

Distribution Channels

The survey covers book distribution in this manner in the new democracies for the second time. The following section of the questionnaire relates to this issue:

#	Item	Remark
38	Bookshops (%)	Questions 38-46 analyze structure of Line 14: shares of distribution channels. This Line 38 includes those bookshops as well, which are in shopping centers.
39	Quasi bookshops (%)	Shops, where books stand for less than 1/3 of sales.
40	Supermarkets (%)	Book sections of supermarkets and department stores.
41	Book clubs (%)	
42	Outdoor (%)	Outdoor sales points: stalls, stands, kiosks, sidewalk desks etc.
43	Salesmen (%)	Door-to-door sales agents.
44	Direct sale (%)	Sales from publisher's own warehouse, publishers' kiosk at book fairs and other occasions.
45	Remainders (%)	Sales of new copies in remainder, 'discounted' or second-hand bookshops.
46	Other, if any (%)	Note that lines 38-46 should add up to 100%. If not, please re-calculate accordingly.

Table 24: Percentage structure of book distribution channels in 2000

	Bookshop	Quasi bookshop	Super-market	Book club	Outdoor	Salesman	Direct	Remainder	Other if any	Total
ALB	45	0	0	0	29	5	10	10	0	100
ARM	70	8	3	0	5	0	10	2	2	100
BOS	38	14	4	0	10	2	27	5	0	100
BUL	30	5	2	1	60	1	1	0	0	100
CRO	30	10	3	1	10	12	5	9	20	100
CZE	78	1	12	2	5	0	2	0	0	100
EST	60	0	20	5	3	0	7	5	0	100
GEO	2	10	5	0	80	1	2	0	0	100
HUN	70	6	5	10	5	0	0	4	0	100
KYR	74	3	2	2	15	0	5	0	0	100
LAT	27	40	5	0	27	0	0	1	0	100
LIT	82	0	6	0	2	2	8	0	0	100
POL	50	7	25	4	0	14	0	0	0	100
ROM	40	7	10	5	23	0	15	0	0	100
RUS	50	10	4	1	15	5	15	0	0	100
SLK	66	5	14	5	3	0	2	5	0	100
SLN	40	12	0	0	0	0	48	0	0	100
TAJ	29	0	0	0	49	5	10	7	0	100
UKR	30	10	0,1	5	35	5	15	0	0	100
YUG	65	5	-	-	15	1	13	1	0	100
average 2000	48,8	7,6	6,0	2,1	19,5	2,6	9,8	2,5		
average 1999	51,2	3,9	4,1	4,6	21,2	4,4	<i>not comparable</i>			

Some of the new democracies show signs of westernisation. Although sidewalks in these countries, too, were full of book vendors a few years ago, now they are quite insignificant; growing sales in shopping centres and book clubs is the current trend. At the other end of the region, outdoor sales are still estimated as being the leading commercial channel for books in a few countries.

Observe Russia: just like in another section of the survey (cost structure of academic books), the biggest country of the region at the same time appears to occupy the central position, always next to the middle value.

Table 25: Sales in bookshops

LIT	82	ALB	45
CZE	78	ROM	40
KYR	74	SLN	40
ARM	70	BOS	38
HUN	70	BUL	30
SLK	66	CRO	30
YUG	65	UKR	30
EST	60	TAJ	29
POL	50	LAT	27
RUS	50	MAC	5
average	46,7	GEO	2

Ranklist of countries by percentages of sales in bookshops.

The countries that have come quite close to being accepted into the EU reflect a picture that is too beautiful to remain as such for long. In the developed western countries we are witnessing a gradual retreat of sales in traditional bookshops to the benefit of alternative channels, especially supermarkets and ordering via Internet. We may perhaps get explanation later on about the unexpected position of Kyrgyzstan and Armenia, and about the unbelievably low figures of Georgia and Macedonia.

Table 26: Sales through supplementary channels

GEO	90
LAT	68
BUL	65
TAJ	56
UKR	45
ALB	39
ROM	30
average	29,6
CRO	29
BOS	29
RUS	25
YUG	21
KYR	18
ARM	15
HUN	15
SLK	13
SLN	12
EST	8
POL	7
CZE	6
LIT	2

Cumulated percentages of sales outdoors + in quasi bookshops + through remainders in 2000.

These categories were first used in previous year's questionnaire; find the definitions above.

The category called "quasi bookshop" may be specific of the transition period from centralised economy. This indicates mainly those retail units which used to be state bookshops, often still are called bookshops, but under new circumstances the decisive majority of their sales is stationery, calendars, bianco invoices, batteries, music cassettes etc.

Also the term *remainder* is an approximative denotation for the *discount shops* that sell large amounts of new books, often of dubious origin.

How to explain the position of the countries on the top, above the double of the average? Whether by tectonic changes in the bookselling infrastructure; local traditions; extreme pessimism (honesty, modesty, rigour etc.) on the part of the respondent? And whether the mere 2% in Lithuania may be explained by the same factors, with opposite + or - sign?