

# Listen & Read

The Battle for Attention



Bookwire

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## The Battle for Attention

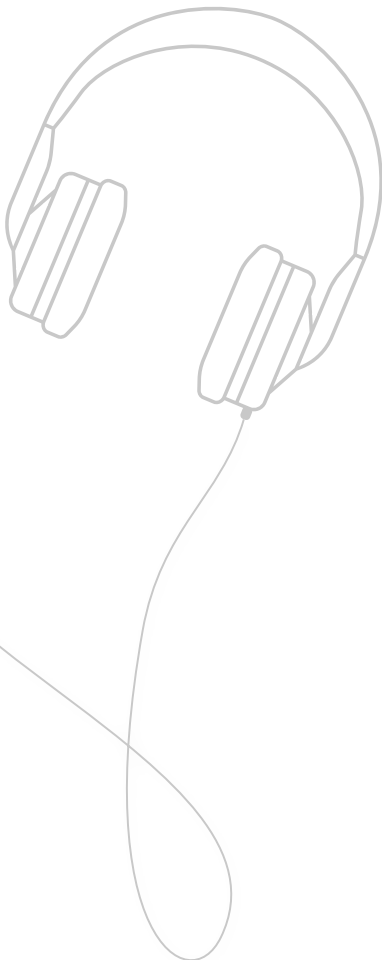
A new report  
about key audience  
behaviour in the age  
of eBooks, audiobooks  
and podcasts

The media landscape, including book publishing, is undergoing rapid development and profound change due to the digitization of content, and its respective sales and marketing channels. It is now possible to consume all kinds of narrative content (from fictional to informative) in more and more formats, which enables it to keep reaching new target groups.

The audio boom, which has already experienced rapid growth for years and still continues to gather pace, shows just how far-reaching the progress of this development is. Consumers keep adapting to new technical possibilities: AirPods and smart speakers have become part of everyday life and continue to change media use. At the same time, more and more content is becoming available at our convenience through globally active platforms. People are listening more now than ever before! An end to the “golden age of audio” is so far not in sight.

Nevertheless, the more media formats are available, the more they compete with each other for users’ attention. Does the audiobook boom mean that people are reading fewer eBooks? Are podcasts taking some of the share of the market from audiobooks? Or could their interdependence even mean that they fuel each other? What can be derived from the usage behaviour of readers and listeners of eBooks, audiobooks and podcasts?

We wanted to know how eBooks, digital audiobooks and podcasts fit into the “battle for attention”. To find out, we surveyed 2,335 people aged between 16 and 65 years, across Germany, about their media use during the past six months, and also asked 1,000 users of eBooks, digital audiobooks or podcasts more detailed questions about their usage behaviour. We conducted the surveys during August and September 2020, in association with GIM Gesellschaft für Innovative Marktforschung mbH. The surveys yielded twelve highly topical and illuminating insights that we will present in the following report.



Summary:  
12 insights  
into the consumer  
behaviour of  
eBook, audiobook  
and podcast users

- 1 eBooks, audiobooks and podcasts have become mainstream. People often use two or three of these media in parallel.
- 2 eBooks, audiobooks and podcasts are complementary media that only cannibalize each other to a minor extent.
- 3 The three media interact in a mutually reinforcing manner.
- 4 eBooks have fans and are more than “just” practical. And they still allow room for printed books.
- 5 Gen Z love to listen; baby boomers enjoy reading.
- 6 Parallel users of the three media examined are in the middle generations, Gen Y and Gen X, and are usually “heavy users”.
- 7 Gen Z would rather pay for access in subscription models over individual purchases. Publishers who want to reach them shouldn’t pass by the major audio platforms.
- 8 Families have a strong affinity for media – and on average use several digital media in parallel.
- 9 People often actively search for content – discoverability is essential.
- 10 Podcast use is focused, and podcast users are loyal listeners.
- 11 Digital audiobooks and podcasts are often accompanying media that people also enjoy using on the move.
- 12 Smart speakers are becoming increasingly relevant.

## Digital reading and listening: Welcome to mainstream media use!



**Insight 1:** eBooks, audiobooks and podcasts have become mainstream. People often use two or three of these media in parallel.

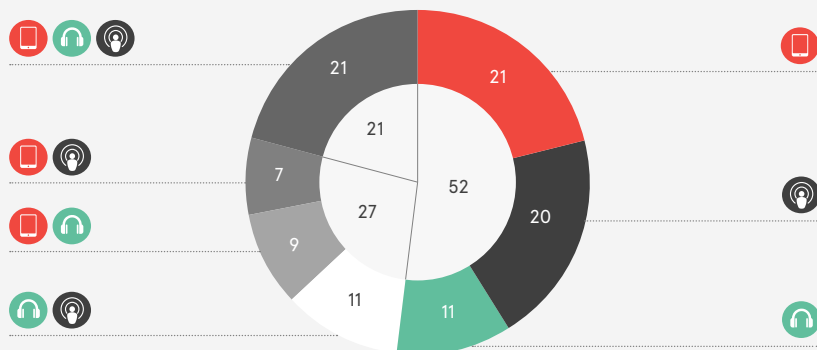
To what extent have eBooks, digital audiobooks and podcasts become mainstream? We looked at how many people use these three media – and how high the proportion of users is who consume two or even all three formats.

The figures show that eBooks, audiobooks and podcasts stopped being a niche market for content producers a long time ago, and have finally reached mainstream consumers in Germany: 43 percent of those questioned said that they had used at least one eBook, audiobook or podcast within the past six months – a fact that is representative of the German population as a whole.

**Parallel and/or cross-media consumption of these media is widespread:** just under half of all users (48 %) use a number of these media in parallel, a good fifth (21 %) even use all three, and more than a quarter use at least two (27 %). Of the other more than half (52 %), 21 percent only use eBooks, 20 percent only use podcasts and 11 percent only use audiobooks.

### Individual or parallel use

■ eBooks
 ■ Digital audiobooks
 ■ Podcasts



Basis: users of eBooks, digital audiobooks and/or podcasts, n=1,000, in %

Competition or mutual reinforcement?  
The interplay of media in the “battle for attention”



**Insight 2:**  
eBooks, audiobooks and podcasts are complementary media that only cannibalize each other to a minor extent.

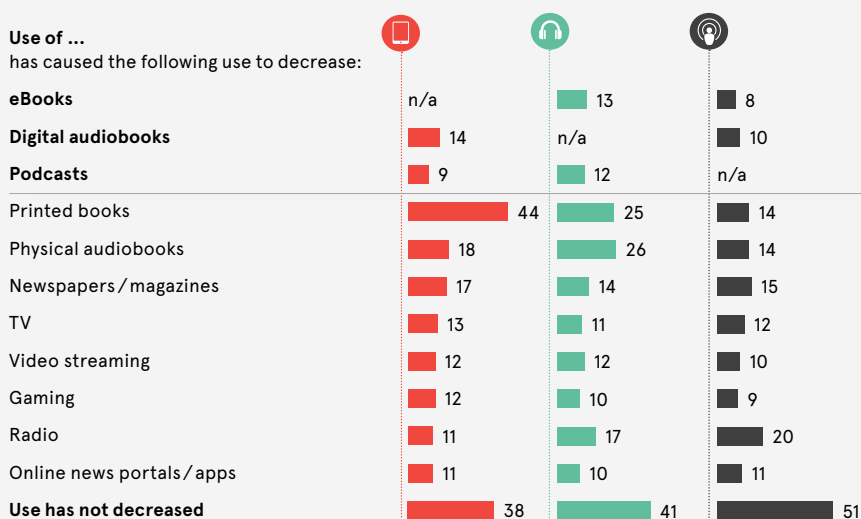
Video killed the radio star? – A classic and crucial question for exploring cross-media usage is that of competition between the various different formats: do new types of media supplant established and/or traditional media, or do they complement them? To what extent do similar media compete for users’ reserves of attention and time – can cannibalization effects be seen here? And does consumption of one medium stimulate or inhibit use of others?

A clear answer to the question about cannibalization effects can be found by looking at the data: **eBooks, audiobooks and podcasts hardly cannibalize each other at all – a maximum of 14 percent of users said that they use eBooks, audiobooks or podcasts at the expense of one of the other two media.**

Thus, 14 percent of eBook readers revealed that choosing this format led them to listen to fewer audiobooks. The other identifiable effects of the three media on each other are even smaller.

Cannibalization of other media

eBooks Digital audiobooks Podcasts



Basis: only respondents who use the respective medium, n=582, 523, 584, in %

Everything points to the three media examined tending to complement each other rather than being in competition with each other. A key reason for this is found in the users’ motivation for choosing a certain medium: all three media are primarily used for entertainment. However, while eBooks and audiobooks are used for relaxation and entertainment more so than podcasts,

podcasts tend to expand knowledge and education and/or are more informative about current affairs.

Looking at cannibalization effects on traditional media, especially printed books, reveals a slightly different picture: just under half of eBook users (44 %) said that they read fewer printed books because of their digital counterpart; this figure was 25 percent among audiobook listeners.

Podcasts, on the other hand, can be regarded as a complementary medium for almost all media consumers. Although there is some cannibalization of classic radio (20 %), it hardly affects other media. "Digital audio kills the radio star" – but only the radio star.



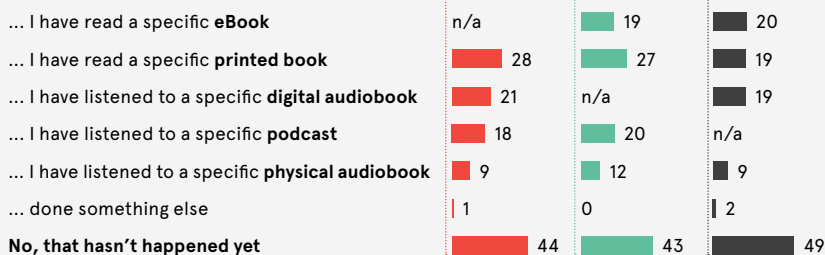
**Insight 3:**  
The three media interact in a mutually reinforcing manner.

The results of the study tend to point to a strong interaction, rather than competition, between the media formats. Over half of eBook users (56 %), audiobook users (57 %) and podcast users (51 %) revealed that consumption of the medium in question had already induced them to use content on another medium – an astonishingly high proportion.

Stimulation of other media

eBooks Digital audiobooks Podcasts

Yes, because of an eBook / digital audiobook / podcast...



Basis: only respondents who use the medium in question and at least one other medium, n=513, 486, 516, in %

In concrete terms, that means that 28 percent of eBook users have read a specific printed book because of their eBook consumption. Around a fifth have listened to a specific audiobook or podcast. Conversely, around a fifth of podcast listeners were inspired to consume a specific eBook, printed book or audiobook.

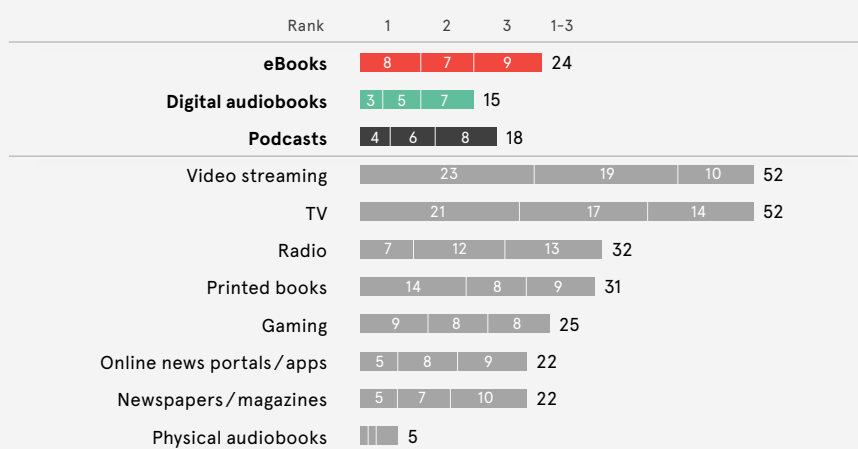


**Insight 4:**  
eBooks have fans and are more than “just” practical. And they still allow room for printed books.

“Which are your favourite media?” A quarter of users of these three media responded to this question by saying that eBooks were their favourite format to consume. They are not only practical and can be used (almost) anywhere, but are also a relevant, independent medium for many users. **The study does not support any fears that eBooks could be replaced by other digital media.**

Ranking by favourite medium

eBooks Digital audiobooks Podcasts



Basis: users of eBooks, digital audiobooks and/or podcasts, n=1,000, in %

At the same time, the data reveals that analogue media still have loyal communities of users today. For 40 percent of users, the main reason for not using eBooks is that they prefer analogue media – a surprisingly high number in our fast-moving digital age, and a fact that will please many.

Perspectives on the target groups: The “clash of media generations”



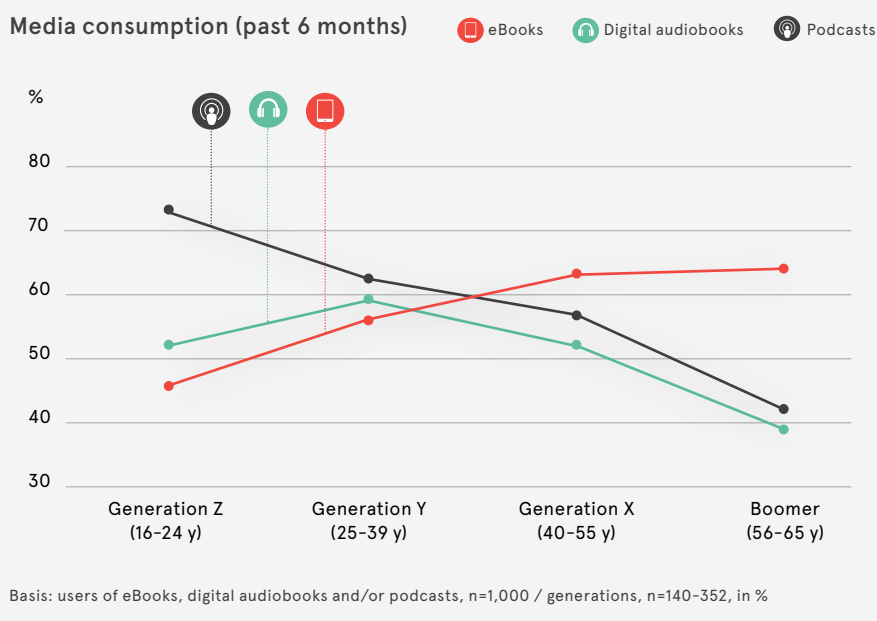
**Insight 5:** Gen Z love to listen; baby boomers enjoy reading.

The type, quantity, diversity and intensity of our media use is not least also a question of age. The three types of media that we and the GIM researched are no exception. We took a closer look at the affinities of the different generations (each abbreviated to “Gen”).

**Media use of the three formats investigated is clearly distributed across the different generations:** audiobooks and podcasts mainly reach Gen X (40–55 years), Gen Y (25–39 years) and Gen Z (16–24 years), but less so the baby boomer generation (56 years and older). By contrast, eBooks are popular with the latter.

However, podcast providers should not completely write off baby boomers as a target group – a good quarter (26 %) of all baby boomers who don’t use podcasts revealed that they had never engaged with the medium and its benefits, so there is definitely still potential here.

Podcast users currently still tend to be younger, with Gen Z the dominant generation.







**Insight 6:**  
parallel users of the three media examined are in the middle generations, Gen Y and Gen X, and are usually “heavy users”.

It is particularly interesting to look at the parallel users of all three media examined. These cross-media pros are mainly in Gen Y and Gen X, i.e. the middle age group (25–55 years). This age group bridges the gap between all of the generations: they often have children and are halfway through their working life but nevertheless spend a lot of time with (digital) media – because they are well-equipped in terms of the necessary technology, thanks to their usually above-average household income.

The parallel users also stand out because their media affinity is higher on the whole than that of the average population – with regard both to other digital media and traditional media: the average simultaneous consumer of eBooks, audiobooks and podcasts also uses other media in parallel. The average number of media used by users of the three media formats examined is seven – and even as high as ten among parallel users of all three media!

**The data shows a link between parallel use and intensive use of the three media. Consumers of all three media (eBooks, audiobooks and podcasts) therefore use them more frequently than consumers of just one or two of these media.**



**Insight 7:**  
Gen Z would rather pay for access in subscription models over individual purchases. Publishers who want to reach them shouldn't pass by the major audio platforms.

For many content producers, Gen Z (16–24 years) is a relevant but hard to reach target group because many aspects of their user behaviour differ greatly from that of older generations: media offers need to be precisely tailored to their interests if they are to notice them at all. Traditional media such as printed books, newspapers, TV and other analogue media are no longer relevant for this target group, and audio media clearly dominate the digital offers we investigated – Gen Z is the “audio generation”.

Looking at the facts, that means: 16 to 24-year-olds listen to podcasts more frequently than other generations (73 % vs. 62 % Gen Y and 57 % Gen X), and they mainly consume media on the major music streaming platforms – if a media content provider isn't listed on one of these platforms, it may as well not exist for Generation Z. Spotify is most frequently named as a favourite provider and is the undisputed top dog – for both audiobooks and podcasts. 43 percent of Gen Z prefer to stream audiobooks with Spotify and 70 percent prefer to stream podcasts with Spotify.

Members of Gen Z said more frequently than older generations that reading eBooks (21 % Gen Z vs. 15 % total) and listening to audiobooks (21 % Gen Z vs. 14 % total) is too expensive – a fact that can also, but not only, be attributed to the limited financial means of this generation. At least in the case of eBooks, they also more frequently reported that they generally had no interest in eBooks (28 % Gen Z vs. 19 % total).

Another striking fact about willingness to pay that initially seems to contradict this is that Gen Z are significantly more likely than Gen X and baby boomers to use subscription models for digital content. The probable explanation for this is that those offer more content for a price that ultimately appears more attractive in comparison to individual purchases. According to our study, Gen Z use subscription providers much more frequently than any other group (77 % Gen Z vs. 55 % total) – at least for consumption of audiobooks and podcasts.

It runs in the family:  
Families as relevant  
target groups for  
digital media

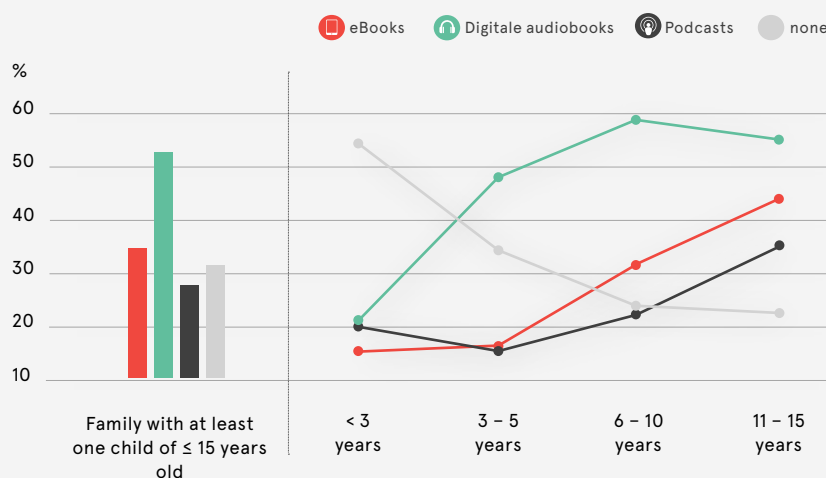


**Insight 8:**  
Families have a strong  
affinity for media – and  
on average use several  
digital media in parallel.

Given the “generation insights” explained above, it is obvious that different age groups, with their corresponding affinity to the three types of media, living under one roof makes families a particularly interesting target group that should be looked at separately.

The figures clearly show that families have a high media affinity. Just under a third (29 %) of users of eBooks, audiobooks or podcasts live in a household with children (defined as at least one child aged 15 or younger in the household). 43 percent of cross-media “heavy users”, who use all three media in parallel, live in families. A particularly interesting fact is that, from the age of just three years, the proportion of children who use digital media is higher than the proportion who don’t use it (yet).

Media consumption among children



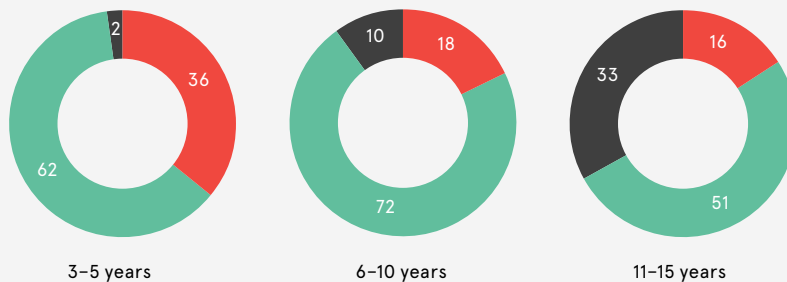
Basis: only respondents with children in the age group in question, n=56-292, in %

Compared with eBooks and podcasts, audiobooks are the most important digital medium for families with children under 15 years. 53 percent of children have listened to audiobooks either alone or with their parents during the past six months. However, 36 percent of children use eBooks (alone or with their parents) and 28 percent use podcasts.

### Choice of content for children

Content for my child(ren)...

- ... was chosen by **me** alone
- ... was chosen by my child and me **together**
- ... was chosen by **my child** independently



Basis: only respondents with children in the age group in question who use digital content, n=47-105, in %

**With regard to the choice of media for children and/or by children, the survey shows that parents act as gatekeepers, but by no means as sole decision-makers.** Parents and children mainly choose media content together (approx. 50-70 % depending on age group). Children's right to make their own decision increases with age.

Search and find:  
Media choice,  
customer journey  
and discoverability



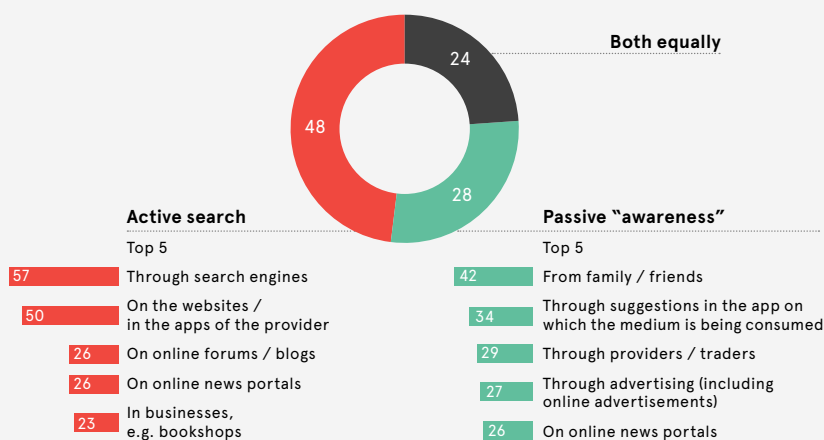
**Insight 9:**  
people often actively  
search for content  
– discoverability  
is essential.

How does content reach users now? Or conversely, how do users find new content and what do their “user journeys”, which ideally lead to purchase or use, look like?

On the basis of the data, it can be said that a large proportion of 72 percent of users actively and specifically search for new content for eBooks, audiobooks and podcasts. The customer journey primarily goes through search engines such as Google etc., as well as provider websites and apps.

It is hardly surprising that the consequence for content producers and providers is that search engine marketing (SEM), search engine optimization (SEO) and metadata optimization will continue to be highly significant in the future for enabling their content to be easily found on the web in general and also within the platforms.

Sources of information for new content



Basis: users of eBooks, digital audiobooks and/or podcasts, n=1,000 / active search, n=725 / passive "awareness", n=520, in %

Around every fourth person actively searching for content also said that they were inspired by blogs, news apps or sites, or brick-and-mortar retailers, e.g. book shops.

Among the respondents who said that they were most commonly made aware of new content passively, recommendations from friends/family were top of the list. "Recommendations in the app" (34 %), "provider/retailer" (29 %) and "advertising" (including online advertisements, 27 %) rank directly below this.

There is still clear visibility potential for publishers and content producers here!



**Insight 10:**  
podcast use is  
focused, and  
podcast users are  
loyal listeners.

Unlike audiobooks and eBooks, podcasts basically have a serial format and therefore give another interesting insight into user behaviour: many respondents evidently consume them in a very specific way. **Around half of all listeners have subscribed to just one to three podcasts, and they listen to them very regularly – around 70 percent of podcast subscribers listen to more than 50 percent of their podcasts regularly. This points to high degree of loyalty among listeners and/or that users have a close attachment to the medium.**

Learning: the first subscription is highly relevant when it comes to podcasts – once a provider has a foot in the user's door and offers good content, it will very probably be rewarded with loyal subscribers.

Flexible and mobile:  
When, where and how  
are the media used?



**Insight 11:**  
digital audiobooks and  
podcasts are often  
accompanying media  
that people also enjoy  
using on the move.

In which situations are eBooks, audiobooks and podcasts used? And which devices are used for their consumption? We looked at the various modes of use.

"Listen on the go": while eBooks, unlike audiobooks and podcasts, are used more frequently at home, on holiday or before going to sleep, digital audiobooks and podcasts are popular in situations where users are going about another task – and can listen at the same time. Examples are travelling to work (podcasts and audiobooks 24 % each, eBooks 16 %), in the car, activities in the household (podcasts 33 %, audiobooks 29 %, eBooks 11 %) and exercise.

The advantage of digital media compared with its analogue counterparts can be seen in typical "on the go" situations: parallel users of eBooks and printed books, as well as parallel users of digital and physical audiobooks, use the digital variations much more universally.



**Insight 12:**  
smart speakers are  
becoming increasingly  
relevant.

The keyword is "smart": when it comes to playback devices for digital media, the smartphone is the ultimate allrounder. It is the most commonly used device for playing audiobooks (72 %) and podcasts (76 %), and comes in joint second with tablets for eBooks (36–37 % each), behind the classic e-reader (62 %). However, smart speakers are also already used by around 20 percent of audiobook and podcast listeners. There is still lots of potential here – smart speakers are a growth market!

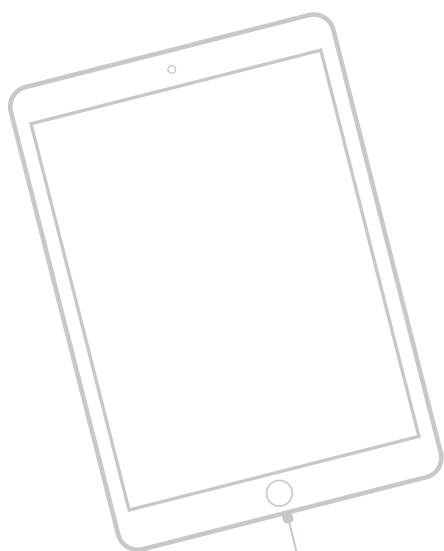
## Conclusion

What follows from these twelve insights? It is definitely possible to give a clear answer to the initial question of our analysis: eBooks, audiobooks and podcasts are in direct competition much less than expected; instead, they complement each other with regard to user motivation and situational context – and even mutually strengthen each other.

So, which concrete recommendations for publishers, platforms and content producers of all kinds can be derived from the findings?

The recommendations from our point of view are as follows:

- A multi-format strategy is essential today: to reach as many target groups as possible, content must be considered for all suitable formats from the start of conception onwards.
- Each age group needs to be addressed separately: the user behaviour of the different generations differs greatly – this must be taken into consideration both during production, as well as for advertising and making new content available.
- Generate audience flow: target young customers and pick them up where they consume, and then accompany them through the years by adapting the way you address them to their changing user behaviour.
- Cannibalize yourself before others do! Anticipate cannibalization by other media with a long-term multi-format strategy.
- Situation matters: media are consumed in different ways according to situational context and technical possibilities, and they are subject to constant change – content, format and usage situation should converge.
- Stimulation is controllable: all of a publisher's content can relate to each other across different formats and media, so the customer always remains in their own content universe.



Against the background of consistent customer focus, the much-feared “battle for attention” among digital reading and audio media doesn’t exist at all in this form. Instead of responding worriedly to the diversifying media landscape, it is more appropriate to recognise and increase the potential there. Because there is a lot of it!

For example, we discovered that 16 to 24-year-olds read few eBooks, but listen to lots of podcasts, partly because they are motivated to expand their knowledge – it is obvious that there is potential here for non-fiction publishers. We learned that eBooks are still and will continue to be a popular medium. We found out that smart speakers are a clear growth market and will continue to determine listeners’ user behaviour in the future. And much more. Every publisher and content producer can draw their own conclusions from this analysis – we can provide advice and support if you wish.

One final point: the era of free podcasts looks to be drawing to a close – by getting involved today, you can help to shape the monetization strategies of the future.

## About this study – basic information

For the present study, GIM Gesellschaft für Innovative Marktforschung mbH surveyed a total of 2,355 people across Germany, aged from 16-65 years, in an online access panel, in a two-stage process during the period 28/08-07/09/2020. The group surveyed was quota-representative (age, gender, state).

The 2,355 people were initially asked in a short survey about their media use during the past 6 months, in order to determine the representative proportion of eBook, audiobook and podcast users for the German population. Of these 2,355 people, 1,000 people had used at least one of the three media (eBooks, digital audiobooks, podcasts) relevant to the study during the past 6 months, and were then surveyed in greater depth about their usage behavior for this media, in order to more precisely investigate the interplay of media use.

### **Excursus: coronavirus pandemic**

In light of the coronavirus pandemic and the possible effect that this special situation might have on media consumption, a few specific questions were posed in the survey. The analysis shows that coronavirus has given the media a small boost, but the majority of current users have already been using the media for a longer time: the overwhelming majority (approx. 70-80%) began reading eBooks and/or listening to digital audiobooks or podcasts before the coronavirus lockdown. Of those who only started their media use during lockdown, most would like to continue to use the respective medium in the future (only 10-20% said "no"). We can therefore guarantee that, on the whole, typical, coronavirus-independent media behaviour was measured.

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