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HOW DO ONLINE BOOKSTORES INFLUENCE THE SALES OF TRADITIONAL BOOKSTORES IN CHINA?

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Abstract

Bookstores have been strongly affected by the rise of electronic commerce. Traditional (physical) bookstores now have to compete with online counterparts that possess several advantages over them, such as lower prices and 24/7 availability. This paper investigates the influence that online bookstores have on the sales of physical bookstores in China. The geographic restriction is based on the particularities of the Chinese market that differentiate China from other markets, both in the book market as well as in the adoption of E-commerce. Since there is a lack of overview in the English academic literature on this topic, we conducted a literature review to summarize the current state of research. Our research highlights multiple advantages and disadvantages of physical and online bookstores in the Chinese market, which in turn influence the sales of traditional bookstores. This paper offers a theoretical and a practical contribution. Participants of the Chinese book market can use the results to better assess and improve their market position by addressing the disadvantages or building on the strengths identified during the review. Furthermore, this paper can serve as a starting point for English researchers, as almost no research on this topic has been published in English.

Keywords: bookstore, E-commerce, China, online bookstore, physical bookstore, online shopping

1 INTRODUCTION

With the popularization of the Internet and the development of e-commerce in China, the way and methods people consume goods are changing. Hence, online shopping has emerged as a competition to traditional (i.e. physical) stores. Since books were one of the earliest goods sold via the internet, this change has had a strong impact on traditional bookstores. Up to the year 2009, 85.5% of Chinese online shoppers have bought books online at least once (Yang, Yufen, 2011, p. 24). In 2014, the total sale of books through online platforms in China has reached 27.95 billion RMB (about 4.5 billion USD), which is an increase of 58% compared to the previous year. The combined sale of the three biggest B2C online book sellers in China – Dangdang, Jingdong, and Amazon.cn – are 12.4 billion RMB (about 2 billion USD), 50% more than the sum of the sales of 127 large-size traditional bookstores (Zhang, Tao, 2015, p. 38). From 2005 to 2013, 1944 state-owned and 3801 private traditional Chinese bookstores have closed (Wang, Zibo, 2013, p. 83). While more than 1.2 million books were purchased from online bookstores in China in 2014, physical bookstores accounted for 1.3 million sales (OpenBook, 2015, p.4).

Further, some differences can be observed regarding the types of books that are sold in physical versus online bookstores (OpenBook, 2015, pp. 6–7). The authors come to the conclusion that while these two markets are similar, some differences can be observed that speak to different customer needs. The numbers presented above show that online bookstores have emerged as a powerful economic force in the Chinese market. Hence, it is clear that they affect the sales of traditional bookstores since these types of stores now have to deal with this new competitor. However, the nature of that relationship does not become apparent just from looking at these numbers. It is not clear how the relationship between the two types of bookstores plays out in China, and how strongly traditional bookstores are affected by their online counterparts. Therefore, we have identified the following research gap: There is a lack of overview on this topic in the literature, in particular in the English literature. A literature review addresses this gap by summarizing the current knowledge on this topic and drawing conclusions for further research. Based on that, we posit the following research question: How do online bookstores influence the sales of traditional bookstores in China? To answer this question, we have conducted a literature review of research on this topic within the last ten years (2006-2015). The results of that review are presented in this paper.

2 THEORETICAL FOUNDATIONS

This section lays out the theoretical foundations of this article. This includes a definition of key concepts such as traditional and online bookstores, and E-commerce. The development of the Internet and E-commerce in China and the particularities of the Chinese book market will be explained.

2.1 E-Commerce

Advances in information technology have strongly shaped the way that business transactions can be conducted (Kollmann, 2011, pp. 26–27). In this paper, we will focus on B2C (Business-to-Consumer) E-Commerce, i.e. commerce conducted between companies and consumers in an electronic manner (Bächle & Lehmann, 2010, p. 85). More specifically, we will focus on e-shops which can be defined as “the internet presence of a merchant with the goal of selling their goods” (Bächle & Lehmann, 2010, p. 95). E-Commerce differs from traditional commerce in several important ways. Communication through the internet can take place 24/7 and location-independently (Kollmann, 2011, pp. 26–27). The electronic exchange of information can significantly lower transaction costs and increase flexibility (Bächle & Lehmann, 2010, p. 85). Internet merchants do not need physical retail space that customers can visit because they conduct their sales online, as well as less or no storage space (Bächle & Lehmann, 2010, p. 95). This results in lower fixed costs, which allows E-commerce vendors to offer lower prices than traditional shops. We define traditional bookstores as stores that sell their goods in

physical (“brick-and-mortar”) shops, which need to be visited by customers in order to make purchases. Contrarily, online bookstores do not have a physical location and instead sell their books online via e-shops.

2.1.1 E-Commerce in China

Publications on E-commerce in China from the early 2000’s highlight the need for a differentiated look at how China and other developing countries have adopted e-commerce. Scholars critique the practice of drawing conclusions from the development of e-commerce in developed economies and just applying them to developing countries (Haley, 2002, p. 119; Hempel & Kwong, 2001, pp. 335–336). They argue that developing countries present a different business context and lack many of the existing prerequisites that allow the rapid development and adoption of E-commerce in developed countries. These prerequisites include the widespread availability and use of information technology, developed distribution networks, and financial infrastructures such as the availability of credit cards or other payment methods than can be used to complete e-commerce transactions. Haley (2002, pp. 120–122) summarize the inhibitors of E-commerce in China in the early 2000’s, such as lack of payment options, regulatory uncertainty, and lack of Internet infrastructure and skilled IT personnel. Due to these factors, e-commerce had not gained as much popularity and developed as quickly in China as in developed countries in the early 2000’s (Tan & Ouyang, 2004, p. 3; Wong, Yen, & Fang, 2004, p. 68). E-commerce in China has faced challenges that are specific to this market such as traditional business models, economic development, and user behavior (Martinsons, 2008, pp. 338–339; Wong et al. 2004, p. 82). These factors have led to a slower than expected growth of the Chinese e-commerce market.

To summarize, the e-commerce activity of a market is shaped by structural conditions (e.g. financial, legal, and logistical infrastructures), as well as by its national culture (Markus & Soh, 2002, p. 10). The findings outlined in this section highlight that China has faced unique challenges to E-commerce adoption and use. This confirms our decision to focus on the Chinese market in particular – due to the unique factors influencing E-commerce in this market, the results are likely to differ from other markets.

Another important factor is the number of Chinese people that have access to the Internet, as that is a prerequisite for participating in E-commerce. According to data published by CNNIC (China Internet Network Information Center) in 2015, the number of the Chinese Internet users has increased rapidly since 2006. Due to this, we have decided to focus our literature review on the last ten years (2006–2015), as older results are likely to be severely outdated given China’s rapid economic development and thus would not be reflective of the current situation.

2.2 The Chinese book market

The Chinese book market has gone through great changes in the last 20 years (Book Information Centre Beijing, 2014, pp. 2-3). Since 1999, the market share of books has continually fallen while other publications like periodicals and newspapers have gained shares (Sun, Yang, & Mao, 2009, p. 95). Furthermore, print books have increasingly been in competition with audio- and e-books. Chinese traditional bookstores are composed of private bookstores, as well as the state-run Xinhua bookstores (Book Information Centre Beijing, 2014, pp. 7–8). Since Xinhua used to be China’s only bookstore chain, it has many stores throughout all of China. However, bookstores only exist in large cities. There is no national distribution network, which means that many titles published by regional publishers are not available nationally. Private bookstores for the most part are smaller and focus mostly on selling textbooks. Due to increasing economic pressure from online competitors and rising costs, many (primarily private) bookstores have closed. The importance and sales of online bookstores have been increasing (Book Information Centre Beijing, 2014, pp. 7–8). The online market is dominated by the three biggest platforms – Dangdang, Amazon, and Jingdong – who make up 60% of the market. Since book prices in China are not fixed, online bookstores are able to provide large discounts and typically do so.

3 RESEARCH METHOD

We will answer the research question with the help of a literature review. We conducted the review according to the framework for literature reviews as outlined by Vom Brocke et al. (2009, p. 9), which consists of the following five steps:

- 1) Definition of review scope
- 2) Conceptualization of topic
- 3) Literature search
- 4) Literature analysis and synthesis
- 5) Research agenda

The first step is definition of the review scope. Our goal is to answer the research question formulated in section 1. As such, our review analyzed the prior research to conduct a state of the art review.

Step 2 concerns the conceptualization of the topic. Before conducting the search for literature, researchers must first gain a broad understanding of the topic and its theoretical foundations, such as defining key terms (Vom Brocke et al., 2009, p. 10). The results of this step are outlined in section 2.

Step 3 is the search for literature. Before a search can be conducted, the search parameters first must be defined. This entails determining the key words and search terms, the outlets, and the time frame (Webster & Watson, 2002, p. xv). For our search, we have decided to focus on publications on China from the last ten years (2006-2015). We performed keyword searches to find our results with three groups of keywords – the first group specifies our focus on China, the second our focus on bookstores, and the third focuses on online shopping and E-Commerce.

Since our team contains three native Chinese speakers, we decided to extend our search beyond English literature and include the CNKI (China National Knowledge Infrastructure) as one of our sources. CNKI is a Chinese e-publishing project that publishes a wide range of Chinese academic resources, such as journals and conference proceedings, as well as newspapers and statistical yearbooks (Intellogist.com, 2012). We also looked for articles on this topic in eleven leading IS journals, which were determined by synthesizing three rankings (Association for Information Systems (AIS), n.d.; Association for Information Systems (AIS), 2011; Verband der Hochschullehrer für Betriebswirtschaft e.V., 2016). Furthermore, a broader search for English-speaking literature on the topic was conducted by searching in large databases. These include EBSCOHost, Science Direct, Springer Link, and Google Scholar. Between these databases and the leading journals, the authors consider this to be an exhaustive search on this topic. Forward and backward searches were performed to find additional literature.

After the collection of literature has been completed, this literature was analyzed and synthesized in step 4 (Vom Brocke, et al. 2009, p. 9). Weber & Watson (2002, pp. xvi-xvii) recommend a concept-centric approach. This is achieved by structuring the review around the key concepts found in the literature and developing a concept matrix that highlights which concepts are discussed in which articles. We followed this approach to identify the central concepts and ideas of the analyzed literature.

Finally, Vom Brocke's et al. (2009, p. 11) framework argues that a literature review should result in a research agenda that shapes further research on the topic. This can happen in the form of posing more detailed questions for further research now that an overview of the topic has been developed, or in the form of showcasing un- or under-explored research areas that new research could focus on. As such, a literature review should not just stand on its own, but contribute to further research. These conclusions and implications for future research will be presented in section 5.

4 RESULTS

In this section, we will discuss the results of our literature review. First, the literature sample will be described briefly. Second, the key findings will be presented. These factors are grouped into four categories that represent the advantages and disadvantages of the two types of bookstores.

4.1 Description of the literature sample

Our overall sample consists of 36 sources that were gathered in the literature review and deemed relevant. Of these 36 sources, 35 are published in Chinese, and only a single relevant source (Lu et al., 2007) is published in English. This finding highlights that this topic has not garnered any attention in English-speaking publications at all, which constitutes a significant research gap in the English literature. Therefore, it can be summarized that this research area is under-explored and offers the potential to pursue a wide range of research questions. As such, it might present an opportunity to conduct “blue ocean” research. Since top journals put high value on articles that make a unique and valuable contribution, this research area might represent an interesting avenue for researchers. On the other hand, the lack of published research might also speak for a lack of interest in this topic – either by authors that did not deem its pursuit valuable or by journals or conferences that rejected such submissions.

4.2 Influence factors

During our review, we have determined influence factors of the two types of bookstores. These factors are presented in figure 1. Most of the advantages for the online bookstores, are disadvantages for the traditional bookstores, and vice versa.

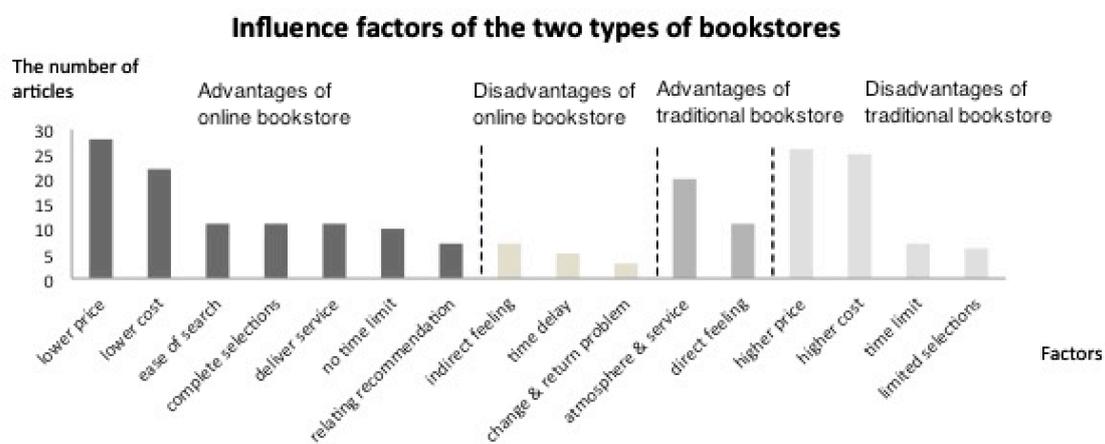


Figure 1. The influence factors of the two types of bookstores

4.2.1 Advantages of online bookstores

The most important factor is the price. This factor has been mentioned for the most times for the both types of the bookstores in our review. The biggest advantage of the online bookstores is the lower price, and that is also the reason for the most customers why they buy book online (Ye, Xiangfeng, 2013, p. 92). The price is the expression of the costs, so they are closely connected with each other. The lower price makes the online bookstore more competitive (Si, Aili, 2014, pp. 60-61). However, there is a lack of detailed and quantitative information on these price differences. We could only find one study that listed concrete price differences – In 2006, books sold in Chinese online bookstores were 17.1% cheaper than in traditional bookstores (Lu, Zhou, & Bin, 2007, p. 76).

Secondly, the convenience of placing orders is also a commonly discussed advantage of the online bookstore. This refers to the fact that customers can buy books online anytime and they do not need to take time to go to the stores. Some of the traditional bookstores have also attempted to open for 24 hours, but most of them are not successful with this strategy (Liu, Shuli, 2007, p. 2). The delivery service also improves the convenience of the online bookstores. The customers do not need to visit a bookstore and instead can get the books shipped to their homes (Liu, Ruiting, 2014, p. 168). The next point is the ease of the search of the online bookstores. They provide powerful search engines, whereas the traditional bookstores do not. Some traditional bookstores have brought computers terminals into their stores to provide a search function, but this has not been a success. Because this internal search could not be compared with the search function of the online bookstores in regards to the quantity of available information, as well as search speed (Liu, Shuli, 2007, p. 2). And the online bookstores have a larger selection of books than the traditional bookstores. This allows them to provide books that traditional stores cannot offer, such as special versions that are only published in certain areas, and books from foreign countries (Zhu, Shenglong, 2013, pp. 14-16).

The online bookstores also have the advantage of the online platform to implement customer relationship management (Gao, Cheng, 2009, p.182). The customers only need to register and upload their data once and the system can track the customers automatically. Based on the search history, the view history and the purchase history, the CRM systems of online bookstores can analyze the demands of the customers and provide personalized recommendations. According to a survey published by CNNIC in July 2008, 53.8% of the online shoppers will also see the related recommendations when shopping online. These recommendations provide not only the convenience to customers, but also let the bookstores have more opportunities to gain profits (Gao, Cheng, 2009, p. 182).

4.2.2 Disadvantages of online bookstores

Undetailed browsing of the books and time delay are the two most inconvenient factors for the customers, when they buy books online. The first factor relates to a lack of available information provided on the books online. Customers can only read the brief introduction without detailed contents. So they have to take the risk of buying the wrong books, which are not exactly what they expect. Shipping can also be regarded as a disadvantage as customers sometimes have to pay for it and they cannot get the books immediately as opposed to traditional bookstores (Wang, Lu, Qiu, 2010, p. 1839). The Chinese postal service and private delivery firms are responsible for the delivery of books, so the collaboration between online bookstores and logistics companies is needed to guarantee quick delivery. However, the delivery service is still in an immature stage, if the customers want to change or return the goods, they might have to deal with complex processes online and pay for it (Jiang, Huan, 2013, p. 116).

4.2.3 Advantages of traditional bookstores

Nowadays, buying books in a traditional bookstore is not only a simple commercial activity, it is more like a leisure activity. The customers could communicate with each other and also enjoy the peaceful and quiet atmosphere in the bookstore (Dong, Lin, 2014, p. 320; Liu, Momo, 2014, p. 51). Therefore, some private traditional bookstores have made a transformation and pandered to the trend of the times. They transformed the bookstores to a personalized place with book selling and cultural activities (Yang, Yufeng, 2011, p. 25). At the same time, not every book is suitable for people to buy it online. For instance, some books have many editions after the first publication or some foreign books have been translated by different translators. But the small amount of information provided online may not be sufficient to explain the differences and make the customers more confused. So if the customers want to buy the right book they want, they need to go to the traditional bookstore to read the contents of the books by themselves then decide, whether they should buy the books. But this could also be one disadvantage for the traditional bookstores. Some customers have also admitted that they have read and found the right books they need, and then went back and bought these books online (Yang, Yufen, 2011, pp. 24-25).

4.2.4 *Disadvantages of traditional bookstores*

The running costs have been increasing in recent years. The two main costs of traditional bookstores are rent and taxes (Jiang, Yanping, 2013, p. 49-50). With the increasing price of real estate, rent continues to increase. The additional increasing personnel costs make it very difficult for traditional bookstores to operate their business. Thus, some traditional bookstores could not afford the costs with the relative lower profits, the only way out is shut down (Shi, Qianfan, 2013, p. 592). The higher cost means that, it is very difficult to lower prices. At the same time, the online bookstores could provide a much larger selection of books and the customers could buy books online at any time. But these are impossible for the traditional bookstores. Because of the limitation of the space and the opening hours, customers often cannot find everything they are looking for (Yang, Yufen, 2011, p. 25).

5 DISCUSSION

In this section, we will outline how the findings presented so far relate to our research question. To reiterate, our research question is to find out how online bookstores influence the sales of traditional bookstores.

The literature review has resulted in a collection of advantages and disadvantages of the two types of bookstores. These factors influence which type of bookstores customers choose to make their purchases. Customers that primarily care about prices are more likely to use online bookstores, whereas customers that want to browse different books and enjoy the atmosphere of a bookstore are more likely to use a traditional bookstore. Therefore, we argue that these factors influence the shopping behaviors of (potential) customers and thus the sales of bookstores. Hence, we address the research question by analyzing these advantages and disadvantages to draw implications for traditional bookstores.

As outlined in the previous section, physical bookstores in China have to deal with a strong competitor in online bookstores. The online stores hold many advantages, such as lower costs and prices. This strongly influences customer behavior. With the addition of rising costs (e.g. for rent and human resources), this puts a lot of economic pressure on traditional bookstores (Jiang, Yanping, 2013, pp. 49-50). These disadvantages are not likely to disappear in the future. Hence, traditional bookstores have to find a way to react to them, or risk falling behind the competition. Their options are somewhat limited, as the chances of winning a price war with online bookstores is very slim. This difficult economic situation has already resulted in a large number of closures (Wang, Zibo, 2013, p. 83).

But on the other side, do the traditional stores have totally no chance in this battle with online bookstores? Certainly not. As shown in the previous sections, they have certain advantages over online bookstores that cannot be replicated. Customers can physically touch and browse books in a way that cannot be replicated in online stores, even if they provide all the relevant information and example chapters. Furthermore, buying books in a traditional bookstore is not only a simple commercial activity. Customers enjoy the quiet, harmonious and joyful atmosphere in the bookstore in the current fast-tempo society (Dong, Lin, 2014, p. 320). They could also communicate with other readers in the bookstores, which gives these stores an additional social component that is difficult to recreate online. That is why many traditional bookstores - especially the private small ones - have changed their business model to be a so called book bar instead of merely a bookstore. From this point, reading and buying books in the bookstore is more like a social activity (Dong, Lin, 2014, p. 320).

This perspective coincides with the findings of OpenBooks' study of the Chinese book market in 2014 (OpenBook, 2015, p. 4). When looking at the sales of physical bookstores, they uncovered an interesting trend: Whereas the number of sales decreased in 2012 and 2013, they increased by 3.3% and reached a historic high in 2014. These findings highlight that physical bookstores have responded to the challenges posed by their competitors. The authors argue that physical bookstores have responded to their decreased sales by making several adjustments, such as improving customer experience, customer service, and marketing efforts (OpenBook, 2015, p. 5). They credit these

adjustments for the improved sales. According to their research, the physical bookstores with the highest growth in 2014 have been ones that were strongly affected by the previous downturn (OpenBook, 2015, p. 5). This finding suggests that these bookstores – mostly located in large cities – have reacted well to the challenges posed by online bookstores by identifying areas of improvement. This highlights that physical bookstores can take measures to improve their market position and sales despite the strong competition by online bookstores by focusing on the advantages inherent in traditional bookstores as identified in our review.

6 CONCLUSION

In this paper, we conducted a literature review to analyze the impact that online bookstores have on the sales of traditional bookstores in China. To do so, we identified the advantages and disadvantages that the two types of bookstores possess, which in turn influence customers' decision to select one of them over the other. We have identified a number of challenges that traditional bookstores have to react to, as well as highlighting their strengths that they could build on to improve their position in the market.

The online bookstores and the traditional bookstores are fitting the requirements of the different customer's groups by virtue of their own advantages. There is no doubt that online bookstores have changed the traditional habit of buying books due lower prices and increased convenience. But the traditional bookstores are unlikely to disappear completely. The online bookstores and the traditional bookstores represent two different business models. They have different core competences. For the traditional bookstores, how to face the influence from online bookstores, how to hold the special features, how to get adapted for the new trend and changing in the current market situation and how to complete the individualization and the transformation are the key questions in the further development in the future.

While this topic has attracted considerable attraction in the Chinese academic literature, further research is necessary to advance this topic. The lack of English articles on this topic constitute a major research gap and presents an attractive area of research for scholars. Research that results in quantitative data (such as price differences) is also largely missing and would allow scholars and practitioners to get a more concrete understanding of the current situation.

This paper makes both a theoretical, as well as a practical contribution. The theoretical contribution lies in the result of the literature review, which will give an overview over the current state of research on this topic. According to (Webster & Watson, 2002, p. xiii), literature reviews create a foundation for the advancement of knowledge. They promote theory development, can discover previously unknown areas where little research exists, as well as highlighting mature research areas with a lot of pre-existing research. Hence, literature reviews play a crucial role in the advancement of a scientific field or topic. Therefore, this paper contains a theoretical contribution. Since this paper seeks to identify the financial impact of online bookstores on their traditional counterparts, it also has practical implications. The article could be useful to a wide range of practitioners. This includes people in both the online and traditional bookstore businesses. They could use the findings of this paper to better understand the current situation of the Chinese book market, their position in the market, and the impact they play on their competitors (and vice versa). Owners or managers of traditional bookstores can gain insights into the advantages and shortcomings of their stores and take measures to stop the decline of the sales and even to increase it. We also argue that owners or managers of the online bookstores could get benefits from our research to better position themselves, find more advantages in the competition with traditional bookstores, and make more profits in the future.

Our research has the following limitations: Since we predominantly relied on database queries to find the literature, we may have been unable to identify relevant literature that do not include our selected search terms (e.g. in their abstracts, title, or key words). Furthermore, lack of access was a problem as there were several promising English articles that could not be accessed and thus could not be analyzed.

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