GEORGIAN BOOK MARKET RESEARCH

2013–2015

This document represents an analytical report of Georgian book market research. This report was prepared by ACT for Georgian National Book Center.

Research results will be used to develop a strategic plan to assess the book market in overall, define existing problems, further development of the book market and expand the database of readers.

TABLE OF CONTENTS

RESEARCH DESIGN

1 / RESEARCH OBJECTIVE

The main objective of the research was to obtain full statistical information of years 2013-2015 on all components of the book segment, which will be used to develop strategic plan to assess the book market in overall, define existing problems, further development of the book market and expand the database of readers.

In addition, the research aimed to identify the weaknesses of the book market, which based on the analysis of obtained information, will make it possible to develop specific recommendations to eliminate mentioned weaknesses.

Following research areas / tasks were identified deriving from the main objective of the research:

~ Publishing market assessment (years 2013-2015)

- Publishing houses operating in Georgia, their distribution according to the size of the enterprise
- Books published by publishing houses, income from sold books, total and average circulation, genre and categories
- Marketing activities of publishing houses
- Specifics of publishing houses' relations with distributors
- Allocation of distribution channels
- Publishing activities of cultural-educational institutions
- Participation of publishing houses in book fairs, literary prizes and competitions

~ Book publishing in 2013-2015 years

- Overall index of books published in Georgia in 2013-2015 years
- Classification of published titles by fiction / non-fiction, Georgian / translated literature
- Average selling price of books in the years 2013-2015

~ Description of distribution market

- Book distribution in 2013-2015 years
- Book distribution companies, their allocation according to the size of the enterprise
- Specifics of distributor's relationship with publishing houses and stores

~ Research of trade enterprises

~ Bestsellers of 2015

- In categories of fiction / non-fiction
- In categories of Georgian / translated literature

~ Literary prizes in 2013-2015 years

~ E-book market in 2013-2015 years

- E-book stores
- Volume of e-book market
- Average selling price of e-books
- Bestsellers among e-books

~ Literacy level in 2015

- The share of fiction readers
- The share of book buyers
- The advantages of book genres and categories
- Sources for obtaining books

~ Libraries operating in Georgia

- Classification of libraries by library types
- Number of readers
- Ways and frequencies of filling the book funds

~ Georgian National Book Center in 2014-2015 years

- Export of Georgian Literature
- Georgian literature in translations, translation statistics

2 / RESEARCH METHODOLOGY

Research method

In order to obtain information about all segments and components of Georgian book market, target segments were identified within the research, which more or less covers all segments of the book market:

> Publishing houses operating in Georgia that publish fiction / non-fiction
> Distributors operating in Georgia
> Book stores operating in Georgia
> E-book stores operating in Georgia
> The variety of cultural and educational centers, which publish literature for commercial purposes
> Libraries operating in Georgia, the Library Association, National Parliamentary Library of Georgia
> Reader of fiction

Different methodologies were combined within the research framework based on goals and objectives, as well as the specifics of the sector:

- Obtaining secondary information - during the reseach, ACT requested secondary information from a variety of institutions, including National Statistics Office of Georgia, National Parliamentary Library of Georgia, The Library Association, Georgian National Book Center, as well as higher education institutions, cultural-educational centers and e-book stores operating in Georgia.

- Qualitative research method - to obtain necessary statistical data, following techniques were used within the reseach framework:

> Semi-structured interviews were conducted using pre-designed questionnaire with the representatives of publishing houses, distributors, and book stores.

RESEARCH METHODOLOGY

Method	Quantitative research
Technique	Semi-structured interview
Target group	Publishing houses, distributors and book stores
Number of conducted interviews	• Publishing houses – 34 interviews
	• Distributors – 4 interviews
	• Stores – 9 interviews
Sampling method	Census in case of publishing houses and distributors
	Targeted selection in case of stores
Research scope	Georgia
Duration of interview	35-40 minutes

> Face-to-face interviews using pre-designed questionnaire with the reader of fiction. The aim of this component was to determine advantages related to literary levels and book reading of residents of big cities of Georgia.

RESEARCH METHODOLOGY

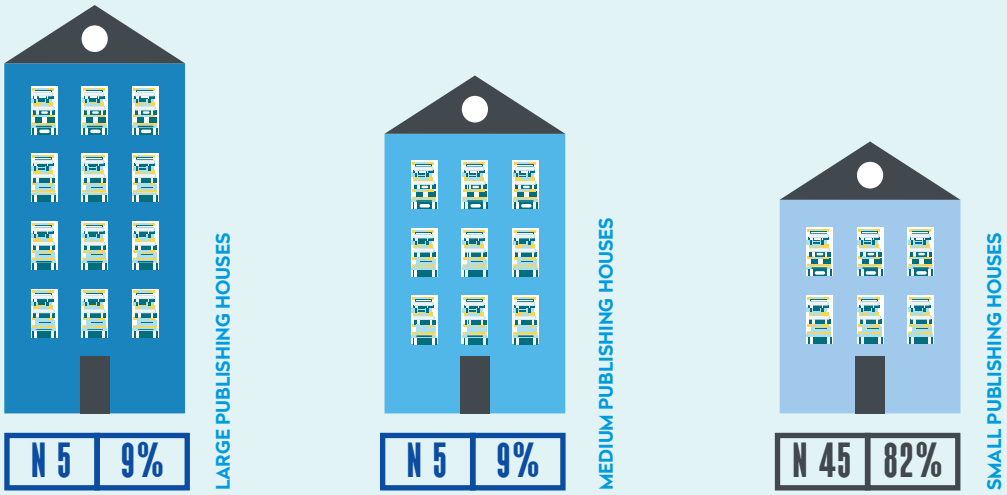
Method	Quantitative research
Technique	Face-to-face interview
Target group	15 years and older residents of big cities of Georgia,
	who have read at least one book in past year (fiction)
Amount of conducted interviews	700 completed interviews
Sampling method	Two-stage cluster sampling method with pre-stratification
Research scope	Tbilisi, Batumi, Kutaisi, Telavi
Duration of interview	30 minutes

II. RESEARCH RESULTS

1 / PUBLISHING MARKET DESCRIPTION

By 2015, about hundred publishing houses were registered in Georgia. Among those, 55 active publishing houses were selected within the reseach framework, most of which were small publishing houses, while large and medium publishing houses were represented in a fewer number at Georgian book publishing market.1

SIZE OF PUBLISHING HOUSES 2014-2015 / TOTAL NUMBER 55

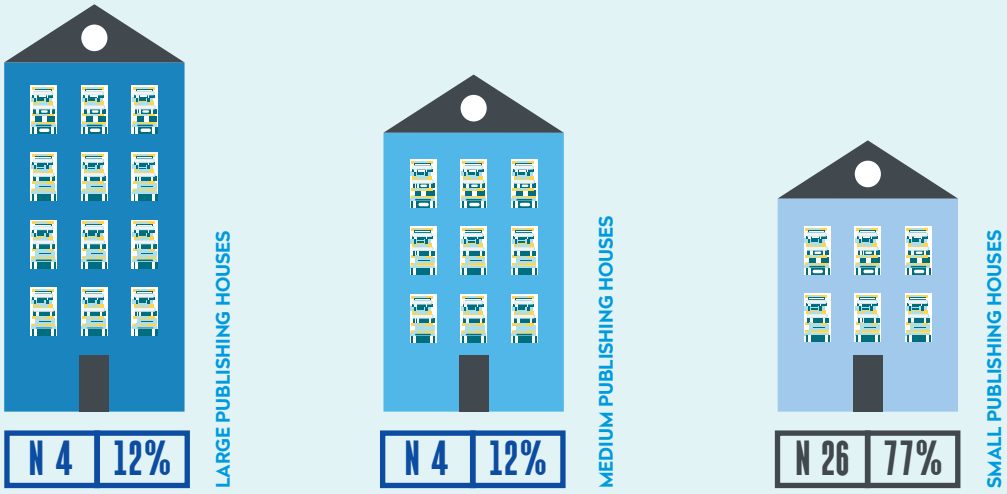


Source: The National Statistics Office of Georgia

The research results revealed that the most part of the publishing activities is concentrated in Tbilisi - from mentioned 55 publishing houses the majority is registered in Tbilisi. Only 4 out of 55 represents regional publishing, among which 2 are engaged in publishing activities in Batumi.

In total, 34 publishing houses participated in research. The research covered the largest portion of the major market players, since the majority of large and medium publishing houses participated in the project.

THE SIZE OF PUBLISHING HOUSES PARTICIPATING IN RESEARCH 2015 / TOTAL NUMBER 36



Source: The National Statistics office of Georgia; Semi-structured interviews with 34 publishing houses

1 / The size of the enterprise is defined in accordance with the methodology of National Statistics Office of Georgia, by combining one year of the company's turnover (excluding VAT) and the number of employees in the company.

The number of titles published in 2015 by participant publishing houses (34 publishing houses) is equal to a total number of 1,491[2] - it includes any genre or category of literature, which was published in the form of a book. The trend demonstrates that since 2013, the numbers of book publishing is increasing annually - if in 2013 the total number of books published was 1,363 titles, by 2015 this figure is equal to 1,491 titles, which is about 9% increase.

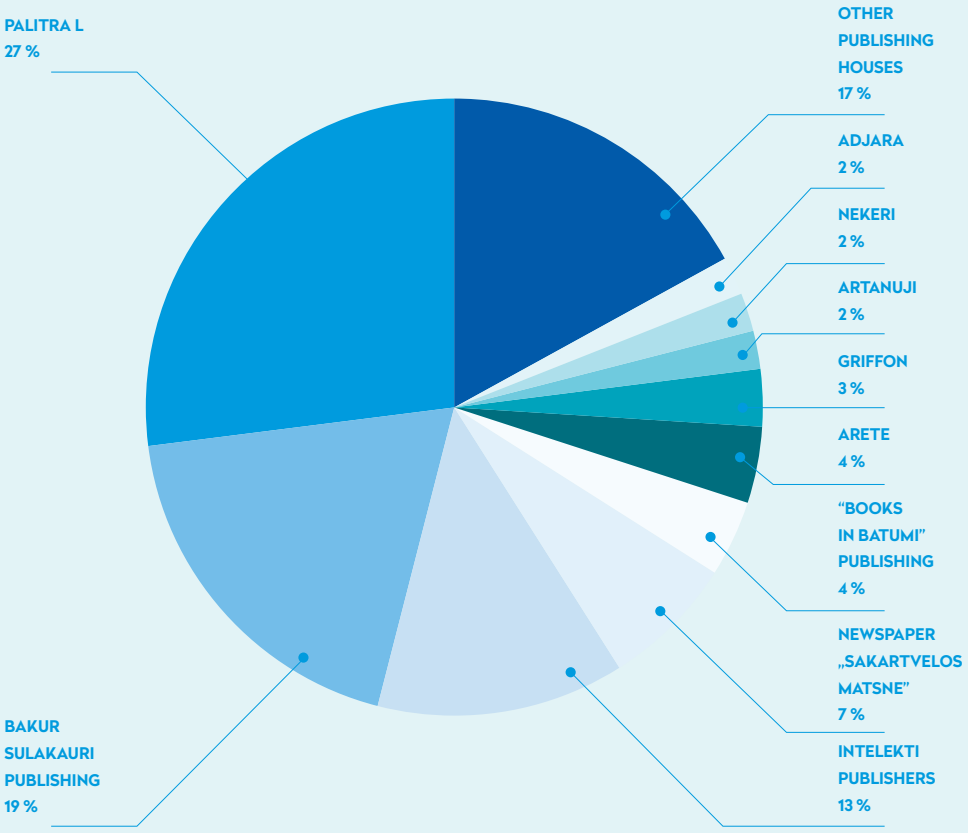
PUBLISHED TITLES 2013-2015

PUBLISHING YEAR	2013	2014	2015
Total number of published titles	1363	1458	1491
First Editions	1054	1129	1090
Reprints	352	372	454

Source: Semi-structured interviews with 34 publishing houses

Within the reseach framework, top 10 publishing houses were identified based on the number of titles published by them in 2015. Ten have been selected only among 34 publishing houses, which participated in the research. It should also be noted that there are publishing houses, which refused to participate in the research, but at the same time, they are major players at the book market and if information was obtained from them, they would make into the mentioned ten. Such publishing houses are "Diogene" and/or "Logos Press".

TOP 10 PUBLISHING HOUSES BY THE NUMBER OF PUBLISHED TITLES 2015 YEAR



Source: Semi-structured interviews with 34 publishing houses

2 / Mentioned data will probably be lower than the total number of titles published by publishing houses in Georgia in 2015, because not all publishing houses participated in the research. As a comparison, we shall bring data recorded by National Parliamentary Library of Georgia, according to which the total number of 4,173 books was published in 2015 - however, among them were publishing houses as well as individuals and private entrepreneurs. More detailed discussion about this data will be presented in the relevant sub-section.

Publishing houses participating in the research, published books by average circulation of 1,000 during the 2013-2015. We can say that this data has not changed since 2013. Interestingly, there are large publishing houses represented in Georgian market, which published a maximum of 7,500 copies in 2013 and 2015. The minimum circulation for each title is 100 copies.

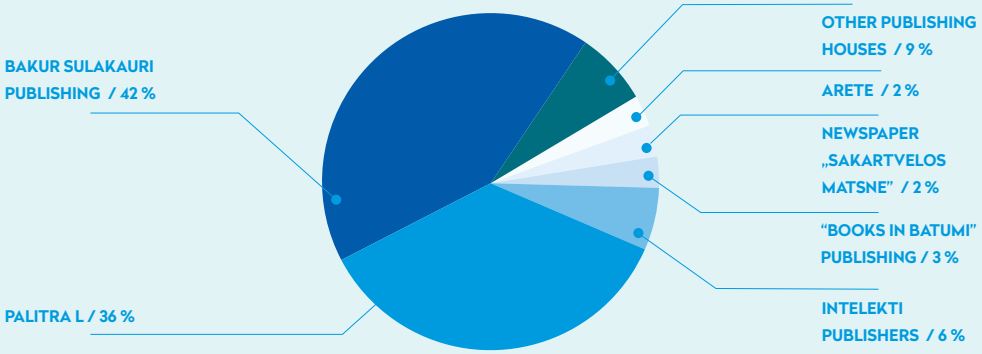
CIRCULATION 2013-2015

YEAR	2013	2014	2015
Total circulation	3 434 274	2 946 773	3 319 666
Average circulation (Median) for each title	925	575	1000
Maximum circulation for each title	7 500	5 239	7 500
Minimum cirulation for each title	100	100	100

Source: Semi-structured interviews with 34 publishing houses

When determining top ten publishing houses according to the total published circulations in 2015, Bakur Sulakauri Publishing holds the leading position3 - it printed books with the largest circulation during 2015, compared to other publishing houses participating in the research.

TOP 6 PUBLISHING HOUSES BY TOTAL CIRCULATION / 2015 YEAR



Source: Semi-structured interviews with 34 publishing houses

The total revenue of participating publishing houses from sold books was 10,707,2034 GEL in 2015. By processing information about revenues, it became possible to calculate the total number of revenue not only for 34 publishing houses that participated in research, but also for those which refused to participate in the research. Accordingly, at least 2,266,995 GEL will be added to the above mentioned figures and the total sum will be 12,974,198 GEL.

The research results revealed that publishing houses participating in the research have increased annual revenue from the sale of books from year to year, however, the number of sold copies is reduced. This fact may be explained by the rising book prices on the market.

THE REVENUE FROM SOLD BOOKS IN 2013-2015

YEAR	2013	2014	2015
Sold copies (Retail)	2 989 444	2 596 431	2 469 196
The revenue from sold books (In GEL)	8 153 245	9 361 704	10 707 203

Source: Semi-structured interviews with 34 publishing houses

3 / When speaking about the book market, we mean those 34 publishing houses, which operate at Georgian book market and participated in the research. This data covers a significant part of the publishing market, as the majority of large and medium-sized enterprises were covered. It should be noted that Georgian market figures such as publishing house "Diogene" and medium-sized publishing house "Logos Press" did not participate in the research. For this reason, identification of Top publishing houses by different criteria was conducted without them, however, based on their size they were likely to take a certain position in the compiled rating.

4 / The margin of error of this data is within the range of 1,000,000 – 700,000, which means that the revenue from sold books of the 34 publishing houses in 2015 might be a maximum of 11,707,203 GEL, as well as minimum of 9,707,203 GEL. This margin of error is due to the fact unreleased information on revenues by publishing houses.

Within the framework of the research, top 10 publishing houses were identified according to gained revenues from sold books in 2015. Based on this parameter, Bakur Sulakauri Publishing is still in the leading position. In addition, it should be noted that this list could have included publishing houses such as Karchkhadze Publishing, Publishing Letta, Diogene and Elf, if they had given consent to provide complete information or to participate in the research.

TOP 10 PUBLISHING HOUSES BY REVENUE FROM SOLD BOOKS IN 2015 YEAR

Bakur Sulakauri Publishing
Palitra L
Arete
Intelekti Publishers
Newspaper „Sakartvelos Matsne"
Artanuji
"Books in Batumi" Publishing
Siesta
Tsignieri
Meridiani

Source: Semi-structured interviews with 34 publishing houses

TOP 10 PUBLISHING HOUSES BY REVENUE FROM SOLD BOOKS IN 2014 YEAR

Bakur Sulakauri Publishing
Palitra L
Intelekti Publishers
Artanuji
Newspaper "Sakartvelos Matsne"
Tsignieri
Arete
World of Lawyers
Meridiani
Gorga

Source: Semi-structured interviews with 34 publishing houses

The most profitable transactions for publishing houses are publishing and sale of fiction books - in the years 2013-2015, the largest share of revenues gained by publishing houses came from the sale of fiction. In the case of some publishing houses, there was a significant reduction in the share of school textbooks, which was the result of the Governmental program in 2013, according to which publishing houses were deprived of the right to publish school textbooks and the only right to print was granted to several print shops.

In 2015, the main source of revenue for 47% of publishing houses participating in the research was publishing of fiction (for 47% of the polled, more than 50% of revenue comes from fiction). The major share of revenues for the remaining 53% partially comes from academic/professional literature, and partially from supplementary school books/textbooks and in some cases from children's literature. It should also be noted that from 2014 until 2015, the distribution of the book genres/categories by revenue in the target segment mostly has not changed, in the case of 9 publishing houses the revenue gained from the sale of fiction was increased compared to 2014, while in some cases the revenue from selling fiction was reduced.

REVENUE FROM SOLD BOOKS BY CATEGORIES 2013-2015

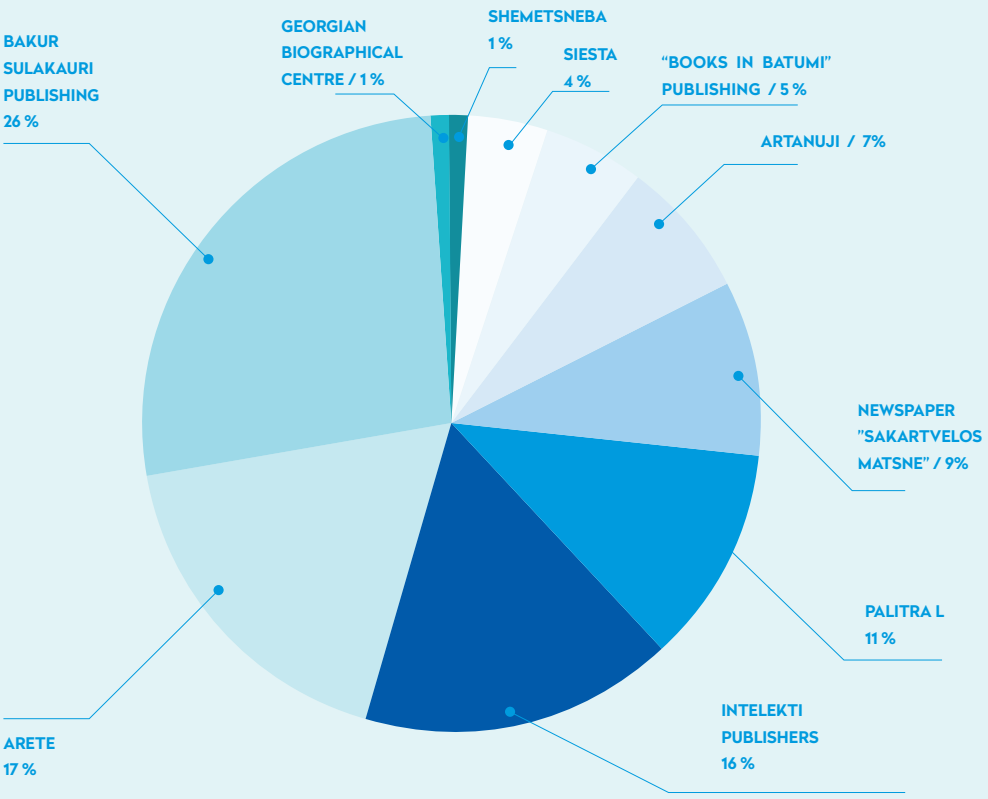
	FICTION	ACADEMIC / PROFESSIONAL LITERATURE	CHILDREN'S LITERATURE	SCHOOL BOOKS / MANUALS / TEXTBOOKS COLLECTION	SUPPLEMENTARY TEXTBOOKS / MANUALS	PICTURE BOOKS (GRAPHIC NOVEL)	RELIGIOUS THEME BOOKS	OTHER (MUSICAL NOTES, MAPS, DICTIONARIES, ALBUMS AND SO ON)
2015	45 %	20 %	11 %	2 %	9 %	0.1 %	1 %	4 %
2014	40 %	21 %	14 %	2 %	5 %	0.1 %	2 %	2 %
2013	35 %	18 %	14 %	6 %	4 %	2 %	2 %	1 %

Note: The diagram shows the average number of responces for each categories cited by 34 publishing house houses.

The research has revealed that Bakur Sulakauri Publishing, the publishing house Arete and Intelekti Publishers hold leading positions in revenues gained from the sale of fiction.

TOP 10 PUBLISHING HOUSES BY REVENUES GAINED FROM THE SALE OF FICTION IN 2015 YEAR

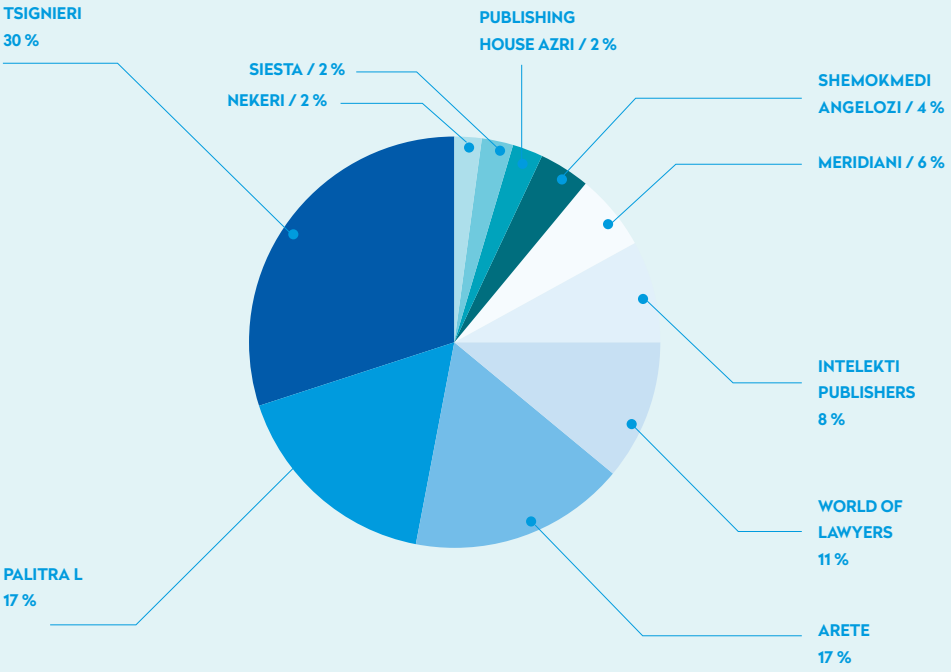
PERCENTAGE DISTRIBUTION OF REVENUES GAINED FROM THE SALE OF FICTION



Source: Semi-structured interviews with 34 publishing houses

The research has revealed that we get entirely different picture when we distribute publishing houses by gained revenues from the sale of non-fiction. Publishing house „Tsignieri“ holds the leading position. It is followed by publishing houses „Palitra L“ and „Arete“ with equal numbers.

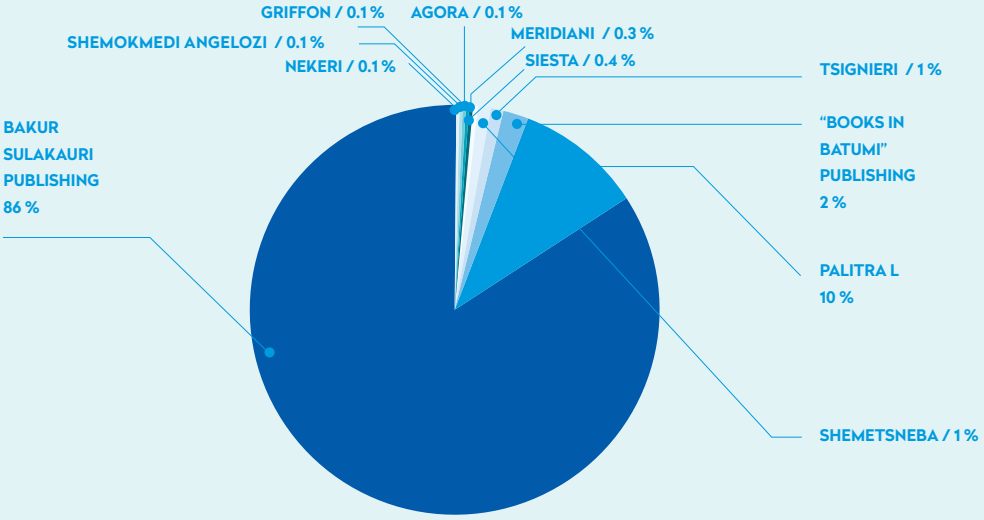
TOP 10 PUBLISHING HOUSES BY REVENUES GAINED FROM THE SALE OF NON-FICTION 2015 YEAR
PERCENTAGE DISTRIBUTION OF REVENUES GAINED FROM THE SALE OF NON-FICTION



Source: Semi-structured interviews with 34 publishing houses

Bakur Sulakauri Publishing is the most explicit leader of the market in terms of revenues gained from the sale of children's literature. It should also be noted that Karchkhadze Publishing would very likely be in this list.

TOP 11 PUBLISHING HOUSES BY REVENUES GAINED FROM THE SALE OF CHILDREN'S LITERATURE 2015 YEAR
PERCENTAGE DISTRIBUTION OF REVENUES GAINED FROM THE SALE OF CHILDREN'S LITERATURE



Source: Semi-structured interviews with 34 publishing houses

By 2015, Georgian literature titles were published in relavitely larger shares in the publishing market – from published titles 55% was Georgian literature, while 45% translated. The research reveals that publishing of translated literature has increased in 2015 compared with the previous 2 years - namely, number of translated literature was significantly lower in 2013 (31%) and it was also lower in 2014 (38%).

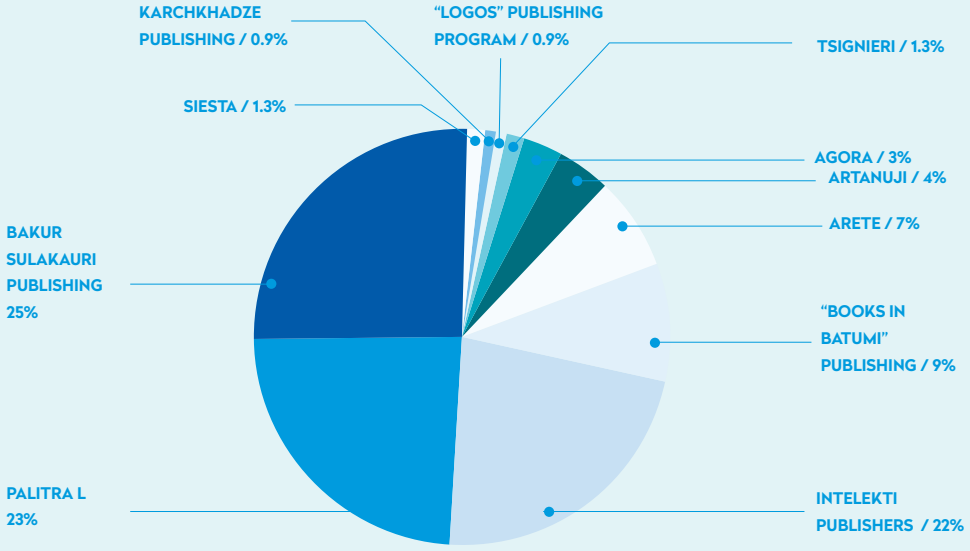
GEORGIAN AND TRANSLATED LITERATURE 2013-2015

YEAR	2013		2014		2015	
	NUMBER	%	NUMBER	%	NUMBER	%
Georgian Literature (Number of titles)	744	69%	681	62%	661	55%
Translated Literature (Number of titles)	335	31%	424	38%	546	45%

Source: Semi-structured interviews with 34 publishing houses

From the numerical point of published translated literature titles, the leading position with equal numbers are held by Bakur Sulakauri Publishing, Palitra L and Intelekti Publishers.

TOP 11 PUBLISHING HOUSES BY NUMBER OF PUBLISHED TRANSLATED LITERATURE TITLES 2015
PERCENTAGE DISTRUBITION OF PUBLISHED TRANSLATED LITERATURE TITLES[5]

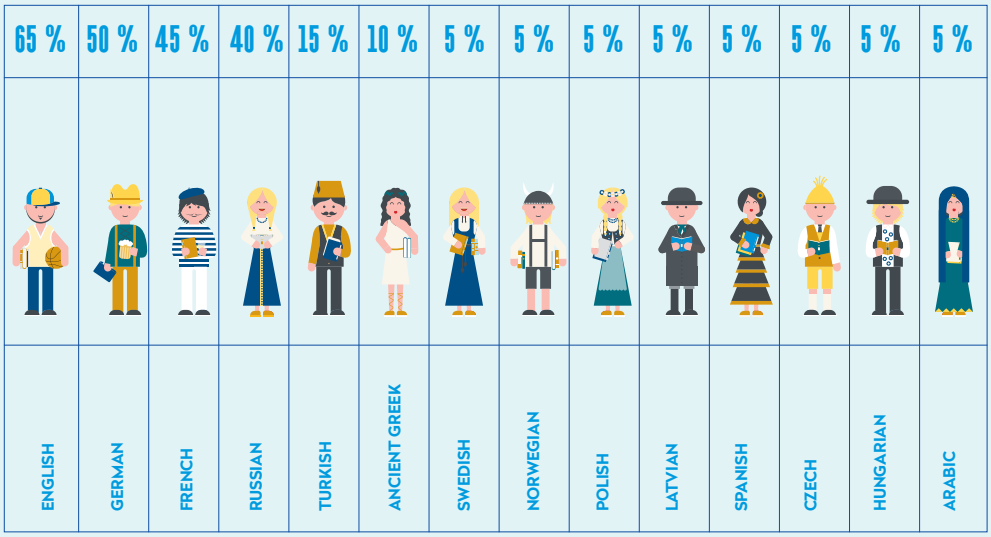


Source: Semi-structured interviews with 34 publishing houses

5 / The table presents the share of each of the publishing houses from the total amount of published translated titles by 34 publishing houses in 2015.

Research reveals that publishing houses most frequently publish titles translated from English. After English, the highest publishing numbers have titles translated from German, French and Russian languages.

2015 YEAR PUBLISHED TRANSLATED BOOKS, ORIGINAL LANGUAGE / % NUMBER FROM 20 PUBLISHING HOUSES

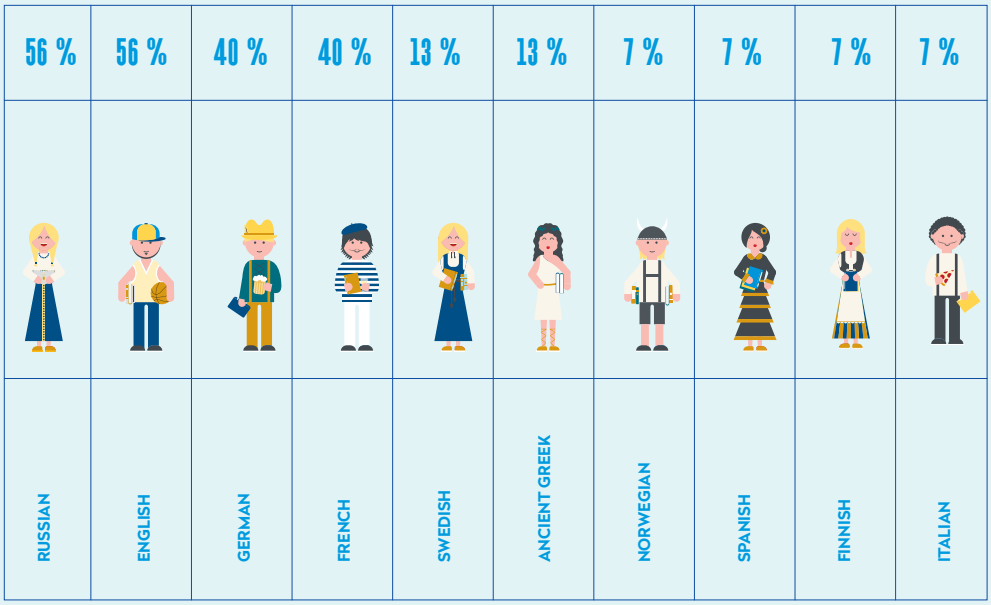


Source: Semi-structured interviews with 34 publishing houses

In 2014, 17 out of 34 publishing houses have not issued any translated literature at all, however, out of those 17, 5 publishing houses have not issued any Georgian books either. Furthermore, one publishing house hasn't even started operating in 2014.

Interestingly, there is an increase in publishing of books translated from English compared to 2014 (2015 - 63%; 2014 - 53%). Same can be said about the number of published literature translated from German and French language - they also are increased compared to 2014 year.

2014 YEAR PUBLISHED TRANSLATED BOOKS, ORIGINAL LANGUAGE / % NUMBER OF 17 PUBLISHING HOUSES



Source: Semi-structured interviews with 34 publishing houses

In 2013- 2015 years, the largest share published by the publishing houses was translated titles fiction by the largest share (69%). In 2015, after fiction, the largest share published by publishing houses was children's literature (14%) and academic/professional literature (11%).

PERCENTAGE DISTRIBUTION OF TRANSLATED BOOKS BY GENRE

	FICTION	ACADEMIC / PROFESSIONAL LITERATURE	CHILDREN'S LITERATURE	SCHOOL BOOKS / MANUALS / TEXTBOOKS COLLECTION	SUPPLEMENTARY TEXTBOOKS / MANUALS	PICTURE BOOKS (GRAPHIC NOVEL)	RELIGIOUS THEME BOOKS	OTHER (MUSICAL NOTES, MAPS, DICTIONARIES, ALBUMS AND SO ON)
2015	69 %	11 %	14 %	0,3 %	5 %	-	0,1 %	0,1 %
2014	65 %	13 %	19 %	1 %	0,5 %	1 %	0,1 %	0,2 %
2013	77 %	8 %	13 %	2 %	-	-	-	1 %

Note: The diagram illustrates the results of publishing houses that have published translated books in the years 2013-2015.

Distribution/sale of books published by book publishing houses is mostly implemented via book distribution companies/distributors. In 2013-2015 years, most of publishing houses (2015 year - 69%, 2014 year - 63%, and 2013 year - 59%) communicated with distributors/book distribution companies to sell books. It should be noted that the practice of direct cooperation with the shop without distributors is increasing from year to year - 56% of publishing houses are using distribution channel in 2015, while in 2013 this number was 41%.

The research results have revealed that compared with 2013, there are more publishing houses that use agents/promoters as a distribution channel, while only 19% of respondents referred to this practice in 2013, and in 2015 this figure is 41%.

As for the Internet, in order to sell printed books 19% of respondents are using this channel, which is three times higher than usage of same channel in 2013 (6%).

The smallest number of publishing houses (9%) state that local book fairs and festivals serve as book's sale channels – this number has increased compared with 2013 (3%).

Finally, out of respondents, three publishing houses sell books only through customer – accepting orders and issuing copies only in the quantity requested by the customer.

USING DISTRIBUTION CHANNELS IN 2013-2015

YEAR	2015	2014	2013
Distributors / book distribution companies	69 %	63 %	59 %
Book stores (without distributor)	56 %	46 %	41 %
Agents / Promoters – door to door principle, telephone sales, etc	41 %	34 %	19 %
Internet – electronic book sales through websites	19 %	13 %	6 %
Local book fairs and festivals	9 %	6 %	3 %
Customer	9 %	9 %	9 %
Sale on spot	6 %	6 %	6 %

Note: The diagram shows the indicators of various distribution channels

SHARE OF DISTRIBUTION CHANNELS 2014-2015

YEAR	2015	2014
Distributors / book distribution companies	42%	39%
Bookstores (the book is sold without a distributor)	23%	19%
Agents / Promoters – doors and door principle, telephone sales, etc.	10%	8%
Customer	9%	9%
Sale on spot	6%	6%
Local book fairs and festivals	2%	1%
Internet – e-book sales through websites	2%	3%
Internet – the printed book sales through the Internet	1%	1%

Note: Percentages in the table represent average percentage of the total for each distribution channel cited by all publishing houses

Marketing activities of publishing houses

Most of the interviewed publishing houses (68%) have conducted marketing activities in 2015, while third of publishing houses (32%) were not active in this regard. It should be noted that for most of the publishing houses use discount practice in marketing direction. In addition to sales, the product is being advertised on television, radio, the internet. Outdoor advertising of such products is also used, such as billboards, brochures and flyers. However, it should be noted that publishing houses use their webpages or Facebook pages to provide information about their marketing activities, which maybe considered as an advantage because of the cost efficiency. Several publishing houses are more active in marketing and use far more diverse methods to communicate with the customer.

Bakur Sulakauri Publishing – Apart from sales, Bakur Sulakauri Publishing offered readers different types of events, competitions and presentations during 2015. For example, among those were "John Green Book Store", "Blind Date in the Book", book video trailer, school competition project "The Most Literate" etc.

In addition to its own website and Facebook page, publishing house also used TV, print, Internet and outdoor advertising media to provide information about their activities. In addition, the publishing house activities were covered on television, reposts were made. Publishing house participated in the sponsorship.

Palitra L - In addition to sales, the activities implemented by the publishing house in 2015 include the use of advertising space in television, print media, internet, radio, use of outdoor advertising channels (billboards, leaflets), ad book stores.

"Books in Batumi" Publishing - Despite the fact that mentioned publishing house is relatively new in the market, it is very active in terms of marketing. During 2015, it offered readers a discount; special offers on different books, book lotteries, contests. Publishing house was also active in terms of advertising, for which it used television, radio and Internet spaces. For working relations, it also used outdoor advertising channels (booklets) and a bookstore.

Siesta - Among the marketing activities carried out during 2015 by this publishing house, there are discounts on book festivals, promotions in social network and presentation of new publications. For working relations with the reader, publishing house uses television and radio advertisements, outdoor advertising (brochures/flyers), as well as their website and Facebook page.

Participation in book fairs

Research shows that the most popular and widespread book fair/festival is Tbilisi International Book Festival - the majority of publishing houses took part in it at least once during 2013-2015 years, while 41% of respondents regularly and annually participate in the festival. This figure is higher than any other similar type of local participation rates.

The relatively low level of participation by local publishing houses were in book fairs, such as Tbilisi Book Days, Spring Festival - Book and Music, New Year Book Festival, Autumn Book Festival, Tbilisi Books exhibition - sale, New Year Book Market, and International Book Day. In some cases, publishing houses have also participated in regional festivals.

As for international markets, research has revealed that one third of surveyed publishing houses participated in international book fairs and festivals. Frankfurt Book Fair should be noted from the point

of the highest participation rate. In participation rates, Frankfurt Book Fair is followed by the London Book Fair, in which 4 publishing houses have participated during 2013-2015 and two among those five participate in those fairs annually.

A very small part of publishing houses regularly takes part in Leipzig, Bologna, Iran, Arab and Istanbul book fairs. Only in rare cases, American and Minsk book fairs were named.

Working relations with Distributors

The majority of surveyed publishing houses cooperate with distributors/book distribution companies to distribute their published books. The quarter of publishing houses (8 publishing houses) do not cooperate with distributors, as they contact bookstores directly to sell their published books, sell them through the Internet or fulfill direct orders.

As for working relations forms of publishing houses and distributors, research has revealed that the most characteristic for publishing houses is to supply distributors with a fixed purchase price book and offer a discount within this price to distributors. In this case, final selling price of the book established by the publishing house remains unchanged and the book reaches readers with one fixed price, regardless in which trade point they buy the book. When communicating with distributors in this manner, publishing houses mostly cooperate with various distributions under same conditions. In rare cases, however, publishing houses offer various discounts to different distributors when supplying them with the fixed price book, discount is defined by publishing house and depends upon the volume of orders, payment terms and the length of cooperation with the distributor.

The research has revealed other forms of working relations with distributors. For example, several publishing houses supply distributors with books with defined price, in such cases distributors assign final selling price by themselves or final price defined by the book store. In such cases, the book price may vary according to the merchant and the buyer might encounter different prices in different stores.

Finally, a small number of publishing houses have different forms of working relations with the distributor – it cooperates with fixed final selling price with some distributors, while in other cases it gives books with defined pricebooks to other distributors and does not fix the final selling price.

Research shows that the majority of all polled publishing houses cooperates with distributors under the same conditions, which means that everyone is offering the same discount within the fixed price or supplies everyone with books with same price. As already mentioned above, a small number of publishing houses cooperate with various distributors under different conditions. Working relations form with distributor depends on various factors, including distributor's order volume, duration and positive experience of cooperation with distributors, individual contacts and friendship, trust, logistical issues, such as transportation conditions, etc.

2 / CULTURAL AND EDUCATIONAL INSTITUTIONS OF PUBLISHING HOUSES

At the book publishing market, such cultural and educational centers as state universities, museums, cultural centers, etc. are considered as publishing houses. In years of 2013-2015, they also published fiction and non-fiction, which (also) had a commercial purpose, hence, those books were sold to the reader. Within the framework of the research, information related to such publications was collected from the following institutions6:

- Ivane Javakhishvili Tbilisi State University
- Korneli Kekelidze National Center of Manuscripts
- Giorgi Leonidze State Museum of Georgian Literature
- Centre for Cultural Relations "Caucasian House"
- National Museum of Georgia

6 / Based on goals and objectives, the report will present only those cultural and educational institutions, which published literature for commercial purposes in the years 2013-2015.

Cultural and educational institutions mostly publish non-fiction - from the total number of published titles only 13% is fiction. Such institutions publish books by lower circulation compared to the publishing houses – average number of circulation for each title is 375 copies.[7]

PUBLICATIONS OF CULTURAL-EDUCATIONAL CENTERS 2013-2015

YEAR	2013	2014	2015
Title number (Retail)[7]	93	88	99
Figure of fiction (%)	14%	16%	10%

3 / BOOK PUBLISHING IN 2013-2015

National Parliamentary Library of Georgia conducts accounting of books published with ISBN code within country. This database is also filled according to the obligatory copy procedure. According to this database, 4,173 book titles were published in Georgia. This data includes books published by any publishing house, private entrepreneurs, natural persons or other institutions/companies.

Over the years of 2013-2015, there has been an increase in the number of published titles - among those years, most of the book titles were published in 2015.

In 2013-2015 years, the biggest share of books published in Georgia were Georgian books. Apart from Georgian books, literature translated into Georgian language, foreign literature and Georgian literature translated into foreign language were also published.

BOOK PUBLISHING

YEAR	2013	2014	2015
Number of published titles	3, 745	2, 964	4, 173

Source: National Parliamentary Library of Georgia

Among all titles published in 2013 and 2014 years, non-fiction is presented by a bigger share. Since National Parliamentary Library of Georgia ISBN code and the obligatory copy database have not been updated since August 2015, the exact figures for 2015 are not available.

FICTION AND NON-FICTIONS

YEAR	2013	2014	2015
Fiction	1536	1145	--
Non-fiction	2207	1819	--

Source: National Parliamentary Library of Georgia

Most of the titles published countrywide in 2013 - 2014 year is Georgian literature - in 2013, 84% of published titles and 78% of published titles in 2014 were Georgian books (the original and text language is Georgian). It should also be noted that 5% of Georgian books published in 2013, and 7% in 2014 represent dual or more language publications, the original language of which is Georgian. In case of 2015 there is a similar trend, among published titles in January-July of this year, most part (77%) is Georgian books, followed by the books translated into Georgian (17%), percentage of foreign-language books is 5%, while Georgian books translated into foreign language have the lowest share (2%).

7 / Number of publications also include those institutions, with which there was no cooperation in getting information required for research. Information about numbers of publications by such institutions was obtained from National Parliamentary Library of Georgia ISBN and obligatory copy database. It should also be noted that the database of National Parliamentary Library of Georgia has not been updated since August 2015, hence data about 2015 year is incomplete.

GEORGIAN AND TRANSLATED LITERATURE

YEAR	2013	2014	2015
Georgian (The original language and the language of the text is Georgian)	3152	2312	--
Georgian literature in foreign languages	34	47	--
Literature translated into Georgian language	352	435	--
Foreign Literature in foreign language	207	170	--

Source: National Parliamentary Library of Georgia

Average book price

The research has revealed that by 2015 the average selling price of the book in Georgia was 11.75 GEL. From 2013 until 2015 we observe an increase in book selling prices on the book market.

BOOK AVERAGE PRICE

YEAR	2013	2014	2015
The final selling price of book in GEL Average indicator	10.77	11.09	11.75
The final selling price of book in EUR[8] Average indicator	4.05	4.17	4.42

Source: semi-structured interviews with publishing houses, distributors, and bookstores (47 interviews in total)

BOOK AVERAGE PRICE BY CATEGORIES

YEAR	2013		2014		2015	
CURRENCY	GEL	EUR	GEL	EUR	GEL	EUR
Fiction	10.4	3.9	10.76	4.04	12.11	4.55
Academic / professional literature	14.41	5.42	14.11	5.30	16.12	6.06
Children's literature	11.83	4.45	11.23	4.22	11.86	4.46
School books / manuals / textbooks collection	7.67	2.88	7.37	2.77	8.15	3.06
Supplementary textbooks	8.55	3.21	7.73	2.91	8.09	3.04
Picture Books	16.38	6.16	18.1	6.80	16.75	6.30
Religious theme books	9	3.38	10.87	4.09	14.22	5.35

Source: semi-structured interviews with publishing houses, distributors, and bookstores (47 interviews in total)

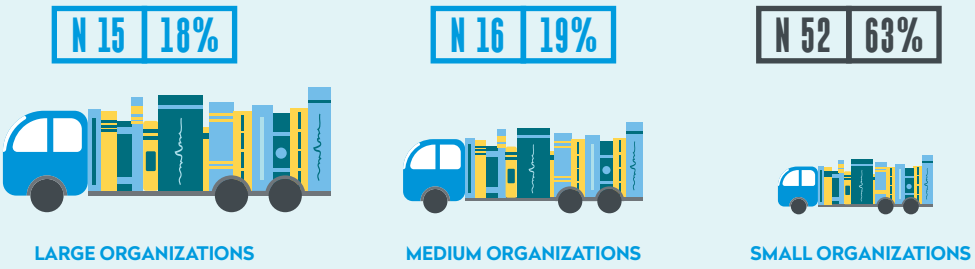
4 / DISTRIBUTION / DISTRIBUTION CHANNELS

Distributors

According to 2014 data of National Statistics Office of Georgia, in total there were 83 recorded organizations in Georgia, which operate in the field of wholesale trade books (wholesale state with accessories, books, newspapers and other periodicals). These organizations might be engaged in wholesale trade of fiction as well as non-fiction books and accessories. According to the employed staff and annual turnover, these organizations are divided into small, medium and large companies. According to the data of National Statistics Office of Georgia, 63% of these organizations are small, while medium and large organizations' size is almost equal and each of them make up 18% to 19% of the total market.

8 / Price is calculated in Euro using official exchange rate of 2.6602 set by National Bank of Georgia on June 1, 2016

SCOPE: WHOLESALE TRADE IN ACCESSORIES, BOOKS, NEWSPAPERS AND OTHER PERIODICALS-2014 YEAR



Source: The National Statistics office of Georgia 2014 year

Within the research framework we choose 7 distribution companies, which operate in the field of fiction books distribution. From these seven, ACT has conducted semi-structured interviews with four distribution companies within the framework of quantitative research.

Surveyed distribution companies list

1. Bookstore
2. Iriatoni
3. Saktsigni
4. Lampari-99

Within the research framework, the distribution companies assessed current trends in the distribution of books in Georgia and the problems that hinders them during their activities. By the distributors assessment, it is a positive fact that the book market was expanded in Georgia in the last years - books are sold not only in specialized bookstores, but also in other types of merchants (eg: supermarkets, pharmacy chains and others).

While assessing the distribution field, distributors mostly focus attention on existing problems. In their view, because of current crisis bookstores have more expenditures, consequently, book price has increased, book sales and purchasing ability has reduced. The price increase has also affected imported books, which is linked to the currency devaluation. Recovering gained money is generally complicated. Existence of tenders also complicates work of distributors - distributors participating in the tender should have already acquired the books, but they may not win in the end.

Distributors say that book fairs and festivals should be held more frequently in Georgia, because at such events books are sold in the greater number.

Distribution activities:

Distribution companies in 2013, 2014 and 2015 carried out sale of books through the following channels: bookstores, wholesalers, Internet, call center and exhibition, and sale. From the above mentioned channels, the highest share of book sales in the last 3 years was in the bookstores.

The research shows that in 2013, 2014 and 2015, the distributors participating in the research, sold 23,200 book titles. The trend of annual decrease in the number of titles sold was observed, which may be caused by the practice of direct working relations between publishing houses and the stores.

NUMBER OF SOLD BOOKS BY TITLES 2013-2014-2015 YEAR

Source: semi-structured interviews with 4 distributors

Based upon earned revenues by the distributors in 2013, 2014 and 2015, it is obvious that the largest revenue can be gained through selling fiction category books. Compared with other categories, more or less profitable is the sale of children's literature category books.

The research showed that in addition to books, distributors also sell accessories and newspapers-magazines, however, the highest share of their revenue comes from the sale of books.

Working relations with publishing houses

At Georgian book market, distributors cooperate with various publishing houses and distribute their publishings; some of them name more than 30 publishing houses.

As it turns out, in the last three years, 8 distributors have cooperated on average with 20 publishing houses.

NUMBER OF PUBLISHING HOUSES, WHICH HAVE WORKING RELATIONS WITH DISTRIBUTORS

YEAR	2013	2014	2015
Average amount of publishing houses	18	19	19
Minimum amount of publishing houses	2	5	8
Maximum amount of publishing houses	30	30	30

Source: semi-structured interviews with 4 distributors

Forms of working relations with publishing houses are different. Publishing houses sell books to distributors at fixed selling price and also at not fixed prices almost in equal amounts. Mixed behavior is also typical, given the fact that one distributor cooperates with several publishing houses; they have to work with different publishing houses under variety of conditions.

Compensation of financial commitments to publishing houses by distributors is done in variety of forms. Some distributors compensate publishing houses immediately after receiving books; some after delivering books to trade spots. There are cases when payment to publishing house is made on a monthly basis. In addition, due to the fact that a distributor cooperates with a variety of publishing houses, books, they have to compensate the value of books under various conditions.

In turn, distributors receive funds from the bookstores after final sale of books. Revenues gained during the delivery of books to trade spots and their distribution represent a large share of income of distributors.

In turn, distributors' behavior about the delivery of certain books is mainly typical – they deliver one and the same book under one and the same price to different trade spots, however, they are aware of the price at which particular trade spot/shop sells the book to the reader.

5 / BOOK STORES

According to 2014 data of the National Statistics Office of Georgia, there were around 50 book stores registered by 2014, most of them were small-sized companies. Specifically, the number of small sized stores is 41, while only "Biblus" is in category of large companies.

As representatives of bookstores mention, there are mostly negative changes for the last two years at the book market, which is reflected in the decline of the sale of books. Part of the respondents noted that decline in sale of books can be attributed to high prices of books (price increase) on the one hand and on the other hand, enhanced competition and effort to strengthen monopolistic state by only one competitor.

Based upon store information the average number of copies sold in 2015 compared to previous years was significantly reduced. If in 2014 this figure amounted to 180,892 books, in 2015 it was reduced by almost 15,000 books and amounted to an average of 165,543 copies.

SOLD BOOKS (TITLES AND COPIES) AT AN AVERAGE NUMBER FOR ONE STORE / BY YEARS 2013-2014-2015

	NUMBER OF TITLES / AVERAGE INDICATOR /	NUMBER OF SOLD COPIES /AVERAGE INDICATOR /
2015	3404	165 543
2014	3482	180 892
2013	3570	183 488

Source: semi-structured interviews with 9 stores

Distribution of sold books by genre has not changed in recent years. 33% -35% of the books sold In 2013-2015 is fiction, children's literature is almost the same, third place is taken by in the textbooks of (average of 10% -13%).

It can be noted as trend that, according to data of the last three years, the Georgian translations of foreign literature is sold in twice the amount than the Georgian literature or foreign literature in a foreign language.

Bookstores Georgian book market are characterized by trade with other products in addition to books, such as: accessories, newspapers / magazines, though, naturally stores largest share of sales - an average of 80%, comes on books, revenue received through other additional product sales generated total turnover of an average of 18-20%.

Book stores mainly receive / buy books from publishing houses for their future sale. However, around 20% from the bought and sold books comes from distributors.. Stores only in rare and exceptional cases, buy books from wholesale trade merchants.

The research showed book stores are more or less involved in other marketing activities, participate in exhibitions, have a variety of holiday-related discounts, some of them organizes meetings with writers, organize competitions and lotteries. For a source of information for this type of marketing activities they mostly use the Internet - to their website and Facebook pages.

According to store representatives, there are mainly two large publishing houses operating in Georgia. Palitra L and Bakur Sulakauri Publishing are considered to be market leaders. Also, in some cases they named Diogene and Intellect.

2015 Best-Seller Books

Within the research framework 2015, best-seller books were revealed, based on the data received from distributors and stores.

MOST SELLING BOOKS / ALL CATEGORIES OF WORK

Zaza Burchuladze – "Mineral Jazz"	Bakur Sulakauri Publishing
Gabriel Garcia Marquez – "Living to Tell the Tale"	Intelekti Publishers
Giorgi Kekelidze – "Gurian Diaries"	Siesta
Daniel Keyes – "Flowers for Algernon"	"Books in Batumi" Publishing
Kakha Bendukidze – "We Have no Other Choice"	Tabula
John Green– „Paper Towns"	Bakur Sulakauri Publishing
Cassandra Clare – "City of Bones"	"Books in Batumi" Publishing
John Green – „The Fault in Our Stars"	Bakur Sulakauri Publishing
Harper Lee – "To Kill a Mockingbird"	Bakur Sulakauri Publishing
James Dashner – "The Maze Runner"	Palitra L

Source: semi-structured interviews with 4 distributors and 9 stores. Titles are not presented according to the sequence.

MOST SELLING BOOKS / FICTION

Zaza Burchuladze – "Mineral Jazz"	Bakur Sulakauri Publishing
Gabriel Garcia Marquez – "Living to Tell the Tale"	Intelekti Publishers
Giorgi Kekelidze – "Gurian Diaries"	Siesta
Daniel Keyes – "Flowers for Algernon"	"Books in Batumi" Publishing
James Dashner – "The Maze Runner"	Palitra L
Eric Emmanuel Schmitt – "Oscar and the Lady in Pink"	Bakur Sulakauri Publishing
John Green– „Paper Towns"	Bakur Sulakauri Publishing
Harper Lee – "To Kill a Mockingbird"	Bakur Sulakauri Publishing
John Green – „The Fault in Our Stars"	Bakur Sulakauri Publishing
Cassandra Clare – "City of Bones"	"Books in Batumi" Publishing

Source: semi-structured interviews with 4 distributors and 9 stores. Titles are not presented according to the sequence.

MOST SELLING BOOKS / NON-FICTION

Ernst Gombrich – "A Little History of the World"	Bakur Sulakauri Publishing
Tamar and Isidore Gvarjaladze – Dictionary	newspaper "Sakartvelos Matsne"
Fritz Říman – "Basic Forms of Fear"	Publishing house „Tsignieri"
Kakha Bendukidze – "We Have no Other Choice"	Tabula
Authors Group – Archaeological Treasures	Georgian National Museum
Rusudan Gorgadze (compiler) – Album 'Georgia'	Bakur Sulakauri Publishing

Source: semi-structured interviews with 4 distributors and 9 stores. Titles are not presented according to the sequence.

MOST SELLING BOOKS / GEORGIAN LITERATURE

Zaza Burchuladze – "Mineral Jazz"	Bakur Sulakauri Publishing
Giorgi Kekelidze – "Gurian Diaries"	Siesta
Nino Kharatishvili – "Zhuzha"	Intelekti Publisher
Mariam Tsiklauri – Georgian Alphabet	Bakur Sulakauri Publishing
Dato Turashvili – "King of Forests"	Bakur Sulakauri Publishing
Kakha Bendukidze – "We Have no Other Choice"	Tabula
Dato Turashvili – "Flight from USSR"	Bakur Sulakauri Publishing
Gela Charkviani – "Interview with Father"	Artanuji
Chabua Amirejibi – "Data Tutashkhia"	Private publishing

Source: semi-structured interviews with 4 distributors and 9 stores. Titles are not presented according to the sequence.

MOST SELLING BOOKS / TRANSLATED LITERATURE

Jean-Paul Sartre – "Nausea"	Alef
Gabriel Garcia Marquez – "Living to Tell the Tale"	Intelekti Publishers
Daniel Keyes – "Flowers for Algernon"– –"Books in Batumi" Publishing	
James Dashner – "The Maze runner"	Palitra L
Erich Maria Remarque – "Three Comrades "	Arete
Frederic Beigbeder – "99 Francs"	Palitra L
John Green – „The fault in our stars"	Bakur Sulakauri Publishing
Harper Lee – "To Kill a Mockingbird"	Bakur Sulakauri Publishing
Cassandra Clare – "City of Bones"	"Books in Batumi" Publishing

Source: semi-structured interviews with 4 distributors and 9 stores. Titles are not presented according to the sequence.

6 / E-BOOK STORES

Nowadays there are two biggest and relatively long-standing e-book stores operating at the e-book market: saba.com.ge and lit.ge. Apart from those shops, there are several new websites operating at e-book market: www.ebooks.ge, www.ibooks.ge, www.readerwill.com.

lit.ge is an e-book store operating at the market since 2011. Now the website readers can purchase/download more than 2,600 titles of books/downloads. The minimum price for books on the website is 0.20 Gel and the maximum price reaches to 19.30 GEL. The website also provides free e-books. There are different genres and categories of books presented at store, including fiction and non-fiction, Georgian, translated from and into foreign language literature.

saba.com.ge is an e-book store operating since 2012. It is the project of TBC bank. Nowadays, more than 2,900 book titles both fiction and non-fiction are presented at the website. The maximum selling price for books presented on the website is 20 GEL and minimum is 0.25 GEL. The reader also has an opportunity to download free e-books.

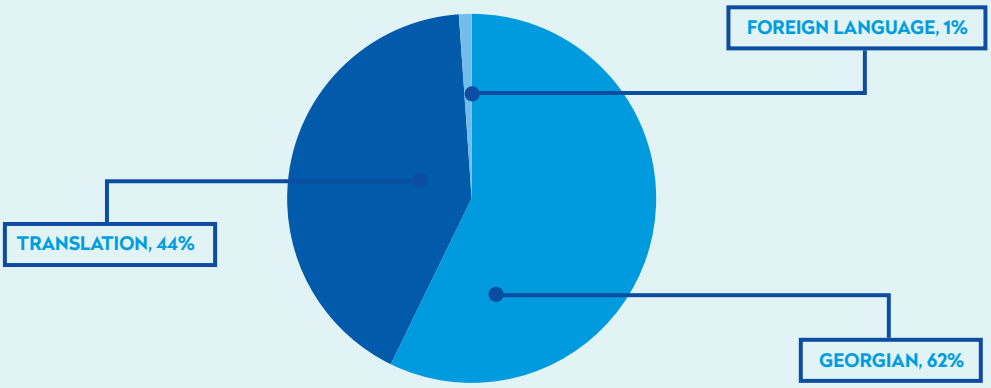
ebook.ge - This website is cooperative project between publishing Palitra L and e-book store www.lit.ge. It has been operating on e-book market since 2015 and offers readers 500 titles of e-books of publishing Palitra L. The maximum selling price for books presented on the website is 9.90 GEL and minimum is 1 GEL. This website contains both fiction and non-fiction, including Georgian and translated books.

ibooks.ge - Online shop for e-books, which offers its customers not only to purchase books, but also to publish them, hence sell. The website started to function since 2014 and now contains 128 book titles. Minimum book price is 0.37 GEL and maximum price 4.44 GEL. This website contains both fiction and non-fiction, including Georgian, translated and foreign books.

readerwill.com – website operates since 2013, however, nowadays they no longer sell fiction .

In 2013-2016 years, the majority of titles presented on websites of e-book stores, namely 60% was Georgian literature, and 39% - was translated literature. E-book store offers foreign-language literature to its customers in a very small number – its share was only 1%.

DISTRIBUTION OF TITLES PLACED ON E-BOOK WEBSITES BY GEORGIAN / TRANSLATED IN 2013-2016 YEARS



As for the e-book genres, the study showed that in years 2013-2016, e-book stores presented fiction by the largest share – from the titles placed in those years - 77% is fiction, while the remaining 22% - is non-fiction.

The research revealed that since 2013, the number of new titles presented for sale by e-book stores has increased from year to year. In 2013, 1,040 new titles have been added to the existing market and were placed in the e-book websites, in 2014, this figure was equal to 1,409 titles, while in 2015 it was 2,145[9].

NUMBER OF E-BOOK TITLES 2013- 2015

YEAR	2013	2014	2015
Number of added titles	1040	1409	2145

Within the research framework, 2015 top sellers in Georgian as well as in translated literature were identified. The following table presents the final version of Saba and lit.ge-'s bestsellers.

9 / Title number does not include unique names. These figures include total of all titles, which is on sale in electronic format on various e-book store websites. Bookstore websites offer books for sale in electronic format. Accordingly, different titles may be repeated for different e-book stores.

2015 TOP SELLERS AMONG GEORGIAN E-BOOKS

"The First Robe"	Guram Dochanashvili
"Flight from USSR"	Dato Turashvili
"Kagdata in Georgia"	Aka Morchiladze
"Kvarkvare Tutaberi"	Polikarp Kakabadze
"Gurji Khatun and Eleven Stories"	Dato Turashvili
"Gurian Diaries"	Giorgi Kekelidze
„77/50"	Tekla Iordanishvili
100 Questions to Raise Intelligence	Giorgi Todashvili
"Another Amsterdam" (Chapter II)	Dato Turashvili
"Devi's Wife's Laugh"	Lia Liqokeli
"Day of Myself"	Lia Liqokeli
"We Don't Have Other Choice"	Kakha Bendukidze
"I am Leaving Tbilisi at Dawn"	Kakha Suluashvili

Note: The table presents top sellers of Georgian Literature from "Saba" and lit.ge in 2015. Titles are not presented according to the sequence.

2015 TOP SELLERS AMONG TRANSLATED E-BOOKS

"Fifty Shades Darker"	E. L. James
"Fifty Shades of Grey"	E. L. James
"Fifty shades Freed"	E. L. James
"The Metamorphosis"	Franz Kafka
"The Trial"	Franz Kafka
"Idiot"	Fyodor Dostoevsky
"The Great Gatsby"	Francis Scott Fitzgerald
"Forgotten Murder"	Agatha Christie
"The Master and Margarita"	Mikhail Bulgakov
"Ali and Nino"	Kurban Said
"Diary of Anne Frank"	Anne Frank
"Red and Black"	Stendhal
"Little Lady of a Big House"	Jack London

Note: The table presents top sellers of translated Literature from "Saba" and lit.ge in 2015. Titles are not presented according to the sequence.

7 / LITERARY COMPETITIONS OF 2013-2015 YEARS

Literary award "saba" / www.saba.com.ge

Literary Award "Saba" was founded in 2003 and is held annually. The aim of the award is to identify best books and authors. At this award competition, there is a discussion about the most original literary works published last year, Georgian translation of foreign works, as well as literary criticism and documentary prose samples.

Literary Award "Saba" is awarded in next nominations: the best romance of the year, the best poetry collection of the year, the best short stories collection of the year, the best play of the year, the best literary debut of the year, the best literary criticism of the year, the best essay and documentary prose of the year, best Georgian translation of foreign work, best foreign translation of Georgian work, the best e-book, the prize "Saba" for outstanding contribution to the development of literature.

Iliauni literary contest / www.iliauni.edu.ge

Iliauni literary contest was founded in 2010 by the Ilia state university and is held annually. Prize is awarded for the best romance and its purpose is to promote the development of romance in Georgia. Up to 2014, award has been granted to 5 nominees. In 2014, academic council of Ilia State University decided to give award for best translation of foreign romance once in every five years.

Tsinandali prize / www.zurabzhvania.ge

"Tsinandali Award" was established in 1998 and renewed in 2014 after several years of interruption. It is designed for young (18-30 years old) scientists and art workers and its goal is to promote, encourage and support young scientists and art workers. "Tsinandali Award" winners are identified by eight categories: art, theater, cinema, fiction (prose), fiction (poetry), music, photography, visual arts, and natural science. The project is implemented under the patronage of the President of Georgia.

Literary award "Tsero" (CRANE)

Literary Award "Tsero" is carried out with support of the Ministry of Culture and Monument Protection of Georgia. The contest is organized by the e-book shop Lit.ge and pharmaceutical company GPC.

The contest was established in the fall of 2006. Its goal is to promote Georgian literature and identify new authors in Georgian literature.

The contest is held on Lit.ge in two stages and anyone can participate in it. In the first stage, the competition works are selected by specially invited jury, and at the second stage, the winners are identified based on readers' assessment of the works selected by the jury.

Apart from these contests, we should also note literary competitions "Emigrant's Letter", "Merani", literary contest in miniature genre "Ertguleba" named after Goderdzi Chokheli, Revaz Inanishvili contest "One Short Story" named after Revaz Inanishvili and children's literary contest "Buknacho".

8 / READERS

Share of book readers

During the research four major cities - Tbilisi, Batumi, Kutaisi and Telavi were studied. Based on the aggregate data, it was found that almost half population of the cities (49, 2%) has read some kind of literature last year, fiction (33.6%) or non-fiction (25.6%). Given the fact that the target segment is fiction readers, this section of the report will be generalized on this segment.

Interesting trends were identified in the context of cities. In particular, most of the readers of the book appeared to be in the capital (51.4%), while the least number of books is read by Kutaisians (37.8%).

THE PRACTICE OF READING / REGIONAL SCOPE

	TBILISI	KUTAISI	BATUMI	TELAVI	FINAL PICTURE
HAS READ NONE	48,6%	62,2%	51,5%	58,1%	50,8%
NON-FICTION	26,9%	13,6%	31,0%	24,1%	25,6%
FICTION	35,2%	29,0%	29,0%	22,8%	33,6%

Source: Reader Poll

The study has found that compared to men, a large share of women reads books (women - 58%, men - 38%), while equal shares of men read fiction (22%) and non-fiction (22%) literature, whereas women mostly read fiction (fiction - 42.4%, non-fiction - 28.3%).

THE PRACTICE OF READING / GENDER SCOPE

	FEMALE	MALE
HAS READ NONE	42,0%	62,0%
NON-FICTION	28,3%	22,2%
FICTION	42,4%	22,3%

Source: Reader Poll

Naturally the research has revealed age differences from the point of book reading practice. The practice of reading some type of literature is comparatively high among young respondents. As age level grows, the practice of reading books decreases. In addition, the practice of reading non-fiction is much higher among 16-24 year-old age group (39%).

THE PRACTICE OF READING / AGE SCOPE

	16-24	25-34	35-44	45-54	55-64	65 +
HAS READ NONE	35,9%	46,4%	49,5%	56,3%	64,4%	61,2%
NON-FICTION	39,0%	28,0%	25,1%	23,2%	18,8%	12,7%
FICTION	37,1%	37,2%	33,6%	29,6%	26,6%	34,9%

Source: Reader Poll

Purchasing books

As the research of urban population showed, among the various spots related to books, readers of fiction mostly visit book stores - the majority (67%) still visits book stores for the last one year with given frequency, while the remaining one-third (33%) has not been in a bookstore in the last one year.

Much lower is the share of audience attending book fairs (19%) and festivals (12%). As for the libraries, 16% of readers polled in the cities visit them. Naturally, this figure is much higher amoung young age and decreases with age.

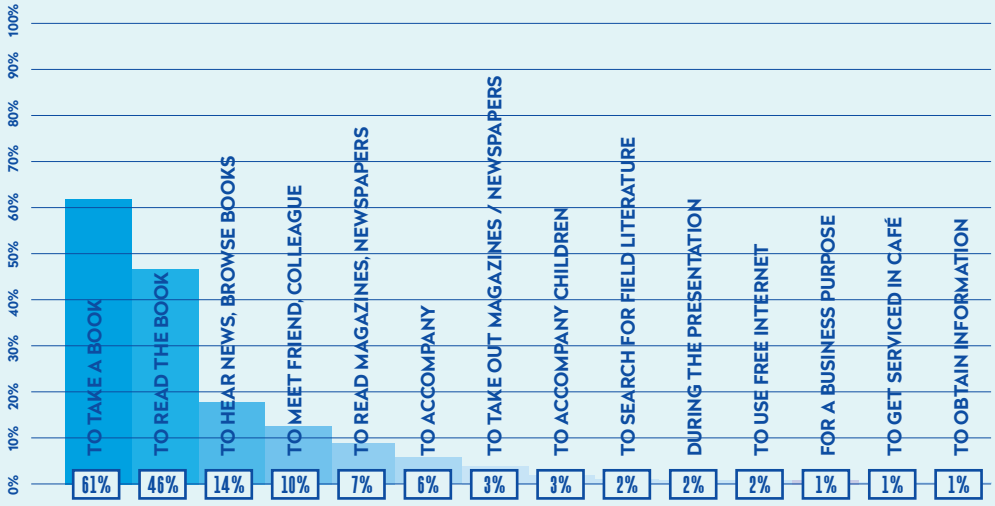
VISITING NUMBER OF VARIOUS SPOTS/ PLACES

	TBILISI	KUTAISI	BATUMI	TELAVI	FINAL PICTURE
BOOK STORE	66,6%	64,1%	73,3%	65,0%	66,9%
BOOK FAIR	21,3%	10,2%	7,5%	6,3%	18,7%
BOOK FESTIVAL	14,2%	1,9%	7,1%	1,2%	12,2%
LIBRARY	14,9%	10,7%	29,1%	25,9%	15,8%

Source: Reader Poll

As the table shows us, 15.8% of readers polled in cities have visited/or are still going to libraries in the past one year. The most frequent reasons for visiting libraries are to take books (61%) and/or to read the book at the spot (46%). The small proportion of readers visit library for the purpose of hearing news (14%) or meeting up with friends (10%).

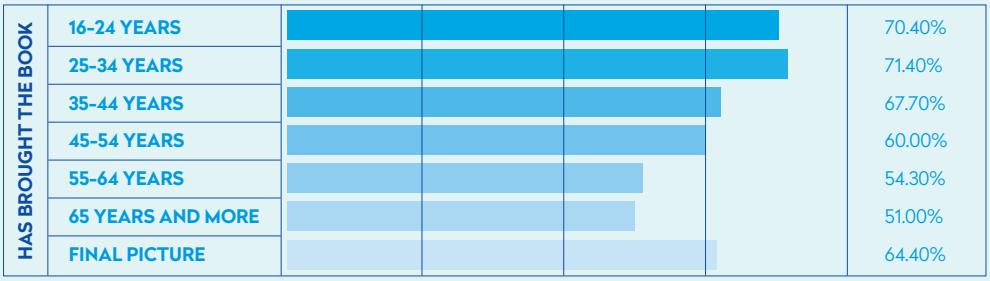
PURPOSE WHEN VISITING THE LIBRARY N=132



Note: The sum of the percentages shown on graph exceeds 100% because more than one answer was permitted.

Only 64% of fiction readers bought any type of literature in the last one year, which means that the remaining 36% of readers is reading literature, but are not renewing their library.

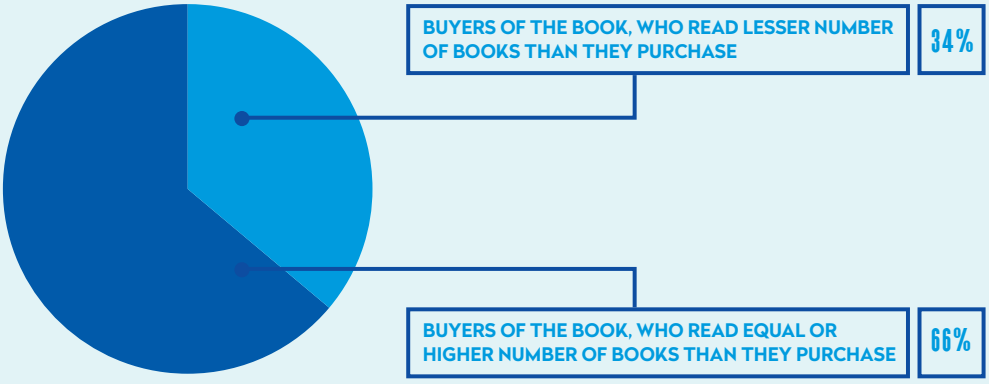
INDICATOR OF BOOK PURCHASES IN THE LAST ON YEAR N=700



Source: Reader Poll

The research results have revealed that the majority of book buyers are also active readers of books.

DISTRIBUTION OF READERS AND BUYERS N=430

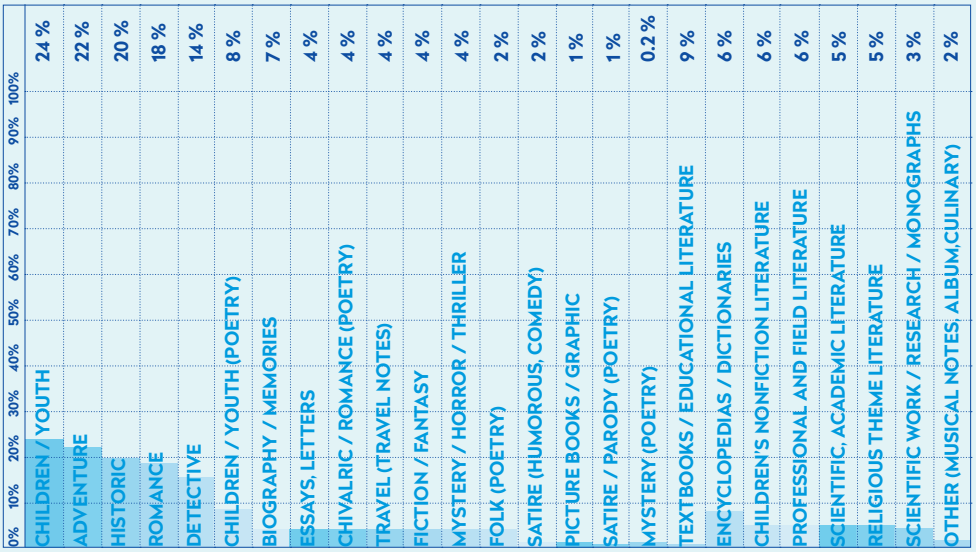


Residents of large cities mostly purchase literature from children's/youth categories (24%).

High interest is also boasted to adventure (22%) and historical (20%) literature. It should also be noted that the reader mainly purchases prose.

As for non-fiction, in this respect, mainly, the textbook purchase is made (9%).

CATEGORIES OF PURCHASED BOOKS (N=458 FROM THOSE WHO PURCHASED)



Note: The sum of the percentages shown on graph exceeds 100% because more than one answer was permitted.

It can be said that the practice of purchasing Georgian literature and translated literature is similar among the book readers - almost half of the book readers (48%) have purchased particular genre of Georgian literature in the last one year, also, the half (48%) has purchased translated literature. Interestingly, almost no one has bought more than 6 books during one year.

Number of purchased books in foreign language is significantly lower - only 12.8% of book readers have purchased different genres of literature in a foreign language.

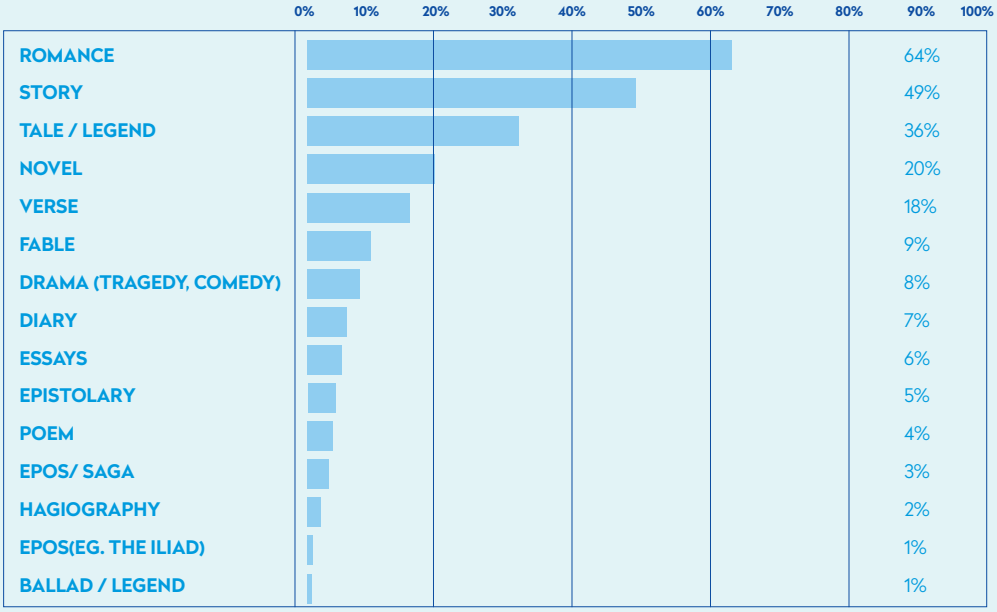
BOOK PURCHASE INDICATOR N=700

	GEORGIAN LITERATURE	LITERATURE TRANSLATED INTO GEORGIAN	FOREIGN LANGUAGE LITERATURE
HAS NOT PURCHASED	52,0%	52,0%	87,2%
1-6 BOOKS	47,2%	46,4%	12,6%
7 AND MORE BOOKS	0,8%	1,7%	0,2%

Source: Reader Poll

During the last year, among the purchased genres romance (64%) and short stories (49%) stand out. Also, a popular genre is tales/legends (36%).

FICTION GENRE N=413



Note: The sum of the percentages shown on graph exceeds 100% because more than one answer was permitted.

Within the research framework, the main spots of book purchase were also studied. The book store was identified as the most typical place for purchasing books (86%). It should be noted that differences were identified from the point of book purchasing spots among the cities. For example, if almost absolute majority in Telavi (97%) purchases books at the book store, in other regional cities the purchase of books is more or less still going on at book fairs and festivals. In addition, the book fair and festival were more frequently mentioned as book purchasing spots in Tbilisi, than in regional cities (the market - 21%, the festival - 12%).

BOOK PURCHASE SPOT (N=458 FROM THOSE WHO PURCHASED)

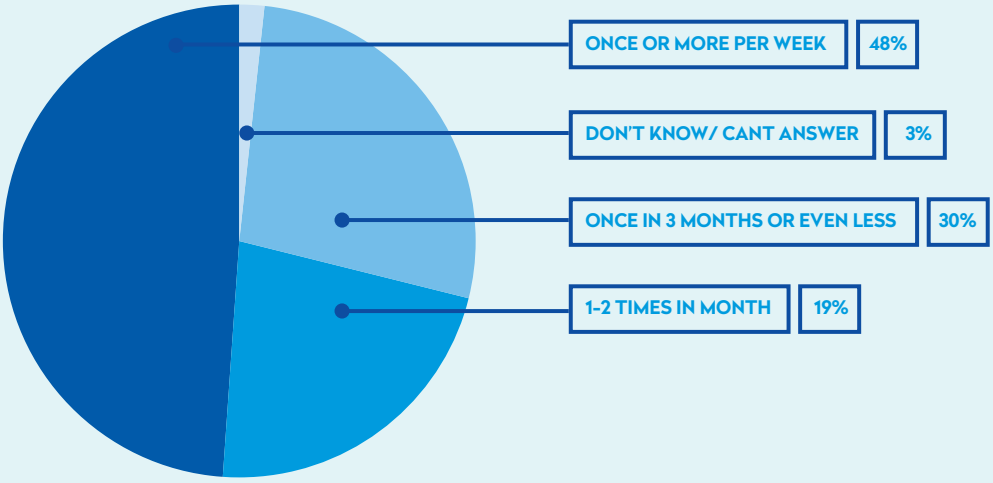
	TBILISI	KUTAISI	BATUMI	TELAVI	FINAL PICTURE
BOOK STORE	86%	89%	85%	97%	86%
BOOK FAIR	21%	9%	7%	3%	18%
BOOK FESTIVAL	12%	3%	9%	0%	11%
SELLERS	12%	0%	3%	0%	10%
INTERNET SUBSCRIPTION	9%	6%	10%	1%	9%
DOOR TO DOOR PRINCIPLE	7%	9%	2%	0%	7%
OTHER TYPES OF TRADING SPOTS	6%	7%	10%	5%	7%
BOOK PUBLISHING	0%	2%	1%	0%	1%
N=	265	63	66	64	458

Source: Reader Poll

Reading habits

Within the framework of the research, the frequency of reading fiction works was identified within a book reader. According to the research, almost half of the readers are actively reading fiction (48% reading once a week or more often). 19% of the book readers are reading mentioned genre 1-2 times a month, while 30% reads fiction works - once in 3 months or even less.

FREQUENCY OF READING FICTION (2015 YEAR N=700)



Source: Reader Poll

Fiction reading frequency varies according to the age. As it turns out, the frequency of reading books increases in line with the age. The highest frequency of reading books is a characteristic for older readers (75% of readers who are 65 years and over, read books once a week or more often).

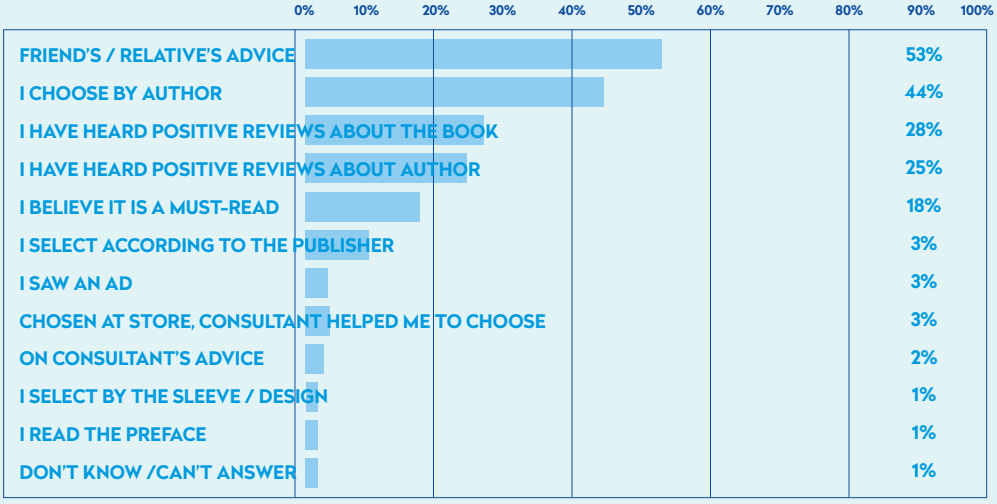
FREQUENCY OF READING FICTION IN THE AGE SCOPE (2015 YEAR)

	16-24	25-34	35-44	45-54	55-64	65 year. +
ONCE OR MORE PER WEEK	40%	46%	42%	45%	46%	75%
1-2 IN MONTH	30%	21%	15%	10%	26%	12%
ONCE IN 3 MONTHS OR LESS	30%	30%	38%	41%	26%	10%
DON'T KNOW/ CAN'T ANSWER	1%	3%	5%	3%	2%	3%
N=	180	157	129	94	71	69

Source: Reader Poll

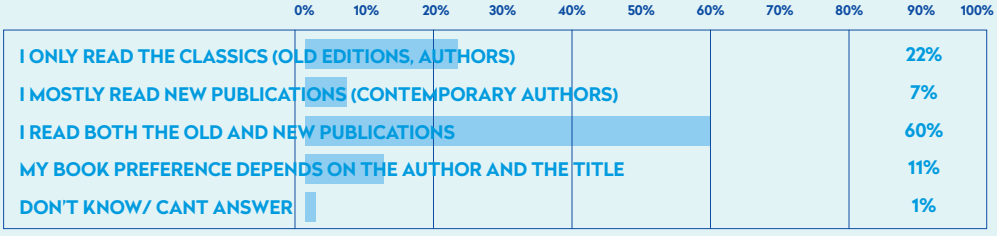
Criteria for selecting the book were identified within the reads of fiction. As it turned out, more than half of the book readers are guided by the advice of family and friends (53%) when choosing the book. A big share of readers select books by author (44%). The research has found that 25% -28% of the readers choose to read a book, based on positive reviews they have heard about the author or the title. 18% of the book readers select books, which they consider as a must-read.

CRITERIA FOR CHOOSING THE BOOK N=700



The research revealed an interesting trend in terms of reading new and old publications. As it turns out, most of the readers prefer to equally read the new as well as old editions of the publications (60%). However, different tendency was identified in the remaining 40% - they prefer to read classics - slightly more than a fifth (22%) of the readers read only classical works, while the new publications / contemporary authors are read by only 7% of readers. One out of ten readers state that the selection of the book depends on the title of the book and the author (11%).

NEW TITLES VS. CLASSIC N=700



Source: Reader Poll

The habit of reading new and old books is different within scope of readers' age. As it turns out, the habit of reading only classics is characterized to mostly older (55 and over) readers, while contemporary authors are mostly read by younger people (16-24 years and 25-34 years).

BEHAVIOUR OF READING NEW AND OLD BOOK PUBLICATIONS IN THE AGE SCOPE

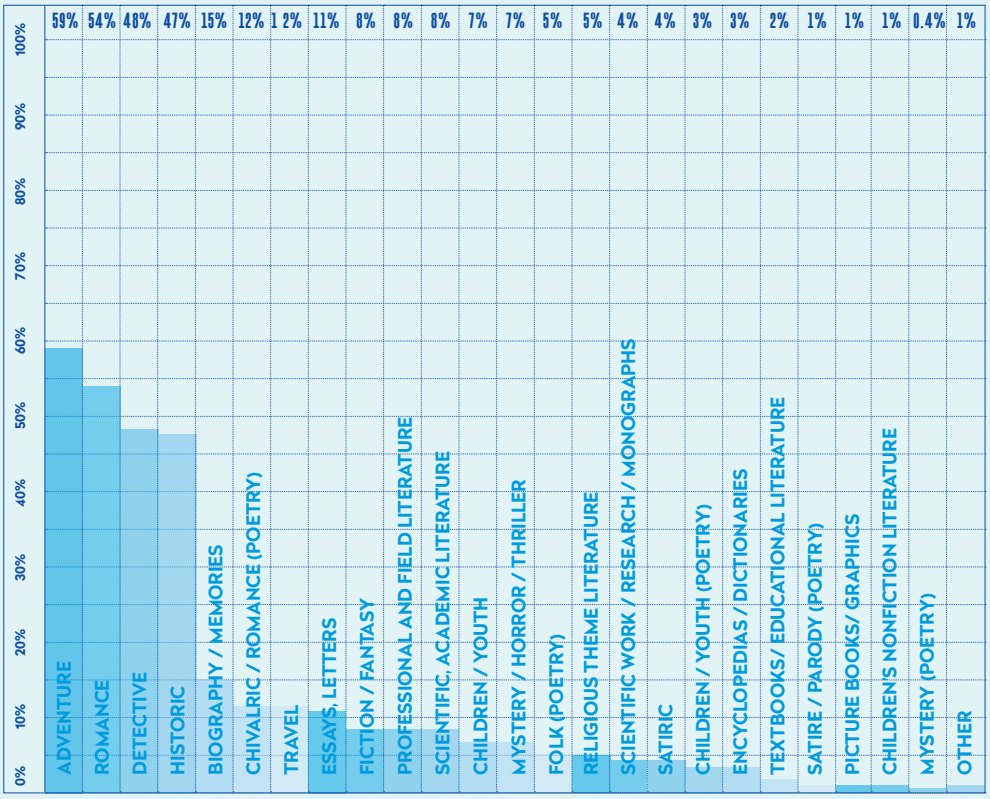
YEAR	16-24	25-34	35-44	45-54	55-64	65 +
I ONLY READ THE CLASSICS (OLD EDITIONS, AUTHORS)	11%	14%	22%	21%	26%	51%
I MOSTLY READ NEW PUBLICATIONS (CONTEMPORARY AUTHORS)	9%	11%	7%	6%	0%	2%
I READ BOTH OLD AND NEW PUBLICATIONS	69%	61%	65%	59%	59%	37%
MY BOOK PREFERENCE DEPENDS ON THE AUTHOR AND THE TITLE	11%	14%	7%	13%	15%	7%
DON'T KNOW/ CAN'T ANSWER	0%	1%	0%	1%	0%	3%

Source: Reader Poll

Advantages of book genres and categories

Research data shows that a large part of fiction readers mostly like to read adventure (59%), romance (54%), detective (48%) and historical (47%) literature.

THE MOST POPULAR BOOK CATEGORIES N=700



Note: The sum of the percentages shown on graph exceeds 100% because more than one answer was permitted. Advantages of various categories vary by age.

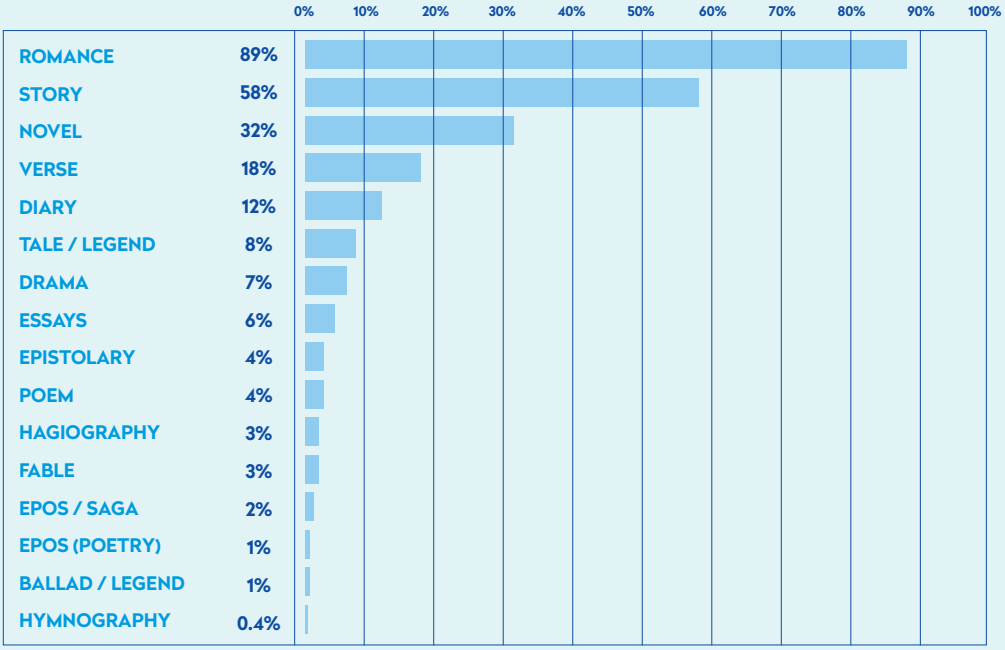
THE MOST POPULAR BOOK CATEGORIES BY AGE

	16-24 YEARS	25-34 YEARS	35-44 YEARS	45-54 YEARS	55-64 YEARS	65 + YEARS
ADVENTURE	70%	57%	56%	48%	62%	57%
ROMANCE	57%	56%	59%	54%	52%	42%
DETECTIVE	50%	46%	41%	52%	53%	50%
HISTORIC	35%	31%	46%	51%	71%	71%
BIOGRAPHY / MEMOIRS	10%	12%	11%	20%	20%	25%
CHIVALRIC / ROMANCE (POETRY)	10%	9%	9%	17%	10%	21%
TRAVEL	12%	9%	12%	13%	15%	12%
ESSAYS, LETTERS	11%	11%	8%	12%	12%	13%
FICTION / FANTASY	16%	11%	5%	3%	6%	6%
PROFESSIONAL AND FIELD LITERATURE	6%	11%	7%	13%	9%	5%
SCIENTIFIC, ACADEMIC LITERATURE	6%	7%	7%	13%	10%	6%
CHILDREN / YOUTH	5%	8%	8%	6%	5%	12%
MYSTERY / HORROR / THRILLER	9%	12%	8%	2%	4%	0%
FOLK (POETRY)	2%	3%	8%	5%	7%	6%
RELIGIOUS THEMES LITERATURE	2%	7%	4%	4%	5%	5%
SCIENTIFIC WORK / RESEARCH / MONOGRAPHS	1%	6%	4%	5%	6%	6%
SATIRICAL (HUMOROUS, COMEDIC)	4%	3%	7%	3%	5%	2%
CHILDREN / YOUTH (POETRY)	1%	2%	4%	4%	4%	3%
ENCYCLOPEDIAS / DICTIONARIES	5%	1%	1%	4%	9%	0%
TEXTBOOKS / EDUCATIONAL LITERATURE	6%	0%	0%	2%	4%	0%
SATIRE / PARODY (POETRY)	1%	1%	1%	3%	0%	2%
PICTURE BOOKS / GRAPHICAL	1%	1%	1%	3%	0%	0%
CHILDREN'S NON-FICTION	0%	0%	0%	2%	4%	0%
MYSTERY (POETRY)	1%	0%	0%	1%	0%	0%
OTHER	0%	1%	1%	1%	1%	3%
BASE: READERS OF SPECIFIC AGE CATEGORIES	N=180	N=157	N=129	N=94	N=71	N=69

Source: Reader Poll

Within the research framework, the most popular literature genre was also revealed among book categories.

THE MOST POPULAR GENRE OF LITERATURE N=700



Note: The sum of the percen8tages shown on the graph exceeds 100% because more than one answer was permitted.

Reading of books by categories and genres

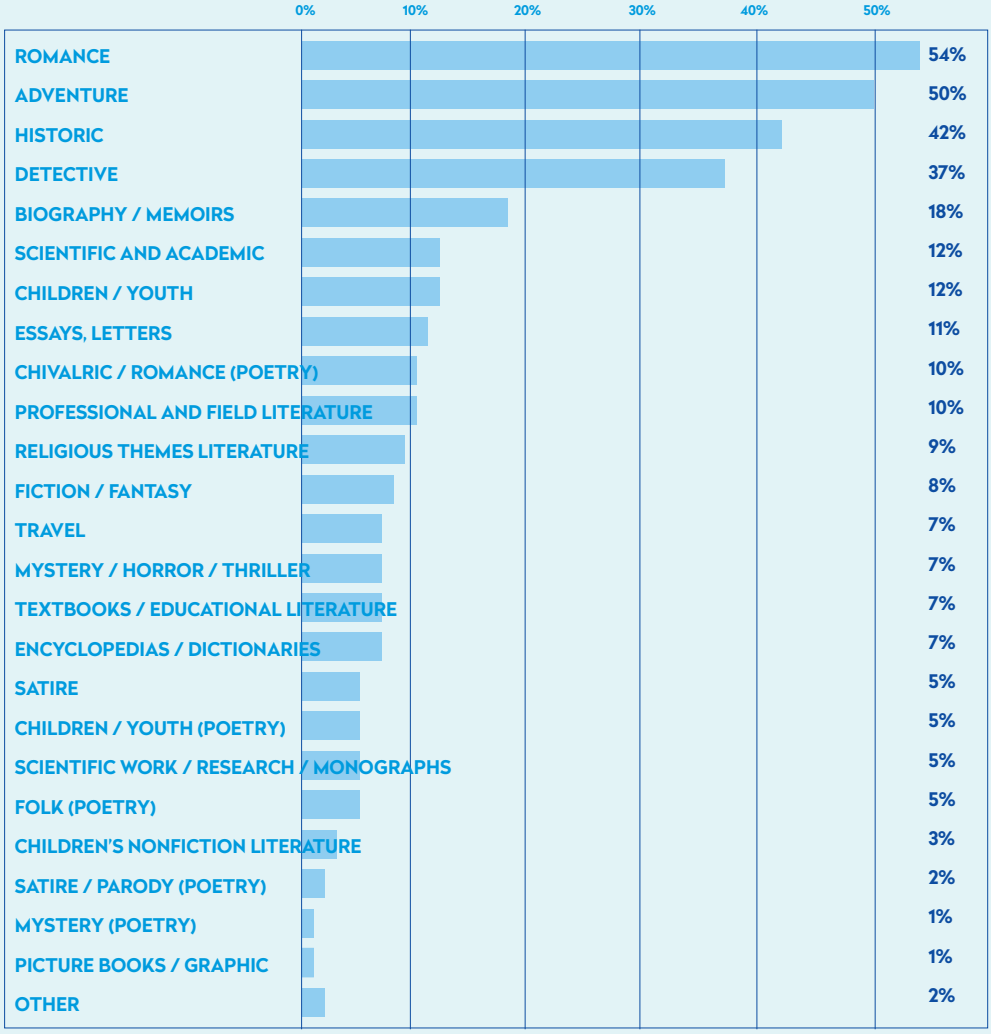
Research results show that among urban population, the majority of fiction readers have read prose in recent years (99%). In this segment, there is also large experience of reading poetry (83%).

The research results reveal that one third of fiction readers have read non-fiction in recent years (32%). It should be noted that readers of non-fiction genre are largely represented in Adjara (42%) and in Tbilisi (33%). However, reading mentioned genre is less common in Kakheti and Imereti (Kakheti - 24%, Imereti 19%).

Within the framework of research, category and genre of the most readable books was revealed in the polled cities. Naturally, according to the study categories and genres of books, which are most likeable by readers, are the ones that are the most readable. As it turns out, it is most common is to read loverly (54%), adventure (50%), history (42%), detective (37%) and biography (18%) works among the readers of fiction literary books .

Among the non-fiction, during the last one year the most readable were scientific academic literature (12%), professional and field literature (10%) and religious genre literature (9%). As research shows, less readers are reading satire (2%), mystic (1%) and picture/graphics books (1%).

BOOK READING EXPERIENCE BY CATEGORY N=700



Note: The sum of the percentages shown on graph exceeds 100% because more than one answer was permitted.

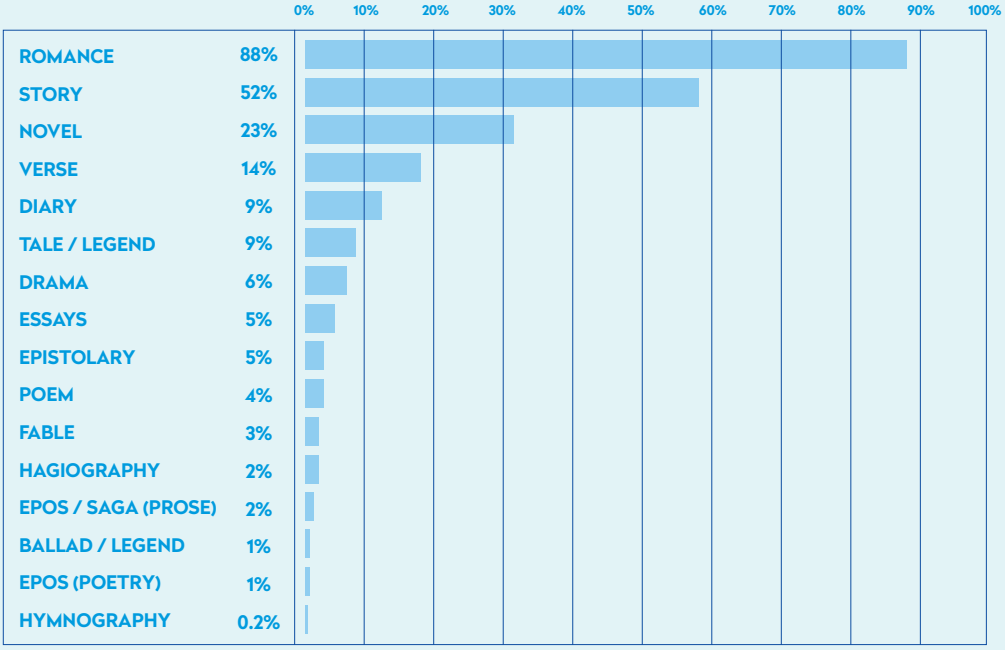
A large proportion of readers has read some genre of Georgian literature (75%) in the last one year, same number has read translated literature, which suggests that the reader equally likes both the Georgian and translated books. In cases of Georgian as well as translated literature, the majority of respondents have read 1-6 books, more books are read by very small part of polled respondents (3%).

NUMBER OF READERS OF GEORGIAN/TRANSLATED LITERATURE

	GEORGIAN LITERATURE	LITERATURE TRANSLATED INTO GEORGIAN	FOREIGN-LANGUAGE LITERATURE
HAS NOT READ	25%	25%	82%
1-6 BOOK	72%	72%	18%
7 AND MORE BOOKS	3%	3%	0%

The research has revealed a genre of literature, which was read in the polled cities during the last one year. According to the research, the most commonly read books among the readers of fiction are romance (88%), short stories (52%), novel (23%) and poetry (14%).

THE EXPERIENCE OF READING BOOKS BY LITERATURE GENRE N=700

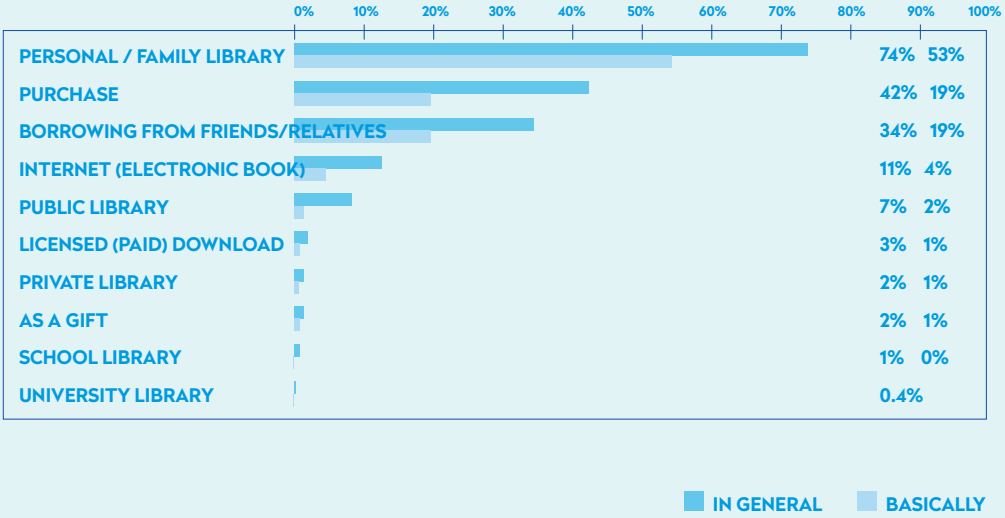


Note: The sum of the percentages shown on graph exceeds 100% because more than one answer was permitted.

Sources for obtaining books

The research has identified general and main sources to get/read different types of books among the readers of fiction. Most of the readers read books from the reader's personal or family library (74%). Above mentioned, represents the source for obtaining books for more than half readers (53%). The second most common source of obtaining books is acquisition (42%). One-fifth of readers considers mentioned source as primary (19%). The third most common source of obtaining books is borrowing them from friends / colleagues (34%). The mentioned source is primary for 19% of the readers. According to the research data, one-tenth (11%) of readers read books electronically.

GENERAL AND MAJOR SOURCE OF OBTAINING BOOKS IN THE LAST ONE YEAR



Source: Reader Poll

9 / LIBRARIES

From 2015, by the initiative of the President of Georgia, the project "Internet for All Village Libraries" is being implemented. The main objective of the project is to move village libraries from various regions of country to modern standards, improve their material and technical base, increase staff qualification and implement modern services, purchase computer equipment for libraries, provide with Internet connecton, teach employees how to find information using computer and internet, and reach international and Georgian electronic databases, etc. Within the project framework, 45 libraries have been already equipped with computers, while the part of librarians passed qualification courses. The second stage of project "Internet for All Village Libraries" is currently implemented - "Modern Internet Service for Village Population of Georgia". With the support of Library Association foundation, it is planned to provide internet access to 70 village libraries at the border regions of Georgia.

The main coordinator of the project is Library Association of Georgia, while the project is supported by National Parliamentary Library of Georgia. The project is implemented with the financial support of the President.

The project "Book for All Village Libraries" should be also mentioned as it was implemented in 2014 with the funding of presidential foundation. Within its framework, 500 Gel voucher have been allocated for all libraries. With such amount, village libraries had opportunity to purchase books appropriate for them and to fill the book funds. For the majority of village libraries, this project is the only source of filling the book funds.

AMOUNT OF PUBLIC LIBRARIES IN GEORGIA, 2015 YEAR

PUBLIC LIBRARIES IN VILLAGES	621 LIBRARIES
PUBLIC (MAIN) LIBRARIES IN REGIONS AND CITIES	67 LIBRARIEST
FROM THOSE PUBLIC LIBRARIES IN TBILISI	37 LIBRARIES
PUBLIC (MAIN, CITI, TBILISI, VILLAGE, CHILDREN)	TOTAL 725 LIBRARIES

Source: Georgian Library Association

AMOUNT OF LIBRARIES IN GEORGIA BY TYPES 2015 YEAR

PUBLIC LIBRARIES	725 LIBRARIES
PUBLIC SCHOOLS LIBRARIES	2085 LIBRARIES
STATE UNIVERSITIES LIBRARIES	50 LIBRARIES
THE LIBRARIES OF PROFESSIONAL COLLEGES	101 LIBRARIES
OTHER TYPES OF LIBRARIES	625 LIBRARIES
	TOTAL 3, 586 LIBRARIES

Source: Georgian Library Association

NUMBER OF READERS 2014-2015[10]

YEAR	2014	2015
TOTAL NUMBER OF READERS[11] AVERAGE NUMBER OF READERS	76 081	94 361
FOR TBILISI LIBRARIES AVERAGE NUMBER OF READERS	1266	1439
FOR REGIONAL LIBRARIES (REGIONAL, MUNICIPALITY, VILLAGE)	214	267

Source: Georgian Library Association

10 / Data is calculated for 206 public libraries.

11 / Since the data was collected for 206 Public Libraries, while there are about 725 public libraries operating in Georgia, the total number of readers for all libraries is probably higher than the figures presented in the table

The research shows that in order to fill the book funds, public libraries purchase books on their own money or receive them as gifts. Books are gifted to libraries by authors, readers, other individuals, cultural and educational centers, non-governmental organizations and local self-governments. In addition, during 2014 one of main sources of filling the book funds were vouchers received in the framework of project funded by the President.

The research shows that during 2014, the major and in some cases, the only way to fill the book funds of village libraries was the mentioned project. In 2014, in contrast to 2013 and 2015, village libraries were receiving the largest numbers of books. In 2014-2015, village libraries have managed to fill book funds by purchasing fairly small number of books on their own money. It should be noted that village libraries renew book funds in most cases once or maximum twice per year.

In 2013, 2014 and 2015 book funds were filled on regular basis by public libraries of Tbilisi, although it should be noted that compared to the previous year, number of new books received in 2015 is lower (in 2015 – 12,056 books were received, while in 2014 – 23,450 books). Tbilisi libraries fill the book funds on average 10-20 times a year.

10. GEORGIAN NATIONAL BOOK CENTER[12]

Georgian National Book Center was established by the Ministry of Culture and Heritage Preservation. The center serves in implementing the state policy of promoting Georgian book and literature overseas, in particular, the development process of translation of Georgian and foreign literature, deepening intercultural dialogue through literature and showing Georgians multi-century old intellectual resource in the field of international literature and publishing.

Georgian literature in translations

A special program was developed to facilitate translation of Georgian literature into foreign languages and its population. The project aims to issue translation and publishing subsidies for foreign publishing houses interested in Georgian literature. In 2015, during Frankfurt Book Fair it was planned to present the updated website and translation program on the Georgian National stand.

In 2011-2014, up to 45 international projects were implemented with the support of the Ministry of Culture and Monument Protection. In 2014-2015, after founding of Georgian National Book Center, more than 55 projects were implemented to facilitate translations. Budget allocated by the state for translation program is increasing annually, alongside with a growing demand of international publishing sector interested in Georgian literature.

Translation statistics

In 2015, 47 types of Georgian literature was translated and published in a foreign language, which is the highest number in 2011-2015. Since 2011, the number of Georgian literature translated and published into foreign language has significantly increased and each year we deal almost with doubled number.

GEORGIAN LITERATURE ON FOREIGN LANGUAGES 2013-2015

YEAR	2011	2012	2013	2014	2015
NUMBER OF PUBLISHINGS	4	6	15	28	47
BUDGET	50 000 GEL	90 000 GEL	150 000 GEL	240 000 GEL	400 000 GEL

Source: Georgian National Book Center

12 / Source: Georgian National Book Center

From the funded projects in 2011-2015 years, Georgian literature has been translated into 21 foreign languages, including:

LANGUAGE	NUMBER OF PUBLISHINGS	NUMBER OF PUBLISHINGS IN 2014-2015 YEARS
GERMAN	19	14
ENGLISH	18	9
ITALIAN	8	7
ARMENIAN	6	6
SWEDISH	5	2
MACEDONIAN	5	5
RUSSIAN	4	3
AZERBAIJANI	4	4
UKRAINIAN	4	4
ARABIC	4	4
TURKISH	4	4
POLISH	3	2
FRENCH	3	1
ALBANIAN	3	3
CROATIAN	2	1
BULGARIAN	2	2
DUTCH	1	0
GREEK	1	1
SPANISH	1	1
SLOVAK	1	1
HEBREW	1	1

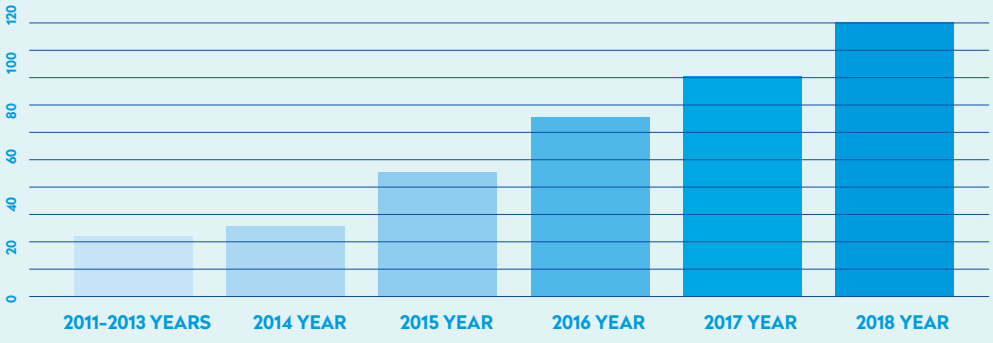
Source: Georgian National Book Center

Within the translation project, prose was the most translated genre. The distribution of financed projects by the genre is as follows:

PROSE	POETRY	NONFICTION	CHILDREN'S LITERATURE
84	10	5	1

Source: Georgian National Book Center

The existing and expected dynamics of Georgian literature translations upto 2018 is following:



Source: Georgian National Book Center

FOR NOTES →

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GEORGIAN BOOK MARKET 2013-2015

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MINISTRY OF CULTURE AND MONUMENT PROTECTION OF GEORGIA

INTERNATIONAL CHARITY FOUNDATION CARTU
საერთაშორისო საქველმოქმედო ფონდი ქართუ

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GEORGIAN PRODUCTS