



BNC RESEARCH

Readers Are Listening Audiobook Use in Canada 2018



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CANADA

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Table of Contents

4	Background
5	Highlights
6	Demographics
8	Buying Behaviour
10	Listening Frequency
12	Listening Experience & Reading Habits
14	Devices
17	Genres & Subjects
20	Audiobook Features
21	Narrators
23	Discoverability
26	Audiobooks in BiblioShare
27	Acquisition
31	Pricing
33	Subscription Services
34	Libraries
35	Audiobooks & Podcasts
36	Exploration of Future Market Trends

Background

We surveyed 449 adult audiobook listeners (over the age of 18) from across Canada in summer 2018 to ask them about their audiobook purchases, preferences, and activities. This report takes an in-depth look at how Canadian audiobook listeners discover, use, and think about audiobooks. To enhance our understanding of the growing audiobook industry, we included data from: our quarterly consumer survey of approximately 750 adult book buyers and 3,000 adult non-book buyers; our annual survey *The State of Digital Publishing in Canada 2017*; and secondary sources.

The book market is evolving as the demand for audiobooks continues. Audiobooks provide a way to consume books on-the-go, relax at home, and more. There are many mental health benefits of listening to audiobooks, especially for the elderly¹, as audiobooks allow readers to read without their eyes, help readers retain meaning and information, and are more emotionally engaging than watching something on-screen²³.

The publishing industry continues to take notice of audiobook growth. *The New York Times* recently started an audiobook bestseller list. We are finding that some authors and publishers are bypassing print editions and releasing audiobook originals, while other authors are selling work directly to audiobook companies, bypassing traditional audio rights with publishers as audiobook companies are going directly to authors for audio rights⁴.

In our *The State of Digital Publishing in Canada 2017* report published earlier this year, we discovered that the majority of Canadian publishers (61%) are producing digital audiobooks, an increase of 24% from 2016 and nearly quadruple from 16% in 2015. Of the 61% of Canadian publishers who are producing digital audiobooks in 2018, 40% of their audiobook production is managed by a third-party producer, 43% is produced in-house, and 10% is managed by retailers⁵.

¹ "The Impact of Audio Book on the Elderly Mental Health". Basic Clin Neurosci, 2017, <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC5691168>. 20 August 2018

² Kozlowski, Michael. "Audiobooks have a positive effect on mental health". Good e-Reader, May 2018, <https://goodereader.com/blog/audiobooks/audiobooks-have-a-positive-effect-on-mental-health>. 20 August 2018

³ Kozlowski, Michael. "Audiobooks are more emotionally engaging than TV or film". Good e-Reader, June 2018, <https://goodereader.com/blog/audiobooks/audiobooks-are-more-emotionally-engaging-than-tv-or-film>. 20 August 2018

⁴ Alter, Alexandra. "Want to Read Michael Lewis's Next Work? You'll Be Able to Listen to It First". *The New York Times*, June 2018, <https://www.nytimes.com/2018/06/02/books/audible-michael-lewis-audiobooks.html>. 20 August 2018

⁵ "The State of Digital Publishing in Canada". BookNet Canada, <https://www.booknetcanada.ca/state-of-digital-publishing>. 12 June 2018

Highlights

- The average audiobook listener identifies as female is between the ages of 25 and 34. Audiobook listeners above the age of 55 grew by 4% from the previous year.
- 14% of respondents have been medically diagnosed with a vision impairment or print disability.
- Most respondents listen to audiobooks one to several times a week.
- While we are finding that audiobook use is growing, we are also finding that those who are listening are consuming fewer books — 55% of listeners consumed five books or fewer over the last year, which is up from 46% in 2016. This may be a result of more first-time audiobook listeners.
- Many listeners choose the audiobook format because they can listen while doing other things, so they can consume more books, and because they like being read to. Respondents listen while doing housework, commuting, and working on a hobby.
- Most listeners download or stream digital audiobooks and listen privately. Home stereo systems and smart speakers (like Echo, Google Home, Alexa, and HomePod) are used equally by 12% of respondents.
- Listeners discover titles mostly from browsing, either by genre or subject, and through reviews or recommendations.
- Audiobook listeners tell us that it has become easier for them to find audiobooks that they want to listen to. Fiction titles are more popular than non-fiction. Most respondents consume the same subjects regardless of the format.
- The most popular place listeners acquire audiobooks is online (i.e., from retailer websites/apps and public library apps).
- A quarter of respondents use subscription services or audiobook rental services.
- The majority of audiobook listeners spend up to \$25 for audiobooks in a year. Most think they received good value for the price they paid.
- 28% of listeners use the bookmarks feature. 21% do not use features in general or their device does not have those features. 13% did not know such features exist.
- 46% of listeners agreed or strongly agreed that they would stop listening to an audiobook if they did not like the sound of the narrator's voice.
- 58% of respondents also listen to podcasts, mostly on a weekly basis or several times a week. 45% of respondents listened to podcasts before they started listening to audiobooks.

Meet the Audiobook Buyer



Name: Libby

Gender: Female

Age: 29

Education: 4-year degree

Household Income: \$62,500

About me: I'm an on-and-off reader. I listen to 5 fantasy audiobooks a year while relaxing or doing housework. I want to read more books.

The average audiobook listener from our survey identifies as female and is between the ages of 25 and 34. Her household income is between \$50,000 and \$75,000. She uses Facebook and YouTube, among others, and listens to podcasts. She discovers audiobooks online on Amazon or YouTube and, after listening to a sample, pays up to \$5 for each audiobook. Her favourite subjects to listen to are fantasy novels and memoirs, which she discovers through browsing by genre or subject, from recommendations and word-of-mouth, or from bestseller or award lists. She listens to books so she can do other things at the same time, and also because she likes being read to. Her preference is to have another book lined up when she finishes the current one.

Demographics

Of those who purchased at least one book of any format within the past year, the majority identify as female and are in their late twenties or early thirties (22%), closely followed by those over 65 (19%), and then 17% for both those between 45 and 54 and those between 55 and 64.

Among audiobook listeners, the majority (65%) also identify as female and belong to the same age range of late twenties to early thirties (31%). The millennial age bucket has decreased since 2016, although the majority of respondents in 2014, 2016, and 2018 have consistently been within the age range of 25 to 34. We are seeing an increase in seniors listening to audiobooks since 2016, up 3% for those between 55 and 64 and up 1% for those 65 and above.

Audiobook listeners, by age

2014

18-24 15%	25-34 34%	35-44 25%	45-54 14%	55-64 10%	65+ 2%
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2016

18-24 21%	25-34 33%	35-44 21%	45-54 14%	55-64 8%	65+ 4%
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2018

18-24 14%	25-34 31%	35-44 25%	45-54 14%	55-64 11%	65+ 5%
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Overall book buyers, by age

18-24	25-34	35-44	45-54	55-64	65+
9%	22%	16%	17%	17%	19%

In this year's survey we asked respondents if they had ever received an eyesight-related medical diagnosis. One out of seven respondents reported that they have been medically diagnosed with a vision impairment or print disability.

A respondent commented on why they choose audiobooks:

"Since I have lived alone for years, audiobooks have been a great way to 'have company' while doing other things. I am not very tech savvy, but learning. I have also used audiobooks for long car travels, and purchased audiobooks for children, for family members who are aging and have visual impairments and/or are blind. I am able to share any audiobooks I purchase with them and often they remain in libraries associated with seniors and care facilities."

The audiobook listeners surveyed mostly use Facebook (78%), YouTube (73%), and Instagram (49%). The following graph notes the six most popular choices broken out by age. Other choices were Goodreads (18%), Tumblr (14%), LibraryThing (7%), Wattpad (6%), and none of the above (5%).

Users of social media platforms, by age

Facebook

18-24	25-34	35-44	45-54	55-64	65+
12%	31%	27%	15%	10%	6%

YouTube

18-24	25-34	35-44	45-54	55-64	65+
16%	33%	25%	13%	9%	4%

Instagram

18-24	25-34	35-44	45-54	55-64	65+
18%	41%	24%	12%	4%	1%

Twitter

18-24	25-34	35-44	45-54	55-64	65+
15%	32%	26%	14%	10%	3%

Pinterest

18-24	25-34	35-44	45-54	55-64	65+
13%	35%	27%	14%	7%	5%

Snapchat

18-24	25-34	35-44	45-54	55-64	65+
28%	48%	14%	5%	5%	0%

Question: Which of these social media networks, communities, or sharing sites do you use?
(Select all that apply.)

Most of our survey respondents listen to audiobooks in English, while less than one fourth listen to audiobooks in another language (20%). Of those, 39% listen in French, 14% listen in Chinese, and 5% listen in Spanish. Respondents also listen to 15 other languages, such as Portuguese, Japanese, Greek, Polish, and Farsi. Interestingly, a few respondents noted that they listen to audiobooks in another language as a way to learn that language.

“Audiobooks are amazing – they help ESL learners.”

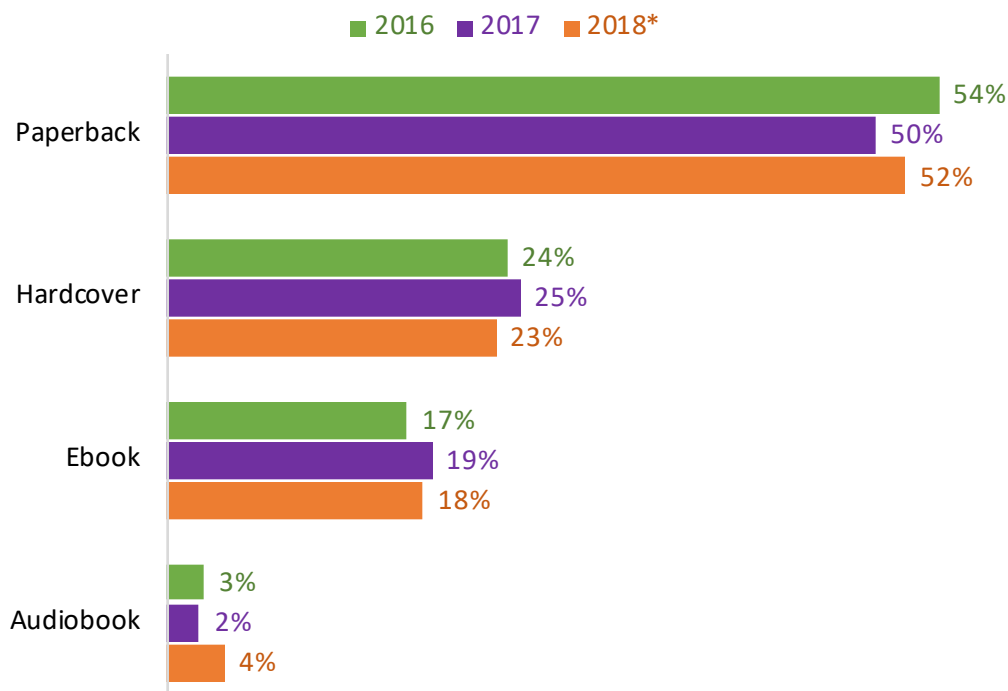
“I use audiobooks to learn Japanese pronunciation and practice speaking via repeating.”

“I try to learn French.”

Buying Behaviour

As of mid-2018, audiobooks account for 4% of all book sales reported by adult book-buying Canadians, which is up 2% from the same time last year. These numbers may be under-reported, however, because not all respondents equate the use of subscription and streaming services as a “purchase.”

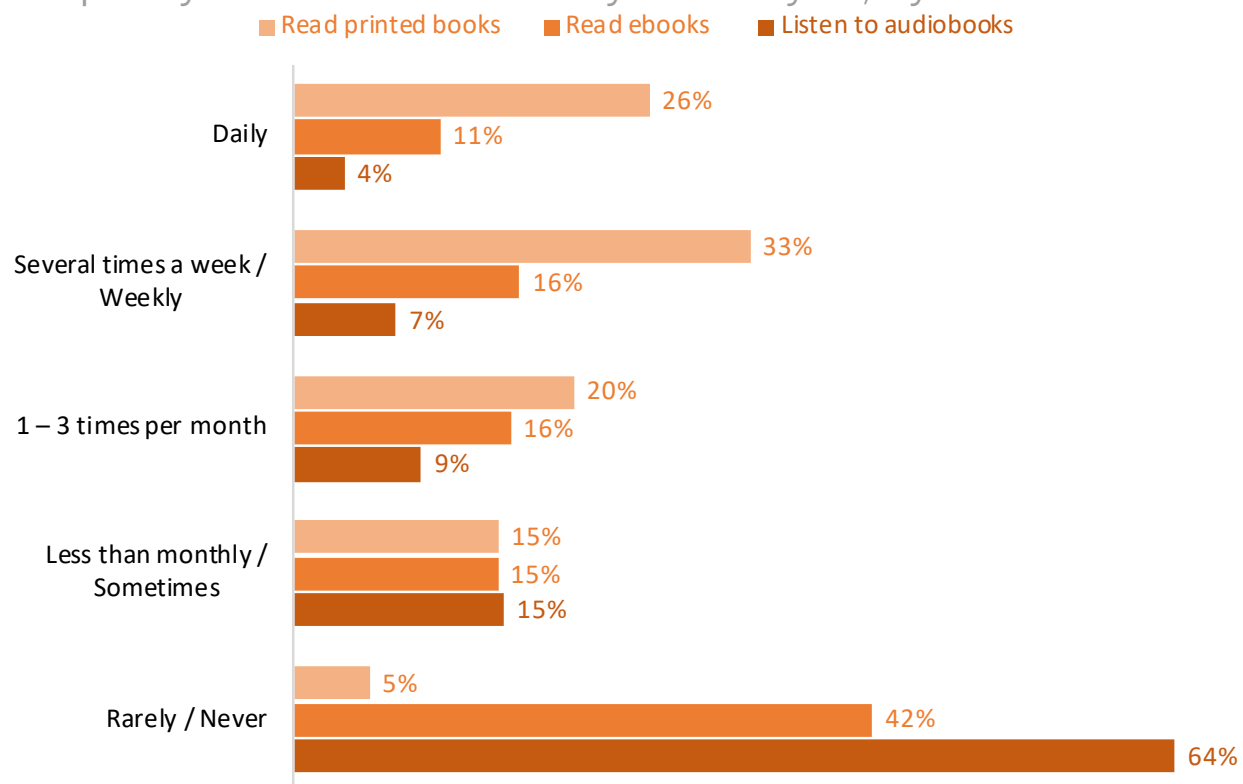
Books bought, by format



*January to June 2018

The majority of audiobook listeners surveyed (42%) are on-and-off-again readers who go through phases of listening a lot, then phases of not listening at all. Overall book buyers surveyed in 2018 for our larger consumer surveys report that they most frequently read books weekly or several times a week and rarely or never listen to audiobooks.

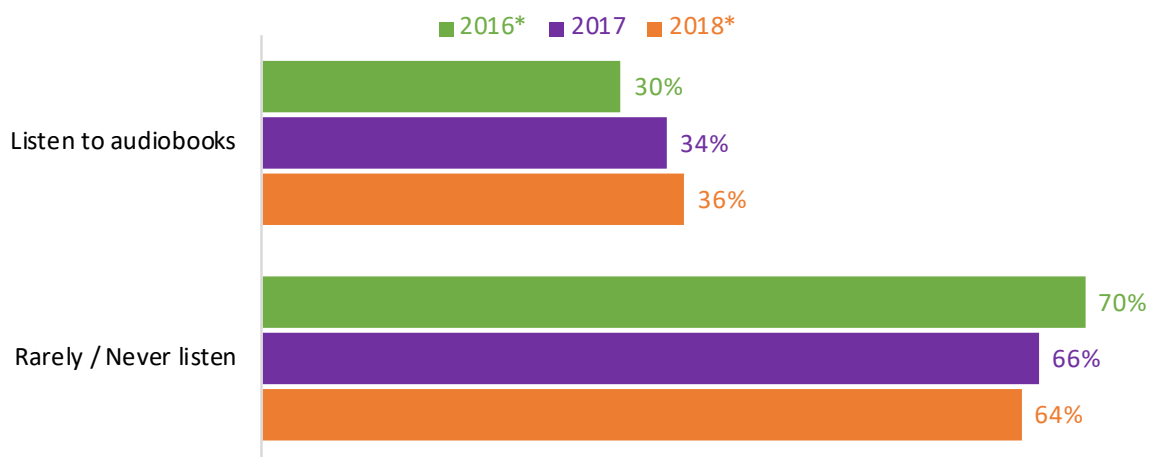
Frequency of books consumed by book buyers, by format



Question: How often do you engage in the following activities?

More book buyers are listening to audiobooks; the percentage of people who rarely or never listen to them has been decreasing since 2016.

Book buyers who listen to audiobooks



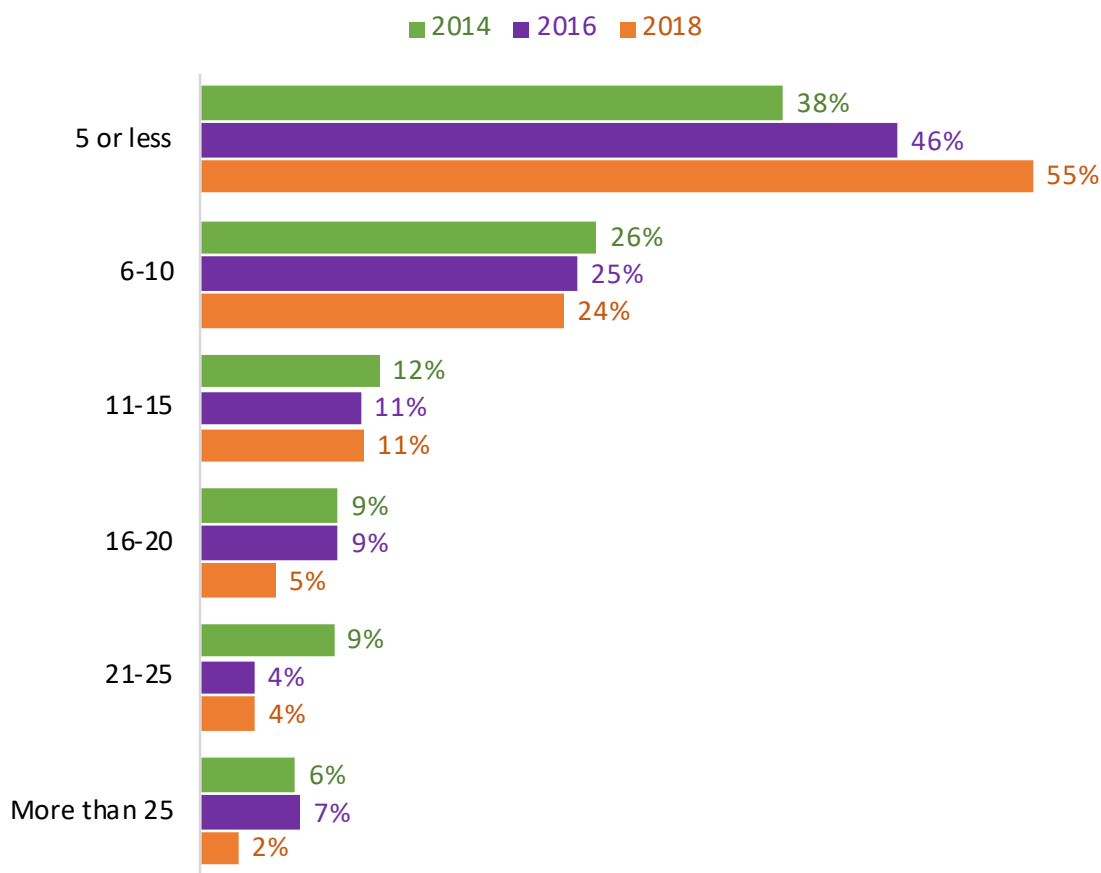
Question: How often do you engage in the following activities?

*Not a full year of data

Listening Frequency

While we are finding that audiobook use is growing over time, we are also finding that listeners are consuming fewer books. We asked respondents how many audiobooks they consumed in 2018 and we found that the majority (55%) listened to five books or fewer, which is up from 46% in 2016. This may be a result of more people trying out audiobooks for the first time.

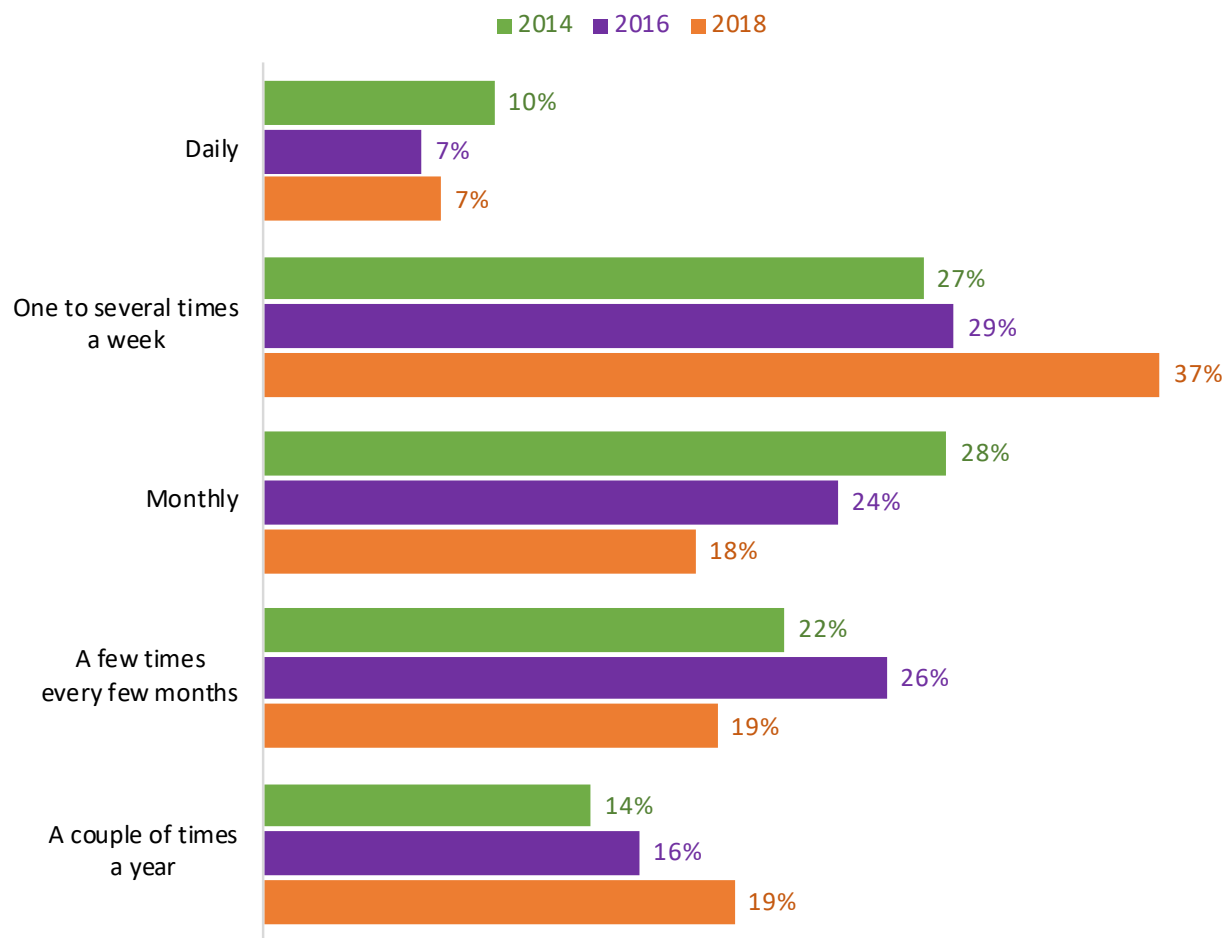
Number of audiobooks listened to over the past year



Question: Approximately how many audiobooks did you listen to in the last year?

Most respondents (37%) listen to audiobooks one to several times a week, followed by 20% listening weekly and 19% listening a couple of times a year.

Frequency of audiobook listening



Question: How often do you listen to audiobooks?

The respondents who listen to audiobooks most frequently are those between the ages of 35 and 44. They listen to audiobooks daily, followed by those between 25 and 34, who mostly listen on a weekly basis.

Frequency of audiobook listening, by age

Daily

18-24	25-34	35-44	45-54	55-64	65+
9%	30%	46%	9%	3%	0%

Several times a week

18-24	25-34	35-44	45-54	55-64	65+
12%	34%	31%	12%	7%	5%

Weekly

18-24	25-34	35-44	45-54	55-64	65+
11%	35%	24%	11%	17%	1%

Monthly

18-24	25-34	35-44	45-54	55-64	65+
20%	31%	19%	14%	11%	5%

A few times every few months

18-24	25-34	35-44	45-54	55-64	65+
12%	29%	23%	17%	11%	10%

A couple of times a year

18-24	25-34	35-44	45-54	55-64	65+
16%	28%	23%	16%	12%	6%

Question: How often do you listen to audiobooks?

Most audiobook listeners (38%) agree or strongly agree that they read the same book in multiple formats, closely followed by 35% of respondents who disagreed or strongly disagreed that they read the same book in multiple formats.

Consuming the same book in multiple formats

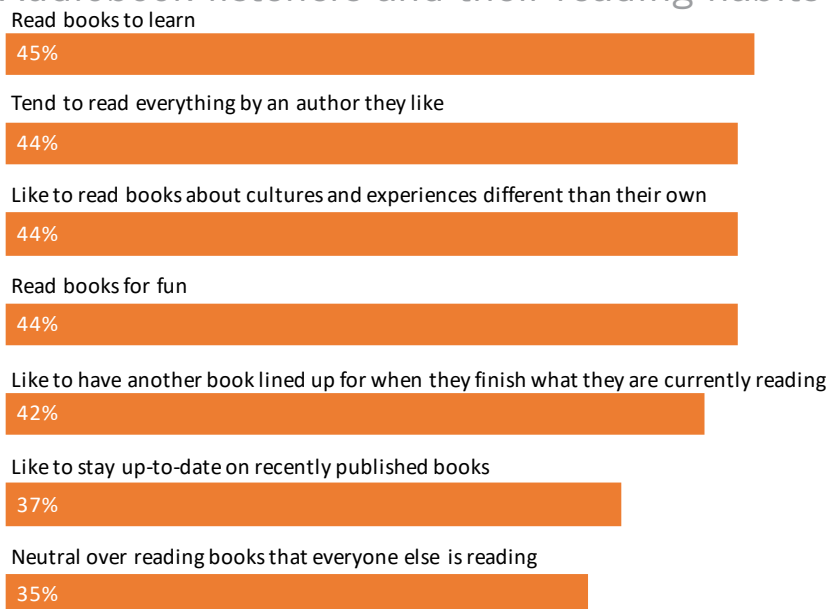
Agree / Strongly agree	Neither agree nor disagree	Disagree / Strongly disagree
43%	25%	31%

Question: How do the following audiobook-related statements best describe you? 1: I read the same book in different formats

Listening Experience & Reading Habits

We asked audiobook listeners to what degree they agreed or disagreed with various statements related to their reading habits. We discovered that most respondents (45%) read books to learn and 30% participate in a book-related rewards or loyalty program.

Audiobook listeners and their reading habits



Question: How do the following book-related statements best describe you?

In 2014 and 2016, the majority of respondents said they chose audiobooks because they help them multi-task, they are portable, and they can be listened to in cars.

In 2018, audiobook listeners chose the audio format over print books and ebooks because they can listen while they do other things (65%), they can read more books (33%), and because they like being read to (31%). This has mostly stayed the same over the past few years.

“I prefer the written page but can’t get things done when my nose is always in a book. With audiobooks I can enjoy the reading and get things done.”

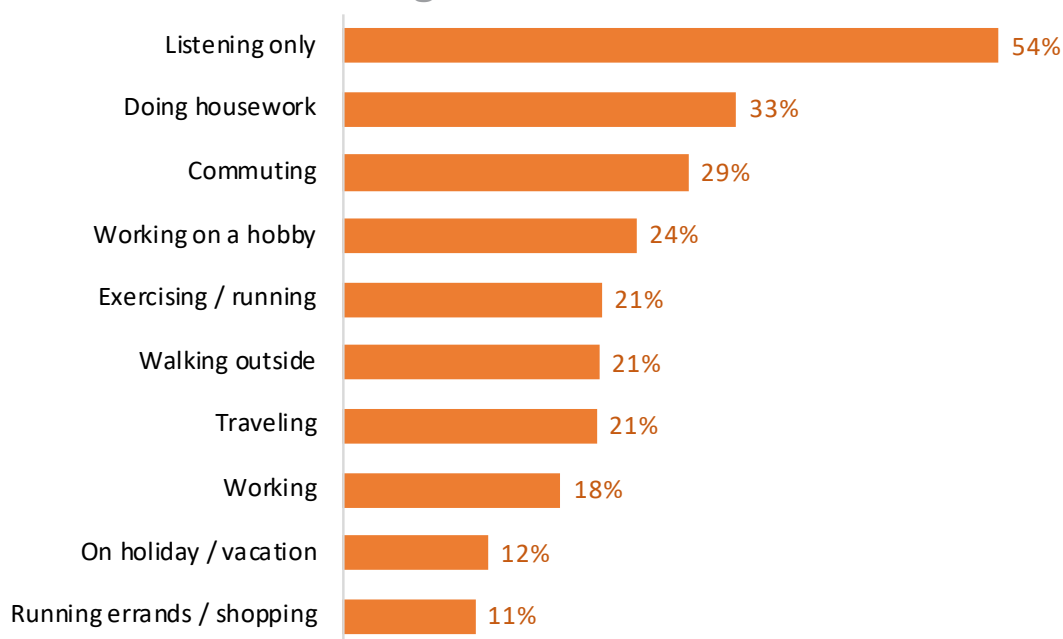
Respondents in 2014 chose the audiobook format because it helped them multi-task (32%), it is portable (28%), they can listen in their car (29%), and listen on their computer (20%). For respondents in 2016, multi-tasking and portability remained the most popular reasons (39% and 28%, respectively), closely followed by the ability to listen in the car (26%) and because they like being read to (22%).

“I love that it helps my family pass [the] time when [we’re] in the car. It’s [a] way to bond, an open avenue for discussing something outside of the usual day-to-day.”

In 2018, the most popular activities respondents do while listening to audiobooks are: listening only (learning/relaxing); doing housework (cleaning/cooking/gardening); commuting; and working on a hobby (baking/crafting/knitting).

“I love listening to audiobooks! With a toddler I find it hard to find time to read, but I can always find a little time to listen to an audiobook while she sleeps, and keep up with my knitting at the same time. My daughter also likes to listen to audiobooks in the car.”

Activities while listening to audiobooks



Question: When you listen to audiobooks, are you (check your main four activities):

Some audiobook listeners commented in the 2018 survey that audiobooks are great for driving long distances as they are entertaining, help people concentrate, and pass the time.

“I enjoy being able to listen while driving long distances, but that is the only time I use audiobooks. I find it entertaining, and it helps the time go faster for long monotonous highway trips.”

Others use audiobooks to help them get to sleep.

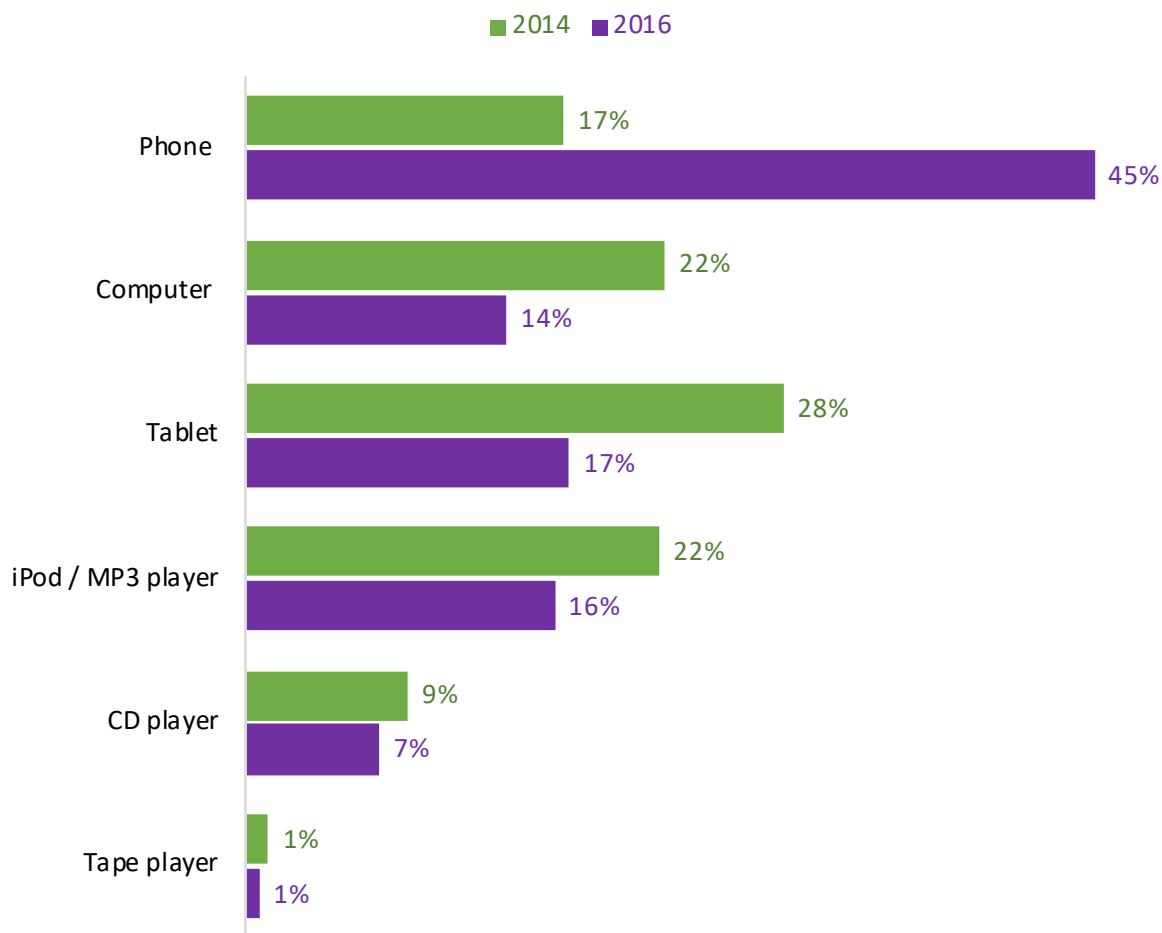
“I love to listen to audiobooks at night on my iPod because it helps me fall asleep and I know a couple other people who do the same thing.”

Devices

When asked if they prefer to use either digital audiobooks or CDs/tapes, the majority of audiobook listeners in 2018 (83%) reported that they mostly download or stream digital audiobooks, with only 17% preferring CDs/tapes. We saw a 7% increase from 2016 of respondents mostly using CDs/tapes, perhaps because the option for respondents to choose that they did not have a preference was removed from the 2018 survey. In 2014 and 2016, the majority of respondents preferred digital downloads (76% and 80%, respectively) while 11% in both 2014 and 2016 had no format preference.

When we asked about the specific devices people use to listen to audiobooks, the most popular devices were phones and tablets. There was a 28% increase in people using phones between 2014 and 2016. The most popular devices people used in 2014 were a tablet (28%), computer (22%) and iPod/MP3 player (22%).

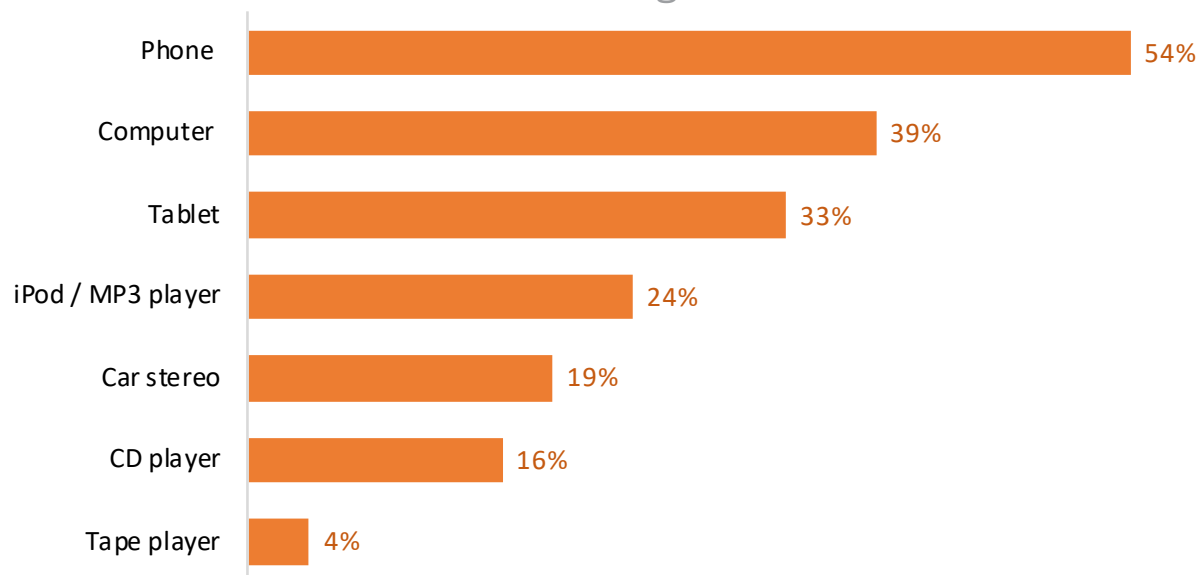
Devices used for audiobook listening in 2014 and 2016



Question: What devices do you primarily use to listen to audiobooks?

The most popular devices people use to listen to audiobooks in 2018 are phones (54%), computers (39%), and tablets (33%).

Devices used for audiobook listening in 2018



Question: What devices do you use to listen to audiobooks? (Select all that apply.)

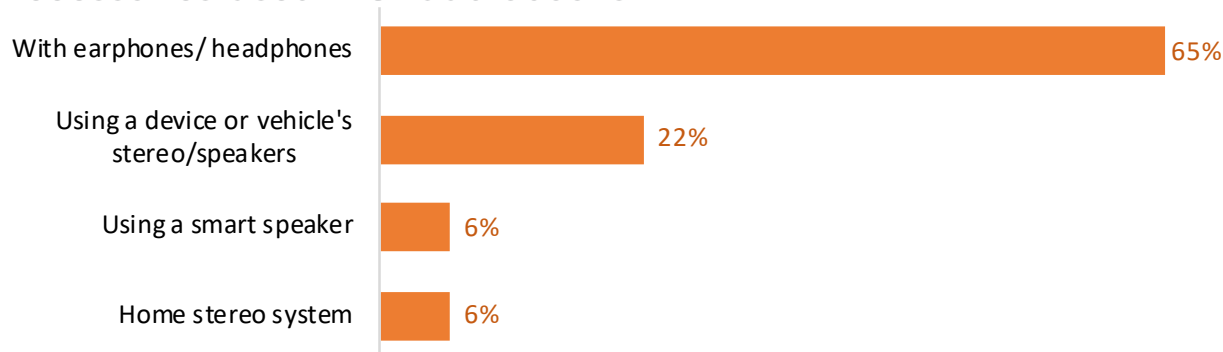
Multiple respondents commented on how much it bothers them that audiobooks deplete their phone batteries.

“One thing that can restrict you from enjoying an audiobook is if your battery dies.”

The majority of respondents (65%) use earphones or headphones to listen to audiobooks.

12% of audiobook listeners are split evenly between listening to audiobooks on their home stereo system and using a smart speaker like Echo, Google Home, Alexa, or HomePod. According to Infinite Dial Canada, a media consumption and consumer study research series, 8% of Canadians own a smart speaker⁶ and, according to a study on global smart speaker trends and data by Strategy Analytics, that percentage will increase⁷.

Accessories used with audiobooks

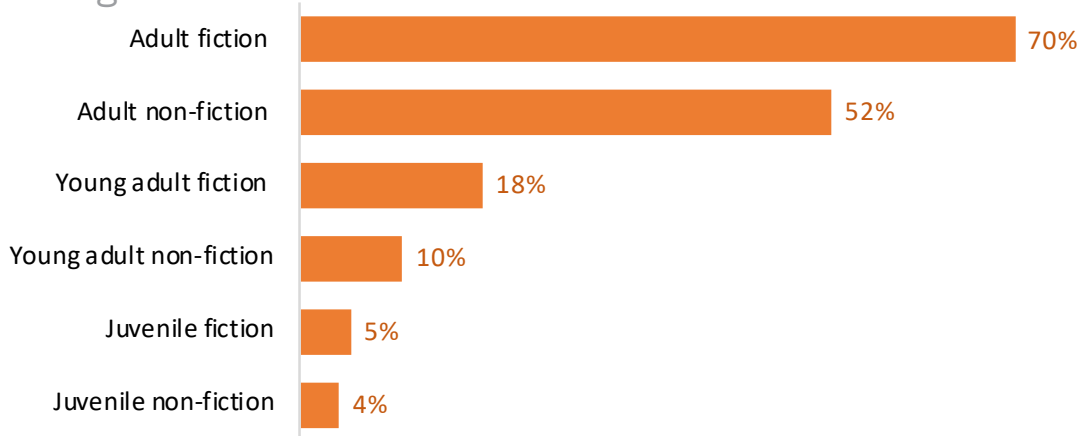


Question: How do you most often listen to audiobooks?

Genres & Subjects

The most popular genres for audiobook listening in 2018 are adult fiction (70%) and adult non-fiction (52%). 18% of respondents reported that they listen to young adult fiction, with 10% listening to young adult non-fiction audiobooks.

Audiobook genres



Question: Which of the following categories describes the majority of the audiobooks you listen to? (Select all that apply.)

⁶ Edison Research. "The Infinite Dial Canada 2018". April 2018, <http://www.edisonresearch.com/infinite-dial-canada-2018/>. 4 September 2018

⁷ <https://mobilesyrup.com/2018/09/19/apple-homepod-smart-speakers-canada-google-home>. 19 September 2018

Juvenile titles are targeted to those who are 11 and under, young adult titles to those aged 12-18, and adult titles are aimed at those 18 and older. Keeping in mind that the audiobook listeners surveyed were all over 18, the following graph looks at the genres they mainly listen to, broken out by age.

Audiobook genres, by age

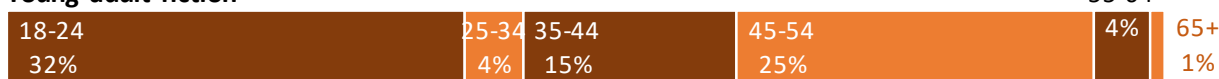
Juvenile fiction



Juvenile non-fiction



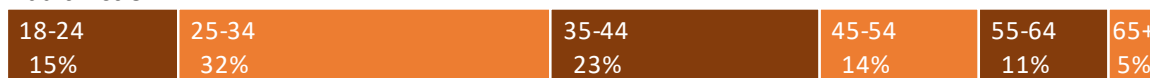
Young adult fiction



Young adult non-fiction



Adult fiction



Adult non-fiction

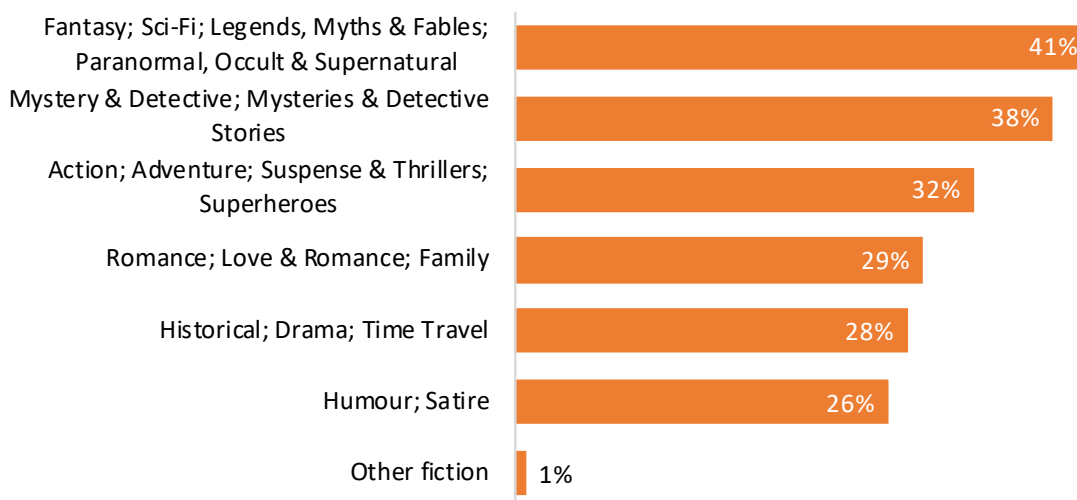


Question: Which of the following categories describes the majority of the audiobooks you listen to? (Select all that apply.)

When we asked respondents about the subjects they primarily listen to in audiobook format, we combined adult, juvenile, and young adult related subjects for each option. For example, Mystery & Detective (adult subject) and Mysteries & Detective Stories (juvenile and young adult subjects) are grouped together in one option.

The most popular fiction subjects respondents said they listen to in audio format are: Fantasy; Science Fiction; Legends, Myths & Fables; and Paranormal, Occult & Supernatural at 41%. This is followed by the combined subjects of: Mystery & Detective; and Mysteries & Detective Stories (38%).

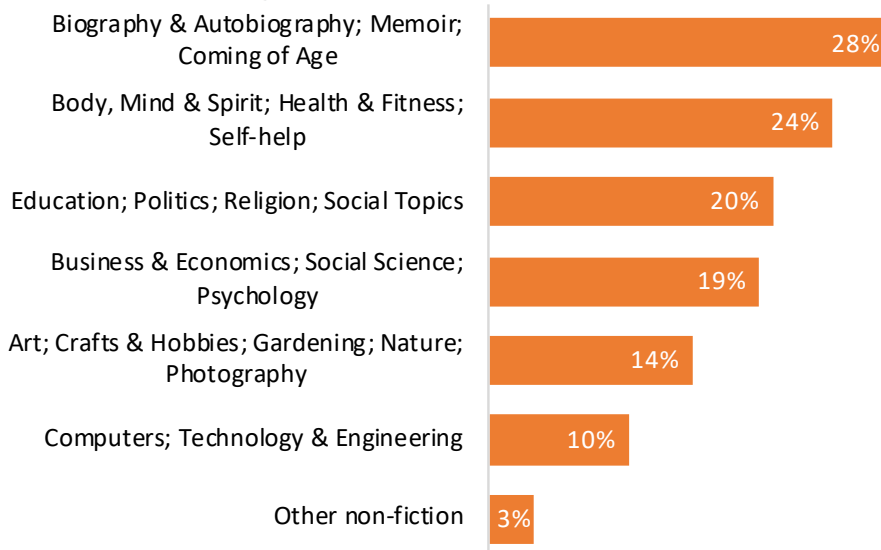
Audiobook subjects, fiction



Question: Which subjects do you listen to in audiobook format? (Select all that apply.)

The most popular non-fiction subjects are: Biography & Autobiography; Memoir; and Coming of Age at 28%. This is followed by: Body, Mind & Spirit; Health & Fitness; and Self-help (24%).

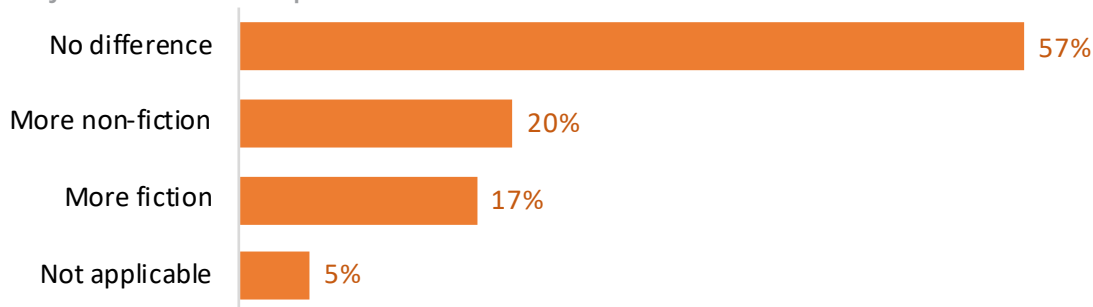
Audiobook subjects, non-fiction



Question: Which subjects do you listen to in audiobook format? (Select all that apply.)

The majority of audiobook listeners (57%) read and listen to the same subjects regardless of the format. 20% listen to more non-fiction titles than they would read in print and 17% listen to more fiction audiobooks. 5% of respondents only listen to audiobooks and do not read ebooks or print books.

Subjects read in print vs. audiobooks



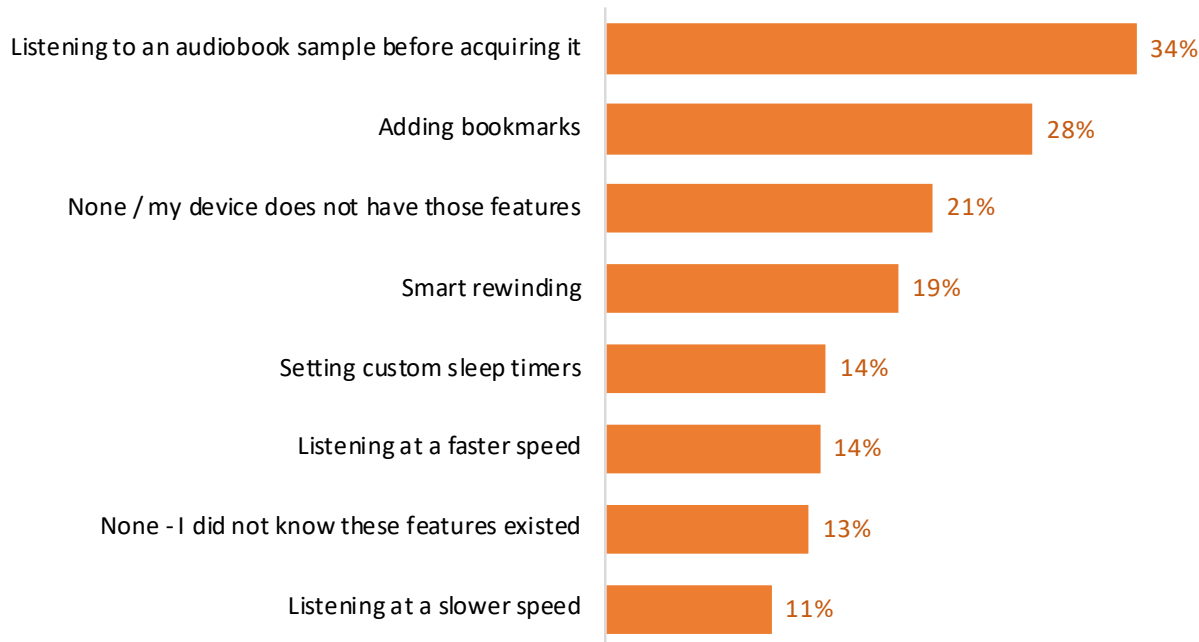
Question: Are the subjects you listen to in audiobooks different from what you read in ebook or print format(s)?

Audiobook Features

In 2016, 51% of respondents listened to a sample before deciding whether or not to buy an audiobook, while 11% did not know how to find audiobook samples. In 2018, 34% of respondents listened to a sample before acquiring an audiobook – a lower percentage than in 2016 possibly because we also asked about other audiobook features in the 2018 survey.

In 2018, the second most popular feature after listening to a sample is adding bookmarks (28%). Other popular features listeners use are smart rewinding (19%), custom sleep timers (14%), and listening to the narrator at various speeds – faster and slower speeds (14% and 11%, respectively). 21% of listeners do not use features in general or their device does not have these features, while 13% of respondents did not know these features existed.

Most used audiobook features



Question: Which audiobook features do you use?

Multiple respondents commented that some features are not available with certain audiobook readers, and there were some requests for chapter breaks as a feature. A few respondents said it bothers them that they can't use bookmarks when they forget where they left off.

"I would like a free player [that] offers bookmarks. Right now I have to write down where I leave off."

Almost half of respondents (43%) are interested in having background sounds or music in audiobooks, with 11% strongly in favour. 31% are not interested, with 4% of those strongly disagreeing. 25% are neutral.

Interest in background sounds or music

Agree / Strongly agree 43%	Neither agree nor disagree 25%	Disagree / Strongly disagree 31%
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Question: How do the following audiobook-related statements best describe you? A5: I am interested in sound or music in audiobooks

Several respondents requested ambient noises, such as suspenseful music in the background of thriller or mystery audiobooks. Some audiobooks already have background music and sounds.

Narrators

In 2016, 58% of audiobook listeners thought the narrator was very important when making a decision to acquire an audiobook and 38% thought it was somewhat important.

Interestingly, when asked in 2018 if they would stop listening to an audiobook if they did not like the sound of the narrator's voice, 32% of audiobook listeners agreed and 14% strongly agreed. 22% of respondents neither agreed nor disagreed while the same percentage (22%) disagreed. 9% of audiobook listeners strongly disagreed; they would continue listening regardless of the narrator's voice.

Further listening impacted by narrator voices

Strongly agree 14%	Agree 32%	Neither agree nor disagree 22%	Disagree 22%	Strongly disagree 9%
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Question: How do the following audiobook-related statements best describe you? I have stopped listening to an audiobook because of the sound of the narrator's voice.

One respondent commented:

“I prefer actual books because you can interpret the book in your own way a lot better than if someone was reading it to you in a specific tone of voice.”

Oral storytelling is an intimate experience, with many people having varying ideas of what makes a good narrator. Based on comments from respondents, there is a clear preference for narrators to be eloquent and express emotion with their voices and to be less mechanic and monotone, or to at least have changes in tone throughout the audiobook.

Listening to an audiobook narrated by the author was both a positive and negative experience for audiobook listeners.

Some respondents commented:

“The only big irritant is probably the reader’s voice and intonation. It could be fun to have different [people] read the same book so you can choose the narrator.”

“It’s hard for me to find a good audiobook with an awesome speaker. I hate how monotone some speakers are and it ruins the audiobook for me. Because it turns me off, I end up not finishing the audiobook and have to find the ebook or physical book and read it.”

“It seems expensive but I love when authors read their own books. It’s also a good way to ‘read’ a book I normally wouldn’t.”

Another comment on what makes a voice “good” was having narrators’ voices match the book setting, possibly referring to accents or pitch. Other respondents commented about voices not being high (feminine) or low (masculine) enough to match the characters.

While most audiobooks have one narrator who performs the entire book, others employ entire casts. Audiobooks with casts are known as fully-casted or dramatized audiobooks, where one voice actor performs each character. The demand for voice actors has grown because of the expanding audiobook market⁸.

Audiobooks with multiple narrators can be easier to listen to, as one respondent noted:

“The narrators in the audiobooks become really boring at times, versus a podcast [that] has multiple speakers often so it is easier to listen to.”

In 2018, the majority of respondents (57%) would rather listen to a narrated audiobook instead of using the text-to-speech feature in ebooks. 30% of respondents were neutral and 13% would rather use the text-to-speech feature than listen to the audiobook.

⁸ Kaufman, Leslie. “Actors Today Don’t Just Read for the Part. Reading IS the Part.” The New York Times, June 2013, <https://www.nytimes.com/2013/06/30/business/media/actors-today-dont-just-read-for-the-part-reading-is-the-part.html>. 4 September 2018

Discoverability

In 2014, the most popular method of discovering an audiobook was through a recommendation by a friend (32%), while in 2016 it was through a retailer or audiobook website (29%), closely followed by a friend's recommendation (28%). Respondents were able to select up to three options.

Discoverability in 2014 and 2016

2014



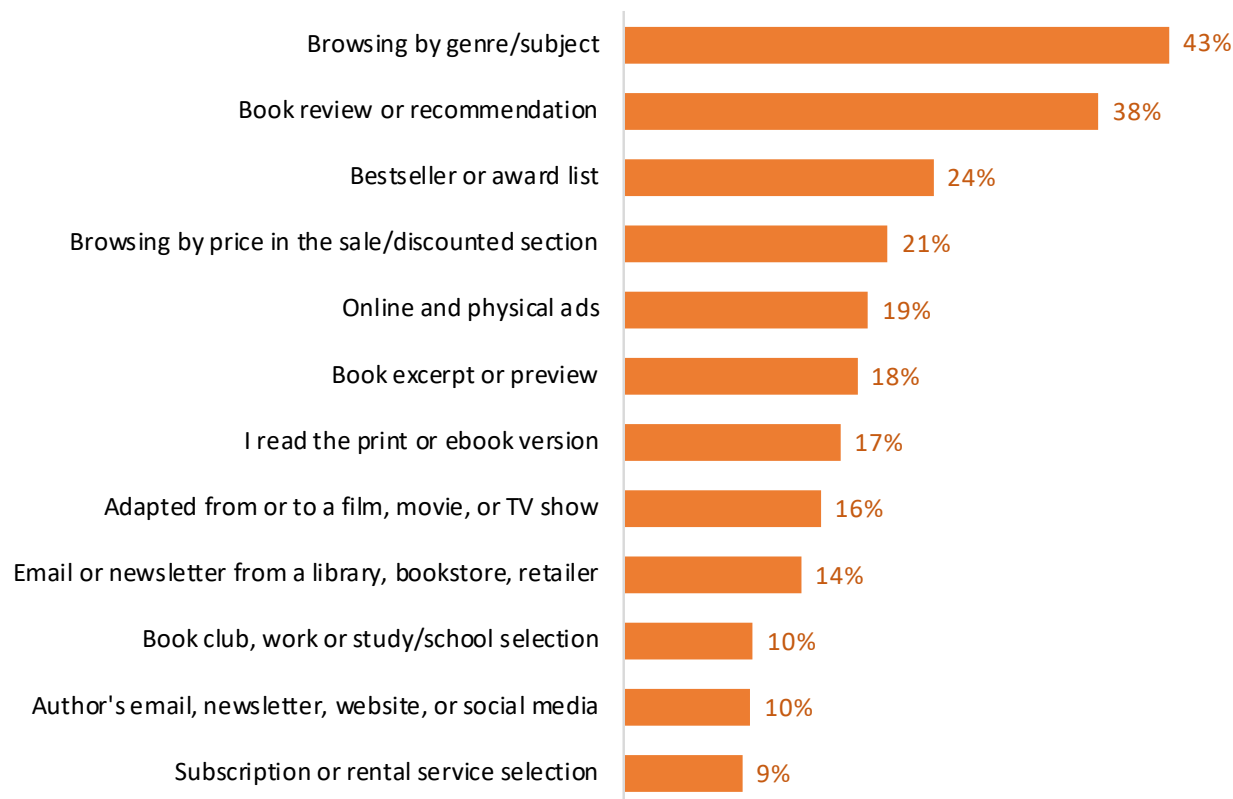
2016



More choices were added to the 2018 survey. Interestingly, even with more options provided, book excerpts increased by 10% between 2016 and 2018.

In 2018, the audiobook listeners we surveyed mostly discovered titles by browsing, either online or in person, by their preferred genre/subject (43%). Reviews/recommendations and bestseller/award lists remain popular choices of discoverability (38% and 24%, respectively). Other popular discoverability methods include browsing in the sale or discounted section (21%) and online and physical ads (19%).

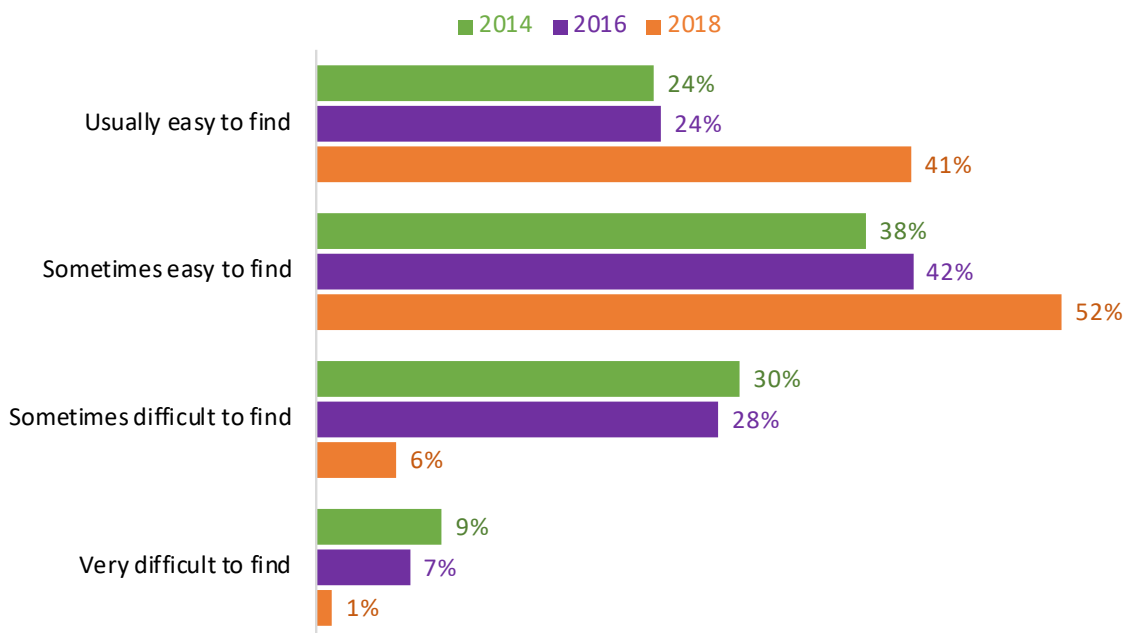
Discoverability in 2018



Question: How do you find the audiobooks you listen to? (Select all that apply.)

Over the last four years, respondents have been having less difficulty finding audiobooks. In 2018, the majority of respondents found titles sometimes or usually easy to find in audio format (93%), while 7% found it difficult or very difficult to find audiobooks.

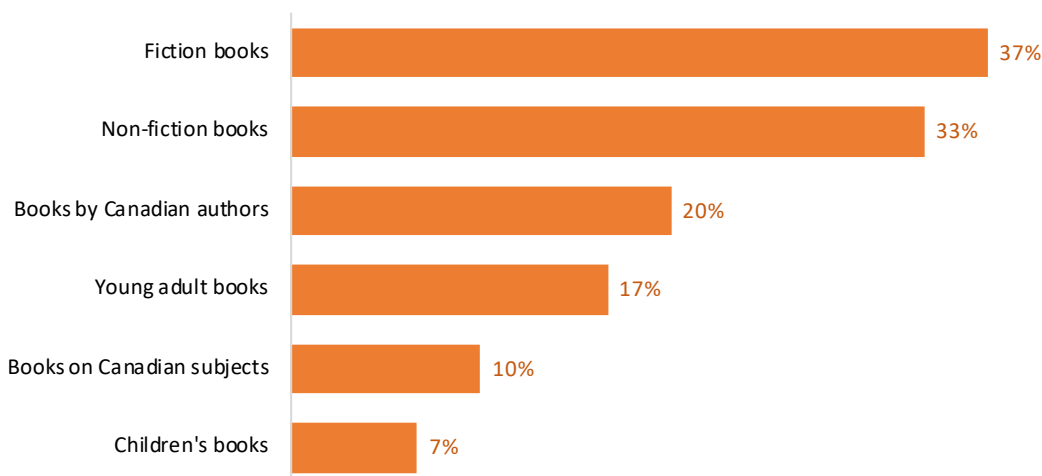
Ease of discoverability, over time



Question: Are you usually able to find the books you want in audiobook format?

Which types of books are the hardest to find? When asked to select all types of content they found difficult to find, most audiobook listeners pegged fiction (37%) and non-fiction (33%) books – perhaps because those are the most popular genres to search for in general.

Audiobook content that is difficult to find



Question: Is there a particular type of audiobook content that is difficult to find? (Select all that apply.)

When discussing discoverability, it is important to note that it is difficult for libraries to purchase some popular titles because of high costs or because the audio rights are only available in the United States⁹.

Some respondents commented on the lack of selection within the library system and in general:

“I love listening at work. It makes the day go faster and allows me to do my work while enjoying a book. I like hoopla, but wish it had better selection, but I accept it as it is free and I wouldn’t pay for books I may not like, and I do not know enough books to choose my own out of nowhere.”

“I wish more audiobooks were available from libraries with different narrators.”

Audiobooks in BiblioShare

BiblioShare, BookNet Canada’s bibliographic aggregation service, contains bibliographic records for 140,284 audiobooks. The number of records has grown considerably from the 21,650 that were listed in BiblioShare in 2014. As of 2018, 88% of these records are for physical audiobooks and 12% are for digital audiobooks.

Of all the audiobooks in BiblioShare, 1% are authored by a Canadian (1,329 audiobook titles). This is also up significantly from the 398 Canadian-authored audiobooks that were listed in 2014.

⁹ Dundas, Deborah. “Why public libraries can’t buy some of Canada’s top audiobooks”. The Toronto Star, July 2018, <https://www.thestar.com/entertainment/books/2018/07/06/why-the-toronto-public-library-cant-buy-some-of-canadas-top-audiobooks.html>. 20 August 2018

Acquisition

In our larger consumer survey, we asked adult book-buying Canadians to select all the ways they have obtained books of any format. 5% of respondents borrowed or listened to an audiobook from a public library, which is 2% more than those who had bought or listened to an audiobook from a retailer or audiobook subscription service. Interestingly, 1% of respondents said received an audiobook as a gift in the last 12 months.

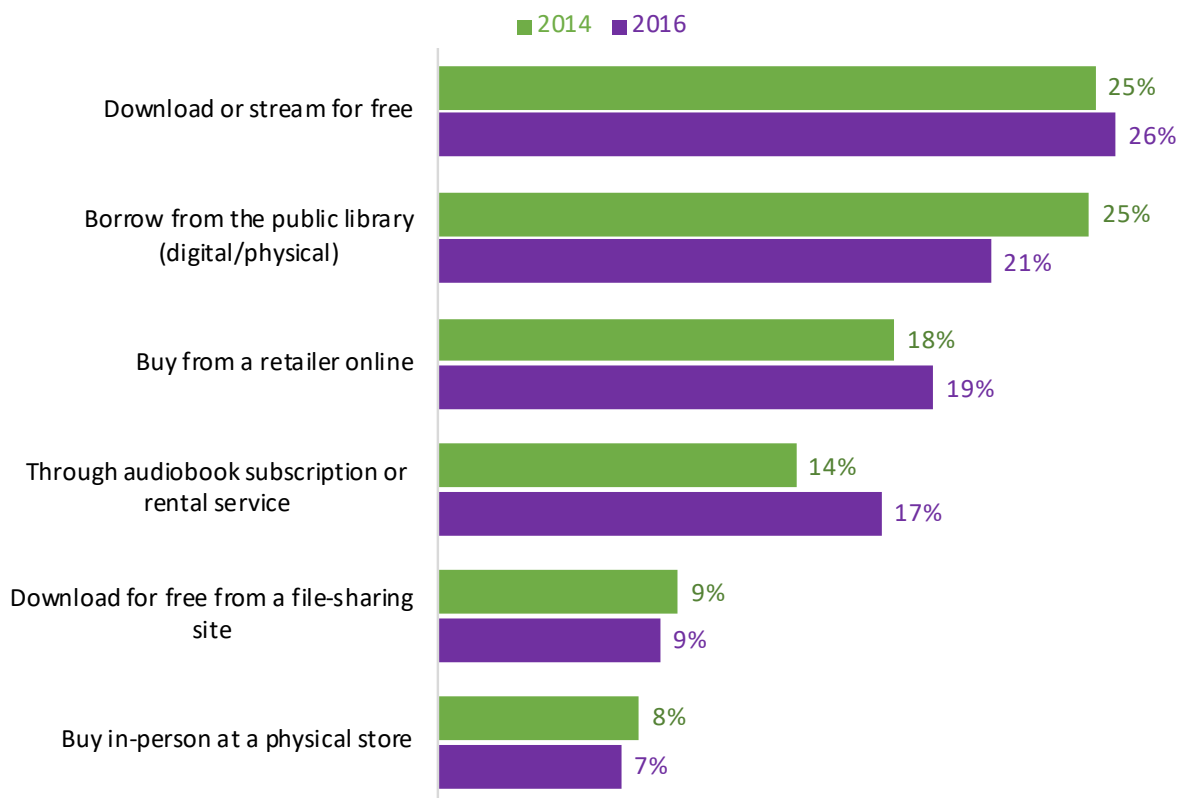
How books are acquired

Bought a book new in printed format	34%
Borrowed a printed book from a public library	23%
Bought a second-hand or used book from charity shop	21%
Received a printed book as a gift	19%
Borrowed a book/ebook from a friend/relative	18%
Downloaded an ebook/book app for free	11%
Bought an ebook	10%
Borrowed an ebook from a public library	7%
Borrowed, or listened to, an audiobook from a public library	5%
Borrowed a book/ebook from a school/college/university library	4%
Received an ebook as a gift	3%
Bought, or listened to, an audiobook from a retailer or audiobook subscription service	3%
Bought a book app	1%
Received an audiobook as a gift	1%
Borrowed an ebook from Amazon Prime/Lending Library	1%
None of these options	30%

Question: In which of the following ways have you obtained books in the last 12 months, either for yourself or for someone else?

In our audiobook surveys from 2014 and 2016, we asked respondents to choose the one way they acquired most of their audiobooks. Most respondents in 2016 downloaded or streamed their audiobooks for free (26%), up 1% from 2014, or they borrowed from the public library (21%), down 4% from 2014. In both 2014 and 2016, more respondents chose a file-sharing site over a physical store.

How listeners acquired audiobooks in 2014 and 2016



Question: How do you acquire your audiobooks? (Select all that apply.)

In 2018, the most popular way listeners acquire audiobooks is by purchasing from a retailer online (49%), followed by downloading or streaming for free from the internet/apps (36%). The third most popular way audiobook listeners acquire audiobooks is from public library apps such as Libby/OverDrive and Hoopla (32%). 25% of respondents use subscription or rental services such as Audible, Audiobooks.com, and Kobo.

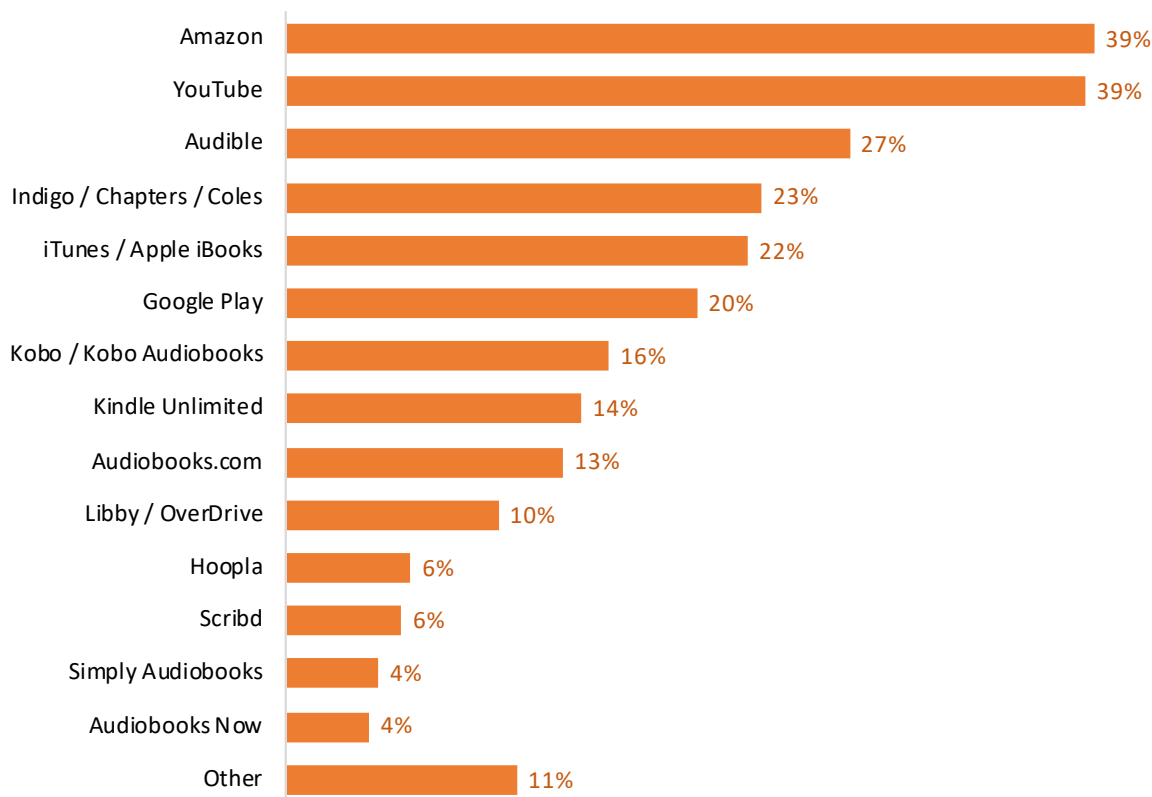
How listeners acquire audiobooks in 2018



Question: How do you acquire your audiobooks? (Select all that apply.)

Looking at audiobook retailers and other services, the majority of respondents found audiobooks from Amazon (39%), closely followed by YouTube (39%) and then Audible (27%). 19% of respondents found titles from the library, whether online through apps like Libby/OverDrive and Hoopla or in person. 16% of respondents selected Kobo / Kobo Audiobooks; Kobo launched its audiobook service in Canada relatively recently, in September 2017.

Where listeners acquire audiobooks

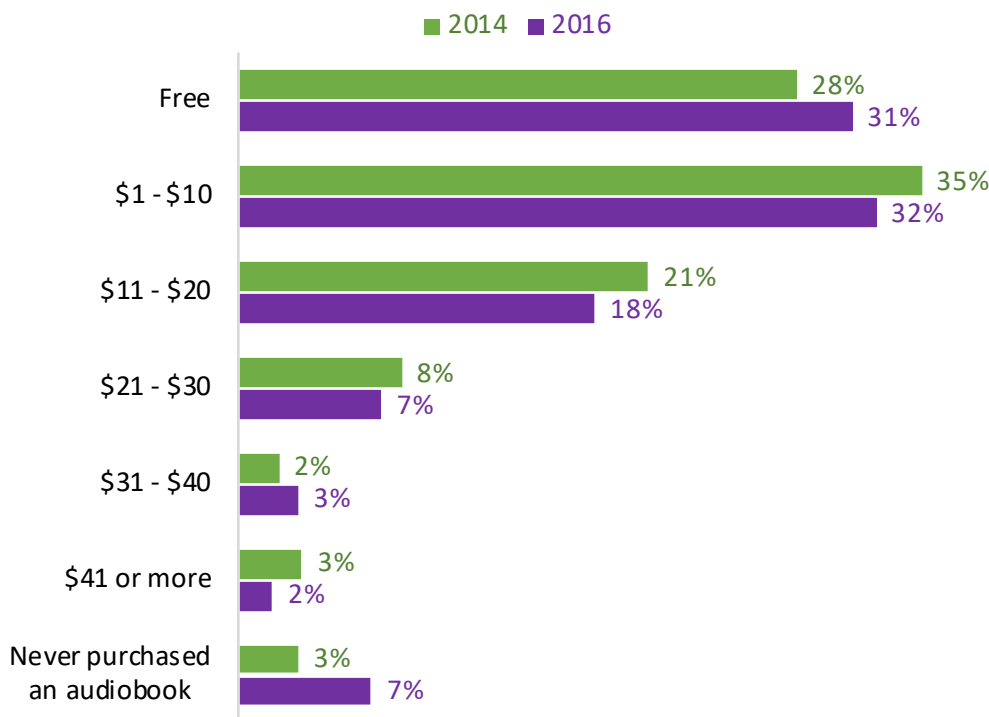


Question: How do you find the audiobooks you listen to? (Select all that apply.)

Pricing

In 2014 and 2016, the majority of respondents paid \$1-\$10 for audiobooks purchased in the previous year (35% and 32%, respectively). The number of respondents who paid nothing for audiobooks increased by 3% between 2014 and 2016, then decreased by 7% between 2016 and 2018.

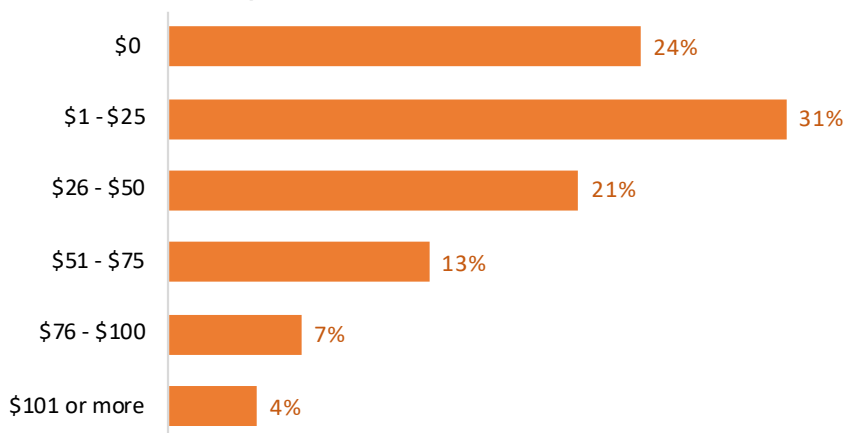
What listeners paid in 2014 and 2016



Question: Approximately how much money did you spend on audiobooks last year?

In 2018, most respondents spent up to \$25 on audiobooks (31%), followed closely by those who acquired free audiobooks (24%). 11% of audiobook listeners spent over \$75 on audiobooks in 2018, compared to the 2% in 2016 who spent \$41 or more.

What listeners paid in 2018



Question: Approximately how much money did you spend on audiobooks last year?

For book buyers who bought at least one audiobook in the previous year, 61% thought the audiobook was of excellent value at the price they paid, compared to 30% who thought it was good value and 9% who thought it was fair value for their money. Other formats are included in the graph below.

Value for money, by format

Paperback

Excellent 52%	Good 41%	Fair 7%
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Hardcover

Excellent 54%	Good 38%	Fair 8%
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Ebook

Excellent 60%	Good 36%	Fair 4%
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Audiobook

Excellent 61%	Good 30%	Fair 9%
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Question: And, at the price you paid, how would you rate the value for your money?

The majority of audiobook listeners (66%) agreed or strongly agreed that the price they paid for their audiobooks were good value. 27% of respondents were neutral and 7% of respondents disagreed.

A few respondents commented that they were bothered by the price of audiobooks:

“I think many of them are overpriced.”

“I like that it is something I can do while doing something else but I don’t like the high prices.”

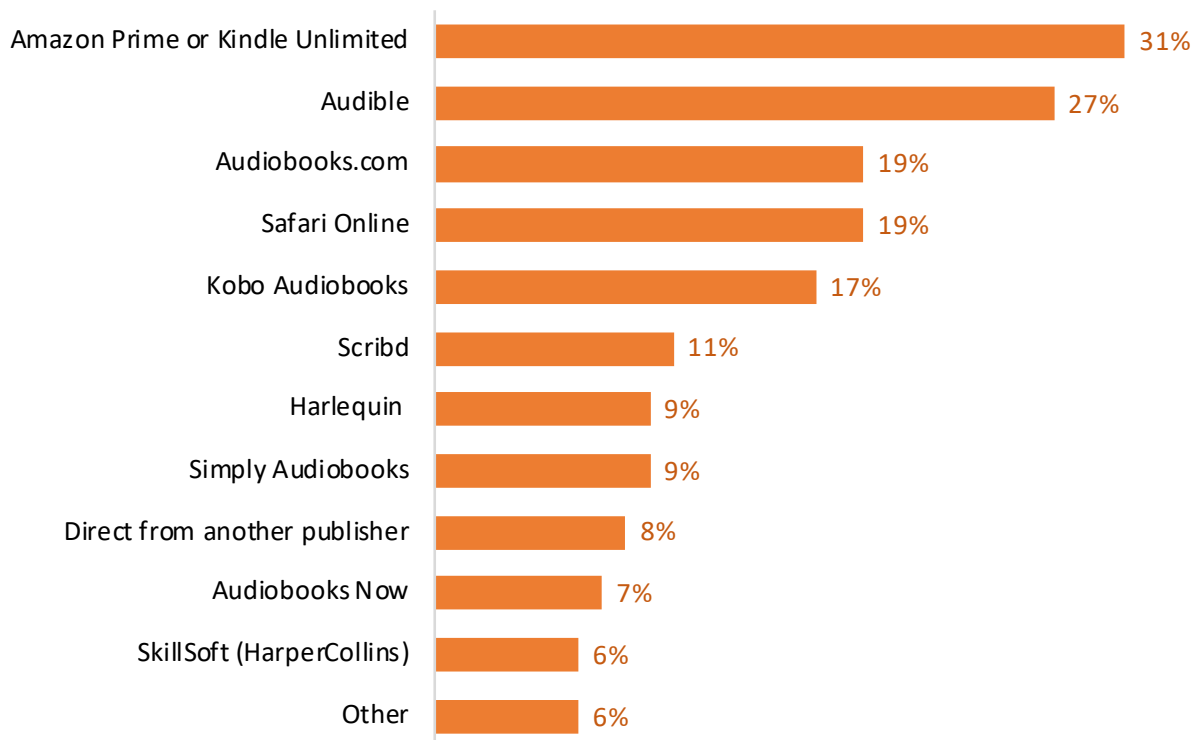
Half of respondents (50%) would spend slightly more on a print book if it came bundled with an audiobook or ebook. More than a quarter of respondents (26%) were neutral. 24% of respondents would not spend slightly more for a bundle.

Subscription Services

In 2018, 1% of all adult book-buying Canadians reported buying or listening to an audiobook from a retailer or audiobook subscription service.

For those respondents, Amazon Prime or Kindle Unlimited (31%) and Audible (27%) were the most popular subscription services used.

Use of subscription services



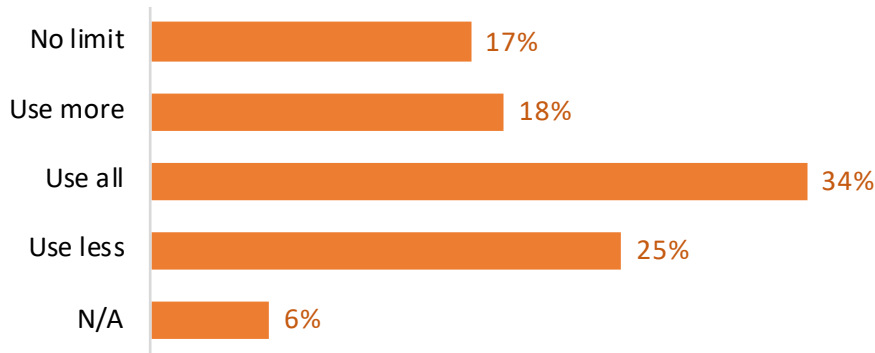
Question: What subscription service did you use?

Among the audiobook listeners we surveyed in 2018, 25% have an audiobook subscription. Of these, 77% have a limited number of books to access or purchase per month. The majority of those with an audiobook subscription (34%) usually access or redeem all of their titles or credits, followed by 25% who access or redeem fewer titles or credits than they have available.

“I also dislike the monthly subscription services because they only give one book and you are forced to pay each month regardless, I can get more option from the library.”

“I also find most subscriptions for audiobooks outrageously expensive for what you’re getting.”

How subscribers use titles or credits in a subscription



Question: With your audiobook subscription, if you have a limited number of books you can access or purchase in a month, which of these statements best describes your use?

Libraries

In 2018, 2% of all adult book-buying Canadians reported in our larger consumer survey that they borrowed or listened to an audiobook from a public library in the previous month.

In our June 2018 survey, 38% of audiobook listeners visited the public library, in person or online, in the previous month. Of the titles they checked out, 5% were audiobooks. In comparison, 85% were printed books and 11% were ebooks.

Public library checkouts, by format

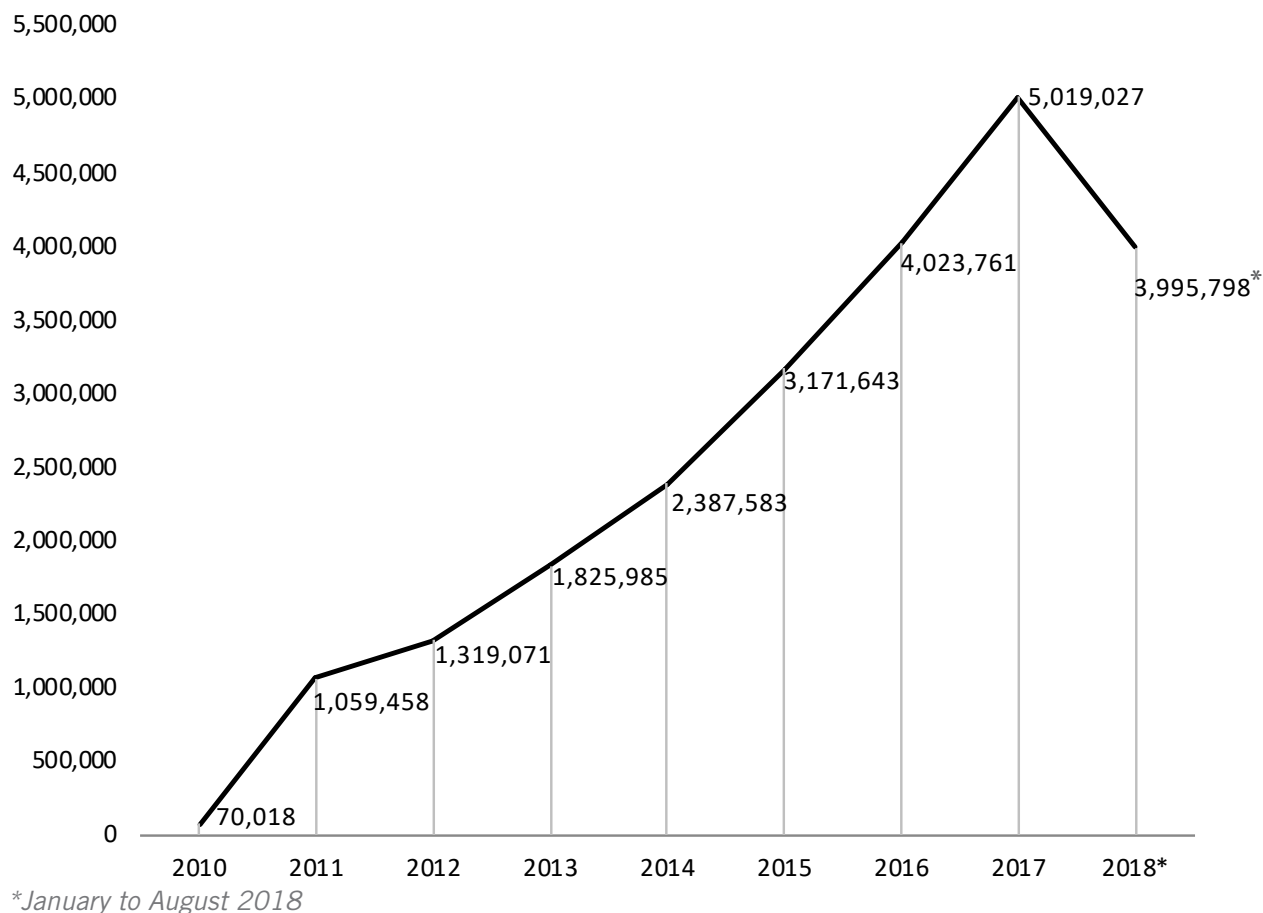
Physical books	Ebooks	Audiobooks
85%	11%	5%

Question: How many of each did you check out in the last month?

While 24% of all audiobook listeners said they obtained their audiobooks for free, only 5% of respondents said they borrowed or listened to an audiobook from a public library.

Checkouts of audiobooks circulating through OverDrive, which represents thousands of public libraries in Canada, have increased by 25% between 2016 and 2017.

Audiobooks being checked out in OverDrive



Audiobooks & Podcasts

Publishers and companies like Penguin Random House Canada, OverDrive, and Scribd have launched their own in-house podcasts, strategizing that free content will lead to impulsive audiobook or subscription purchases¹⁰. Some book publishers are turning podcasts into books as well as books into podcasts, and, of course, into audiobooks.

When we asked audiobook listeners whether they also listened to podcasts, there was a 1% decrease in podcast listeners since our 2016 audiobook survey. In 2018, 58% of respondents listen to podcasts, mostly weekly (26%) or several times a week (23%).

¹⁰ Kozlowski, Michael. "Global Audiobook Trends and Statistics for 2018". Good e-Reader, December 2017, <https://goodereader.com/blog/audiobooks/global-audiobook-trends-and-statistics-for-2018>. 20 August 2018

45% of audiobook listeners have listened to podcasts before starting to listen to audiobooks. 37% of audiobook listeners did not listen to podcasts before they started listening to audiobooks.

One respondent commented:

“I really like audiobooks. I think I would enjoy podcasts as well but I haven’t figured out how to play them.”

Exploration of Future Market Trends

Audiobooks have expanded from passive listening to interactive audiobooks, as seen in murder mysteries and dramas audiobooks, such as BBC’s *The Inspection Chamber* and Open Road Integrated Media’s *The Murder Chronicles*, and serialized storytelling like Serial Box.

As noted in the May 2018 episode of the BookNet Canada Podcast on audiobooks¹¹, the intersection and distinctions between different forms of audio content are blurred with narrative podcasts, books-to-podcasts and podcasts-to-books, audio long-form journalism, radio dramas, and other content that may also include thematic music and sound effects.

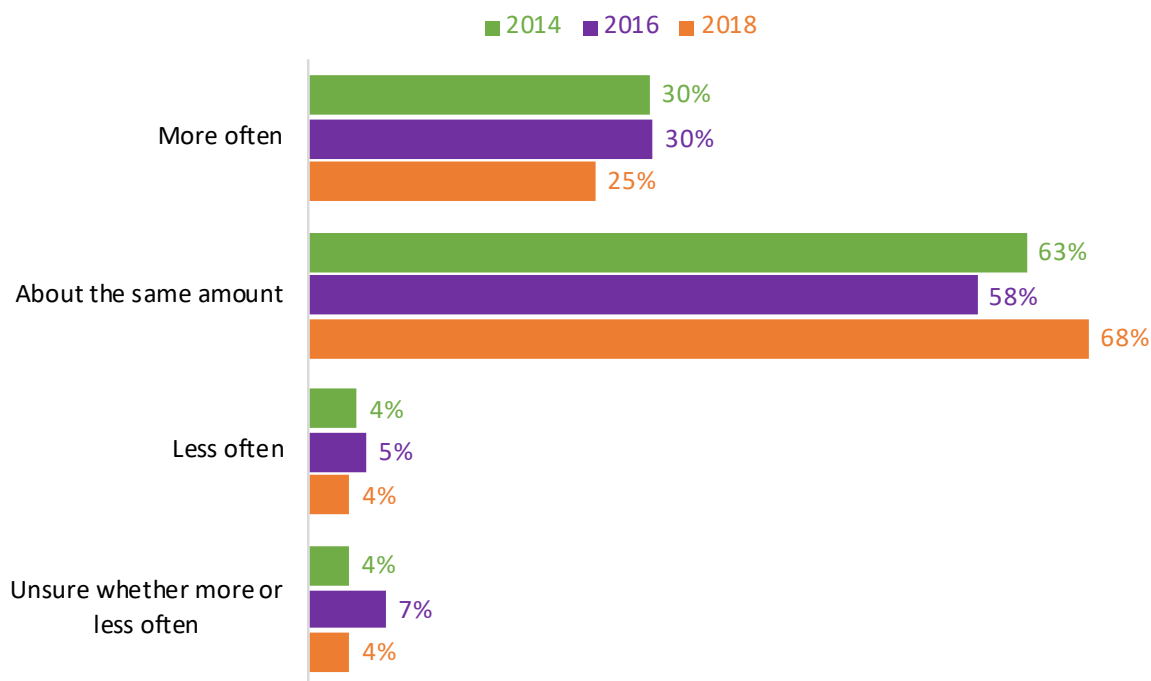
Blurred content between formats is also seen through described videos (a category in the Netflix app that can turn movies and TV shows into audiobooks), the spoken-word shows and live performances produced by Audible, the vinyl record label from Book*hug that pairs Canadian musicians and authors to combine music with literary readings, CBC’s recordings of poetry readings on vinyl, and others.

Even ebooks blur the lines by featuring audio, video, and read-along features. These enhanced ebooks are produced by 22% of Canadian publishers, as noted in our *The State of Digital Publishing in Canada 2017* report, with 32% of Canadian publishers either planning to or investigating the possibility of producing enhanced ebooks.

¹¹ BookNet Canada. “Podcast: Audiobooks, enhancements, and accessibility – Digital publishing in 2017”. BookNet Canada, June 2018, <https://www.booknetcanada.ca/blog/2018/6/28/podcast-audiobooks-enhancements-and-accessibility-digital-publishing-in-2017?rq=audiobooks>. 4 September 2018

Meanwhile, 68% of audiobook listeners expect to listen to audiobooks at about the same frequency in the near future, which is up from 58% in 2016. Since 2016, fewer respondents plan on listening to audiobooks more often.

Planned audiobook listening in the future



Question: In the near future, do you expect to listen to audiobooks:

Interestingly, this conflicts with the views of 73% of publishers who think audiobook sales are on the rise; 23% of publishers surveyed in *The State of Digital Publishing in Canada 2017* report think audiobook sales will stay the same. We will find out.