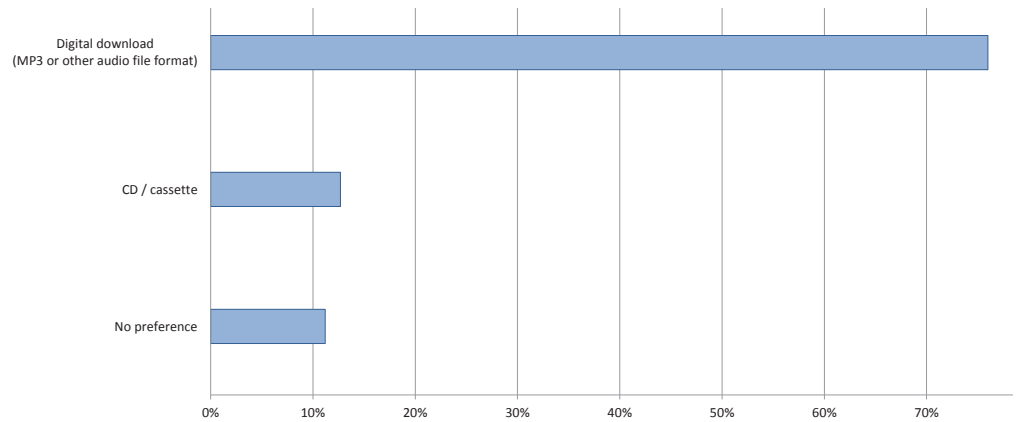
DEVICES – WHICH DEVICES ARE PRIMARILY USED BY LISTENERS



Question: What device do you primarily use to listen to audiobooks?
(N=400)

Not surprisingly, the majority of people (76%) prefer to access content via a digital download.

FORMATS – WHICH FORMATS LISTENERS PREFER

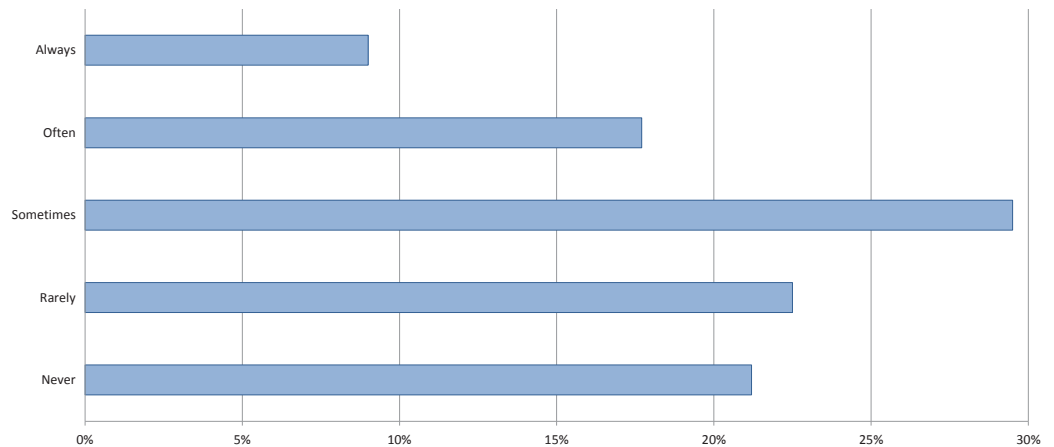


Question: What is your preferred format for audiobooks?
(N=400)

When asked about switching between formats for the book they are reading, (e.g., listen in the car and also read the print book), 27% of audiobook users say they either “always” or “often” switch between formats. Additionally, 30% said they sometimes switch between formats.

27%
of listeners said they either “always” or “often” switch between formats of the same book

SWITCHING FORMATS – LIKELIHOOD OF LISTENERS CONSUMING MULTIPLE FORMATS OF THE SAME BOOK



Question: Do you switch between audiobooks and other formats of the same book (e.g. listen in car and also read the print book)?
(N=400)

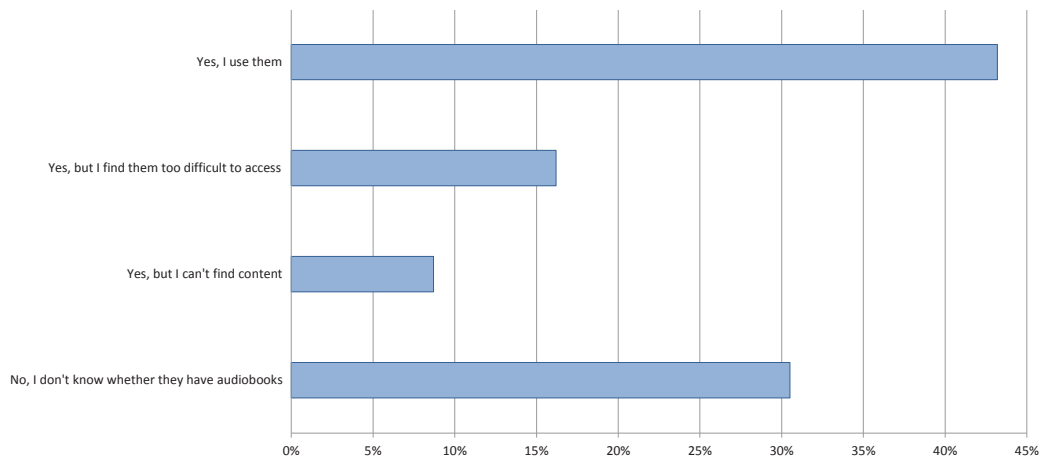
Audiobooks and Libraries

One quarter of listeners acquire most of their audiobooks through the public library

As mentioned previously, 25% of audiobook users said they generally acquire most of their audiobooks through the public library, and 19% said the way they obtained their last audiobook was also through the library. We asked audiobook users if they were aware that they could borrow digital audiobooks from the library. 43% of respondents said they use them, and an additional 16% said they know they are available but find them too difficult to access. 31% of respondents said they were unaware that they can borrow digital audiobooks from the library.

Overall, women are notably more aware of audiobooks being available at their local library (27% as compared to 16% of men).

AWARENESS OF DIGITAL AUDIOBOOKS FROM THE PUBLIC LIBRARY



Question: Are you aware if audiobooks are available for download from your public library?
(N=400)

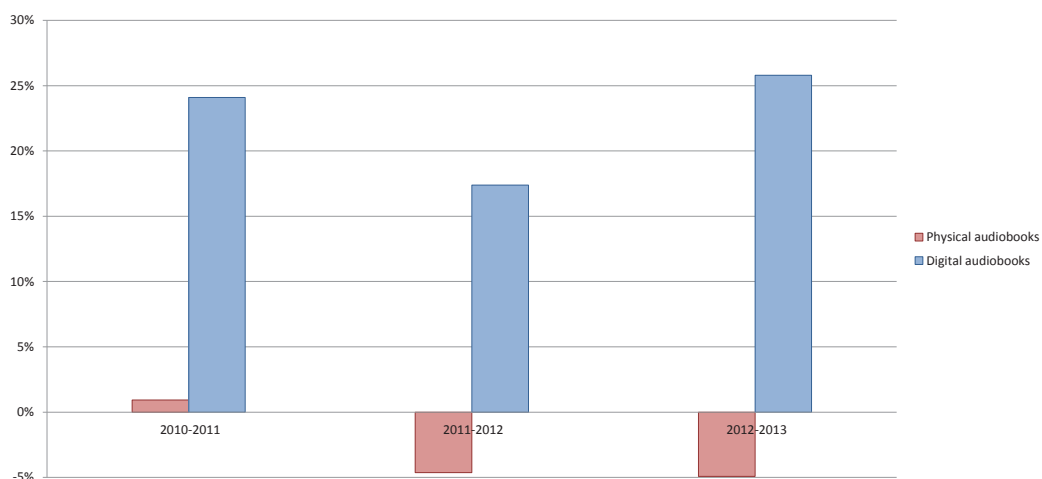
To get a better idea of how audiobook checkouts have been trending in public libraries, the Canadian Urban Library Council (CULC) provided BookNet Canada with audiobook checkout data from 18 of their member libraries. These libraries are some of the larger urban library systems, and are regionally representative.

By looking at the percent change of year-over-year audiobook loans, we found that the circulation of digital materials has been skyrocketing in some libraries systems, with an increase of upwards of 50% year-over-year. Some of this growth is likely attributed to an increase in available content, but is also indicative of demand.

Conversely, as availability of digital content grows, libraries are seeing the circulation of physical audiobooks diminishing, with declines of up to 10% per year for the past two years.

Similarly, OverDrive, the digital content platform for libraries, posted information on their website about the growth of digital downloads via their library systems². While this is likely a blending of both US and Canadian libraries, they indicated that audiobook downloads increased 38% in 2014, outpacing the 32% increase of ebook downloads.

PERCENT CHANGE OF DIGITAL VS. PHYSICAL AUDIOBOOK LOANS



(N= 18 Canadian library systems)

² "eBook Use Up 33% in Libraries through OverDrive"
<http://company.overdrive.com/news/ebook-use-up-33-in-2014-in-libraries-through-overdrive/> (January 8, 2015).

Conclusion

In February 2014, Fast Company published a short article, “Your Brain on Audiobooks: Distracted, Forgetful and Bored,”³ that compares the various ways people absorb and retain book content. While the article argues that audiobooks are the worst way to absorb content, allowing for limited focus on the part of the reader, it also points to the fact that, in the US, the audiobook industry is “a billion-dollar industry with huge annual sales growth, in part because anyone with a smartphone can now also pocket an audiobook.”

One aspect the article does not explore is the fact that listening to audiobooks is only one way the majority of audiobook users are consuming book content; many listeners are also reading the same books in their print or ebook formats, and the majority have indicated a potential interest in paying more for print books that are bundled with digital formats. Meanwhile, many audiobook users are also listening to books they have previously read. All of this could provide a unique opportunity for publishing firms who are selling into Canada.

With consumers saying they want more audiobook content, and libraries asking specifically for more Canadian content, it has become increasingly important for publishers to do everything they can to ensure their audiobooks are discoverable. So we encourage all publishers to mind their bibliographic data: review your Canadian content, mark Canadian contributors, and be sure to link all formats in the ONIX record. Allow librarians and consumers the chance find your audiobooks as easily as possible.

³ Jaffe, Eric “Your Brain On Audio Books: Distracted, Forgetful, And Bored”
<http://www.fastcodesign.com/3026224/evidence/your-brain-on-audio-books-distracted-forgetful-and-bored> (February 12, 2014).

Acknowledgements

ABOUT BOOKNET CANADA

BookNet Canada is a non-profit organization that develops technology, standards, and education to serve the Canadian book industry. Founded in 2002 to address systemic challenges in the industry, BookNet Canada supports publishing companies, booksellers, wholesalers, distributors, sales agents, and libraries across the country.

BookNet Canada's services and research help companies promote and sell books, streamline workflows, and analyze and adapt to a rapidly changing market. BookNet Canada sets technology standards and educates organizations about how to apply them, performs market research, and tracks 85% of all Canadian English-language print book sales through BNC SalesData.

Industry-led and partially funded by the Department of Canadian Heritage, BookNet Canada has become, as *The Globe and Mail* puts it, "the book industry's supply-chain nerve centre."

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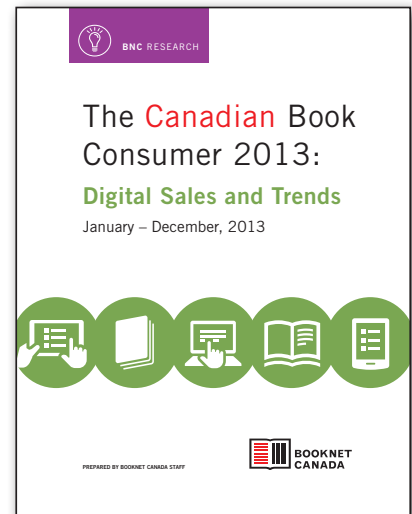
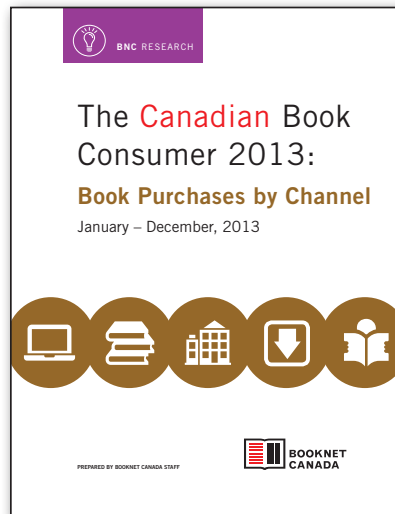
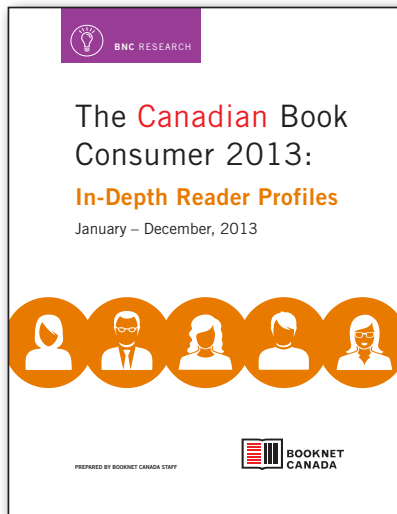
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