



**Survey of UK  
Distributors  
and Sales and  
Marketing  
Organizations  
(2005)**

**Association for  
the Export of  
Canadian Books**

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## Introduction

This project was set up by the Association for the Export of Canadian Books (AECB) in March 2005 to research the availability and suitability of UK organizations in the distribution and sales and marketing sectors. Canadian publishers had reported that they found it difficult to find efficient and cost-effective services in the UK. The purpose of this report and the survey which forms the basis of it was as follows:

- to research whether this perception was accurate;
- to identify UK suppliers who were interested in providing services to Canadian publishers;
- and to identify any reasons why UK suppliers might not wish to provide services to Canadian publishers.

## Methodology

A questionnaire, the contents of which were discussed and agreed with the AECB and which can be found at the end of this report, was sent to the following 26 distributors and 17 sales and marketing organizations:

### *Primarily distributors*

- Airlift Book Company
- Bookpoint
- Central Books
- Clipper Distribution
- Combined Book Services
- Deep Books
- Gazelle Book Services
- HarperCollins Supply Chain
- Lavis Marketing
- Littlehampton Book Services
- Macmillan Distribution
- Marston Book Services
- MK Book Service
- NBN International
- Orca Book Services
- Portfolio Books
- Ragged Bears
- Random House Distribution

- Thomson Publishing Services
- The Trade Counter
- Turnaround Publisher Services
- Turpin Distribution Services
- Vine House Distribution
- Welsh Books Council Distribution Centre
- Windsor Books International
- Wisdom Books

*Primarily sales and marketing organizations*


- Amalgamated Book Services
- Book Representation and Distribution
- Bounce! Sales and Marketing
- Brian Inns Booksales and Service
- Chris Lloyd Book Sales
- Combined Academic Publishers
- Compass Independent Book Sales
- Derek Searle Associates
- The Eurospan Group
- Hi-Marketing
- John Rule Sales and Marketing
- John Wilson Book Sales
- Kuperard
- Melia Publishing Services
- Quantum Publishing Solutions
- Premier Book Marketing
- Troika

## **Responses**

The following organizations responded positively (i.e. by returning the questionnaire):

- Chris Lloyd Book Sales
- Clipper Distribution
- Combined Academic Publishers
- Combined Book Services



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- Deep Books
  - Gazelle Book Services
  - Grantham Book Services
  - HarperCollins Supply Chain
  - John Rule Sales and Marketing
  - Lavis Marketing
  - Littlehampton Book Services
  - Marston Book Services
  - MK Book Service
  - NBN International
  - Orca Book Services
  - Portfolio Books
  - Random House Distribution
  - Thomson Publishing Services
  - The Trade Counter
  - Turnaround Publisher Services
  - Turpin Distribution Services
  - Vine House Distribution
  - Windsor Books International

The following organizations replied that they had no interest in pursuing the matter, though none gave particular reasons apart from Ragged Bears, who are not interested in new clients at present:

- Amalgamated Book Services
- Bounce! Sales and Marketing
- Derek Searle Associates
- John Wilson Book Sales
- Macmillan Distribution
- Ragged Bears

The response from the sales and marketing organizations in particular is very disappointing, but it must be borne in mind that many of these organizations are relatively small and unsophisticated and exist primarily to provide representation for smaller UK publishers. They might well not have the necessary resources or infrastructure to contract directly with Canadian publishers.

### **Summary of survey results**

The response highlighted the polarization by size which has been taking place in the UK trade. The major distributors, virtually without exception the in-house distribution centres for multinational compa-

nies, are certainly interested in providing services to new clients but only if the turnover and number of titles is substantial, and probably at levels beyond the reach of most Canadian publishers. At the other end of the spectrum are the dwindling numbers of independent distributors, generally with their own sales and marketing services, who would welcome new business at any level but may be unable to provide the degree of support Canadian publishers would ideally like. The poor response to the survey from sales and marketing companies strongly indicates that a strategy of keeping distribution and sales apart in the UK market may be a difficult one to put into practice.

Although all those who replied expressed at least polite interest in providing services to Canadian publishers, there was a distinct impression given that there is not much spare capacity at the present time and that most could pick and choose the publishers who would suit them best. Good companies, with whom Canadian publishers have worked in the past – Turnaround and Ragged Bears, for example – said they were not looking for new business.

Most respondents with overseas clients claimed to have had good experiences in their dealings with them and no major problems. 'Parochial' content and unsuitability for the UK marketplace were mentioned by one or two, however, as being obstacles to sales. Those distributors who also sell set great store by product they promote being compatible with their other lines and evidently prefer books that they can sell successfully to those they can simply put in their warehouses! There was also mention of high shipping costs causing some problems, though this would be a general comment on the UK market for Canadian publishers.


### **A cautionary note on distributors**

As mentioned above, the independent distribution sector has come under intense pressure in recent years, with a number of high-profile casualties (Bailey Brothers, Biblios, Plymbridge, among others). In most of these cases, publishers have had to resort to law to secure funds which they believed were in client accounts and belonged to them, not always successfully. Even with good legal advice on contracts, publishers can suffer in these situations if the Courts take a different view of ownership of funds.

It is important also to understand why these casualties have occurred. Distribution has become an increasingly capital-intensive business, widening the divide between large and small. While the big publishing groups have been pouring money into better computer systems, bigger and better warehouses and services which will contribute to better customer service and sales opportunities, the smaller companies have found it impossible to match this level of investment. The result is that many of the smaller independents are ever



## About the author



**Peter Kilborn** is a book industry consultant specializing in the supply chain and business improvement. His early career was spent as a production director with a number of well-known London publishing houses. In 1993 he was appointed to manage the UK industry's successful campaign against the imposition of value added tax on books; he then worked for a period as a director of the Publishers Association. In his present capacity, Kilborn works primarily as a consultant to Book Industry Communication (BIC) where he is project manager for the UK's supply chain returns project, and EDItEUR, the international standards organization. He has also acted as an adviser to the Department of Canadian Heritage on its supply chain initiative.