



GEORGIAN BOOK MARKET RESEARCH 2016-2020



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PREPARED BY ACT FOR GPBA
AND WRITERS' HOUSE

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1. INTRODUCTION

This document constitutes an analytical report of the Georgian book market research prepared by ACT for Georgian Publishers and Booksellers Association and Writers' House.

The research findings may be used to evaluate the general market situation, identify the existing problems, and elaborate a strategic plan to develop the market and attract more readers.



2. RESEARCH DESIGN

2.1 MAIN OBJECTIVES OF THE RESEARCH

The main objective of the research is to collect comprehensive statistical data on all components of book industry (publishing houses, cultural and educational centers, bookstores / e-book stores, bookselling companies, libraries, readers, and their activity) in 2016-2019. This report also encompasses the 2020 data to allow for the assessment of the impact that the pandemic exerted on the Georgian book industry.

Based on the main goals of the research, the following tasks were identified:

› Market shares from 2019 to 2020, the pandemic considered:

- » Large publishing houses;
- » Medium-sized publishing houses;
- » Small publishing houses;
- » Regional publishing houses;

› Book market from 2016 to 2019 + 2020, the pandemic considered:

- » Income from book sales at the publishing price;
- » Increase / decrease in percentage;

› Book publishing from 2016 to 2019 + 2020, the pandemic considered:

- » Published titles;
- » First editions / reprints;
- » Print run / average print run;
- » Copies sold;

› Georgian and translated literature (all categories, total indicator) from 2016 to 2019 + 2020, the pandemic considered:

- » Published titles;
- » Index of Georgian literature;
- » Index of translated literature;



› **Income according to categories (%) from 2016 to 2019 + 2020, the pandemic considered:**

- » Mainstream literature;
- » Non-fiction - documentary prose;
- » Children's books;
- » School books / collections;
- » Academic and professional literature;
- » Illustrated books;
- » Albums, art books;
- » Religious books;
- » Other (including music notes and maps);

› **The largest publishing house from 2016 to 2019 + 2020, the pandemic considered:**

- » Income from books sold in 2018;
- » Income from books sold in 2019;
- » Income from books sold in 2020;

› **Ten largest publishing houses in 2020 in the following areas:**

- » Fiction;
- » Non-fiction, documentary prose;
- » Translated literature;
- » Children's literature;
- » Academic and professional literature;
- » Art books / albums;

› **Average book price for 2016-2020 (GEL / EUR) in general and by categories:**

- » Fiction;
- » Non-fiction, documentary prose;
- » Translated literature;
- » Children's literature;
- » Academic and professional literature;
- » Art books / albums;



› **Distribution in 2016-2020 / Distribution market share:**

- » Bookstores;
 - » E-Commerce (Internet Sales);
 - » Non-specialized shops and spaces (markets, pharmacies, etc.);
 - » Door-to-door principle, telephone sales;
 - » B2B;
 - » Book fairs and festivals;
 - » E-books;
-

› **Distribution channels (how publishers distribute books at stores):**

- » Through distributors [booksellers];
 - » Direct collaboration with stores;
 - » Their own distribution network;
-

› **E-Commerce:**

- » Increase / decrease of its share in view of the pandemic;
 - » Delivery of the product to the reader;
-

› **Georgian and translated literature from 2016 to 2020:**

- » Georgian literature in foreign languages: translations published in 2016-2020 (language / genre / print run);
 - » Foreign literature in Georgian: translations published in 2016-2020 (language / genre / print run);
 - » Bestsellers in 2019-2020: fiction / non-fiction;
-

› **Marketing activities of publishing houses in 2019-2020:**

- » Information on the marketing activities of publishing houses;
-

› **Book Fairs from 2016 to 2020:**

- » Participation of Georgian publishing houses in local and international book fairs;



› **Literary Awards from 2016 to 2020:**

- » Information about literary awards and prizes in Georgia;

› **Libraries in 2016-2020:**

- » Number of public library readers;
- » Number of libraries (total, public, academic, educational, professional);
- » Renewing book stocks of public libraries (source / frequency);

› **Impact of the pandemic on each component of the book market (bookstores, publishing houses, distributors, readers, libraries).**

READERS' HABITS - LITERACY LEVEL FOR 2019-2020

› **Reader to buyer % ratio:**

- » Reader;
- » Buyer;

› **Number of books read over the past 12 months:**

- » None;
- » 1 to 6 books;
- » 7 or more books;

› **Ways to obtain books:**

- » Purchase at a bookstore or other commercial location;
- » Purchase of printed books through online stores;
- » E-book;
- » Private / personal library, borrowing from friends / family;
- » School library;
- » Public library;
- » Private library;
- » Unlicensed internet download;
- » Other;



› **Places to purchase books:**

- » Bookstores;
 - » E-Commerce (Internet Sales);
 - » Directly from publishing houses;
 - » E-books;
 - » Book festivals / fairs;
 - » Telemarketing;
 - » Second-hand books;
 - » Press distribution booths;
 - » Non-specialized shops and spaces (hypermarkets, pharmacies, etc.);
-

› **Book purchase frequency in Georgia:**

- » At least once a month;
 - » Once every two to three months;
 - » Once a year;
-

› **An annual total spent (in GEL) on books [per person]:**

- » Less than 50 GEL;
 - » 50-100 GEL;
 - » 100-200 GEL;
 - » 200-500 GEL;
 - » 500-1000 GEL;
 - » More than 1000 GEL;
-

› **When purchasing literature in a foreign language:**

- » The language of the books purchased; The category / genre of purchased books in foreign languages;
- » Categories of books (Georgian literature / translated literature) purchased by Georgian readers:



› Categories of books (Georgian literature / translated literature) purchased by Georgian readers:

FICTION / CONTEMPORARY LITERATURE

- » Classics / modern classics;
 - » Literature for teenagers / young adults;
 - » Fiction, fantasy;
 - » Detective, horror, mystery;
 - » Science fiction, utopia;
 - » Comics, graphic novels;
 - » Drama;
 - » Poetry;
 - » Children's and illustrated books;
 - » Other;
-

NON-FICTION

- » Scientific and popular (scientific books written in a relatively simplified language);
- » Essay and criticism;
- » Biographies, memoirs, letters, diaries;
- » Art books / albums;
- » History, politics, culture;
- » Books for self-development;
- » Religion;
- » Professional / occupational / academic / educational literature;
- » Travel / tourism, geographical, atlases, maps;
- » Culinary books;
- » Encyclopedias, dictionaries, guides;
- » Other;



› Genres preferred by Georgian readers:

- » Story;
 - » Novel;
 - » Romance;
 - » Drama (tragedy, comedy);
 - » Essays;
 - » Poetry;
 - » Fables;
 - » Hagiography;
 - » Fairy tale / legend;
 - » Epistle;
 - » Poems;
 - » Epic / saga / ballad / legend;
 - » Hymnography;
 - » Other.
-

› Factors influencing the reader's choice of books:

- » Book content / review;
- » Author;
- » Appearance / cover;
- » Book price;
- » Discount promotions;
- » Series;
- » Edition quality;
- » Book awareness;
- » Screen versions;
- » Other.



› How does the reader choose books for purchase?

- » Personal choice;
 - » Advice of a friend / family member;
 - » Information or advertisements found on the Internet / social network;
 - » Radio or television ad / commercial;
 - » Information published in magazines and newspapers;
 - » Advice of a sales consultant;
 - » Other.
-

› Reasons for a reader to purchase books:

- » Interest in a specific book;
 - » Love for reading;
 - » Raise the level of general education / knowledge;
 - » Enrich personal library;
 - » Gift purchase;
 - » Other.
-

› How often does a Georgian reader read a book?

- » Daily;
- » Once every 2-3 days;
- » Approximately once a week;
- » Approximately once a month;
- » Once every two to three months;
- » Once a year.

› In case of parents of children under the age of 7 - do they purchase books and read to their children?



2.2 RESEARCH METHODOLOGY

In order to collect data on all components of the Georgian book market, the following target segments, which broadly cover all market players, were identified as part of the research:

- › Publishing houses operating in Georgia, which publish fiction / non-fiction;
- › Booksellers operating in Georgia;
- › Bookstores operating in Georgia;
- › E-book stores operating in Georgia;
- › Various cultural and educational centers, which publish literature for commercial purposes;
- › Libraries operating in Georgia, the Georgian Library Association, the National Parliamentary Library of Georgia;
- › Readers of fiction.

This research employs a combination of different methodologies, depending on the objective, goals, and the specific nature of the sector:

- » Secondary data – within the framework of this research, ACT requested information from various institutions, including the Georgian National Statistics Office, the Education Management Information System, the National Parliamentary Library of Georgia, Georgian Publishers and Booksellers Association, Writers' House, central libraries of municipalities, higher education institutions in Georgia, cultural-educational centers, and e-book stores.
- » Primary data - to collect the necessary statistical data, the following techniques were used in this research:



- › Semi-structured interviews with publishing houses, booksellers, and store managers using a specifically designed questionnaire. For the detailed design, please see Table №1.

RESEARCH METHODOLOGY - TABLE №1

| | |
|--------------------------------|---|
| Method | Quantitative research |
| Technique | Face-to-face / self-administered interview |
| Target group | Book publishing houses, booksellers, and shops |
| Number of conducted interviews | <ul style="list-style-type: none"> • Publishing houses - 32 interviews • Distributors - 4 interviews • Shops - 12 interviews |
| Sampling method | Targeted selection |
| Research area | Georgia |
| Duration of the interview | 35-45 minutes |

- › Face-to-face interviews with readers of fiction, using a specifically designed questionnaire. The goal of this component was to determine readers' preferences in Georgia's large cities in terms of purchasing and reading books. For the detailed design, please see Table №2.

RESEARCH METHODOLOGY - TABLE №2

| | |
|--------------------------------|--|
| Method | Quantitative research |
| Technique | Face-to-face interview |
| Target group | People aged 16 and over, who have read at least one work of fiction last year. |
| Number of conducted interviews | 1000 completed interviews |
| Sampling method | Selection of two-stage clusters through the pre-stratification method |
| Research area | Tbilisi, Batumi, Kutaisi, Telavi, Zugdidi, Gori |
| Duration of the interview | 20-25 minutes |



- › In-depth interviews were held with large and small publishers, as well as large and small shops, representatives of the National Library of Georgia and the Library Association. The goal of this component was to conduct in-depth study of the current market situation in each of these areas. For the detailed design, please see Table №3.

RESEARCH METHODOLOGY - TABLE №3

| | |
|--------------------------------|--|
| Method | Qualitative research |
| Technique | In-depth interview |
| Target group | Book publishing houses, shops, the National Library, and the Georgian Library Association |
| Number of conducted interviews | A total of 6 interviews: <ul style="list-style-type: none"> • A Large publishing house - 1 interview • A small publishing house - 1 interview • A large store - 1 interview • A small shop - 1 interview • The Georgian National Library - 1 interview • The Georgian Library Association - 1 interview |
| Research area | Tbilisi |
| Duration of the interview | 30-40 minutes |

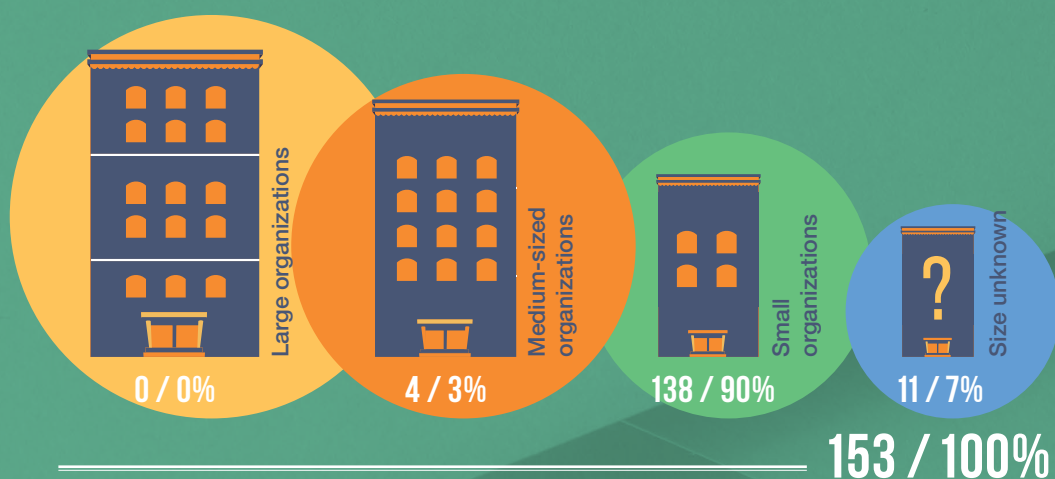


3. RESEARCH FINDINGS

3.1 BOOK PUBLISHERS

According to the 2021 data provided by the National Statistics Office of Georgia, approximately 150 companies are engaged in book publishing in the country. Most of them are small enterprises operating in Tbilisi, as determined by the Statistics Office based on its new methodology¹ for counting the annual turnover and number of employees. As for regions, there are very few publishing houses in Batumi, Kutaisi, Khelvachauri, Kaspi, and Gori.

DISTRIBUTION OF GEORGIA'S BOOK PUBLISHERS BY SIZE



Source: National Statistics Office of Georgia, 2021

¹ Large enterprises are enterprises of all organizational and legal forms, where the average annual number of employees exceeds 250 people (according to the old methodology - 100) or the average annual turnover is 60 million GEL (according to the old methodology - 1.5 million).

The average annual number of employees in medium-sized enterprises varies from 50 to 249 people (according to the old methodology - from 20 to 99 people), while the average annual turnover - from 12 million to 60 million GEL (according to the old methodology - from 0.5 million to 1.5 million GEL).

The average annual number of employees in small enterprises does not exceed 49 (according to the old methodology - 19), and the average annual turnover - 12 million GEL (according to the old methodology - 0.5 million).



Approximately 50 organizations, which specialize in book publishing and have the relevant experience over the past years, were selected from among these companies. Thirty-two of these (including 2 regional publishers) expressed their readiness to participate in the research. The company with the longest experience boasts a history of a half-century, while the youngest one is only 2 years old. More than the half of the companies have been operating in the Georgian market for at least 15 years. At present, these 32 companies have a total of 300 or more permanent employees. This figure may periodically increase by 400 temporary employees.

The publishing business is considered less lucrative, with only a few companies having reached the annual turnover of more than 0.5 million GEL (VAT excluded) by 2020. There are cases of publishing houses owning bookseller companies or shops to sell their publications.

Several important publishers, whose responses might have affected the findings, refused to participate in this research. Nevertheless, the data presented below provides a clear picture of the market situation, as it embraces the leading companies in this field.

PUBLISHING ACTIVITY

In 2016-2020 years, more than 5,000 new (first print) books have been published by the companies participating in this research (32 publishing houses), encompassing literature of all genres and categories. Progressive annual growth in the number of published books ended abruptly after 2019, which should be seen as the direct impact of the pandemic. The total number of books published in this period was 13% lower than in 2019, which may be attributed to the decrease in first editions.



PUBLISHING OF BOOKS BASED ON THE DATA OF 2016-2020²

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|----------------------------------|-------|-------|-------|-------|-------|
| Number of titles issued in total | 1,419 | 1,578 | 1,784 | 1,780 | 1,542 |
| Number of first print editions | 938 | 1,064 | 1,279 | 1,136 | 860 |
| Number of reprints | 272 | 304 | 298 | 440 | 489 |

Source: Semi-structured interview with 32 publishing houses

Top ten leaders were identified based on the total number of first editions and reprints of any genre and category published by the respondents over the last 5 years. Two companies - Palitra L and Bakur Sulakauri Publishing House - have published over 50% of the aforementioned total quantity of books. It is noteworthy that these companies also boast the largest number published titles as well as the total of their print runs³.

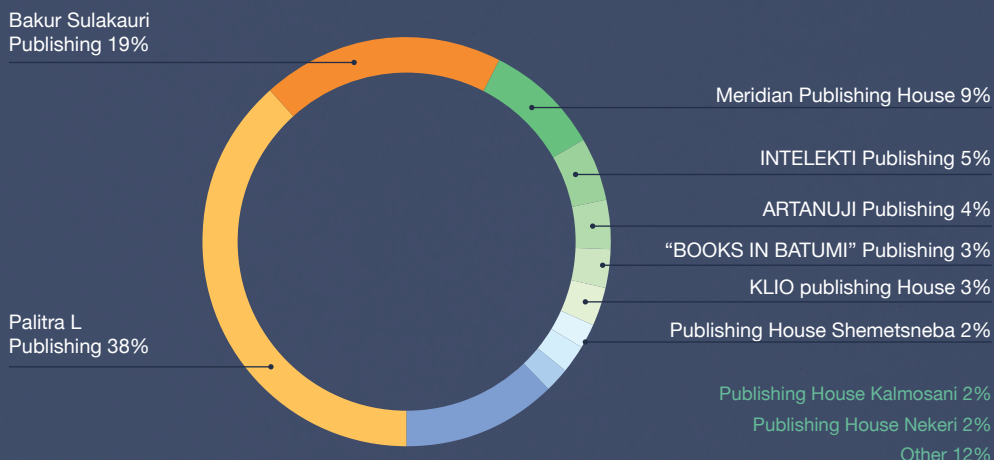
² The data presented in the table reflects the summarized results of 32 publishing houses that participated in the research, which is less than the total number of books published by all publishing houses operating in the market.

³ Several important market players (e.g., Karchkhadze Publishing, Diogene, Elf Publishing) have refused to participate in the research. Their responses could have influenced the Top 10 in terms of the number of book titles and total print run.



TOP 10 COMPANIES BASED ON THE TOTAL NUMBER OF BOOKS PUBLISHED IN 2016-2020

Share of published books
(first print + reprint)



Source: Semi-structured interview with 32 publishing houses

The analysis of book categories published in 2016-2020 reveals that Palitra L and Bakur Sulakauri Publishing House maintain the leading positions in the publishing market in terms of quantity and diversity, although the top 3 positions may vary by categories:

TOP 3 LEADERS BASED ON THE NUMBER OF TITLES OF PUBLISHED BOOKS

| FICTION | NON-FICTION | TEXTBOOKS | CHILDREN'S LITERATURE | ACADEMIC LITERATURE | ART BOOKS |
|----------------------------------|----------------------|----------------------------------|----------------------------------|---------------------------|----------------------------------|
| Palitra L Publishing | Palitra L Publishing | Bakur Sulakauri Publishing House | Palitra L Publishing | Meridian Publishing House | Palitra L Publishing |
| Bakur Sulakauri Publishing House | ARTANUJI Publishing | Meridian Publishing House | Bakur Sulakauri Publishing House | Palitra L Publishing | Publishing House Kalmosan |
| INTELEKTI publishing | INTELEKTI publishing | INTELEKTI publishing | Zebra Publishing Group | Publishing House Neker | Bakur Sulakauri Publishing House |

Source: Semi-structured interview with 32 publishing houses



Publication of fiction and non-fiction, which is greatly popular among all research participants, remains the most competitive area among the above-mentioned categories. A relatively small company works on the publication of textbooks and art books.

Based on the print runs of books published by the companies over the last 5 years, it can be argued that the average number of copies of literary works printed in Georgia amounts to 1000; however, there are cases of books printed in as many as 7,500 and as few as 40 copies.

PRINT RUN OF PUBLISHED BOOKS ACCORDING TO 2016-2020

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------|-----------|-----------|-----------|-----------|-----------|
| Full print run | 2,168,937 | 3,236,588 | 3,697,722 | 3,415,536 | 2,780,274 |
| Average print run | 983 | 1,020 | 1,291 | 1,090 | 972 |
| Maximum print run | 2,520 | 3,500 | 7,500 | 3,500 | 3,000 |
| Minimum print run | 40 | 40 | 50 | 50 | 50 |

Source: Semi-structured interview with 32 publishing houses

As demonstrated by the data from the participating companies, approximately 2-3 million copies are sold per year, and the earned profit varies from 17 to 20 million GEL. Book sales had a tendency of steady growth until 2019. Notwithstanding the significant decrease in sales rate in 2020 (by almost a million), the revenues fell by 5%, which can be explained by the soaring selling prices of books as compared to previous years.

A majority of books published over the past 5 years fall into the category of Georgian translations of foreign literature, slightly outpacing books written in the Georgian language. This may be attributed to the larger number of books available for translation as well as a relatively sizable print run. It is noteworthy that the trend of publishing books translated to Georgian is decreasing in recent years (from 56% to 46%) as the number of foreign language publications is slowly increasing (from 3% to 7%).



Nine (9) companies from among the research participants have the precedent of selling copyrights. They sell a total of 30-40 copyrights annually. Therefore, Georgian books are published in quite a few countries.

PERCENTAGE DISTRIBUTION OF PUBLISHED BOOK CATEGORIES BY LANGUAGE

| | 2016 | 2017 | 2018 | 2019 | 2020 | Share |
|---|------|------|------|------|------|-------|
| Books in Georgian | 37% | 39% | 46% | 45% | 44% | 45% |
| Books translated from foreign languages to Georgian | 49% | 56% | 48% | 47% | 46% | 52% |
| Books in foreign languages | 4% | 3% | 4% | 7% | 7% | 3% |

Source: Semi-structured interview with 32 publishing houses

Given the share of books translated from a foreign language, it is hardly surprising that most companies participating in the research (~70%) have published at least one book from the mentioned category over the last 5 years. Fiction and non-fiction lead the category of translation, while textbooks and dictionaries remain in the lowest positions. It should be noted that there is a slight increase in publishing textbooks and dictionaries in 2020.

CATEGORIES OF PUBLISHED TRANSLATED BOOKS













| | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------------------------|------|------|------|------|------|
| Fiction literature | 45% | 45% | 39% | 45% | 45% |
| Non-fiction documentary literature | 36% | 40% | 48% | 41% | 45% |
| children's literature | 27% | 35% | 35% | 36% | 32% |
| Academic and professional literature | 27% | 25% | 26% | 27% | 27% |
| Arts book / Album | 14% | 15% | 17% | 14% | 14% |
| Textbook / Collections | 5% | 5% | 4% | 5% | 9% |
| Dictionaries | | | | | 5% |

Source: Publishing houses that published books translated from a foreign language (N=22)



The original languages of these translations are mostly English, Russian, German, French, Italian, Turkish, and Spanish, although, in some cases, translations are made from: Swedish, Finnish, Norwegian, Portuguese, Greek, Chinese, Japanese, Polish, Ukrainian, Arabic, Persian, Latin, Hebrew, Armenian, and Azerbaijani.

THE ORIGINAL LANGUAGE OF BOOKS TRANSLATED IN 2020

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|--|---|
| ENGLISH | FRENCH | RUSSIAN | GERMAN | ITALIAN | TURKISH | SPANISH | SWEDISH | GREEK | JAPANESE | UKRAINIAN | PORTUGUESE |
|  |  |  |  |  |  |  |  |  |  |  |  |
| 59% | 41% | 36% | 36% | 27% | 18% | 18% | 9% | 9% | 5% | 5% | 5% |

Note: Results are counted for 22 publishing houses

The number of published books and the size of the print run make Palitra L and Bakur Sulakauri Publishing House unrivalled leaders in terms of book sales and income. It shall be noted that the above list of the top ten has remained largely unchanged over the past 5 years, albeit with a few exceptions; in 2019 and 2020 children's publishing house Zebra Group emerged as a leader, and in 2020, Cezanne Publishing House also joined the list. It is also notable that this list would look different if some important market players (Karchkhadze Publishing, Diogene, Elf Publishing) had participated in the research.



INCOME RECEIVED BY PUBLISHING HOUSES IN 2016-2020

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|------------|------------|------------|------------|------------|
| Sold copies (single unit) ⁴ | 2,917,299 | 2,996,964 | 3,513,410 | 3,428,242 | 2,510,916 |
| Income from books sold (GEL) ⁵ | 17,278,147 | 17,133,447 | 19,289,509 | 20,364,809 | 19,258,459 |

Source: Semi-structured interview with 32 publishing houses

TOP 10 COMPANIES IN TERMS OF INCOME FROM BOOK SALES IN 2016-2020⁶

| | |
|----|----------------------------------|
| 1 | Palitra L Publishing |
| 2 | Bakur Sulakauri Publishing House |
| 3 | INTELEKTI publishing |
| 4 | ARTANUJI Publishing |
| 5 | Bakmi Publishing |
| 6 | Meridian Publishing House |
| 7 | KLIO publishing House |
| 8 | “BOOKS IN BATUMI” Publishing |
| 9 | Publishing House Shemetsneba |
| 10 | Agora Publishers |

⁴ The total amount given reflects the results of 20 publishing houses participating in the research. Since the rest of the companies refrained from sharing the accurate data, the approximate rate of increase in their sales was estimated based on the assumption that they sold the entire print run of all published books in these years. Therefore, in the best case scenario, the figures given in the table would have increased by 160,400 in 2016; 159,150 in 2017; 172,140 in 2018; 246,150 in 2019; and 218,150 in 2020.

⁵ The total income given only reflects results of 25 companies participating in the research, as several publishing houses refused to share the data. Given the total number of books sold by them and the average retail price per book, it is possible to calculate the approximate income each year. Therefore, assuming that the above mentioned companies were able to sell all books published during the past 5 years at the average recorded price, in best case scenario, the income indicated in the table would have been increased by: 1,695,200 GEL in 2016; 1,749,425 GEL in 2017; 2,163,000 GEL in 2018; 3,111,100 GEL in 2019; and 2,970,650 GEL in 2020.

⁶ Due to privacy concerns, the percentage figures of individual companies are not included.



The most readable mainstream literature amounts to 26-28% of publishers' profit. It is followed by documentary prose (15% -19%), academic and professional literature (15% -19%), textbooks (16% -18%) and children's literature (11-13%). These five categories account for the largest share (87%-92%) of the income of the vast majority of the surveyed publishing houses. It should be noted, however, that there has been a slight decline in the share of textbooks and children's books in recent years.

THE MOST PROFITABLE CATEGORIES OF BOOKS

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|------------------------------|------|------|------|------|------|
| Mainstream (most readable) | 28% | 26% | 26% | 28% | 28% |
| Documentary prose | 16% | 15% | 19% | 18% | 18% |
| Academic and professional | 15% | 15% | 19% | 18% | 18% |
| Textbooks | 18% | 17% | 17% | 16% | 16% |
| Children's books | 13% | 13% | 12% | 11% | 11% |
| Illustrated books | 2% | 2% | 2% | 2% | 2% |
| Religious books | 1% | 1% | 1% | 1% | 1% |
| Art books / albums | 1% | 1% | 1% | 1% | 1% |
| Other (music notes and maps) | 5% | 5% | 5% | 4% | 4% |

Note: The chart shows the average shares in each category named by 32 surveyed publishing houses

The research demonstrated that Palitra L is an undisputed leader in terms of income in almost all categories of books (except for textbooks and children's books). Other important players of the market are Bakur Sulakauri Publishing House, INTELEKTI Publishing, and ARTANUJI, which hold a significant advantage.

The top 10 leaders according to the income from different book categories are presented in the table below. This rating is based on the publishing houses participating in the research, which have named the share of each book category [in the total income] and the total income from sales. It does not include companies that refrained from disclosing shares of each category of income (8 publishers in total) or have refused to participate in the research. Most likely, the data collected from them would have influenced the rating below.



TOP 10 COMPANIES IN 2020 ACCORDING TO INCOME RECEIVED FROM THE FOLLOWING CATEGORIES OF BOOKS

| | Mainstream (most readable) literature | Non-fiction - Documentary prose | Children's books | Textbooks / collections | Academic and professional literature |
|----|---|---------------------------------------|------------------------------------|---------------------------------|--|
| 1 | Palitra L Publishing | Palitra L Publishing | Sulakauri Publishing | Sulakauri Publishing | Palitra L Publishing |
| 2 | Sulakauri Publishing | Cezanne Publishing House | Palitra L Publishing | INTELEKTI Publishing | INTELEKTI Publishing |
| 3 | INTELEKTI Publishing | INTELEKTI Publishing | Zebra Group Publishing House | Meridian Publishing House | ARTANUJI Publishing |
| 4 | ARTANUJI Publishing | ARTANUJI Publishing | Publishing House Shemetsneba | KLIO Publishing House | Meridian Publishing House |
| 5 | Bakmi Publishing | Bakmi Publishing | INTELEKTI Publishing | ARTANUJI Publishing | Sulakauri Publishing |
| 6 | "BOOKS IN BATUMI" | Sulakauri Publishing | ARTANUJI Publishing | Publishing House Shemetsneba | Business Literature Publishing |
| 7 | Meridian Publishing House | Publishing House Nekeri | Bakmi Publishing | Zebra Group Publishing House | Publishing House Nekeri |
| 8 | Agora Publishers | Agora Publishers | "BOOKS IN BATUMI" | | KLIO Publishing House |
| 9 | Akti Publishing House | "BOOKS IN BATUMI" | Agora Publishers | | World of Lawyers Publishing |
| 10 | Publishing House Kalmosani | Poezia Publishing House | Academic Press of Georgia | | ZVIAD KORDZADZE Publishing |

Source: Semi-structured interview with 24 publishing houses

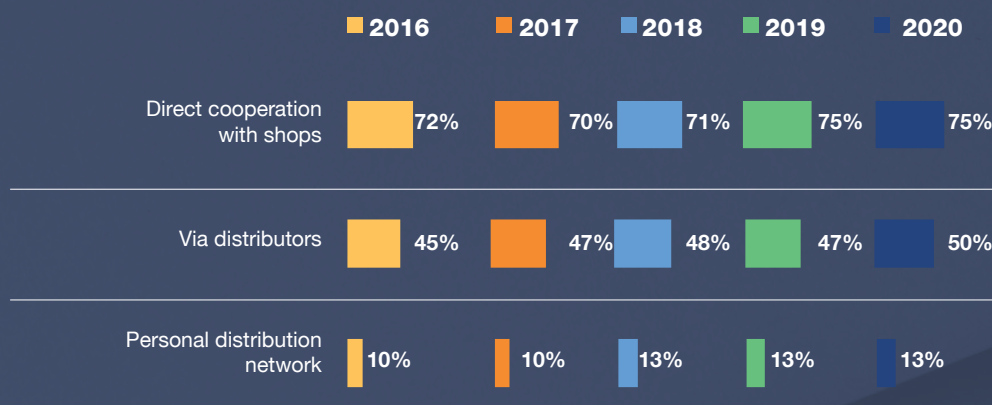
In 2020, more than half of the companies participating in the research gained full or partial (75% or more) profit from books written in Georgian, while the other half of the companies derived profit from translated literature (at least 58%). These include companies that focus entirely on Georgian authors and their books. Their number is growing as compared to previous years. There are very few publishers that publish only translated literature. Most of them are relatively new publishing houses established in recent years.



USE OF DISTRIBUTION CHANNELS BY PUBLISHING HOUSES

Publishers mainly use two methods for selling books: they have direct cooperation with bookstores and / or they use the services of bookseller companies. Only one third of respondents prefer to work directly with bookstores, while only 10% of publishers exclusively use distributor's services. The slowly growing trend of owning distribution networks has been noted in recent years (from 10% to 13%).

SALES CHANNELS OF BOOKS PRINTED BY PUBLISHING HOUSES



Source: Semi-structured interview with 32 publishing houses

Notwithstanding the recent tendency of activating almost all possible channels, it is still not surprising that of all sales outlets, bookstores receive the largest share of full print run. In 2020, the pandemic-related restrictions were behind this trend, as most companies (including bookstores) could only operate online. As a result, facilities that would not be usually associated with books a few years ago (e. g., supermarkets, pharmacies) became increasingly attractive to publishing houses.



DISTRIBUTION OF PUBLISHED BOOKS IN SALES OUTLETS

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|--------------------------------|------|------|------|------|------|
| Bookstores | 70% | 65% | 65% | 59% | 53% |
| Markets, pharmacies, etc. | 1% | 1% | 3% | 5% | 10% |
| E-Commerce / Internet sales | 3% | 4% | 4% | 5% | 10% |
| Telephone (door to door) sales | 5% | 5% | 6% | 6% | 7% |
| Book festivals / fairs | 9% | 8% | 8% | 13% | 6% |
| B2B | 2% | 2% | 3% | 2% | 3% |
| Electronic books | 2% | 2% | 2% | 3% | 3% |
| Glovo, Wolt, Vendoo, etc. | 0% | 0.1% | 0.1% | 0.3% | 1% |
| Book clubs, saloons | 2% | 2% | 1% | 1% | 1% |
| Other | 5% | 5% | 7% | 7% | 9% |

Source: Semi-structured interview with 32 publishing houses

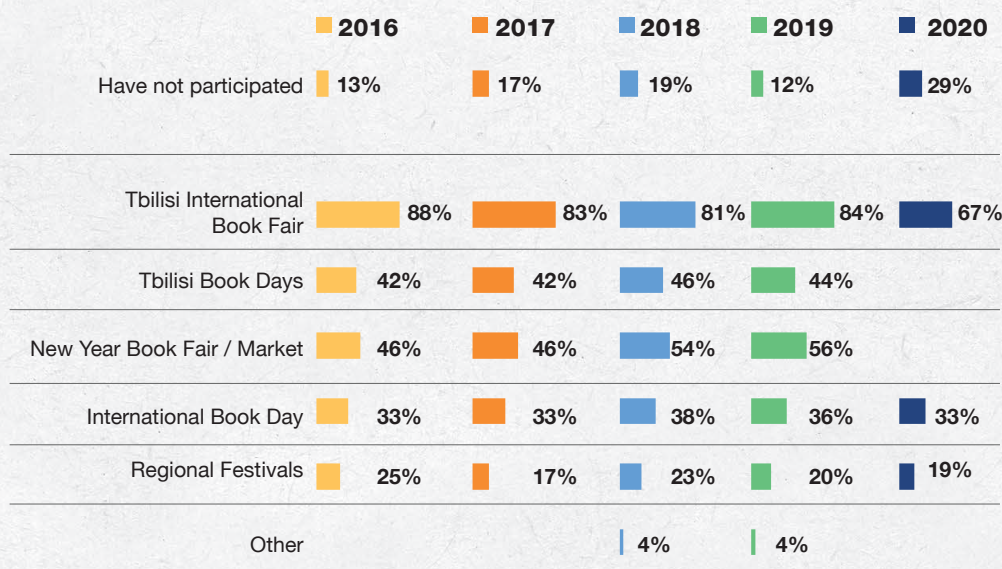
PARTICIPATION OF PUBLISHING HOUSES IN LOCAL AND INTERNATIONAL FAIRS

Book fairs represent a key event for publishers, as evidenced by the findings of the research. The vast majority of the surveyed publishers (>80%) have participated in at least one local fair over the past 5 years. The exception is 2020, when the pandemic-related restrictions and the changed format curbed the number of participants by 17% as compared to the previous year.

Tbilisi International Book Fair is the most popular and large-scale book fair in the country, and it is distinguished by large numbers of visitors and loyal publishers. The number of companies participating in other similar events is significantly lower.



PARTICIPATION OF PUBLISHING HOUSES IN LOCAL BOOK FAIRS



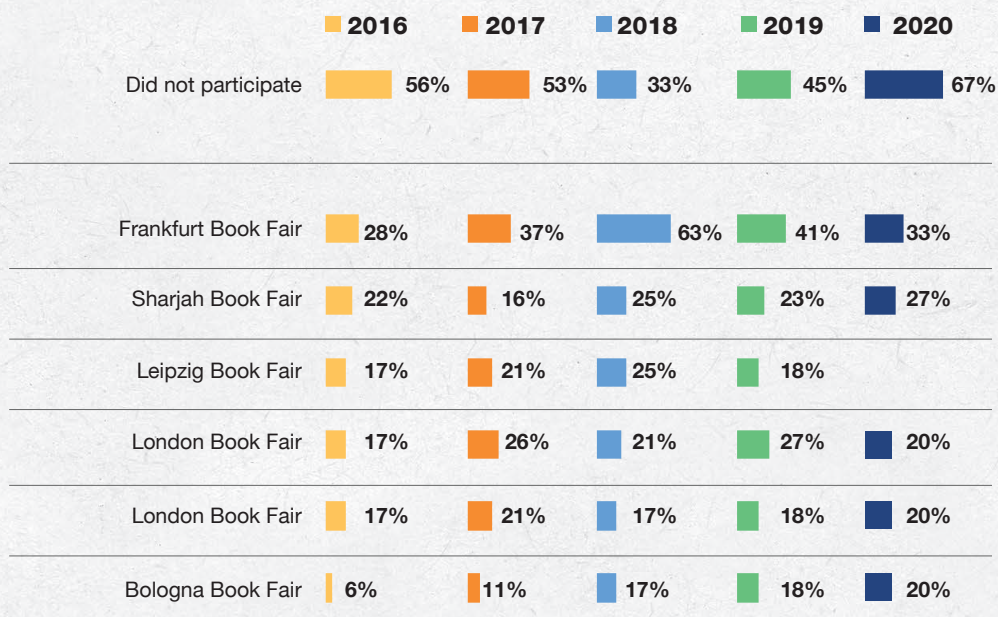
Source: Semi-structured interview with 32 publishing houses

Publishing houses also participate in various international book fairs, although their participation is relatively low. Within the past 5 years, more than half of the surveyed publishers were represented at least at one similar event. There was some progress in this regard before the pandemic, although by 2020 only one third (33%) were able to participate in international events (including online events).

The Frankfurt Book Fair (Frankfurter Buchmesse) is a leading international event with the highest number of Georgian participants, and the country's publishing houses took particular interest in it in 2018, when Georgia was the Guest of Honor at Buchmesse. This allowed Georgian publishing houses to display their books and use business meetings to their advantage.

Frankfurt is followed by Sharjah, Leipzig, and London book fairs with relatively high index of participants. Additionally, there is a growing interest in the Bologna Book Fair every year.



PARTICIPATION OF PUBLISHING HOUSES IN INTERNATIONAL BOOK FAIRS

Source: Semi-structured interview with 32 publishing houses

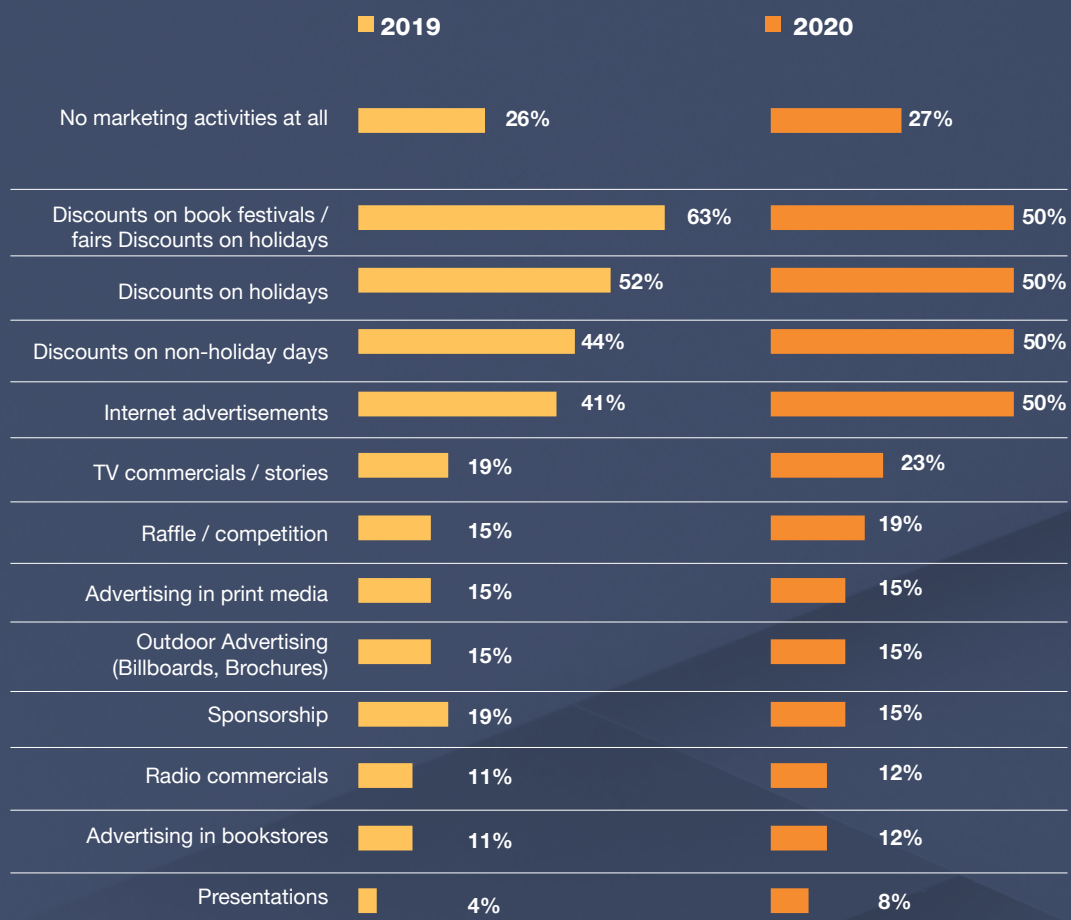
In general, only a few Georgian publishing houses are able to participate in both local and international fairs on a regular basis or with relatively high intensity. These are ARTANUJI Publishing, INTELEKTI, Palitra L, Shemetsneba and Bakur Sulakauri Publishing House.

MARKETING ACTIVITIES OF PUBLISHING HOUSES IN 2019-2020

According to the research results, the overwhelming majority of publishing houses (73% -74%) have been engaged in marketing activities over the past 2 years. Most of them have offered discounts and deals to the public at book fairs, holidays, or even ordinary days. Some publishing houses were also relatively active in using internet advertising. Moreover, in a number of cases, companies have used TV,



print, radio, outdoor, or bookstore advertisements to inform their readers. Marketing channels used in 2019-2020 included raffles, sponsorships, and presentations. The following companies offer somewhat diverse marketing activities to the public: Sulakauri Publishing, INTELEKTI and ARTANUJI.



Source: Semi-structured interview with 32 publishing houses



3.2 CULTURAL AND EDUCATIONAL INSTITUTIONS

In addition to publishing houses, cultural and educational centers such as state universities, museums, etc. also contribute to the development of the Georgian book market. The data for this research was collected from the following organizations:

- » Ivane Javakhishvili Tbilisi State University
- » Korneli Kekelidze National Center of Manuscripts
- » Museum of Literature
- » Georgian National Museum

Books published by these organizations include fiction and non-fiction; the publications are intended for commercial purposes and are available for purchase. It is noteworthy that non-fiction (scientific and popular, biographical / memoirs, critique, references, calendars, etc.) predominates among such publications.

The absolute majority of these books are in Georgian ($\approx 80\%$) or the Georgian and English languages (15%). In some cases, there are publications in the English, French, Turkish, Russian, and Azerbaijani languages. The selling price ranges from 4 GEL to 50 GEL; these books are generally published in small quantities as compared to the print runs of the popular book market.

BOOKS PUBLISHED BY CULTURAL AND EDUCATIONAL ORGANIZATIONS

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------------------|--------|--------|--------|--------|--------|
| Number of titles of published books | 26 | 30 | 37 | 23 | 20 |
| Average selling price | 14 GEL | 14 GEL | 15 GEL | 15 GEL | 21 GEL |

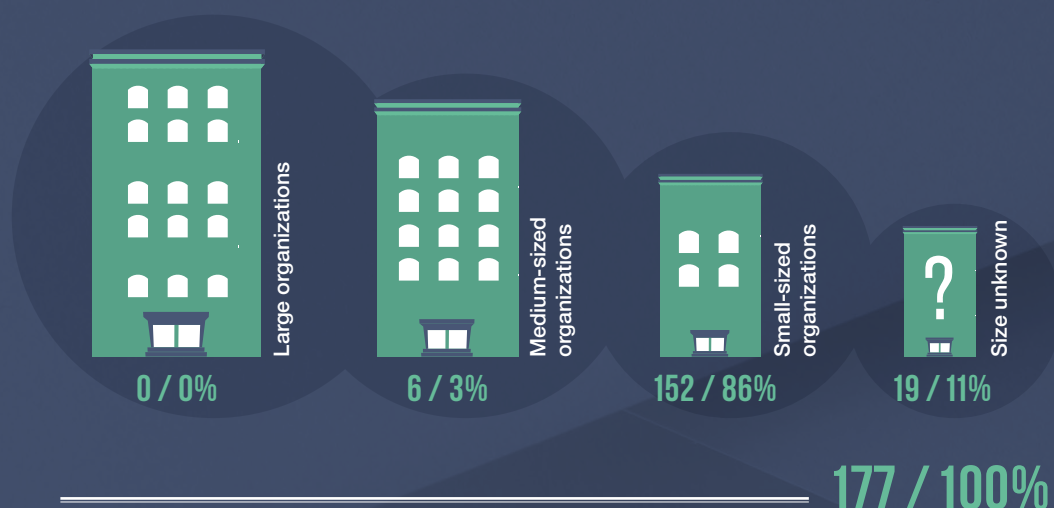
Source: 4 Cultural and educational organizations



3.3 BOOK DISTRIBUTION COMPANIES

According to the data provided by the National Statistics Office of Georgia for 2021, a total of 177 active entrepreneurial entities are registered in Georgia as wholesale stationeries, sellers of books, newspapers, and other periodicals. These companies may operate in one or several of the listed areas. Considering the annual turnover and the number of employees, the vast majority of them (86%) are small companies, 3% - medium, while large enterprises are not observed in this field at all.

DISTRIBUTION (BY SIZE) OF COMPANIES INVOLVED IN TRADING WHOLESALE STATIONERY, BOOKS, NEWSPAPERS, AND OTHER PERIODICALS



Source: National Statistics Office of Georgia, 2021

The above-mentioned list encompasses companies operating in Tbilisi, which have been actively distributing fiction or non-fiction books in recent years. Four distribution companies expressed readiness to participate in the research. They have a history of minimum eight (8) and maximum 50 years. At the moment, they have a total of 100



full-time employees. The number of employees may increase to over 200 temporary employees on various occasions. According to the new methodology for calculating the size of an enterprise, all of them may be qualified as small companies.⁷

Some of the listed enterprises are distribution companies owned by holding companies, while some have their own bookstores.

Distribution companies participating in the research

| | |
|---|-----------------------|
| 1 | Iriatoni |
| 2 | Elva.ge |
| 3 | Elvaservice / Mercury |
| 4 | Saktsigni |

The research allowed distribution companies to discuss the changes, trends, and challenges in the book market over the past two years. Increased interest in books is believed to be the major progress in this direction, while most problems are still related to the pandemic. More precisely, restrictions imposed between 2020-2021 reduced the number of publications as well as public demand for books. Distributors also mention increased retail prices of books.

7 Large enterprises are enterprises of all organizational and legal forms, where the average annual number of employees exceeds 250 people (according to the old methodology - 100) or the average annual turnover is 60 million GEL (according to the old methodology - 1.5 million).

The average annual number of employees in medium-sized enterprises varies from 50 to 249 people (according to the old methodology - from 20 to 99 people), while the average annual turnover - from 12 million to 60 million GEL (according to the old methodology - from 0.5 million to 1.5 million GEL).

The average annual number of employees in small enterprises does not exceed 49 (according to the old methodology - 19), and the average annual turnover - 12 million GEL (according to the old methodology - 0.5 million).



DISTRIBUTION ACTIVITIES

Distribution companies use numerous channels to sell books. These include bookstores, wholesalers, online sales, non-specialized facilities (e. g. supermarkets, pharmacies, etc.), exhibitions / festivals, etc. The trend remained unchanged from 2016 to 2020, and bookstores still occupy the leading positions among the above-mentioned channels, accounting for the largest share of book sales. It is noteworthy that in 2019, all four distribution companies participating in the research started using online channels for sales. The total annual revenue earned by the distribution companies (booksellers) from 2016 to 2019 amounts to about 14 million GEL (about 3,8 million EUR). It is important to participate in festivals and exhibitions, as income accrued at such events sometimes amounts to 20% of the annual income. Relatively few distributors turn to non-specialized bookstores and wholesale sellers.

The average number of titles of books sold by them in recent years demonstrates that literature in Georgian translation and books written in Georgian constitute the biggest part of sales. It is noteworthy that Georgian translations are attracting increasing attention in recent years as interest in Georgian authors and their books has been declining. The share of foreign translations of Georgian books is quite meager as compared to other books sold. This is generally due to the low demand for such literature and, consequently, relatively low publication frequency.

AVERAGE NUMBER OF TITLES OF BOOK SOLD IN 2016-2020

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|---------------------------------|---------|---------|---------|---------|---------|
| Number of titles sold (Average) | 1,633 | 1,274 | 1,563 | 1,577 | 1,551 |
| Number of copies sold (Average) | 572,282 | 543,513 | 493,665 | 517,596 | 408,812 |
| Average of a single book sold | 350 | 427 | 316 | 328 | 264 |

Source: Semi-structured interview with 4 distributors



AVERAGE NUMBER OF BOOK TITLES SOLD BY CATEGORIES

| | | | | | |
|--|-------|-----|-----|-----|-----|
| Georgian language books | 1,043 | 667 | 773 | 577 | 563 |
| Books translated from a foreign language | 450 | 433 | 443 | 617 | 583 |
| Books translated into a foreign language | 34 | 34 | 34 | 35 | 34 |
| Books in a foreign language | 217 | 217 | 283 | 277 | 250 |

Source: Semi-structured interview with 3 distributors⁸

It can be argued that book sales gained the participating companies the total annual income of about 14 million before the pandemic. The occurrences in 2020 seems to have reduced the figure by about 15% to 18% (12 million).

TOTAL INCOME OF DISTRIBUTION COMPANIES FROM BOOK SALES

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|------------------------|------------|------------|------------|------------|------------|
| Income from book sales | 14,337,348 | 14,062,200 | 14,206,892 | 14,357,808 | 11,658,658 |

Source: Semi-structured interview with 4 distributors

The portfolio of the studied distribution companies comprises various categories of locally produced books (e. g., academic, children's, religious, non-fiction books, etc.). The main source of income comes from the mainstream (most read) literature. Children's / illustrated books, non-fiction and academic / professional literature is also relatively profitable.

⁸ Of the four (4) distribution companies participating in the research, one was unable to provide the quantities by category, so figures are based on the results of 3 companies only.



Book distribution is the main activity of companies participating in the research. Consequently, the highest share of income flows from book sales, although some distributors distribute magazines and newspapers, souvenirs, toys, and accessories. In recent years, all of them have refused to distribute stationery, molding clay and modelling dough, and school supplies.

COLLABORATION WITH PUBLISHING HOUSES AND SALES OUTLETS

Distribution companies cooperate with a number of bookstores and sales outlets to distribute books of different publishing houses. This number has been relatively growing over the past 5 years.

AVERAGE NUMBER OF PARTNER PUBLISHING HOUSES, BOOKSTORES, AND SALES OUTLETS

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|-------------------------------------|------|------|------|------|------|
| Average number of publishing houses | 16 | 17 | 19 | 23 | 23 |
| Average number of bookstores | 23 | 30 | 35 | 34 | 36 |
| Average number of sales outlets | 71 | 78 | 79 | 68 | 81 |

Source: Average number of sales outlets

As seen in the table above, there are dozens of publishing houses, bookstores, and sales outlets among the distributors' partners. Their cooperation with each other is not homogenous. In rare cases, several publishing houses provide distribution companies with books for a certain payment and then give them freedom to define the final selling price themselves; in most cases, however, the final selling price is pre-determined and distributors enjoy discounts. This issue is subject to agreement between the parties, and, therefore, the distributors have not expressed discontent in this regard.



The situation is also uncertain when dealing with bookstores and sales outlets. Prices determined by distribution companies may be uniform for all locations, or they may also vary among different outlets. The payment between publishing houses and distributors sometimes takes place upon the receipt of books, and, in some cases, after their sale. Repayment of financial liabilities is relatively standardized in case of bookstores and sales outlets and depends on the ultimate sale of books.

It should be noted that publishing houses and sales outlets are equally important to distribution companies in terms of income. The large portion of income is earned from publishing houses upon the receipt of books, and, in some cases – upon the delivery of books to sales outlets; sometimes both publishing houses and sales outlets are of equal importance.

MARKETING ACTIVITIES OF DISTRIBUTION COMPANIES IN 2019-2020

Distribution companies participating in the research have been active in terms of marketing for the last 2 years. Some of them enhanced their retail sales. Placing internet advertisements and offering holiday deals have been known as relatively popular among the implemented activities. From 2019 to 2020, almost all of them managed to organize events and presentations. Activities implemented by some distributors included: discounts on festivals and non-holiday days, raffle / competitions, advertising at bookstores. Only few companies have benefited from sponsorship, billboards and advertising on television, radio, or print media.

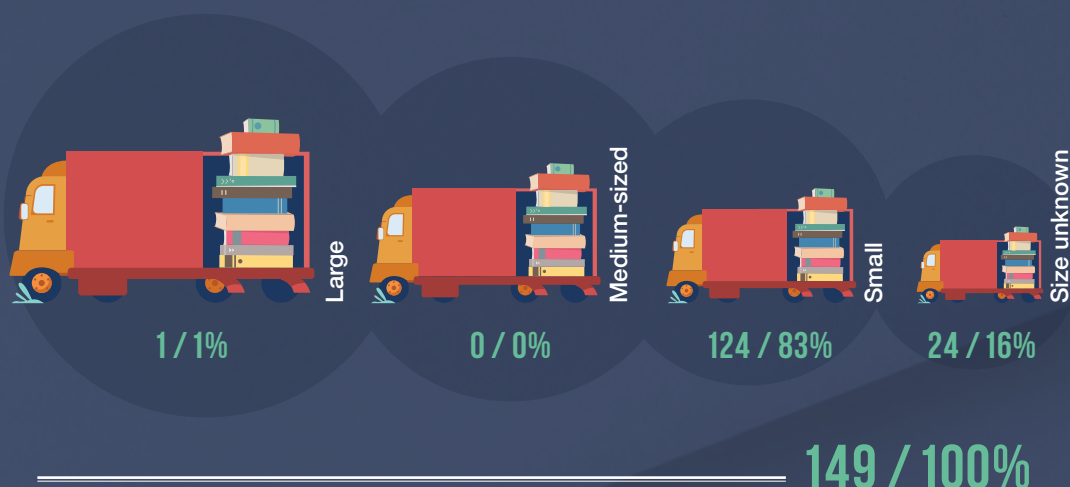
Websites and social network pages (Facebook, Instagram, Tik-Tok, etc.) as well as internet advertising are widely used to inform readers about the activities planned. Advertising at bookstores is also among the most actively used communication channels.



3.4 BOOKSTORES

According to the data provided by the National Statistics Office of Georgia, as of 2021, there are 140 active companies and nine second-hand booksellers specializing in the retail trade of books registered in our country. Considering the annual turnover and the number of employees, the vast majority (83%) are small companies; medium-sized enterprises are not at all registered and there is only one large-sized company.

DISTRIBUTION OF BOOK RETAILERS AND SECOND-HAND BOOKSELLERS BY SIZE⁹



Source: National Statistics Office of Georgia, 2021

⁹ Large enterprises are enterprises of all organizational and legal forms, where the average annual number of employees exceeds 250 people (according to the old methodology - 100) or the average annual turnover is 60 million GEL (according to the old methodology - 1.5 million).

The average annual number of employees in medium-sized enterprises varies from 50 to 249 people (according to the old methodology - from 20 to 99 people), while the average annual turnover - from 12 million to 60 million GEL (according to the old methodology - from 0.5 million to 1.5 million GEL).

The average annual number of employees in small enterprises does not exceed 49 (according to the old methodology - 19), and the average annual turnover - 12 million GEL (according to the old methodology - 0.5 million).



The above-mentioned list encompasses companies, whose main activity is selling fiction or non-fiction, and which have been active in this regard in recent years. Twelve (12) companies in total have expressed readiness to participate in the research. They have a history of minimum twelve (12) years of activity. The newbie company has been operating at the market for two years, while the most experienced company has the background of 21 years. Each company has 5-6 employees on average. This number may increase in exceptional cases by 2-3 temporarily hired employees.

Currently functioning bookstores are mainly located in Tbilisi, and they are usually represented with only one outlet. Bookstores also tend to have single branches in the big regional cities (Batumi, Kutaisi, Zugdidi, Khashuri, Samtredia, Rustavi, Gori, etc.). Companies participating in the research own more than 50 bookstores in the capital and more than 40 bookstores in the regions, the majority of which belong to the Biblusi chain of stores. In some cases, publishing houses or holding companies have their stores as well.

BOOKSTORE ACTIVITIES

According to the information provided by the stores, the number of books sold over the last two years has significantly decreased. The downward trend is observed in both the number of titles of books sold ($\approx 17\%$ decrease) and their copies ($\approx 40\%$ decrease).



AVERAGE QUANTITY OF TITLES AND COPIES OF SOLD BOOKS

| | 2018 | 2019 | 2020 |
|---|------------|------------|------------|
| Quantity of titles of books sold (average) | 3,503 | 2,893 | 2,902 |
| Quantity of sold copies (average) ¹⁰ | 247,450 | 221,542 | 144,791 |
| Income from sales | 18,626,000 | 20,129,133 | 16,172,470 |

Source: Semi-structured interview with 10 stores

Readers seem to take higher interest in Georgian language books and books translated from a foreign language, which has made up the greater part of sales in recent years. It is hardly surprising that they account for the largest share 70% <) of the income of publishing houses.

The main sources of income are children's books (29% -33%), the mainstream (25% -33%), and non-fiction (14% -16%), while religious books constitute the least sold category (2% -3%).

SHARE OF BOOK CATEGORIES AMONG SOLD BOOKS

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|------|------|------|------|------|
| Titles of Georgian language books | 39% | 48% | 51% | 45% | 38% |
| Titles of books translated from a foreign language | 41% | 33% | 36% | 39% | 40% |
| Titles of books translated into a foreign language | 1% | 2% | 2% | 2% | 4% |
| Titles of books in a foreign language | 19% | 17% | 12% | 14% | 18% |

Source: Semi-structured interview with 10 stores


10 As far as most bookstores failed to provide the complete data, the research presents the results of the last 3 years. However, in a singular case, the ballpark figure of sold copies was calculated using the annual income from book sales and the selling price for a single book. It is also noteworthy that the Biblusi bookstore chain holds the greatest share of the overall amount of books sold.



AVERAGE PRICE OF A BOOK

Data collected from publishers, distributors, and bookstores participating in the research enabled to estimate the average price paid by readers for the purchase of a single book. Book selling price was found to have grown in recent years. More specifically, in 2016-2020 it increased by 28%, from 14 to 18 GEL.¹¹

AVERAGE BOOK SELLING PRICE IN 2016-2020¹²



| | 2016 | 2017 | 2018 | 2019 | 2020 |
|----------------------------------|-------|-------|-------|-------|-------|
| Average book selling price (GEL) | 14,04 | 14,16 | 14,94 | 16,51 | 18,04 |
| Average book selling price (EUR) | 5,37 | 5,07 | 4,81 | 5,40 | 5,61 |

Source: Semi-structured interviews with publishing houses, distributors, and stores (45 interviews in total)

In recent years, book prices seem to have increased for all types of content printed and published. Prices have particularly soared in case of non-fiction, documentary literature (+ 54%), art-related books (+31%), and children's publications (+30%), while the price is relatively stable for school books (+12%). It is also noteworthy that, as compared to Georgian books, the price of translated literature seems to have flown much higher (+ 15% vs + 31%).

Given that books are purchased from publishing houses for relatively higher prices, the ultimate price will obviously increase on books sold by distributors and bookstores. Consequently, the tendency of price increase in recent years is observed in this

¹¹ This may be attributed to the increased foreign exchange rate, as in majority of cases, publishing houses print books or buy copyrights outside the country.

¹² The price in EUR is calculated in accordance with the exchange rate set by the National Bank of Georgia on January 1 of the respective year: 2016 1 GEL = 2.61, 2017. - 2.79, 2018. - 3.10, 2019- 3.06, 2020. - 3.21 EUR.

direction. Non-fiction (+ 27%) and art books (+ 19%) offered by booksellers seem to have soared to new heights.

AVERAGE SELLING PRICE (GEL) SET BY PUBLISHING HOUSES FOR BOOK CATEGORIES

| | 2016 | 2017 | 2018 | 2019 | 2020 | Price growth rate 2016 vs 2020 |
|---|-------|-------|-------|-------|-------|--------------------------------------|
| Fiction | 12.39 | 12.66 | 12.35 | 14.18 | 15.41 | + 24% |
| Non-fiction, documentary literature | 9.79 | 10.72 | 11.19 | 14.63 | 15.04 | + 54% |
| Textbooks / collections | 8.05 | 8.10 | 8.16 | 8.48 | 9.03 | + 12% |
| Children's Literature | 9.86 | 9.98 | 10.53 | 10.93 | 12.82 | + 30% |
| Academic and professional literature | 12.89 | 13.45 | 14.61 | 14.05 | 16.17 | + 25% |
| Art books / Albums | 21.43 | 23.99 | 21.80 | 24.40 | 28.01 | + 31% |
| Georgian books | 11.54 | 11.42 | 10.94 | 12.88 | 13.28 | + 15% |
| Translated books | 11.11 | 11.31 | 11.97 | 13.21 | 14.50 | + 31% |

Source: Semi-structured interview with 29 publishing houses



AVERAGE SELLING PRICE (GEL) SET BY DISTRIBUTORS AND STORES FOR BOOK CATEGORIES¹³

| | 2016 | 2017 | 2018 | 2019 | 2020 | Price growth rate 2016 vs 2020 |
|--|-------|-------|-------|-------|-------|--------------------------------|
| Mainstream (most readable) literature | 13.78 | 13.84 | 14.64 | 14.97 | 16.09 | + 17% |
| Non-fiction - Documentary prose | 15.40 | 16.18 | 17.88 | 18.61 | 19.59 | + 27% |
| Children's books | 16.79 | 17.34 | 16.74 | 17.46 | 18.80 | + 12% |
| Textbooks | 9.15 | 9.39 | 10.51 | 10.46 | 10.48 | + 15% |
| School collections | 30.40 | 26.83 | 28.83 | 29.50 | 33.17 | + 9% |
| Academic and professional literature | 22.21 | 23.12 | 23.53 | 23.95 | 24.96 | + 12% |
| Illustrated books | 22.30 | 22.18 | 23.18 | 24.17 | 25.25 | + 13% |
| Albums, art books | 33.55 | 32.56 | 34.35 | 38.18 | 39.88 | + 19% |
| Religious books | 18.78 | 19.26 | 20.08 | 20.69 | 20.45 | + 9% |
| Other (including music notes and maps) | 9.13 | 9.25 | 10.50 | 12.38 | 10.70 | + 17% |
| Books in Georgian | 12.55 | 13.22 | 13.39 | 14.67 | 15.28 | + 22% |
| Books translated to Georgian | 14.19 | 14.77 | 15.43 | 15.41 | 16.42 | + 16% |
| Books translated from Georgian | 13.38 | 14.80 | 20.32 | 18.90 | 17.20 | + 29% |
| Books in foreign languages | 17.37 | 18.73 | 19.05 | 22.28 | 22.55 | + 30% |

Source: Semi-structured interviews with distributors and stores (14 interviews in total)

13 In both cases, purchase price is in GEL, which is the book price offered to the reader.



One third of the surveyed stores (33%) offer imported books; imported books represent the main source of income (70% or higher) for only few of them.

In addition to books, it is also possible to purchase various products at bookstores: stationery and school supplies, drawing / molding clay, model dough, and various accessories, which are available at almost all outlets. Shops take growing interest in souvenirs. Magazines, newspapers, toys, and holiday decorations are relatively underrepresented. Naturally, the largest share of store income (60%-70%) comes from books, and this share seems to be growing every year.

Bookstores rarely use a single channel to purchase the desired products. The surveyed companies are actively collaborating with dozens of publishing houses and several distributors. They use wholesale shops on relatively rare occasions.

Cooperation of bookstores with publishing houses is also far from unambiguous. In rare cases, they are given the freedom to set the selling price for a book, and in most cases, they enjoy a certain discount from the partnering publishing house in exchange for offering a fixed price to readers. The payment between them in most cases takes place after the final sale of the books. The chosen form of cooperation is generally acceptable to both parties, although few bookstores prefer the fixed price set by the publishing house.



BOOKSTORE MARKETING ACTIVITIES IN 2019-2020

A vast majority of bookstores were engaged in marketing activities in 2019-2020, such as discounts, ads, events, presentations, sponsorships, etc. The most popular method is offering discounts on festivals and holidays, as well as on ordinary days. In recent years, almost every store has worked on online advertising. A proven method is to inform customers of news directly at the bookstore. Very few companies have implemented marketing activities other than those listed (sponsorship, outdoor advertising, etc.). Websites and social media pages (Facebook, Instagram) of companies remain the most popular channel of communication between bookstores and readers, and they have gained even greater importance during the pandemic.

According to a representative of one of the bookstores, their company had constant marketing communication with customers, however, buyers seemed to have grown oversensitive to even minor problems caused by the company during the pandemic. Recently, marketing messages have changed and become simpler.

THE MOST IN-DEMAND BOOKS AND AUTHORS OF 2020

A list of books in highest demand in 2020 provide some interesting insight for this research. To this end, the research established a list of bestsellers by bookstores and distributors in the tables below:



THE BESTSELLING BOOKS OF 2020

Fiction



“The First Garment”
Guram Dochanashvili



“The Forty Rules of Love” and “Honour”
Elif Shafak



“The Eighth Life (for Brilka)”
Nino Haratischvili



“Oh, World”
Zaira Arsenishvili



“The Sun, the Moon and the Wheat Field”
Temur Babluani

Non-fiction

“The Subtle Art of Not Giving a F*ck” - **Mark Manson**

“Sapiens” - **Yuval Noah Harari**

HBR (Harvard Business Review) 10 Must Read Series („On Emotional Intelligence“, “On Leadership“, “On Managing Yourself“, “HBR Guide to Building Your Business Case”)

Georgian Kings

My First Books of Questions and Answers

Books of various philosophers (e. g. Kant, Nietzsche, Heidegger, Hegel, Mamardashvili, Osho, Gurdjieff)



TOP AUTHORS OF 2020

Georgian authors

| | | |
|---------------------|--------------------|-------------------|
| Aka Morchiladze | Dato Turashvili | Nodar Dumbadze |
| Akaki Tsereteli | Zaira Arsenishvili | Otar Chiladze |
| Gela Charkviani | Temur Babluani | Chabua Amirejibi |
| Giorgi Kekelidze | Tinatin Beridze | Jemal Karchkhadze |
| Guram Dochanashvili | Ia Kargareteli | |

Foreign authors

| | |
|--------------------|-------------------|
| Agatha Christie | Khaled Hosseini |
| Elena Ferrante | Jerome Salinger |
| Elif Shafak | Harper Lee |
| Fyodor Dostoevsky | Haruki Murakami |
| Franz Kafka | Yuval Noah Harari |
| Nino Haratischvili | Mark Manson |

Harvard Business Review
(Authors: Daniel Goleman; Clayton M. Christensen; Peter F. Drucker; Raymond Sheen, Amy Gallo)

Source: Book distributors and stores participating in the research (15 companies in total).
The list is not presented in order of ranking.



3.5 ELECTRONIC BOOKSTORES

In addition to printed literature, readers can use e-books, which are available on websites of publishing houses as well as on specialized online stores (e.g. www.saba.com.ge, www.lit.ge, and www.ibooks.ge). On rare occasions, electronic versions of Georgian books can be found on Apple and Amazon.com. Even though the number of published e-books has been increasing in recent years, it still accounts for a small share of publishing houses' income (<10%). Companies participating in the research mostly prefer to publish electronic versions of books translated to Georgian (70% -80%) or Georgian language books (≈25%). As for the categories, these are mainly fiction (≈60%) and non-fiction (≈30%), academic, and professional books (≈10%).

saba.com.ge – Saba e-book store – the project of TBC Bank. Since 2012, it offers readers a variety of literature: classics and contemporary fiction, Georgian literature, foreign fiction, audio books, and podcasts. By 2021, the website had accumulated more than 6,000 e-books, which is almost twice as many as back in 2016. The majority of these books are works of fiction written in or translated to Georgian, although it also offers books in English, German, French, Russian and Italian languages. E-book prices on the website range from 10 Tetri to 30 GEL. In addition, up to 800 books are available for free. Readers have the opportunity to use the SABA Reader app and subscribe to 1, 4, or 8 book models. Monthly fees are 3.99, 6.99, and 12.99 GEL, respectively.

lit.ge – This e-book store has been on the market since 2011. It offers readers the service of purchasing e-books / periodicals and creating a personal, secure online library. Up to 3,500 books of various categories and genres are currently available on the website, and prices range from 20 tetri to 30 GEL. This website also offers more than 100 free books.

ibooks.ge – another e-book store, which, in addition to purchasing desired literature, also allows users to publish books. It has been operating since 2014 and currently offers readers up to 1,000 paid or free books. It offers both fiction and non-fiction. The minimum price of books ranges from 0.99 GEL to 32 GEL.

In the scope of this research, the following were identified as the most popular e-books of the previous year:



BEST-SELLING E-BOOKS IN 2020**Georgian authors**

| | |
|----|--|
| 1 | "The Sun, the Moon, and the Wheat Field" - Temur Babluani |
| 2 | "The Bedouin" - Nefertari |
| 3 | "The First Garment" - Guram Dochanashvili |
| 4 | "The Secret of Another Desert" - Ia Kargareteli |
| 5 | "The Anatomy of Hybrid Warfare" - Collection |
| 6 | "Oh, World... (Kakhetian chronicles)" - Zaira Arsenishvili |
| 7 | "Father Gabriel – Your Life is My Life" - Malkhaz Dzhinoria |
| 8 | "The Diaries of the Prostitute" - Sandro Sakvarelidze |
| 9 | "Sex Education University" - Sandro Sakvarelidze |
| 10 | "Love and Sex Without Rules" - Mariam Rakviashvili |

Translation

| | |
|----|--|
| 1 | "Flowers for Algernon" - Daniel Keyes |
| 2 | "The Eighth Life (for Brilka)" - Nino Haratischvili |
| 3 | "The Subtle Art of Not Giving a F*ck" - Mark Manson |
| 4 | "Meditations" - Marcus Aurelius |
| 5 | "Crime and Punishment" - Fyodor Dostoevsky |
| 6 | "Mein Kampf (My Fight)" - Adolf Hitler |
| 7 | "Greek Myths and Legends" - Nikolay Kun |
| 8 | "Twenty-Four Hours in the Life of a Woman" - Stefan Zweig |
| 9 | "The Witcher – The Last Wish" - Andrzej Sapkowski |
| 10 | "The Witcher – Sword of Destiny" - Andrzej Sapkowski |
| 11 | "The Witcher – Blood of Elves" - Andrzej Sapkowski |

Source: saba.com.ge and lit.ge

The names are not presented in the ranking order.




3.6 LIBRARIES

Ilia Chavchavadze National Library of the Parliament of Georgia is the main scientific library of the country, which preserves the most important scientific and universal printed publications and other documents of both local and foreign origin. Its mission is to pass on local or international intellectual treasures from generation to generation. As of 2018, the library fund consists of more than 4,700,000 units, including more than 3,780,000 books in 99 languages.¹⁴

Each book published in the country is registered at the National Parliamentary Library of Georgia with ISBN code assigned by publishing houses. The database is completed in accordance with *the Mandatory Copy Provision Rule*, which means that a copy of any printed document¹⁵ produced across the country will be transferred to the National Library free of charge. According to the database, the number of printed books published in the country is growing.

NUMBER OF BOOKS REGISTERED AT THE NATIONAL LIBRARY¹⁶



| | 2016 | 2017 | 2018 | 2019 |
|-----------------------|--------|--------|--------|--------|
| Number of book titles | 3,245 | 3,625 | 3,709 | 3,938 |
| Number of book copies | 96,074 | 10,480 | 10,692 | 11,824 |

Source: National Parliamentary Library of Georgia

¹⁴ The National Library's large-scale research on the country's libraries is still underway in 2021, due to which some recent data is not available.

¹⁵ Material object with any form of information on it, presented in the form of text, sound recording, image, or a combination thereof, the requisites of which are used for its identification, and which are intended to be transmitted and stored for public use in time and space (Source: Law of Georgia on Mandatory Copy of Document).

¹⁶ Processes delayed and hindered by the pandemic in 2020 included the mandatory registration of copies, which continues in 2021; thus, the data is currently unavailable. Moreover, the number of copies includes books received in any form (gift, donation).



In addition to the National Library, there are numerous public or private libraries in our country, both in Tbilisi and regions. The capital also has a multimedia library¹⁷. Notwithstanding the fact that the number of village libraries has been growing every year over the past 5 years, the average number of visitors remains significantly lower than in Tbilisi.

NUMBER OF PUBLIC LIBRARIES IN GEORGIA ACCORDING TO 2016-2020

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|---|------------|------------|------------|------------|------------|
| Public libraries in Tbilisi | 36 | 36 | 35 | 35 | 35 |
| Multimedia Library in Tbilisi | 2 | 2 | 3 | 3 | 3 |
| Public libraries in villages ¹⁸ | 690 | 674 | 708 | 708 | 732 |
| Public (main) libraries in regions and cities | 64 | 64 | 64 | 64 | 64 |
| Total | 792 | 776 | 810 | 810 | 834 |

¹⁷ Multimedia library is a cultural and educational platform that offers customers an extensive library of modern and classical, Georgian, and foreign books, fiction and sectoral literature, a quiet workspace, computer services, a wide selection of artistic or scientific events, and a space for business and creative meetings. Membership is paid.

¹⁸ According to the National Parliamentary Library of Georgia, as of January 1 2021, the number of municipal central, city and village libraries amounted to 827.



NUMBER OF LIBRARIES IN GEORGIA BY CATEGORIES¹⁹

| | 2016 | 2017 | 2018 | 2019 | 2020 |
|--|--------------|--------------|--------------|--------------|--------------|
| Public Libraries (Tbilisi, Regions) | 792 | 776 | 810 | 810 | 834 |
| Public school libraries | 2,085 | 2,085 | 2,085 | 2,085 | 2,085 |
| State University Libraries | 20 | 20 | 20 | 19 | 19 |
| Libraries of state professional institutions | 38 | 37 | 35 | 36 | 34 |
| Other types of private libraries (private universities and schools, general education institutions, vocational colleges, etc.) | 356 | 339 | 318 | 314 | 308 |
| Total | 3,291 | 3,257 | 3,268 | 3,264 | 3,280 |

Source: National Parliamentary Library of Georgia; Education Management Information System

19 The National Library continues the process of examining the condition of libraries at the country's schools, universities, etc. in 2021, which makes certain data unavailable. The table is prepared based on the information provided by LEPL Education Management Information System concerning the active educational institutions in Georgia and the assumption that all of them have a library.



NUMBER OF READERS OF PUBLIC LIBRARIES IN GEORGIA; BOOK STOCK

| | 2016 | 2017 | 2018 |
|--|--------|--------|--------|
| Total number of readers in Tbilisi (excluding Multimedia Library) | 50,307 | 38,797 | 32,726 |
| Average number of readers in Tbilisi | 1,397 | 1,078 | 935 |

Source: National Parliamentary Library of Georgia

| | | | |
|--------------------------------------|--------|--------|--------|
| Total number of readers in regions | 71,648 | 71,304 | 78,906 |
| Average number of readers in regions | 324 | 316 | 349 |

Source: Main Municipal Libraries (a total of 226 village libraries)²⁰

| | | | |
|--|------------|------------|-----------|
| Total of library documents ²¹ (book stock) | 10,179,358 | 10,017,520 | 9,657,203 |
|--|------------|------------|-----------|

Source: Main Libraries of Municipalities

20 Due to the fact that the information on the number of readers is also currently unavailable, the total and average numbers of readers in the regional libraries are calculated by the municipalities for ACT, based on data provided about 226 village libraries. Considering the fact that there are many more village libraries operating in Georgia today, the number of readers should be significantly higher than the figure in question. For example, according to the National Parliamentary Library of Georgia, which relies on the data from 789 libraries in regions, the number of library readers is approximately 240,725 by 2020, i. e. an average of 305 readers / visits per library each year. It should be noted that the lack of a uniform standard, in some cases, does not allow for sharp distinction of the reader and the visit.

21 When determining the book stock, the National Library of Georgia shall take into account two types of data: 1. Information provided by Municipal Central Libraries about the book stock preserved in a particular municipality; 2. summarized data of separate libraries included in it. In some cases, they significantly differ from each other. One of the reasons for this is the lack of a standard procedure for writing off books that are unsuitable for use at district libraries (infected with fungus, damaged by moisture, taken out of the library, and not returned, etc.), which is being handled by the Library Science and Standards Department of the National Library of Georgia.



Books are purchased from various publishing houses with the budget allocated to the library or are received as gifts from readers, authors, publishing houses, various cultural and educational organizations (universities, schools, etc.), government agencies, private companies, local and international NGOs, individuals, etc. However, in most cases, this happens once a year. The practice of exchanging paper waste is also common.

According to the representative of the Library Association, the process of renewing the book stock is quite complicated and is conducted with violations. In particular, libraries are not allowed to purchase books independently without a tender, which, in turn, is associated with complicated procedures and bureaucracy. The difficulty is that in some cases the publishing houses do not comply with the tender conditions, which hinders the process of purchasing books.

Private donations are also possible; however, in these cases libraries receive books not based on their needs and priorities but in accordance with the donor's wishes and preferences.

In addition to the above-mentioned, vouchers also constitute an important source of renewing the book stocks. One of the examples is the Georgian Regional Libraries Book Stock Renewal Project, which aims to renew the book stock with new editions. Approximately 70 libraries, 30 publishing houses and booksellers participate in it. The project is organized by Georgian Publishers and Booksellers Association and supported by the Ministry of Culture and Sports of Georgia and Writers' House. Vouchers are the only way to renew the book stock for several libraries participating in the research. There is a risk, however, that they will be used for purchasing old books as librarians may lack awareness of the latest editions. Positive dynamics has been observed in recent years in terms of mitigating such risks. More specifically, presentations given to libraries by project participants provide comprehensive information on new and best publications.



3.7 LITERARY COMPETITIONS

This research determined the level of awareness of Georgia's leading publishing houses of local literary awards, participation, and prizes. It was found that the vast majority of respondents were aware of the literary award - "Saba". More than the half have also heard of the following literary competitions: Litera, Litera for Translators, Tsinandali Award, and Iliauni Literary Competition. The awareness of publishing houses about other competitions was relatively low (<25%): Revaz Inanishvili "One Story" competition, children's literary competition "Buknacho", Goderdzi Chokheli literary competition in the miniature genre "Loyalty", literary competition "Emigrants Letter", literary competition "Merani".

More than half of the surveyed publishing houses have participated in these competitions over the past 5 years. The most popular competition is Saba Literary Award. All publishing houses have participated in it at least once. As for other events, competitions such as "Litera" and "Litera for Translators", "Iliauni Literary Competition" and "Tsinandali Award" also attract the publishers' interests.

› Literary Award "Saba" - www.saba.com.ge

The annual Literary Award Saba was established in 2002 by the TBC Bank and Rati Amaglobeli. The aim of the award is to identify the previous year's best books and authors in the following nominations: Best Novel of the Year, Poetry Collection; Prose Collection; Play; Literary Debut; Literary Criticism; Essay and Documentary prose; the best Georgian translation of a foreign work; and award "Saba" for outstanding contribution to the development of literature.²² The competition jury consists of five (5) members.

The jury composition changes every year and brings together writers and literati, whose works are not participating in the competition this year. The winning authors will be awarded a special award along with cash prizes by TBC Bank.

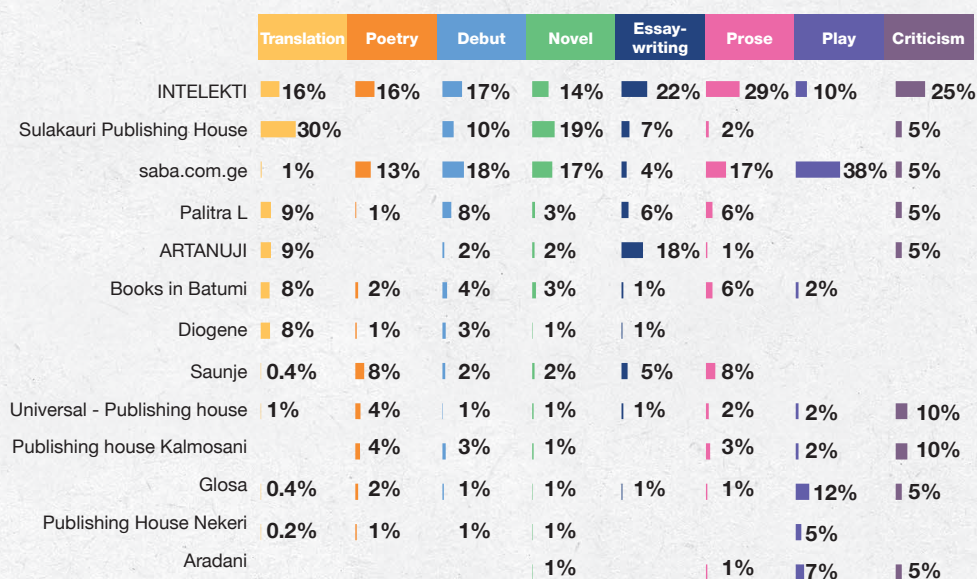
²² The nomination Best E-Book of the Year has been canceled since 2018. Also, the nomination Best Foreign Translation of Georgian Works has been canceled since 2019.



During the last 5 years, about 130 publishing houses, individual entrepreneurs or authors participated in the event. It can be argued that the biggest competition among “Saba” nominations is in revealing the best translation of the year. The number of participants is also relatively high in the following categories: Best Poetry collection; Best Debut; Best novel; Best Essay-writing, and Documentary Prose.

The leaders among the most actively engaged publishing houses in various nominations of “Saba” between 2016-2020 include INTELEKTI, Bakur Sulakauri Publishing House, saba.com.ge, Palitra L and ARTANUJI.

THE MOST ACTIVE COMPANIES PARTICIPATING IN THE SABA AWARD BY CATEGORY²³



Source: saba.com.ge

²³ The list includes only those companies, whose activity is higher than 5% in at least one of the categories.



SABA AWARD 2020

| Nomination | Publishing house | Author and title of the book |
|---|--|--|
| The best novel | Sulakauri Publishing House | Beso Solomanashvili “The story of the old shoots and the story of the new to be shot” |
| The best prose collection | INTELEKTI | Mamuka Dolidze “Walking in Time Space” |
| The best poetry collection | INTELEKTI | Besik Kharanauli “The Big Bacchanal” |
| | Kalmosani | Tariel Chanturia “Black Box of Love” |
| Best Essay -writing and Documentary Prose | ARTANUJI | Shorena Lebanidze “If necessary, we will make you tell us” |
| Best Literary Debut | Books in Batumi | Maia Tsiramua “Goodbye, Uncle Gershwin!” |
| The best literary criticism | Palitra L | Ramaz Chilaia “Poetic Records” |
| The best play | Temur Chkheidze Studio (Royal District Theater) | Alex Chighvinadze “Marina Revia” |
| The best Georgian translation | ARTANUJI | Elza Akhvlediani - Emma Vigodskaya “Captive of Algerian Pirates: The Unusual Adventures of Miguel de Cervantes” |
| Award for outstanding contribution to Georgian literature | Batu Danelia (poet, translator) | |



› The Litera Literary Award and Litera for Translators - www.writershouse.ge

The Litera Literary Award was established by Writers' House and the Ministry of Education, Science, Culture and Sports in 2015, and it has been awarded annually in the following nominations:

- » Best novel of the year
- » Best poetry collection of the year
- » Best documentary prose of the year
- » Best cover design of the year
- » Best debut of the year

Since its foundation, the panel of judges has already reviewed 331 applications submitted for competition. The prize money of the literary award amounts to 5,000 GEL.

LITERA AWARD 2020

| Nomination | Publishing house | Author and title of the book |
|----------------------------|------------------|--|
| The best design | ARTANUJI | Tinatin Chkhikvishvili - for Jana Amirejibi's book "Me - Real Kokosha" |
| The best debut | INTELEKTI | Nini Eliashvili - "After the Full Stop" |
| The best documentary prose | Indigo | Giorgi Maisuradze - "Another Language" |
| The best poetry collection | INTELEKTI | Shota Iatashvili - "Poet of the Beginning of 21 st Century" |
| The best prose collection | Books in Batumi | Eka Kevanishvili "Nothing about my mother" |
| The best novel | INTELEKTI | Irakli Samsonadze - "Wake/Wedding" |



Litera for Translators was established in 2020. Its main goal is to evaluate the work of translators, motivate, and encourage them. In addition, it sets the objective for the integration and rapprochement of Georgian and foreign literary processes; the award was granted in 4 nominations in 2020:

WINNERS OF LITERA FOR TRANSLATORS AWARD 2020

| Nomination | Publishing house | Author and title of the book |
|---|------------------|---|
| The best young translator | Palitra L | Salome Benidze for Rupee Kaur's book "Milk and Honey" |
| Best translation of texts on humanities and sciences, and popular-scientific pieces (philology, psychology, sociology); | Agora | Lali Unapkoshvili - for Julien Grack's book "City Shape" |
| Best Prose Translation (Novel, Collection of Short Stories) | ARTANUJI | Zaza Chiladze - for William Faulkner's book "Invincibles" |

Davit Tserediani Award was granted to Elza Akhvlediani for her contribution to translation

› Iliauni Literary Competition - www.iliauni.edu.ge

Iliauni Literary Competition has an 8-year history. It was founded in 2010 by Ilia State University and aims to develop the novel genre in Georgia. The jury consists of university professors and students whose identities are confidential. The winner of the competition is awarded a solid cash prize (10,000 GEL).

In 2014, the Academic Council of Ilia State University decided to award the prize for the best translation of a foreign language novel once every five years.



WINNERS OF ILIAUNI LITERARY COMPETITION (BEST NOVEL)

|  Publishing house |  Book authors |  Title |  Year |
|--|--|---|---|
| Sulakauri Publishing House | Archil Kikodze | “Southern Elephant” | 2016 |
| Sulakauri Publishing House | Lasha Bugadze | “Small country” | 2017 |
| Sulakauri Publishing House | Zurab Jishkariani | “Chewing dusks: sugar-free” | 2017 |
| INTELEKTI | Lana Kalandia | For the translation of two novels by Mario Vargas Llosa “City and Dogs” and “The Feast of the Goat” | 2018 |

› Tsinandali Award - www.zurabzhvania.ge

The Tsinandali Award was established in 1998 and resumed in 2014 after a hiatus of several years. Its purpose is to popularize, encourage and promote young (18-30 years old) scientists and artists. The winners are identified in 8 nominations: Theatrical Art; Film art; Fiction (prose); Fiction (poetry); Music; Photography; Visual Arts; Natural science.

The project is implemented under the patronage of the President of Georgia. Three selected nominees in each category will be awarded a special diploma, and the winner will be awarded the diploma, the award, and the cash prize of 5,000 GEL.



› Literary Competition Merani

Nikoloz Baratashvili Literary Competition “Merani” has been held annually since 2009, and it is supported by Tbilisi City Council and the Center for Cultural Events of the City Hall. The competition is open to young poets aged from 16 to 35.

The first prize “Merani” is established for the author of winning poem. The winner of the prize will receive 1000 GEL. Additionally, there are four incentive prizes in the amount of 500 GEL each. The works approved by the jury will be published in the collection “Merani”.

› Revaz Inanishvili Competition One Story

The One Story Competition of the Aneuli literary magazine aims identify best works and authors in Georgia’s literary circles, demonstrate the creativity of talented young authors, and popularize their works. The goal of the competition is to spark interest of young generation in Georgian literature and to popularize Revaz Inanishvili’s works. Three cash prizes in the amount of 500, 300, and 200 GEL will be granted within the framework of the competition. In addition, four participants will be awarded special prizes and diplomas.

› Loyalty - Goderdzi Chokheli Literary Competition in the Miniature Genre

Goderdzi Chokheli Literary Competition in the miniature genre was established in 2014 with the support of the Ministry of Education, Science, Culture and Sports of Georgia and upon the initiative of the Cultural Dialogue Foundation. The aim of the competition is to explore the best miniature / sketch of the year and promote one of the most powerful, interesting and, at the same time, challenging genres in literature. The authors of the best miniatures / sketches will be awarded cash prizes (1000, 700 and 500 GEL).



› Children's Literary Competition Buknacho

Children's literature competition Buknacho was first held in 2015. The aim of the competition is to empower authors to create new poems and further enrich children's literature. Any author across the country has the opportunity to participate in the literary competition Buknacho. The age of the authors, themes, and the volume of the work is not limited.

The authors of three best works are awarded cash prizes and valuable gifts. Best poems are included in the collection published as part of the competition and with a print run of no less than 200 copies. The books are then donated to authors, as well as libraries, cultural centers, and art organizations.

› Literary Competition Emigrant Letter

Literary competition Emigrant Letter was held for the first time in 2016. Its purpose is to facilitate the identification, presentation, and popularization of Georgian-speaking authors living outside Georgia. The main task of the competition is to find and collect the works of authors living abroad and to integrate them in the Georgian literary space; to introduce the best works in Georgian to readers in Georgia, publish and distribute them in printed and electronic formats.

The competition is held in three nominations: Poetry, Prose, and Essay. Additionally, the best young author (one nomination) will be revealed; Best Non-Georgian Author (one nomination); Readers' Favorites (one incentive prize in each of the three nominations); Finalists (incentive diplomas for nominees in the top ten nominations).

The jury reveals 5 to 10 finalists in each nomination. The authors of the best works are awarded cash prizes and valuable gifts. The best works are included in the collection published as part of the competition with a print run of no less than 500.



› Georgian National Award and Vazha-Pshavela Award

Georgian National Award is awarded to authors for a series of works or work in the field of natural sciences, humanities, social, political, economic, legal, medical, life sciences, or engineering sciences, which has gained universal recognition and not only contributed to Georgian science, but also to spiritual, social and / or economic development of the world. The prize is awarded annually to two people in the amount of 10,000 GEL each.

The Vazha-Pshavela Award is awarded to a person for a major literary achievement (prose, poetry, journalism), which gains national recognition due to its artistic merits. It must meet the universal ideals of freedom, humanism, and patriotism. The award – 5,000 GEL - is granted once every two years to a single winner.

› Giorgi Shervashidze Award

Giorgi Shervashidze Award is the biggest award of the Government of Abkhazia in the fields of literature, science, journalism, art, and architecture. It is awarded to all original literary works published as books over the past two years (novel, prose collection, poetry collection, play), Georgian translation of foreign works, pieces of literary criticism and documentary prose (children's literature excluded). Additionally, the work created in the fields of art, journalism, and science, which has gained recognition for its artistic and other virtues, responds to the idea of freedom, humanism, and patriotism, and is an achievement for Georgian and Abkhazian literature, art, journalism, and science. All winners will receive the title of Shervashidze Award laureate as well as the diploma and the prize of 3,000 GEL.

› Autumn Legend Competition

The student literary competition Autumn Legend is a joint project of Ivane Javakhishvili Tbilisi State University and Silknet, which aims to discover talented young people and pave the way for them. It was first held in 2008 and then turned into annual



event. Students of the higher education state institutions accredited in Georgia may participate in the competition. The jury is composed of contemporary Georgian writers, who will reveal the winner after the competitors complete several stages.

› **Iakob Gogebashvili Children and Teenagers Award**

Iakob Gogebashvili Children and Adolescent Literary Award was established by Writers' House in 2017. The award supports the development of children and youth literature; its purpose is to popularize children's writing and encourage publishing houses. Most nominations are classified by age. The award recognizes not only writers but also children's book illustrators. The Children's Literary Prize is awarded in the following nominations:

- » Best Poetry Book (two awards)
- » Best Prose Book (three awards)
- » Best Illustrated Book (three awards)
- » Best Play for Children
- » Best Debut
- » Best Translated Children's Book
- » Kids / Teenagers Innovation Project
- » Award for Merit in Children's Literature

The award is the prize and a cash prize. The prize fund is 2,000 GEL for each nomination, and 3,000 GEL for the merit in children's literature.

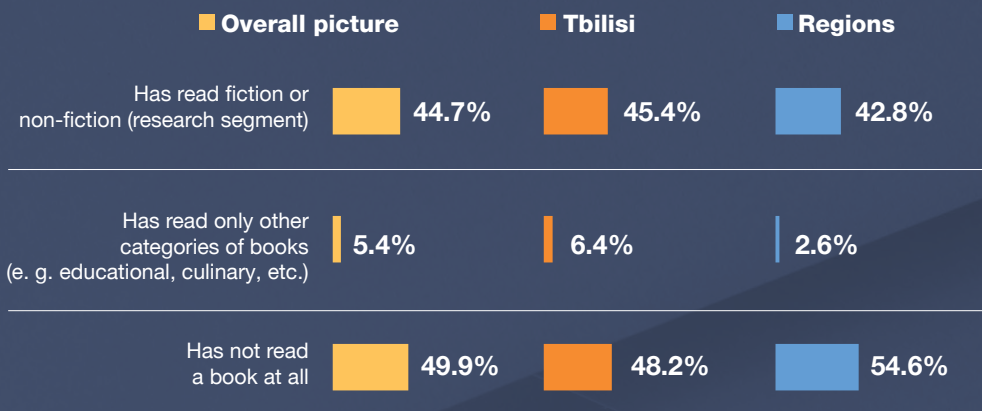


3.8 READER RESEARCH RESULTS

› Share of book readers across the population

This subsection describes the habit of reading and purchasing books by residents of the capital of Georgia and several large regional cities (Kutaisi, Batumi, Zugdidi, Telavi, Gori) both before and during the pandemic. According to the survey results, 16+ population is divided into two equal parts: 50% that read books with a certain regularity, and 50% that did not finish reading a single book in 2020. The share of book readers in Tbilisi (51.8%) slightly outcompetes the share of readers living in regions (45.4%).

SHARE OF BOOK READERS / OVERALL PICTURE



Source: Sample population

More specifically, among the considered regional cities, Gori (56.1%) and Telavi (54.5%) have the highest number of readers, while Batumi (45.2%) and Kutaisi (39.4%) have the lowest readership, where readers are the minority of the entire population.



BOOK READERS' SHARE / REGIONAL CITIES PERSPECTIVE

| | Kutaisi | Batumi | Zugdidi | Telavi | Gori |
|--|---------|--------|---------|--------|-------|
| Has read fiction / non-fiction (research segment) | 37.3% | 41.8% | 46.4% | 53.7% | 55.2% |
| Has read books of another category (e. g., educational, cooking guide, etc.) | 2.1% | 3.4% | 4.3% | 0.9% | 0.9% |
| Has not read a book | 60.6% | 54.8% | 49.3% | 45.5% | 43.9% |

Source: Sample population

In terms of book reading practices, the research has also found differences between the age and gender. More specifically, women have a significant advantage over men (women - 59.3%, men - 38.4%). In terms of age factor, young respondents are more inclined to read books. This habit decreases from 65.3% to 38.3% as the age number grows.

BOOK READERS' SHARE / GENDER AND AGE PERSPECTIVE

| | Female | Male | 16-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65 + |
|---|--------|-------|-------|-------|-------|-------|-------|-------|
| Has read fiction or non-fiction (research segment) | 52.7% | 34.5% | 61.1% | 52.8% | 45.3% | 35.7% | 33.3% | 35.3% |
| Has read only other categories of books (e. g. educational, culinary, etc.) | 6.6% | 3.9% | 4.2% | 3.4% | 6.1% | 7.3% | 5.0% | 6.7% |
| Has not read a book at all | 40.7% | 61.6% | 34.7% | 43.8% | 48.6% | 57.0% | 61.7% | 57.9% |

Source: Sample population



The target segment of this research was the category of readers who have read at least 1 work of fiction or non-fiction, although the results exclude respondents interested only in the books of the following categories: religion, professional / educational literature, travel / geography, culinary books, encyclopedias, dictionaries, and guides. Their share in the population is 5.4%.

It is noteworthy that the share of readers interested exclusively in non-fiction literature is quite low, which allows us to assume that results presented below mainly reflect the behavior of fiction book readers.

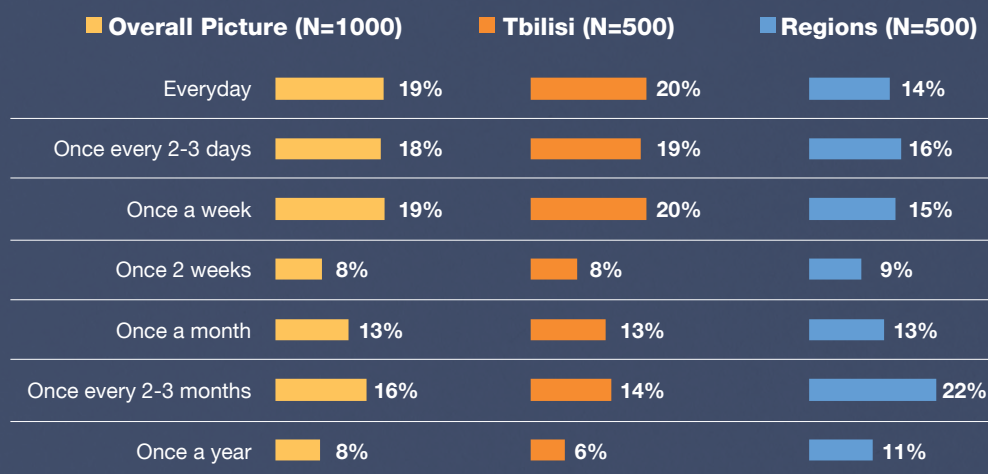
› Book reading frequency

The research revealed book reading frequency of readers. According to the results, the majority of the population (56%) finds time to read fiction or non-fiction literature at least once a week, among which 19% are intensive, daily readers. Almost a quarter (23%) of readers read quite rarely, at best, only once every 2-3 months.

The difference in reading frequency is evident between readers in Tbilisi and regions. If 6 out of every 10 readers are active and read books at least once a week in the capital, only a minority (44%) manages to do this in regions. It should also be noted that one-fifth (20%) of Tbilisi respondents spend certain time with books on a daily basis, as opposed to 14% of regions. The most common reading frequency in regions is once every 2-3 months (22%). No specific frequency was identified in Tbilisi. Equal shares of readers in Tbilisi tend to read on a daily basis (20%), once every 2-3 days (19%), and once a week (20%).



BOOK READING FREQUENCY / REGIONAL CITIES PERSPECTIVE



Source: Sample population of readers of fiction / non-fiction N=1000

The situation is somewhat better among regional cities in terms of intensive, daily reading in Gori (24%), and relatively worse in Zugdidi (4%). In the latter, the reading population mainly reads once a month or more rarely (72%). Half of readers in Batumi (51%) and Telavi (55%) spend time with books with similar frequency. In the mentioned cities, the following number of people spend time on reading at least once a week: more than half of the population in Kutaisi (61%) and Gori (57%), one third in Batumi (36%), Telavi (34%), and as few as 16% in Zugdidi.



BOOK READING FREQUENCY / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|-----------------------|----------------------------|---------------------------|----------------------------|---------------------------|-------------------------|
| Everyday | 15% | 12% | 4% | 16% | 24% |
| Once every 2-3 days | 24% | 11% | 4% | 12% | 19% |
| Once a week | 22% | 13% | 8% | 7% | 14% |
| Once every 2 weeks | 4% | 13% | 11% | 10% | 10% |
| Once a month | 10% | 15% | 20% | 12% | 11% |
| Once every 2-3 months | 16% | 25% | 27% | 33% | 18% |
| Once a year | 10% | 11% | 25% | 10% | 4% |

Source: Sample population of readers of fiction / non-fiction N=500

When comparing results from gender perspective, it was found that women readers who actively read at least once a week (59%) outnumber men (49%). Among the age categories, the eldest (55+) and the youngest respondents spend little time actively reading. Six (6) out of every 10 respondents read once a week or more often. Readers from 25-54 age category also do not fall far behind this frequency. More than half of them (51-52%) spends time with books with the mentioned frequency.



BOOK READING FREQUENCY / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|-----------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Everyday | 21% | 14% | 20% | 13% | 15% | 29% |
| Once every 2-3 days | 18% | 18% | 23% | 20% | 13% | 19% |
| Once a week | 20% | 17% | 16% | 19% | 23% | 16% |
| Once every 2 weeks | 8% | 8% | 9% | 9% | 9% | 5% |
| Once a month | 12% | 15% | 11% | 12% | 11% | 17% |
| Once every 2-3 months | 15% | 18% | 15% | 18% | 16% | 13% |
| Once a year | 6% | 10% | 6% | 8% | 12% | 2% |

Source: Sample population of readers of fiction / non-fiction N=1000

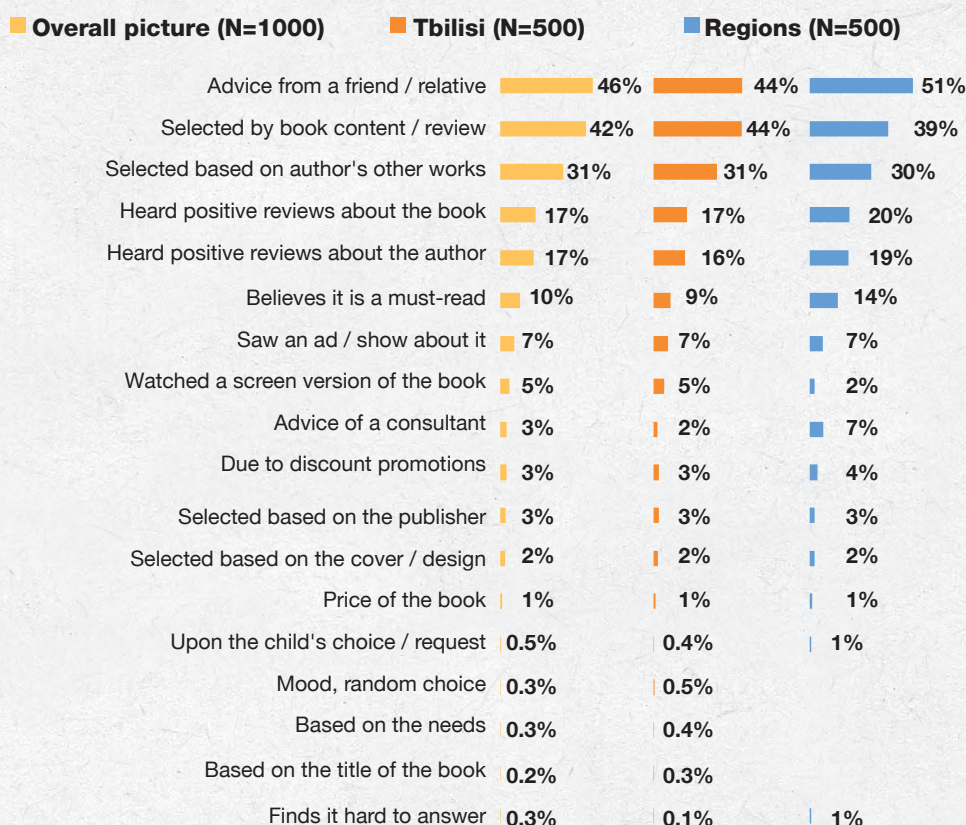
› Criteria for the selection of books to read

The research has identified several factors that have strong influence on readers' choice of books. It was found that readers are primarily guided by advice from relatives and friends (46%); the content and review of the book is equally important (42%). Almost one third of respondents (31%) choose a particular author based on his acclaimed works. A small share of the respondents (17%-17%) attach weight to positive reviews about the author and the book. Readers are also influenced by the "must-read" factor. However, it only affects the choice of one out of 10 respondents



(10%). Moreover, readers in both Tbilisi and regions are guided by similar factors with slight differences. If recommendation of friends and the content / review of the book are equally important for capital residents (44%-44%), in regions, the opinion of friends or relatives holds the first place (51%), while the content / review of the book holds the second (39%).

CRITERIA FOR THE SELECTION OF BOOKS TO READ / OVERALL PICTURE²⁴



Source: Sample population of readers of fiction / non-fiction N=1000

²⁴ The total of the data exceeds 100%, as selection of multiple choices was possible.



Major factors that influence book selection are mostly identical in regional cities with minor differences. When choosing a book, the opinion of friends and relatives is taken into account in Batumi (49%), Zugdidi (52%), Kutaisi (53%) and Gori (56%), while Telavi readers pay more attention to the content and review (56%).

READING BOOK SELECTION CRITERIA / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|---|--------------------|-------------------|--------------------|-------------------|-----------------|
| Advice from a friend / relative | 53% | 49% | 52% | 36% | 56% |
| Selected by book content / review | 42% | 38% | 36% | 56% | 32% |
| Selected based on author's other works | 33% | 30% | 23% | 30% | 34% |
| Heard positive reviews about the book | 17% | 27% | 15% | 22% | 11% |
| Heard positive reviews about the author | 21% | 20% | 19% | 14% | 18% |
| Believes it is a must-read | 8% | 17% | 8% | 17% | 20% |
| Saw an ad / show about it | 5% | 7% | 3% | 13% | 11% |
| Watched a screen version of the book | 5% | | | 1% | 5% |
| Advice of a consultant | 8% | 8% | 11% | 1% | 1% |
| Due to discount promotions | 5% | 4% | 6% | 1% | 1% |
| Selected based on the publisher | 2% | 2% | 3% | 1% | 6% |
| Selected based on the cover / design | 1% | 5% | | 1% | 1% |
| Price of the book | 1% | | 6% | | 1% |
| Upon the child's choice / request | 1% | 1% | 2% | | |
| Finds it hard to answer | 1% | 2% | | | |

Source: Sample population of readers of fiction / non-fiction N=500



There is a slight difference in terms of gender and age. When choosing a book, content / reviews (45%) and advice from friends/relatives (43%) are almost equally important for women, whereas half of men choose books based on recommendation from friends / relatives (50%) and content plays a secondary role for them (37%). As for the age difference, young people (aged 16 to 24) consider content / review of the book (53%) and advice of friends / relatives (51%) equally important. All other factors are at least twice less important to them. The elderly (55+) read books based on impression left by the content and review (45%), as well as experience of reading already familiar authors (41%). There is a tendency that as the age of readers increases, they pay lesser attention to the advice of relatives (51% to 30%), while the relevance of familiar authors increases (26% to 41%).

CRITERIA FOR THE SELECTION OF BOOKS TO READ / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|---|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Advice from a friend / relative | 43% | 50% | 51% | 53% | 47% | 30% |
| Selected by book content / review | 45% | 37% | 53% | 37% | 36% | 45% |
| Selected based on author's other works | 30% | 33% | 26% | 26% | 33% | 41% |
| Heard positive reviews about the book | 18% | 16% | 21% | 18% | 16% | 16% |
| Heard positive reviews about the author | 19% | 12% | 19% | 14% | 18% | 15% |
| Believes it is a must-read | 10% | 11% | 15% | 7% | 10% | 8% |



| | | | | | | |
|--------------------------------------|------|------|------|----|------|----|
| Saw an ad / show about it | 8% | 6% | 9% | 6% | 7% | 6% |
| Watched a screen version of the book | 4% | 6% | 8% | 4% | 3% | 3% |
| Advice of the consultant | 4% | 2% | 3% | 2% | 4% | 3% |
| Due to discount promotions | 4% | 1% | 1% | 5% | 3% | 3% |
| Selected based on the publisher | 3% | 2% | 2% | 3% | 2% | 3% |
| Selected based on the cover / design | 2% | 3% | 5% | 4% | 1% | 1% |
| Price of the book | 1% | 2% | 2% | 1% | 1% | 1% |
| Upon the child's choice / request | 1% | | | 1% | 0.2% | 1% |
| Mood, random choice | 1% | | | | 0.4% | 1% |
| Based on the needs | 0.4% | | | | 1% | |
| Based on the title of the book | | 1% | | 1% | | |
| Finds it hard to answer | 0.2% | 0.5% | 0.2% | | | 1% |

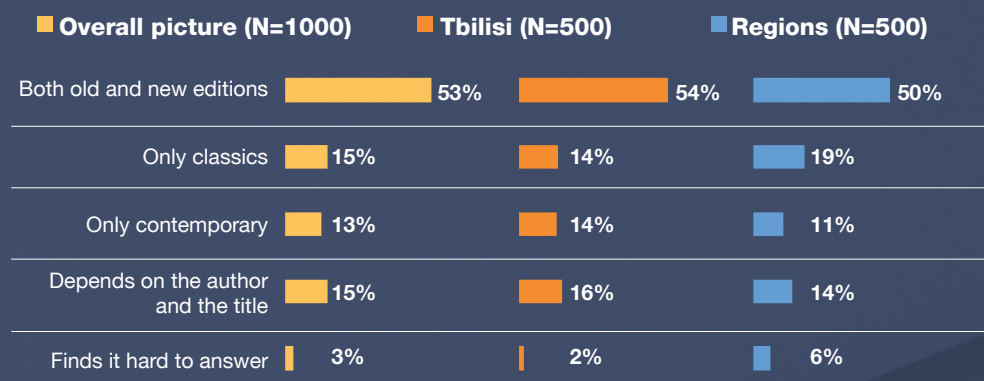
Source: Sample population of readers of fiction / non-fiction N=1000



› Choice between classics and modern literature

It is interesting to discover which literary period is popular with Georgians. According to the research findings, half of readers both in Tbilisi (54%) and regions (50%) do not pay attention to the date of [first] publication - they read both classics and modern literature. Fifteen (15) percent of readers make decisions based on the author and the title. The remaining share of readers is almost equally divided into exclusive admirers of classics (15%) and exclusive admirers of modern authors (13%).

CLASSICS AND MODERN BOOKS / OVERALL PICTURE



Source: Sample population of readers of fiction / non-fiction N=10000

Although there is no significant difference between readers in Tbilisi and regions in terms of their selection of new and old books, an interesting trend is observed when comparing regional cities. For example, in Zugdidi (75%), Telavi (62%), and Gori (60%) readers are comparably less likely to select books by publication period. The majority of the population of these cities pay equal attention to classic and modern books. It seems that the reading community in Kutaisi is rather more critical of the author and the title (21%). Kutaisi also has a relatively high number of readers of classics (25%).



CLASSIC AND MODERN BOOKS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|--|--------------------|-------------------|--------------------|-------------------|-----------------|
| Both old and new editions | 38% | 45% | 75% | 62% | 60% |
| Only Classics | 25% | 19% | 8% | 17% | 15% |
| Only contemporary authors | 14% | 11% | 4% | 4% | 13% |
| Depends on the author and the title | 21% | 12% | 9% | 16% | 10% |
| Finds it hard to answer | 2% | 14% | 4% | 1% | 1% |

Source: Sample population of readers of fiction / non-fiction N=500

The classification of results based on gender in the category of new and old editions is insignificant: the majority of both women (56%) and men (48%) read both classics and modern authors. The difference in age is obvious. Half of the respondents (49%-57%) attribute less importance to when the book was published, while the second half demonstrates the tendency that keeps intensifying as the age increases – aged people are more prone to choose classics (from 9% to 27%), losing interest in modern authors (from 17% to 5%).

It is also noteworthy that authors and titles are of greater importance to young people (21%) than to the elderly (13%).



CLASSICS AND MODERN BOOKS / GENDER AND AGE PERSPECTIVE

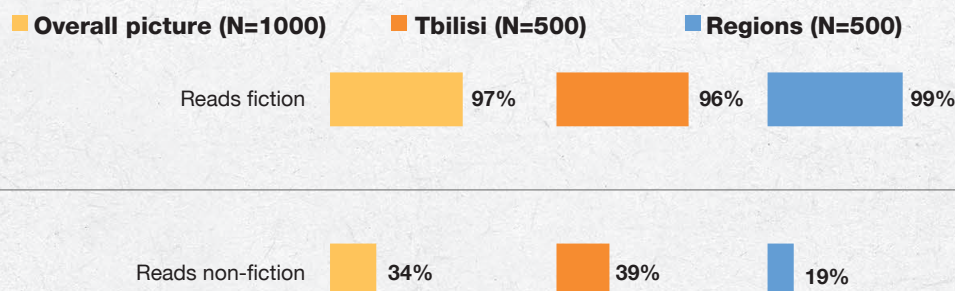
| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|-------------------------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Both old and new editions | 56% | 48% | 49% | 57% | 53% | 54% |
| Only classics | 14% | 19% | 9% | 13% | 14% | 27% |
| Only contemporary authors | 14% | 11% | 17% | 14% | 15% | 5% |
| Depends on the author and the title | 14% | 17% | 21% | 11% | 16% | 13% |
| Finds it hard to answer | 2% | 6% | 4% | 5% | 2% | 2% |

Source: Sample population of readers of fiction / non-fiction N=1000

› Categories of read books

The research has demonstrated that almost all readers have read at least one work of fiction (97%) in 2020, and 86.5% of these usually prefer fiction. Non-fiction, which is generally read by one third of readers (34%), is chosen as the main choice by 13.5% of respondents.



SHARE OF BOOK CATEGORIES SELECTED BY READERS / OVERALL PICTURE²⁵

Source: Sample population of readers of fiction / non-fiction N = 1000

More specifically, both contemporary literature (51%) and classical works (51%) are read with equal enthusiasm. These two are major reading choices for 57% of readers. Other categories fall at least twice behind: detective / horror / mystery (generally 23%, mostly 11%), poetry (generally 16%, mostly 3%) and children's books (generally 12%, mostly 6%).

Naturally, child readers under 7 have significantly higher figures in children's book category (35%). This segment represents one fifth of readers (20%).

The following categories of non-fiction are popular among readers: historical / political / cultural (13%), biographical (memoirs) (10%) and professional / industry books (8%). This trend is common in both Tbilisi and regions.

²⁵ The total of the data exceeds 100%, as selection of multiple choices was possible.



ALL BOOK CATEGORIES AND MOST POPULAR CATEGORIES / OVERALL PICTURE²⁶

| Overall picture (N=1000) | Tbilisi (N=500) | Regions (N=500) | Main category (N=1000) |
|-------------------------------------|--------------------|--------------------|------------------------|
| Contemporary literature | 51% | 53% | 45% 30% |
| Classics / Modern Classics | 51% | 52% | 46% 27% |
| Detective, horror, mystery | 23% | 25% | 18% 11% |
| Children's books | 12% | 11% | 15% 6% |
| Poetry | 16% | 17% | 13% 3% |
| Comics, graphic novel | 7% | 5% | 11% 3% |
| Science fiction, fantasy, utopia | 9% | 11% | 3% 2% |
| Literature for teenagers | 9% | 10% | 5% 2% |
| Drama | 6% | 6% | 5% 1% |
| Total | | | 86% |
| History, politics, culture | 13% | 17% | 3% 4% |
| Professional / training | 8% | 9% | 4% 2% |
| Scientific and popular | 6% | 7% | 3% 2% |
| Biographies, memoirs, letters | 10% | 12% | 5% 1% |
| Art Books / Albums | 6% | 7% | 2% 1% |
| Religion | 7% | 8% | 4% 1% |
| Culinary books | 5% | 6% | 4% 1% |
| Books for self-development | 4% | 5% | 1% 0.3% |
| Encyclopedias, dictionaries, guides | 5% | 6% | 2% 0.2% |
| Essay writing and criticism | 2% | 3% | 1% 0.1% |
| Tourism, geographical | 2% | 2% | 1% |
| Other | 1% | 1% | 1% 0.2% |
| Total | | | 13% |

Source: Sample population of readers of fiction / non-fiction N=1000

26 The total of the data for “all categories” exceeds 100% as multiple choice was allowed; in case of the “main category”, there is one choice.



Most actively read categories of fiction (both modern and classic) remain unchanged in every target regional city. More specifically, in Kutaisi they are read with equal enthusiasm (48% and 45% respectively), while in Batumi, Telavi, and Gori classic works are preferred (47%, 39%, 57%, respectively). Modern literature is significantly leading in Zugdidi (69%). Moreover, detective books are among the top 3 categories in Kutaisi (15%), Zugdidi (17%) and Gori (39%), followed by children's books in Batumi (22%) and comics and graphic novels (18%) in Telavi.

The interest in non-fiction is also quite low in regional cities. Gori has larger number of non-fiction readers, although even the most popular category there - books with religious content - are read by only one in every 10 respondents (12%). Similar picture is observed in case of historical and political (11%), professional (10%) and culinary books (10%). It was found that the level of interest in non-fiction literature is lowest in Kutaisi and Zugdidi. The highest rate in these cities is only 3%-4%.

ALL CATEGORIES OF READ BOOKS / REGIONAL CITIES PERSPECTIVE

| Biographies, memoirs, letters | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|----------------------------------|-----------------|----------------|-----------------|----------------|--------------|
| Fiction | | | | | |
| Contemporary literature | 48% | 36% | 69% | 29% | 44% |
| Classics / Modern Classics | 45% | 47% | 36% | 39% | 57% |
| Detective, horror, mystery | 15% | 13% | 17% | 16% | 39% |
| Poetry | 9% | 14% | 7% | 8% | 24% |
| Children's books | 7% | 22% | 11% | 17% | 16% |
| Science fiction, fantasy, utopia | 3% | 1% | 2% | 6% | 9% |



| | | | | | |
|--------------------------|-----|----|----|-----|-----|
| Literature for teenagers | 4% | 5% | 6% | 2% | 10% |
| Comics, graphic novel | 14% | 8% | 7% | 18% | 11% |
| Drama | 5% | 5% | 3% | 6% | 7% |

Non-fiction

| | | | | | |
|-------------------------------------|----|----|----|----|-----|
| History, politics, culture | 2% | | 3% | 9% | 11% |
| Biographies, memoirs, letters | 3% | 7% | 2% | 5% | 9% |
| Professional / training | 2% | 5% | | 3% | 10% |
| Religion | 4% | 3% | 1% | 4% | 12% |
| Scientific and popular | 4% | 3% | | 5% | 5% |
| Art books/ Albums | 2% | 2% | | | 6% |
| Culinary books | 3% | 2% | 1% | | 10% |
| Encyclopedias, Dictionaries, Guides | 1% | 1% | | | 8% |
| Books for self-development | 1% | | | 1% | 3% |
| Essay Writing and Criticism | 1% | | 1% | | 1% |
| Tourism, geographical, atlases | | 1% | 2% | | 5% |
| Other | 1% | 1% | | | |

Source: Sample population of readers of fiction / non-fiction N=500



Both women (modern - 55%, classics - 48%) and men (modern - 43%, classics - 55%) choose modern literature and classics. The top 3 categories also include detectives / horror / mystery among men and women, although these are slightly more popular among men (29%). It should also be noted that children's (16%) and teenagers' literature (11%) is mostly read by female readers.

Non-fiction is read less frequently regardless of gender; although as compared to women, the leading category of non-fiction (history / politics / culture) is slightly more popular among men - (11% vs 18%). Gender balance is maintained in the second top category of biographies / memoirs, which has one reader in every 10 respondents (10% -10%).

No significant deviation from the general trend is observed from age perspective. Regardless of age, readers mostly prefer classics, modern literature, and detective / horror / mystery. As the age increases, readers are losing interest in modern literature (54% to 44%) as they turn to classics instead (48% to 61%).

Interest in non-fiction is slightly higher among the youngest generation (16-24 years old), with almost one-fifth (18%) of respondents reading books on history, politics, and culture.



ALL CATEGORIES OF BOOKS READ / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|----------------------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Fiction | | | | | | |
| Contemporary literature | 55% | 43% | 54% | 57% | 49% | 44% |
| Classics / Modern Classics | 48% | 55% | 48% | 43% | 51% | 61% |
| Detective, horror, mystery | 21% | 29% | 33% | 23% | 16% | 23% |
| Poetry | 17% | 15% | 19% | 12% | 15% | 19% |
| Children's books | 16% | 4% | 4% | 16% | 16% | 9% |
| Science fiction, fantasy, utopia | 7% | 14% | 18% | 11% | 5% | 5% |
| Literature for teenagers | 11% | 4% | 16% | 7% | 8% | 3% |
| Comics, graphic novel | 6% | 8% | 11% | 7% | 5% | 4% |
| Drama | 6% | 7% | 13% | 6% | 2% | 4% |
| Non-fiction | | | | | | |
| History, politics, culture | 11% | 18% | 18% | 9% | 13% | 14% |
| Biographies, memoirs, letters | 10% | 10% | 12% | 11% | 5% | 14% |
| Professional / Educational | 7% | 10% | 14% | 10% | 4% | 5% |
| Religion | 7% | 7% | 10% | 6% | 5% | 7% |



| | | | | | | |
|--|------|----|----|----|------|----|
| Scientific and popular | 5% | 8% | 6% | 6% | 5% | 8% |
| Art books/ Albums | 7% | 5% | 6% | 5% | 5% | 9% |
| Culinary books | 7% | 2% | 2% | 5% | 5% | 9% |
| Encyclopedias, dictionaries, guides | 4% | 7% | 7% | 6% | 3% | 5% |
| Books for self-development | 4% | 5% | 7% | 4% | 4% | 1% |
| Essay-writing and Criticism | 2% | 2% | 5% | 1% | 1% | 2% |
| Tourism, geographical | 1% | 4% | 5% | | 2% | 2% |
| Other | 0.3% | 3% | 3% | 1% | 0.4% | |

Source: Sample population of readers of fiction / non-fiction N=1000

› Genres of the read books

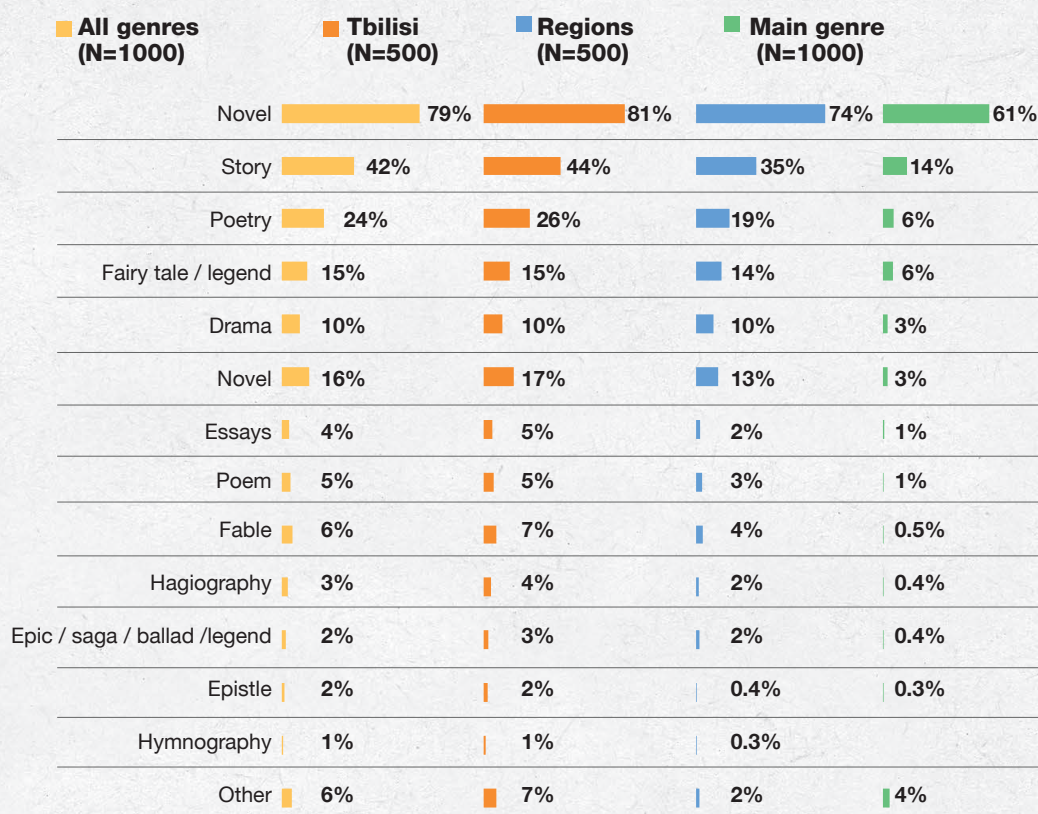
The results of the research demonstrate that the novel is the most popular genre among Georgian readers, as 8 out of 10 the interviewed seem to prefer novels (79%). Moreover, it is the main genre for every 6 of them (61%). Stories (42%) and poetry (24%) notably fall behind novels. Notwithstanding the fact that quite a significant portion of respondents have read the aforementioned genres the previous year, they are a priority for only one-fifth of readers (poems 14%, poetry 6%).

This trend is also reflected in data collected in Tbilisi and regions. In both cases, top genres include novels (Tbilisi - 81%, regions - 74%), short stories (Tbilisi - 44%, regions - 35%), and poetry (Tbilisi - 26%, regions - 19%), which have slightly more readers in Tbilisi. Readers in Tbilisi and regions share equal interest in fairy tales (Tbilisi - 15%, regions - 14%) and plays (Tbilisi - 10%, regions - 10%).



It is noteworthy that the popularity of fairy tales among parents of children under age 7 amounts to 34%, and this genre ranks third after novels (82%) and stories (36%).

ALL BOOK GENRES AND MOST READ GENRES / OVERALL PICTURE²⁷



Source: Sample population of readers of fiction / non-fiction N=1000

²⁷ The total data for “all genres” exceeds 100%, as it allows multiple choices; in case of the “main genre”, there is only one choice.



Minor differences were observed among the top 3 most read genres when comparing regional cities: for example, the novel is a leading category in Kutaisi, Zugdidi, and Gori (82%, 86%, 76%, respectively), followed by short stories (35%, 22%, 41%) and poetry (19%), 13%, 40%). In Batumi and Telavi, fairy tales occupy the third place. At the same time, the most popular genre (the novel) has the greatest number of readers in Zugdidi (86%) and Kutaisi (82%), and less - in Batumi (65%) and Telavi (63%).

ALL GENRES OF THE READ BOOKS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|-------------------------|--------------------|-------------------|--------------------|-------------------|-----------------|
| Novel | 82% | 65% | 86% | 63% | 76% |
| Story | 35% | 37% | 22% | 27% | 41% |
| Poetry | 19% | 13% | 13% | 18% | 40% |
| Novel | 16% | 10% | 5% | 10% | 19% |
| Fairy tale / legend | 8% | 18% | 12% | 22% | 18% |
| Drama (tragedy, comedy) | 9% | 13% | 7% | 10% | 8% |
| Fable | 4% | 3% | 3% | 2% | 8% |
| Poem | 4% | 1% | 3% | 3% | 9% |
| Essays | | 4% | 2% | 3% | 2% |
| Hagiography | 1% | 2% | 2% | 1% | 4% |
| Epic/saga/ballad/legend | 4% | 1% | | 2% | 2% |
| Epistle | | | | 3% | 2% |
| Hymnography | | | | 1% | 2% |
| Other | | 2% | 1% | 15% | 1% |

Source: Sample population of readers of fiction / non-fiction N=500



The leading genres are equally interesting to both men and women - novel (80%, 78%), short story (42%, 42%), poetry (27%, 20%), although there is a notable difference with regard to reading fairy tales. In this genre, women outnumber men by two to one (18% vs 8%).

Novels, short stories, and poetry represent major areas of interest in all age segments. As per research findings, the interest in novels decreases slightly (81% to 75%), while the trend of reading stories (33% to 50%) and poems (21% to 33%) grows as the age increases. Nevertheless, it is clear that novels have a significant advantage over other genres among all surveyed cities, regardless of gender or age.

ALL GENRES OF THE READ BOOKS / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|---------------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Novel | 80% | 78% | 81% | 81% | 80% | 75% |
| Story | 42% | 42% | 43% | 33% | 42% | 50% |
| Poetry | 27% | 20% | 21% | 21% | 24% | 33% |
| Novel | 19% | 11% | 16% | 12% | 15% | 23% |
| Fairy tale / legend | 18% | 8% | 6% | 21% | 19% | 13% |
| Drama (tragedy, comedy) | 9% | 13% | 17% | 12% | 7% | 7% |
| Fable | 8% | 4% | 8% | 6% | 7% | 4% |
| Poem | 6% | 4% | 9% | 4% | 2% | 6% |
| Essays | 4% | 4% | 8% | 5% | 1% | 4% |
| Hagiography | 3% | 4% | 5% | 4% | 2% | 4% |
| Epic/saga/ ballad/ legend | 2% | 3% | 5% | 3% | 1% | 2% |
| Epistle | 2% | 1% | 1% | 1% | 2% | 2% |
| Hymnography | 1% | 1% | 2% | 0.1% | 1% | 1% |
| Other | 4% | 10% | 6% | 5% | 4% | 8% |

Source: Sample population of readers of fiction / non-fiction N=1000



› Number and languages of books read

The research also determined the number of books read by the inhabitants of large cities of Georgia last year. Results have shown that during 2020, an average of 13 books were read - 6 Georgian, 5 translated books, and 2 books in a foreign language. At the same time, the average number of books read by Tbilisi respondents is twice higher than in the regions (15 books vs 7).

The findings are almost identical among regional cities, with an average of 6 books per year. The exception is Gori, which comes close to Tbilisi figures (15 books) with an average of 12 books per year.

The research results demonstrate that the youngest generation (16-24 years old) is most actively familiar with both Georgian (7) and translated (8) books as well as literature in foreign languages (5 books). It should be noted that the number of books – especially, books in foreign languages (from 5 to 1) - read during the year decreases by half (from 20 to 10) with the increase of the reader's age. No differences are observed in terms of gender in this regard.

AVERAGE NUMBER OF READ BOOKS

| | Georgian | Translated | Foreign Language | Total |
|---------------------------------------|----------|------------|------------------|-------|
| Overall picture | | | | |
| | 6 | 5 | 2 | 13 |
| Tbilisi / Regional perspective | | | | |
| Tbilisi | 7 | 6 | 3 | 15 |
| Regions | 3 | 3 | 1 | 7 |



Regional cities perspective

| | | | | |
|---------|---|---|---|----|
| Kutaisi | 2 | 3 | 1 | 6 |
| Batumi | 3 | 2 | 1 | 6 |
| Zugdidi | 3 | 3 | 1 | 6 |
| Telavi | 3 | 3 | 1 | 6 |
| Gori | 6 | 5 | 1 | 12 |

Gender perspective

| | |
|--------|--|
| Female | The data in terms of gender perspective is not differentiated in a statistically reliable manner from the overall picture. |
| Male | |

Age perspective

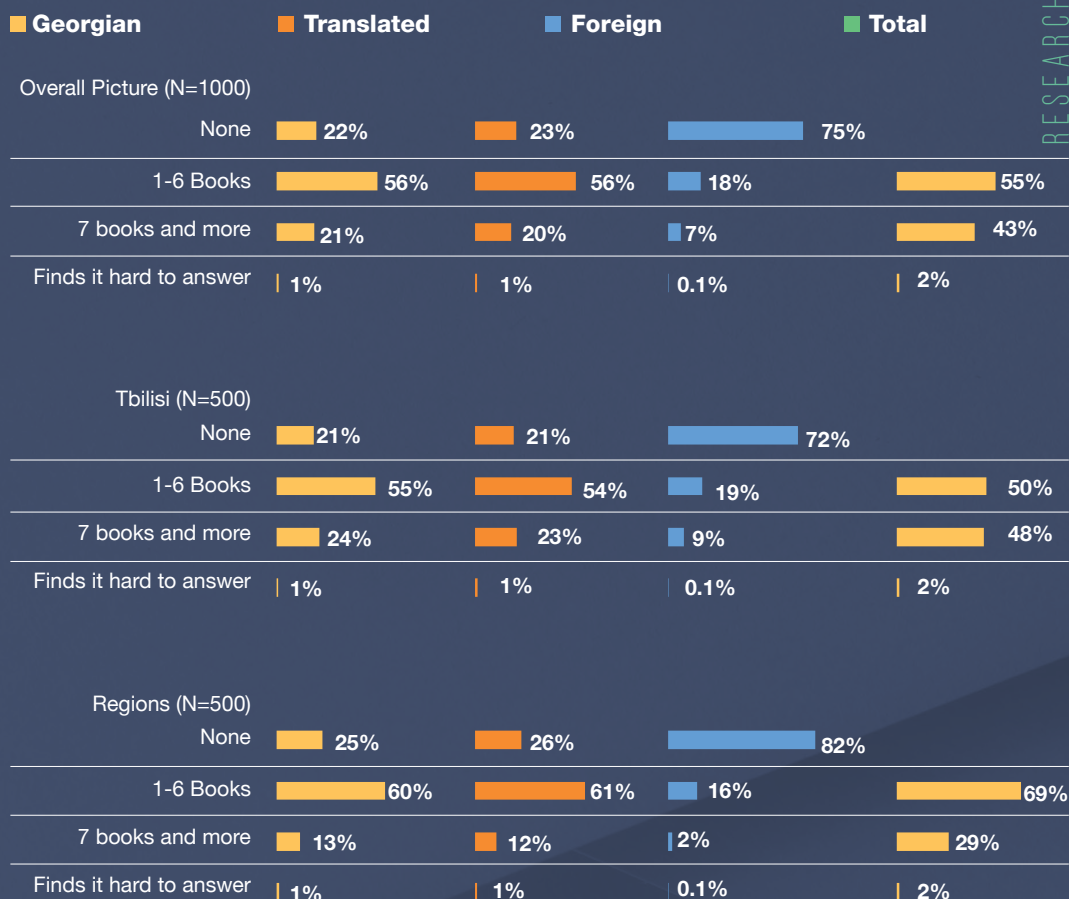
| | | | | |
|-------|---|---|---|----|
| 16-24 | 7 | 8 | 5 | 20 |
| 25-34 | 5 | 5 | 2 | 13 |
| 35-54 | 5 | 4 | 1 | 11 |
| 55 + | 6 | 4 | 1 | 10 |

Source: Sample population of readers of fiction / non-fiction N=1000

The vast majority of readers have read both Georgian (78%) and translated (77%) books past year in almost equal share. The number of foreign book readers falls significantly behind, and represents only a quarter of the sample population (25%). Although the public seems to have read an average of 13 books in 2020, it is noteworthy that their majority (55%) names only 1 to 6 books as their annual maximum. Similarly, the share of less active readers is higher in regions (69%) as compared to Tbilisi (50%).



NUMBER OF READ BOOKS / OVERALL PICTURE



Source: Sample population of readers of fiction / non-fiction N=1000

As mentioned earlier, reading frequency among regional cities is relatively high in Gori (daily readers - 24%). Therefore, readers of at least 7 books (53.5%) slightly surpass passive readers of 1 to 6 books (46.5%). The share of the latter is much higher in all other cities (69% -79%). It is noteworthy that the number of readers of books in a foreign language is slightly higher in Batumi (26%) and Gori (20%), and lower in Zugdidi (3%).



NUMBER OF READ BOOKS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|---|--------------------|-------------------|--------------------|-------------------|-----------------|
| Georgian Literature | | | | | |
| None | 29% | 26% | 21% | 22% | 21% |
| 1 to 6 books | 62% | 63% | 68% | 64% | 43% |
| 7 or more books | 6% | 11% | 11% | 6% | 36% |
| Finds it hard to answer | 3% | - | - | 7% | - |
| Foreign literature | | | | | |
| None | 27% | 29% | 25% | 33% | 13% |
| 1 to 6 books | 59% | 64% | 62% | 50% | 62% |
| 7 or more books | 12% | 7% | 13% | 9% | 25% |
| Finds it hard to answer | 2% | - | - | 8% | - |
| Translated literature | | | | | |
| None | 85% | 74% | 97% | 88% | 79% |
| 1 to 6 books | 15% | 22% | 2% | 8% | 18% |
| 7 or more books | 1% | 4% | 1% | 3% | 2% |
| Finds it hard to answer | - | - | - | 1% | - |
| Total (Georgian, translated, foreign literature) | | | | | |
| 1 to 4 books | 74% | 71% | 79% | 69% | 47% |
| 7 or more books | 23% | 29% | 21% | 21% | 54% |
| Finds it hard to answer | 3% | - | - | 10% | - |

Source: Sample population of readers of fiction / non-fiction N=500



No significant deviation from the general trend was observed among women and men. Similar to the previous categories, both genders have mostly read from 1 to 6 books. There is a small difference in favor of women (80% vs 72%), but only in terms of reading Georgian books.

Among the sample age categories, the majority of active readers (more than 7 books) are found in 16-24 age category, which is slightly ahead of relatively passive (1 to 6 books) readers of the same age category (51% vs 48%). The number of readers of Georgian literature increases with age (from 42% to 65%), however, the number of books read during the year does not exceed 6 books. The picture is reverse in case of translated and foreign literature, as the interest slightly decreases with age.

Although relatively old (55+) readers slightly outpace the youngest (16-24 years old) category in terms of weekly reading frequency, the following conclusion may be drawn based on the number of books they read: young people spend more time reading or read faster. As a result, they are able to complete twice as many books per year.



NUMBER OF READ BOOKS / GENDER AND AGE PERSPECTIVE

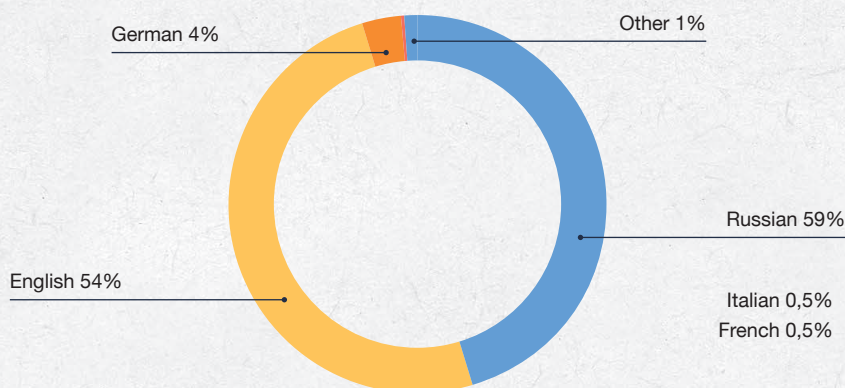
| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|------------------------------|---|-----------------|--|------------------|------------------|-----------------|
| Georgian literature | | | | | | |
| None | 19% | 27% | 31% | 30% | 16% | 12% |
| 1 to 6 books | 57% | 55% | 42% | 51% | 64% | 65% |
| 7 or more books | 23% | 17% | 27% | 18% | 19% | 21% |
| Finds it hard to answer | 1% | 1% | 0.3% | 2% | 1% | 1% |
| Translated literature | | | | | | |
| None | The data in terms of gender perspective is not statistically reliable and different from the overall picture. | | 16% | 17% | 26% | 30% |
| 1 to 6 books | | | 54% | 59% | 56% | 54% |
| 7 or more books | | | 30% | 22% | 16% | 15% |
| Finds it hard to answer | | | 0.3% | 2% | 2% | 2% |
| | | | Foreign literature | | | |
| None | | | 63% | 78% | 79% | 76% |
| 1 to 6 books | | | 23% | 18% | 17% | 16% |
| 7 or more books | | | 14% | 4% | 4% | 8% |
| Finds it hard to answer | | | | | | 1% |
| | | | Total (Georgian, translated, foreign) | | | |
| Books 1-6 | | | 48% | 56% | 58% | 56% |
| 7 books and more | | | 51% | 42% | 40% | 41% |
| Finds it hard to answer | | | 0.3% | 1% | 2% | 3% |

Source: Sample population of readers of fiction / non-fiction N=1000



As already mentioned, a quarter of the surveyed population reads books in foreign languages. It is unsurprising that Russian (59%) and English (54%) are the undisputed leaders among the languages. Less popular languages include German, Italian, French, Turkish, and Korean, with only a handful of books being read in them.

LANGUAGES OF BOOKS READ IN A FOREIGN LANGUAGE / OVERALL PICTURE²⁸



Source: Sample population of foreign language readers N=215

› Sources for obtaining books to read

The study has identified all major ways to obtain books to read used by readers over the past year. It was found that half (50%) of the population uses their personal or family library, which represents the main source for one third (34%) of readers. The second most common method is book purchase (44%), which is more actively used by one third of readers (31%) as compared to other channels. The third in the list is borrowing the desired book from friends / colleagues (30%), which represents the main source for 17% of the readers. According to the research, 14% of readers prefer purchasing online rather than visiting the sales outlet. Online purchase represents the main source for 8% of the respondents. One tenth (9%) of the respondents downloads electronic versions of books from the Internet. However, this approach

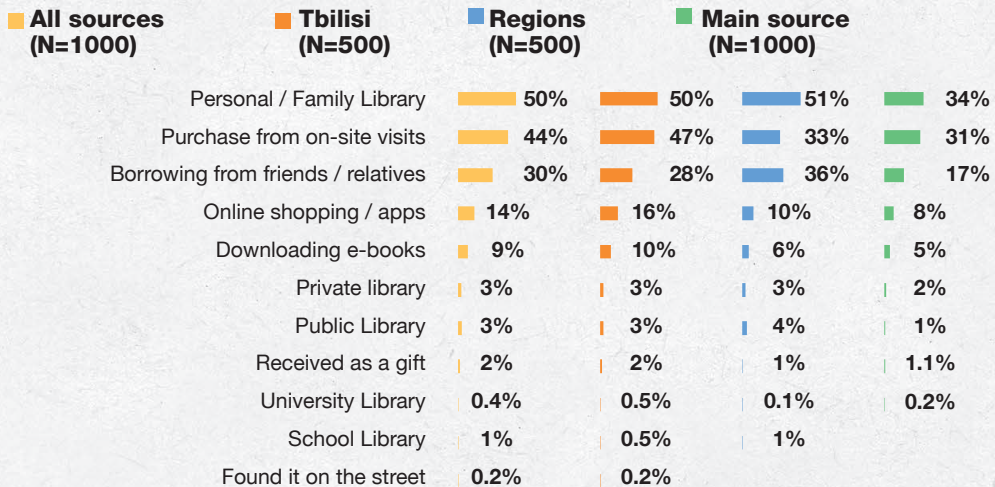
²⁸ Due to the scarcity of data, only aggregate results are presented.



is extensively used by only 5% of readers. It turned out that libraries are the rarest channels for obtaining books. Only 3% of readers depend on it.

Although the major channels for obtaining books to read (personal / family library) are equally used in Tbilisi (50%) and regions (51%), there is a slight difference in the use of other sources. For example, if in Tbilisi another most popular approach is to visit bookstores (47%), the second method of choice for people in regions is borrowing from friends / relatives (36%).

SOURCE OF READ BOOKS / REGIONAL CITIES PERSPECTIVE



Source: Sample population of readers of fiction / non-fiction N=1000

With regard to the above-mentioned top sources, the following trend is observed in the regional cities: in Kutaisi, Zugdidi, and Gori, readers are relatively active in using their personal libraries (47%, 52%, 52%), borrowing from friends / relatives (44%, 52%, 35%), and buying books from various sale outlets (40%, 36%, 43%). While in Batumi (49%) and Telavi (71%), readers mainly depend on their personal / family libraries. All other sources fall at least twice behind.



SOURCE OF READ BOOKS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|--|--------------------|-------------------|--------------------|-------------------|-----------------|
| Private / Family Library | 47% | 49% | 52% | 71% | 52% |
| Purchase from various facilities during on-site visit | 40% | 22% | 36% | 32% | 43% |
| Borrowing from friends / relatives | 44% | 28% | 52% | 10% | 35% |
| Online shopping / through apps (including Glovo, Wolt) | 5% | 16% | 2% | 4% | 13% |
| Licensed / unlicensed download of e-books | 7% | 7% | 4% | 3% | 2% |
| Public Library | 3% | 1% | 11% | 8% | 6% |
| Private library | 2% | 2% | 6% | | 8% |
| Received as a gift | 1% | | | 4% | 1% |
| School Library | | 1% | 1% | 1% | 2% |
| University Library | | | | 1% | |

Source: Sample population of readers of fiction / non-fiction N=500

The general trend is common for both genders and all age categories. In particular, last year, the sources of read books for both women and men included their personal library (51%, 48%), bookstores (47%, 37%) and borrowing from relatives (28%, 35%). Although females are more inclined to go shopping for books, while men are more prone to borrow. As age increases, the importance of personal library doubles (36% to 70%) as the tendency of purchasing from various facilities (from 50% to 34%) and borrowing from friends decreases (from 37% to 20%).



SOURCE OF READ BOOKS / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|---|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Private / Family Library | 51% | 48% | 36% | 45% | 50% | 70% |
| Purchase from various facilities during on-site visit | 47% | 37% | 50% | 48% | 42% | 34% |
| Borrowing from friends / relatives | 28% | 35% | 37% | 32% | 31% | 20% |
| Online shopping (including Glovo, Wolt) | 16% | 10% | 13% | 19% | 16% | 8% |
| Downloaded e-books | 7% | 11% | 20% | 7% | 6% | 2% |
| Public Library | 3% | 3% | 7% | 1% | 1% | 4% |
| Private library | 3% | 4% | 4% | 2% | 3% | 3% |
| Received as a gift | 1% | 2% | 1% | 1% | 2% | 2% |
| School Library | 0.5% | 1% | 1% | 0.1% | 0.4% | 0.1% |
| University Library | 0.2% | 1% | 1% | | | |
| Found on the street | | 0.4% | | | | 1% |

Source: Sample population of readers of fiction / non-fiction N=1000



› The most read books and authors of 2020

This research identified top five books and authors that were popular among readers last year. It should be noted that despite different tastes of readers, several works and authors deserve great praise in people of different genders and age categories, regardless of where they live: such as Chabua Amirejibi's "Data Tutashkhia" and Fyodor Dostoevsky's "Idiot".

MOST READ BOOKS AND AUTHORS / OVERALL PICTURE

| Most read books (2020) | | | Most read Authors (2020) | |
|------------------------|--|----|--------------------------|----|
| N | | | | |
| 1 | Data Tutashkhia (Chabua Amirejibi) | 4% | Fyodor Dostoevsky | 7% |
| 2 | Sun, the Moon and the Wheat Field (Temur Babluani) | 4% | Nodar Dumbadze | 6% |
| 3 | Idiot (Fyodor Dostoevsky) | 3% | Erich Maria Remarque | 5% |
| 4 | The Secret of Another Desert (Ia Kargareteli) | 3% | Konstantine Gamsakhurdia | 5% |
| 5 | The Forty Rules of Love (Elif Shafak) | 3% | Chabua Amirejibi | 5% |



MOST READ BOOKS AND AUTHORS / REGIONAL PERSPECTIVE

| N | Tbilisi (N=500) | Regions (N=500) |
|---|-----------------|-----------------|
|---|-----------------|-----------------|



Books

| | | | | |
|---|---|----|--|----|
| 1 | Sun, the Moon and the Wheat Field (T. Babluani) | 4% | Data Tutashkhia (Ch. Amirejibi) | 6% |
| 2 | Data Tutashkhia (Ch. Amirejibi) | 4% | Generation Jeans (D. Turashvili) | 5% |
| 3 | The Idiot (F. Dostoevsky) | 4% | Me, Grandma, Iliko and Ilarion (N. Dumbadze) | 4% |
| 4 | The Secret of Another Desert (I. Kargareteli) | 3% | Stealing the Moon (K. Gamsakhurdia) | 3% |
| 5 | The Forty Rules of Love (E. Shafak) | 3% | Arch of Triumph (EM Remark) | 3% |



Authors

| | | | | |
|---|--------------------------|----|--------------------------|----|
| 1 | Fyodor Dostoevsky | 7% | Fyodor Dostoevsky | 7% |
| 2 | Nodar Dumbadze | 6% | Nodar Dumbadze | 7% |
| 3 | Erich Maria Remarque | 5% | Chabua Amirejibi | 6% |
| 4 | Temur Babluani | 5% | David Turashvili | 6% |
| 5 | Konstantine Gamsakhurdia | 5% | Konstantine Gamsakhurdia | 5% |



MOST READ BOOKS AND AUTHORS / GENDER PERSPECTIVE

| N | Females (N=764) | Males (N=236) |
|---|-----------------|---------------|
|---|-----------------|---------------|



Books

| | | | | |
|---|---|----|--------------------------------------|----|
| 1 | Sun, the Moon and the Wheat Field (T. Babluani) | 5% | Data Tutashkhia (Ch. Amirejibi) | 8% |
| 2 | The Secret of Another Desert (I. Kargareli) | 4% | The Idiot (F. Dostoevsky) | 5% |
| 3 | "The Forty Rules of Love" (E. Shafak) | 3% | The Wolf Path (A. Iasaghashvili) | 4% |
| 4 | Jane Eyre (C. Bronte) | 3% | Crime and Punishment (F. Dostoevsky) | 4% |
| 5 | Data Tutashkhia (Ch. Amirejibi) | 3% | Arch of Triumph (EM Remark) | 3% |



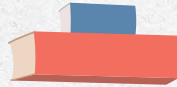
Authors

| | | | | |
|---|----------------------|----|--------------------------|-----|
| 1 | Fyodor Dostoevsky | 6% | Fyodor Dostoevsky | 10% |
| 2 | Nodar Dumbadze | 5% | Chabua Amirejibi | 8% |
| 3 | Erich Maria Remarque | 5% | Nodar Dumbadze | 7% |
| 4 | Temur Babluani | 5% | Agatha Christie | 6% |
| 5 | Elif Shafak | 5% | Konstantine Gamsakhurdia | 5% |



MOST READ BOOKS AND AUTHORS / AGE PERSPECTIVE

| N | 16-24 years (N=216) | 25-34 years (N=228) | 35-54 years (N=304) | 55+ years (N=252) |
|---|------------------------|------------------------|------------------------|----------------------|
|---|------------------------|------------------------|------------------------|----------------------|



Books

| | | | | |
|---|---|--|--|---|
| 1 | Jane Eyre (Sh. Bronte) 5% | Sun, the Moon and the Wheat Field (T. Babluani) 4% | Data Tutashkhia (Ch. Amirejibi) 7% | Data Tutashkhia (Ch. Amirejibi) 6% |
| 2 | The Adventures of Sherlock Holmes (AK Doyle) 5% | The Eighth Life: (for Brilka) (N. Haratischwili) 4% | Sun, the Moon and the Wheat Field (T. Babluani) 5% | Me, Grandma, Iliko and Ilarion (N. Dumbadze) 4% |
| 3 | Generation Jeans (D. Turashvili) 5% | The Idiot (F. Dostoevsky) 4% | The Kite Runner (K. Hosseini) 4% | Right of the Grand Master (K. Gamsakhurdia) 3% |
| 4 | The Idiot (F. Dostoevsky) 5% | Fear, come out (N. Panjikidze) 4% | The Secret of Another Desert (I. Kargareli) 4% | The Adventures of Sherlock Holmes (AK Doyle) 3% |
| 5 | "The Forty Rules of Love" (E. Shafak) 4% | "The Forty Rules of Love" (E. Shafak) 3% | The Idiot (F. Dostoevsky) 3% | The First Garment (G. Dochashvili) 3% |



Authors

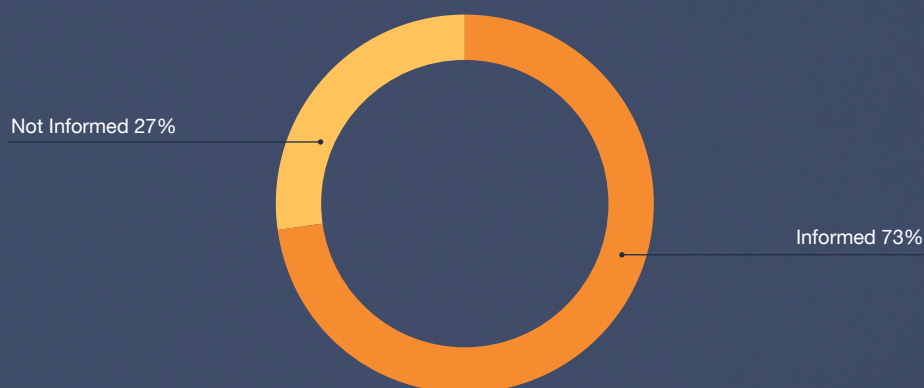
| | | | | |
|---|----------------------------|-------------------------------|-------------------------|--------------------------------|
| 1 | Fyodor Dostoevsky 10% | Fyodor Dostoevsky 9% | Chabua Amirejibi 8% | Nodar Dumbadze 11% |
| 2 | David Turashvili 8% | Erich Maria Remarque 6% | Nodar Dumbadze 8% | Konstantine Gamsakhurdia 8% |
| 3 | Erich Maria Remarque 7% | Victor Hugo 4% | Temur Babluani 6% | Chabua Amirejibi 6% |
| 4 | Elif Shafak 7% | Alexander Iasaghashvili 4% | Khaled Hosseini 5% | Fyodor Dostoevsky 5% |
| 5 | Agatha Christie 7% | Elif Shafak 4% | Fyodor Dostoevsky 5% | Levan Sanikidze 4% |



› Awareness about translation of Georgian books

The research showed that the level of awareness about intensive translation of Georgian literature into foreign languages is quite high in both Tbilisi and regions. This information is known to 7 out of 10 surveyed readers (73%), although it is noteworthy that young people have less information about it.

AWARENESS ABOUT TRANSLATIONS / OVERALL PICTURE²⁹



Source: Sample population of readers of fiction / non-fiction N=1000

AWARENESS ABOUT TRANSLATIONS / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|-----------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Yes, I am informed | 77% | 65% | 65% | 72% | 76% | 79% |
| No, I am not informed | 23% | 35% | 35% | 28% | 24% | 21% |

²⁹ The data from the perspective of regions and cities is not differentiated from the aggregate picture in a statistically reliable manner.

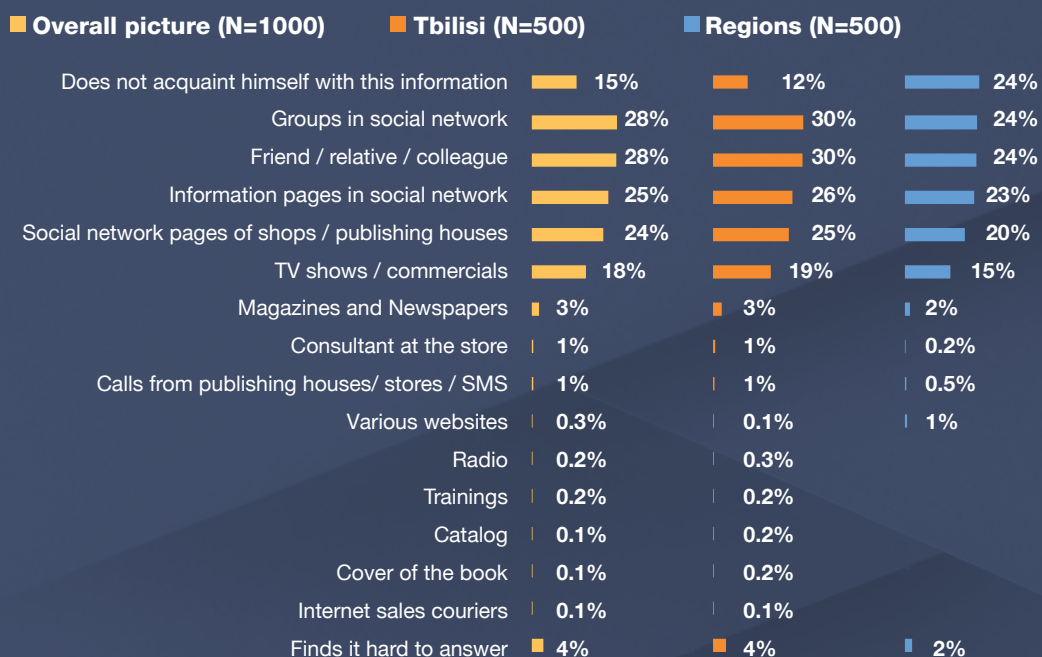


› Sources of information on new publications

The vast majority of readers (85%) learn about new publications. Their main sources of information include social network (including, social network groups - 28% and news pages - 25%) and friends / relatives (28%). Magazines and newspapers (3%), sales consultants (1%), calls / SMS from publishing houses and / or bookstores (1%) and other means of communication (<1%) play minor role in informing readers.

The sources of information are similar for readers in regions, however, the number people who are less interested in such information is twice higher in regions as compared to Tbilisi (Tbilisi - 24%, regions - 12%).

SOURCES OF INFORMATION ON NEW PUBLICATIONS / OVERALL PICTURE



Source: Sample population of readers of fiction / non-fiction N=1000



Among the regional cities, Batumi community is the least informed of new publications. A third of readers (35%) are largely unaware of such news. The social network pages of bookstores and publishing houses are the main sources of information for the remaining respondents (22%).

The most informed respondents are from Gori (90%), who receive information from various sources, the most prominent of which include the following: groups and information pages on social network (33%, 30% respectively), friends / relatives (26%), and pages of bookstores or publishing houses on social network (22%).

In general, it should be noted that the social network is the main source of information about new publications in almost all cities, except Zugdidi, where the role of friends and relatives in sharing information is paramount (40%).

SOURCES OF INFORMATION ABOUT NEW PUBLICATIONS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|---|--------------------|-------------------|--------------------|-------------------|-----------------|
| Is not informed | 21% | 35% | 21% | 20% | 10% |
| Groups in social network | 27% | 18% | 21% | 25% | 33% |
| News pages in social network | 38% | 8% | 15% | 32% | 30% |
| Friend / relative / colleague | 25% | 16% | 40% | 26% | 26% |
| Social network pages of bookstores / publishing houses | 13% | 22% | 29% | 21% | 22% |
| TV shows / commercials | 13% | 15% | 23% | 14% | 14% |
| Calls / messages from publishers / stores | | 1% | | | 1% |
| Consultant at the store | | | | 1% | 1% |
| Newspapers / magazines | | 4% | 1% | 3% | |
| Various websites | 3% | | | | |
| Finds it hard to answer | 4% | 2% | 2% | | |

Source: Sample population of readers of fiction / non-fiction N=500



Women and men receive information about new editions of books basically from similar sources. In both cases, there is a minor difference between social networks and friends / relatives. These two mentioned categories play almost equal roles in informing women, whereas for men, friends and relatives represent the main source of information.

This trend is similar among relatively young readers, although it is noteworthy that as the age increases, the role of social network declines and television becomes more popular. More specifically, the share of readers informed through TV shows increases from 8% to 41% with age.

SOURCES OF INFORMATION ABOUT NEW PUBLICATIONS / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|--|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Is not informed | 12% | 20% | 10% | 16% | 16% | 17% |
| Groups in social network | 33% | 19% | 38% | 33% | 27% | 15% |
| Friend / relative / colleague | 26% | 32% | 32% | 29% | 29% | 22% |
| News pages in social network | 27% | 22% | 31% | 32% | 27% | 9% |
| Social network pages of bookstores / publishing houses | 26% | 19% | 32% | 29% | 22% | 12% |
| TV shows / commercials | 19% | 16% | 8% | 11% | 14% | 41% |
| Magazines and newspapers | 3% | 2% | | 0.1% | 1% | 10% |
| Consultant at the store | 1% | 1% | | 1% | 0.4% | 1% |
| Publishing house/ store calls / SMS | 1% | | | | 1% | 2% |
| Websites | 0.3% | 0.3% | | | 1% | 0.5% |
| Radio | 0.3% | | | | | 1% |
| Trainings | 0.2% | | | | 1% | |
| Catalog | 0.2% | | | | 0.4% | |
| Cover of the book | 0.2% | | | | 0.4% | |
| Internet sales couriers | 0.2% | | | | | 0.5% |
| Finds it hard to answer | 3% | 4% | 3% | 3% | 4% | 5% |

Source: Sample population of readers of fiction / non-fiction N=1000

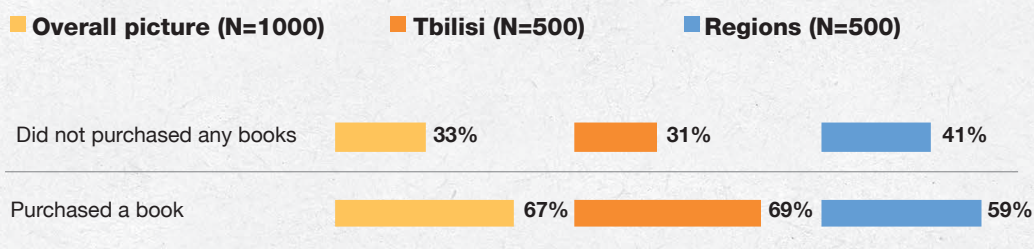


› Share of book buyers among readers

As per research findings, 67% of readers purchased various categories of literature in 2020. This indicates that one third (33%) has not renewed their personal collections of books last year. Representatives of bookstores believe that economic hardship and lack of time are the key reason behind this.

There is a subtle difference between Tbilisi and regions in this regard. In particular, 7 out of every 10 readers of the capital purchased books (69%), while in regional cities – 6 out of 10 (59%) have done so.

SHARE OF BOOK BUYERS AMONG READERS / OVERALL PICTURE



Source: Sample population of readers of fiction / non-fiction N=1000

Among regional cities, Gori leads with a significant advantage in terms of book purchase (76%). In Kutaisi, Batumi, Zugdidi, and Telavi, 6 out of every 10 readers purchased books in 2020.



SHARE OF BOOK BUYERS AMONG READERS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|-----------------------|--------------------|-------------------|--------------------|-------------------|-----------------|
| Did not purchased any | 42% | 45% | 44% | 41% | 24% |
| Purchased a book | 58% | 55% | 56% | 59% | 76% |

Source: Sample population of readers of fiction / non-fiction N=500

It should be noted that women are more inclined to purchase books (women - 72%, men - 57%). As for age groups, over the past year, more books were purchased by young people aged 16-34 (72%-75%) than by relatively old readers above 35 years (52%-67%).

SHARE OF BOOK BUYERS AMONG READERS / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|-----------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Did not purchased any | 28% | 43% | 28% | 25% | 33% | 48% |
| Purchased a book | 72% | 57% | 72% | 75% | 67% | 52% |

Source: Sample population of readers of fiction / non-fiction N=500

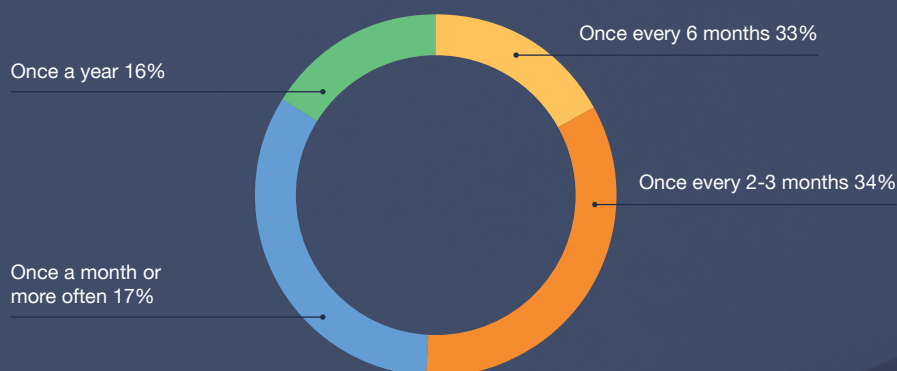
Following sub-sections illustrate the behavior of readers who purchased at least one book in 2020.



► Frequency of book purchases and amount spent

The findings of this research have outlined the frequency of book purchases by Georgian population and their annual expenditure in this regard in 2020. It was found that half (51%) of the respondents visited bookstores at least once every 2-3 months in person or online; one third (33%) - twice a year, and 16% - relatively rarely, only once a year. This trend is observed in all surveyed cities. There is no difference from gender and age perspectives.

FREQUENCY OF BOOK PURCHASES / OVERALL PICTURE³⁰

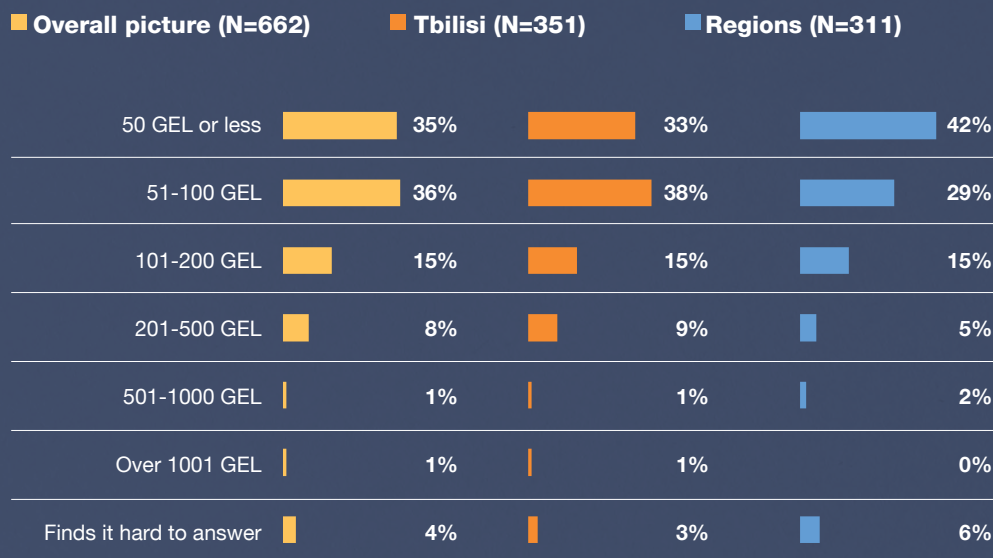


Source: Readers who purchased a book last year (2020) N=662

As for the amount spent on book purchases throughout the year, the vast majority of readers (86%) spent no more than 200 GEL on books. More specifically, the value of books purchased [per capita] by 35% of respondents does not exceed 50 GEL. The number of these low-budget readers in regions is slightly higher than in Tbilisi, which is unsurprising considering the social background of population (42% - regions, 33% - Tbilisi).

³⁰ Data by region, city, gender, and age perspective are not differentiated from the overall picture in a statistically reliable manner.



AMOUNT SPENT ON BOOKS / OVERALL PICTURE³¹

Source: Readers who purchased a book last year (2020) N=662

It can be argued that the annual budget of Georgian population allocated for book purchases is a maximum 200 GEL. The absolute majority of readers of all age segments (82% - 91%) spent no more than 200 GEL in 2020. However, there is a big share of readers with the budget of 100 GEL (67% - 77%) among them.

31 The data in terms of regional cities perspective is not differentiated from the overall picture in a statistically reliable manner.



AMOUNT SPENT ON BOOKS / GENDER AND AGE PERSPECTIVE

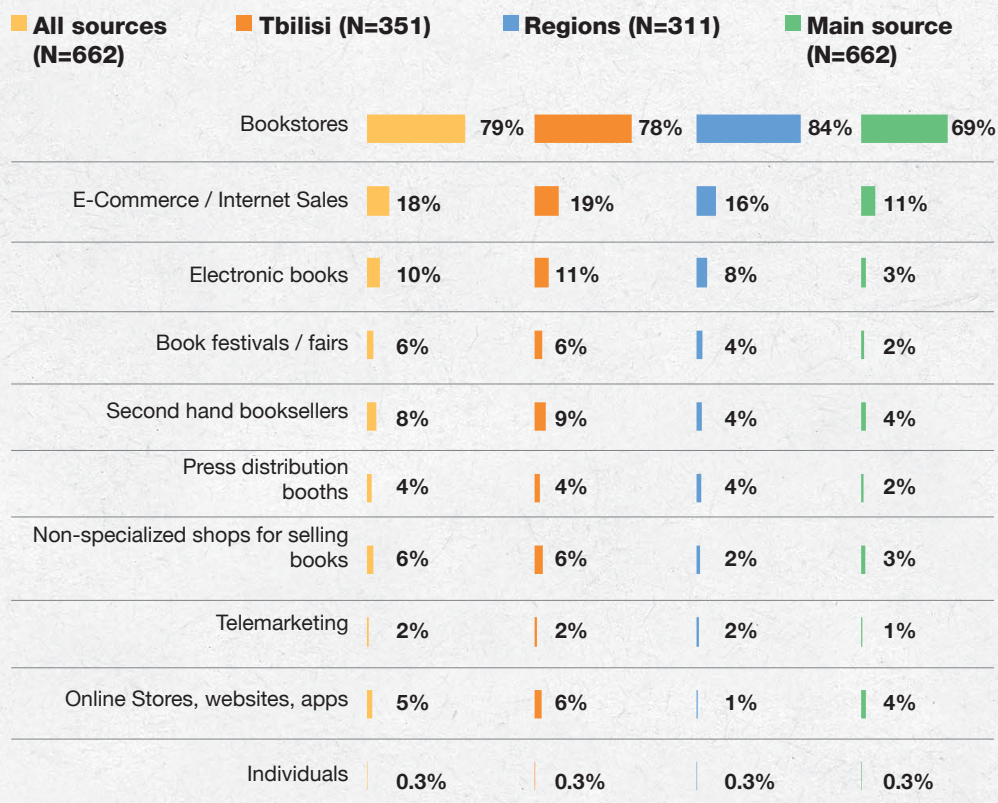
| | Female (N=537) | Male (N=125) | 16-24 (N=151) | 25-34 (N=176) | 35-54 (N=210) | 55 + (N=125) |
|-------------------------|---|-----------------|------------------|------------------|------------------|-----------------|
| 50 GEL or less | The data in terms of gender perspective is not differentiated from the overall picture in a statistically reliable manner. | | 35% | 38% | 26% | 47% |
| 51-100 GEL | | | 36% | 34% | 41% | 30% |
| 101-200 GEL | | | 15% | 11% | 19% | 14% |
| 201-500 GEL | | | 7% | 11% | 9% | 5% |
| 501-1000 GEL | | | 0.3% | 1% | 2% | 1% |
| More than 1001 GEL | | | | 2% | 1% | |
| Finds it hard to answer | | | 6% | 4% | 2% | 2% |

Source: Readers who purchased a book last year (2020) N=662

➤ Place of book purchase

Georgian readers use various sales outlets to purchase books, among which bookstores are unconditional leaders both in Tbilisi and regions. 79% of respondents purchased books at book stores in 2020. Moreover, the pandemic notwithstanding, most people (69%) still purchase books at bookstores. The remaining 21% prefer the following channels: online purchases from bookstores and publishing houses, licensed download of e-books, purchases from second-hand booksellers, attending book fairs / festivals, etc.



ALL AND MAIN SOURCES OF BOOK PURCHASE / OVERALL PICTURE

Source: Readers who purchased the book last year (2020) N=662

Bookstores are also undisputed leaders among regional cities. The overwhelming majority of readers (79-87%) have visited bookstores to purchase books in 2020. It is noteworthy that Kutaisi is an undisputed leader of bookstore visits (87%), and it is also relatively active in terms of e-book purchase (17%). Kutaisi also demonstrates a high attendance rate at book festivals / fairs last year (14%). No such activity is observed in Batumi, Zugdidi, and Telavi. It is possible to assume that similar events were not held in these cities in 2020.



PLACE OF BOOK PURCHASE / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=59) | Batumi (N=59) | Zugdidi (N=58) | Telavi (N=59) | Gori (N=76) |
|---|-------------------|------------------|-------------------|------------------|----------------|
| Bookstores | 87% | 82% | 83% | 79% | 84% |
| E-Commerce / Internet Sales (from specialized facilities) | 8% | 22% | 10% | 21% | 18% |
| Electronic books | 17% | 3% | 3% | | 9% |
| Book festivals / fairs | 14% | | | | 1% |
| Second-hand booksellers | 6% | 1% | 3% | 1% | 7% |
| Press distribution booths | | 2% | 9% | 6% | 8% |
| Non-specialized shops for selling books | 2% | 1% | 5% | | 5% |
| Telemarketing | | | 5% | | 6% |
| Non-specialized online stores, websites, apps | | 2% | | | |
| Individuals | | | | 4% | |

Source: Readers who purchased a book last year (2020) N=311

Gender balance is almost maintained among consumers of bookstores (80% - women, 77% - men). Women slightly outnumber men when purchasing books online (20% vs 13%), whereas men outnumber women when purchasing e-books (8% - women, 15% - men).

As the age increases, readers become less active in using specialized book-selling facilities (e. g., bookstores, publishing houses or websites, e-books, book festivals / fairs). Their preference is given to channels that are more accessible in terms of location: press distribution booths, non-specialized shops / online stores, and second-hand books.



PLACE OF BOOK PURCHASE / GENDER AND AGE PERSPECTIVE

| | Female (N=537) | Male (N=125) | 16-24 (N=151) | 25-34 (N=176) | 35-54 (N=210) | 55 + (N=125) |
|--|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Bookstores | 80% | 77% | 83% | 81% | 77% | 74% |
| E-Commerce / Internet Sales | 20% | 13% | 21% | 20% | 19% | 10% |
| Electronic books | 8% | 15% | 22% | 10% | 7% | 1% |
| Book festivals / fairs | 6% | 4% | 8% | 4% | 8% | 1% |
| Second-hand booksellers | 7% | 9% | 7% | 6% | 8% | 12% |
| Press distribution booths | 4% | 5% | 2% | 4% | 5% | 6% |
| Non-specialized shops for selling books | 4% | 8% | 3% | 7% | 3% | 10% |
| | 2% | 1% | 1% | 0% | 4% | 2% |
| Non-specialized online Stores, websites, apps | 5% | 3% | 1% | 4% | 8% | 6% |
| Individuals | 0.4% | | | 1% | 0.1% | 0.1% |

Source: Readers who purchased a book last year (2020) N=662

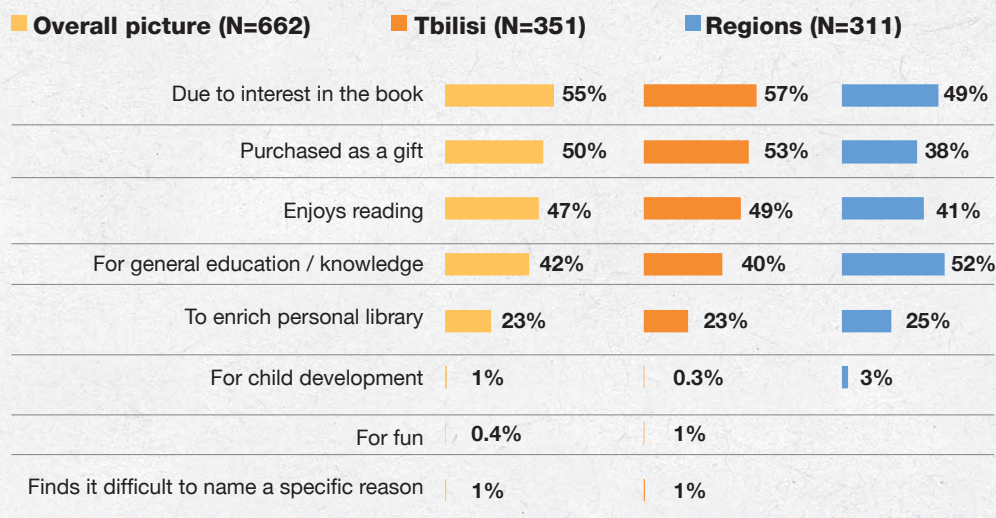
› Purpose of book purchase

Readers in Tbilisi and regions seem to buy books mainly out of interest (55%). Half of the respondents (50%) not only read books, but also purchase them as gifts. It is also pleasant that one of the main reasons for purchasing books is reading for pleasure (47%).



The purpose behind purchasing books vaguely differs between Tbilisi and regions. In particular, when purchasing a book in the capital, readers are mainly driven by their interest (57%), whereas readers in regions are motivated to purchase books for raising the level of general education (52%).

PURPOSE OF BOOK PURCHASE / OVERALL PICTURE



Source: Readers who purchased a book last year (2020) N=662

There are also some differences between the motives for purchasing books in regional cities. In particular, readers in Kutaisi and Telavi are mainly interested in books for pleasure (75% and 56% respectively); in Zugdidi, greater attention is given to the possibility of improving their level of education / knowledge (45%), while in Gori books are mainly purchased as gifts (60%). It is noteworthy that when compared to other cities, the most key factor for Batumi readers is that the purchased books supports their intellectual development (74%). It was found that books are rarely purchased as gifts in Batumi (16%).



PURPOSE OF BOOK PURCHASE / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=59) | Batumi (N=59) | Zugdidi (N=58) | Telavi (N=59) | Gori (N=76) |
|---|-------------------|------------------|-------------------|------------------|----------------|
| Due to interest in the book | 75% | 28% | 35% | 56% | 49% |
| Purchased as a gift | 46% | 16% | 42% | 42% | 60% |
| Enjoys reading | 40% | 40% | 41% | 51% | 44% |
| To raise the level of general education / knowledge | 35% | 74% | 45% | 47% | 45% |
| To enrich personal library | 20% | 36% | 16% | 19% | 20% |
| For child development | 2% | 7% | 2% | 1% | 1% |

Source: Readers who have purchased a book last year (2020) N=311

Motives for purchasing books vaguely vary between genders. The top three reasons why women purchase books are: buying for interest (50%), as gifts (52%), and for reading pleasure (49%). Interest is somewhat higher motivation for men (66%), followed by the goal of improving general knowledge / enhance education (47%).

The analysis of age segments revealed the following trends: the younger generation mainly purchases books for interest (66%). The opportunity to improve general knowledge with purchased books is also important (49%). The relevance of these reasons decreases as age increases. Reverse picture is observed in terms of purchasing books as gifts, which is a more customary practice in a relatively old generation (increase from 36% to 56%).



PURPOSE OF BOOK PURCHASE / GENDER AND AGE PERSPECTIVE

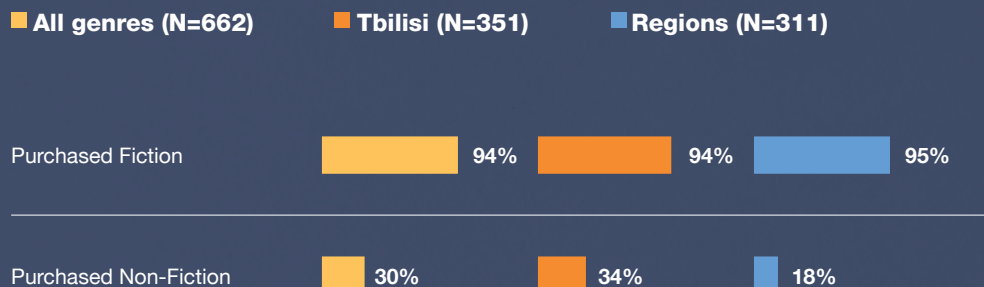
| | Female (N=537) | Male (N=125) | 16-24 (N=151) | 25-34 (N=176) | 35-54 (N=210) | 55 + (N=125) |
|--|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Due to the interest in a particular book | 50% | 66% | 66% | 52% | 53% | 46% |
| Purchased as a gift | 52% | 44% | 36% | 50% | 57% | 56% |
| Enjoys reading | 49% | 43% | 46% | 46% | 44% | 57% |
| To improve the level of general education | 41% | 47% | 49% | 42% | 43% | 34% |
| To enrich personal library | 23% | 23% | 20% | 28% | 24% | 17% |
| For child development | 1% | 1% | | 1% | 2% | 1% |
| Finds it difficult to name a specific reason | 0.3% | 1% | 2% | | | |
| For fun | 1% | | 1% | 1% | | |

Source: Readers who purchased a book last year (2020) N=662

> Categories of purchased books

It is unsurprising that similar to book readers, the share of book buyers interested in fiction (94%) is significantly higher than the share of non-fiction buyers (34%). Moreover, the latter category is purchased almost twice as less in regions (18%).



SHARE OF PURCHASED BOOK CATEGORIES / OVERALL PICTURE³²

Source: Readers who purchased a book last year (2020) N=662

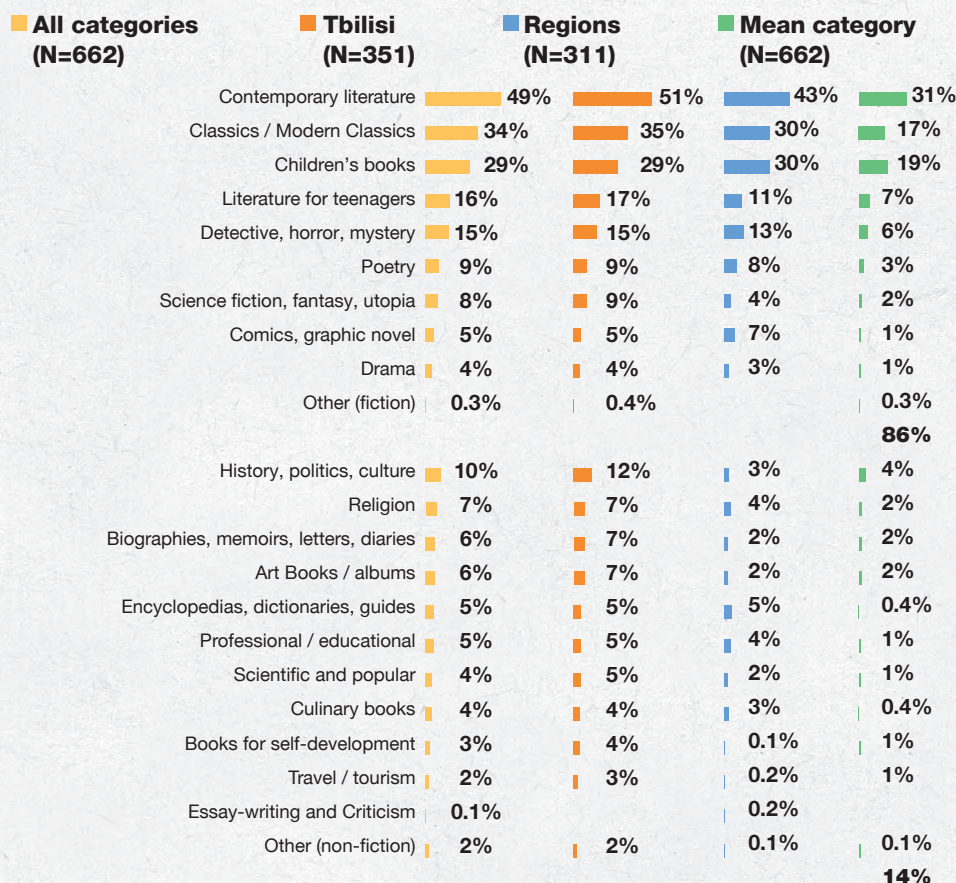
Last year, the population has mostly purchased books from the following fiction categories: contemporary literature (49%), classics (34%) and children's books (29%). Leading categories include literature for teenagers (16%) and detective and horror stories (15%). About 80% of the books purchased during the pandemic fall within the above-mentioned categories.

It is rational that if the society reads non-fiction with a fairly low intensity, it is less likely to purchase books of such content. Books on history / politics / culture hold tiny advantage among the discussed categories. Although even in this case, such books were purchased by only 10%, and only 4% list non-fiction as their major interest.

When parents of children under 7 purchase books, their priority is to entertain / educate their children. Accordingly, children's / illustrated books are leading significantly among the categories of books purchased by them (62%).

³² The total of the data exceeds 100%, because some respondents purchased both fiction and non-fiction.



ALL BOOK CATEGORIES AND MOST PURCHASED CATEGORIES / OVERALL PICTURE³³

Source: Readers who purchased a book last year (2020) N=662

Modern literature (27%-54%), classics (22%-38%), and children's books (20% -38%) maintain leading positions among the most actively purchased book categories in the surveyed regional cities. More specifically, the majority of book buyers select modern literature in Kutaisi (54%), Zugdidi (54%), and Gori (42%), children's books are leading in Batumi (37%), whereas classics and modern classics are preferred in Telavi (36%).

³³ The total of the data for "all categories" exceeds 100%, as multiple choices were allowed; in case of the "main category", there is one choice.



Encyclopedias and dictionaries are the most purchased non-fiction categories in Gori (11%), scientific and popular books - in Telavi (8%), culinary books - in Kutaisi (6%), historical, political and culture books - in Zugdidi (5%), whilst the demand for religious books and encyclopedias / dictionaries is equal in Batumi (4%-4%).

ALL CATEGORIES OF BOOKS PURCHASED / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=59) | Batumi (N=59) | Zugdidi (N=58) | Telavi (N=59) | Gori (N=76) |
|---|-------------------|------------------|-------------------|------------------|----------------|
| Fiction | | | | | |
| Contemporary literature | 54% | 34% | 54% | 27% | 42% |
| Classics / Modern Classics | 22% | 33% | 38% | 36% | 31% |
| Children's books | 20% | 37% | 38% | 25% | 31% |
| Literature for teenagers | 9% | 6% | 13% | 5% | 22% |
| Detective, horror, mystery | 10% | 13% | 20% | 11% | 14% |
| Poetry | 4% | 7% | 10% | 4% | 17% |
| Science Fiction, Fantasy | 3% | 1% | 4% | 6% | 8% |
| Comics, graphic novel | 11% | | 5% | 6% | 13% |
| Drama | 5% | 4% | 1% | | |
| Non-fiction | | | | | |
| History, politics, culture | 4% | 1% | 5% | 3% | 3% |
| Religion | 2% | 4% | 2% | 6% | 7% |
| Biographies, memoirs, letters, diaries | 2% | 2% | 2% | 1% | 1% |



| | | | | | |
|------------------------------|----|----|----|----|-----|
| Art books / Albums | 2% | 1% | 2% | | 2% |
| Encyclopedias, dictionaries | 1% | 4% | 4% | 6% | 11% |
| Professional / educational | 4% | 3% | | 2% | 7% |
| Scientific and popular | 1% | 3% | | 8% | 3% |
| Culinary books | 6% | | 2% | | 7% |
| Books for self-development | | | | 3% | |
| Travel / tourism | | | | | 1% |
| Essay -writing and Criticism | | | 2% | | |
| Other (non-fiction) | | | | 2% | |

Source: Readers who purchased a book last year (2020) N=311

There is a minor difference in consumer behavior of women and men when purchasing books. Although modern literature is an undoubted leader in both cases, women are somewhat more active in choosing modern literature (women 53%, men 38%). The share of classics (37%) among books purchased by men is quite significant. The second top category among women is children's books (36%), which were purchased 2.5 times more actively as compared to men. It is noteworthy that detective books are twice as popular among men (11% vs 23%), whilst men are almost three times more likely to purchase science fiction than women (5% vs 15%).

When purchasing non-fiction books, there is no significant deviation from the general trend between genders. Both women and men select historical and political books (women 9%, men 12%) for the most part. Religious books make up the second leading category among women (7%), while men choose between biographies / memoirs, and art books (10%-10%). It should be noted that the purchase of professional and educational books is slightly more characteristic of men (8% vs 3%).



Modern literature continues to dominate in terms of book purchases across all age segments participating in the research. Although with age, its popularity vaguely decreases (from 52% to 43%). In the majority of cases, the second place is occupied by classics / modern classics. Exceptions include readers aged 25-34, who are relatively active in purchasing children's books (41%). Considering that readers aged 35-54 typically have teenage children, the purchase indicator of teenage literature is relatively high in this segment (26%). It is noteworthy that younger generation (16-24 years old) is more inclined to purchase detectives/horror (23%).

There is a minor difference among the age segments when purchasing non-fiction. In particular, top 3 categories for readers of 16-24 include the following: historical and political books (13%), biographical books (7%) and religious literature. Professional / academic (8%), biographical (8%) and historical / political (8%) books are equally represented among categories purchased by readers from 25 to 34. Readers over 35 are increasingly interested in books of religious content, history / politics, and art.

ALL PURCHASED BOOK CATEGORIES / GENDER AND AGE PERSPECTIVE

| | Female (N=537) | Male (N=125) | 16-24 (N=151) | 25-34 (N=176) | 35-54 (N=210) | 55 + (N=125) |
|----------------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Fiction | | | | | | |
| Contemporary literature | 53% | 38% | 52% | 48% | 50% | 43% |
| Classics / Modern Classics | 33% | 37% | 36% | 30% | 38% | 32% |
| Children's books | 36% | 14% | 10% | 41% | 34% | 32% |
| Literature for teenagers | 18% | 9% | 11% | 11% | 26% | 10% |
| Detective, horror, mystery | 11% | 23% | 23% | 15% | 9% | 13% |
| Poetry | 9% | 9% | 10% | 8% | 9% | 8% |



| | | | | | | |
|--------------------------|----|-----|----|----|----|----|
| Science Fiction, Fantasy | 5% | 15% | 9% | 9% | 7% | 3% |
| Comics, graphic novel | 5% | 8% | 7% | 7% | 6% | 1% |
| Drama | 3% | 4% | 5% | 6% | 2% | 1% |
| Other (fiction) | | 1% | 1% | | | |

Non-fiction

| | | | | | | |
|-------------------------------|----|------|-----|------|----|------|
| History, politics, culture | 9% | 12% | 13% | 8% | 8% | 14% |
| Religion | 7% | 6% | 5% | 3% | 8% | 10% |
| Biographies, memoirs, letters | 4% | 10% | 7% | 8% | 3% | 7% |
| Art books / Albums | 4% | 10% | 4% | 5% | 7% | 7% |
| Encyclopedias, dictionaries | 5% | 5% | 4% | 5% | 6% | 7% |
| Professional / educational | 3% | 8% | 3% | 8% | 4% | 2% |
| Scientific and popular | 4% | 5% | 4% | 2% | 5% | 5% |
| Culinary books | 4% | 4% | 1% | 2% | 5% | 7% |
| Books for self-development | 2% | 4% | 5% | 3% | 3% | 0.1% |
| Travel / tourism | 1% | 4% | 1% | 3% | 2% | 2% |
| Essay -writing and Criticism | | 0.2% | | 0.2% | | |
| Other (non-fiction) | 2% | 2% | 1% | 3% | 1% | 3% |

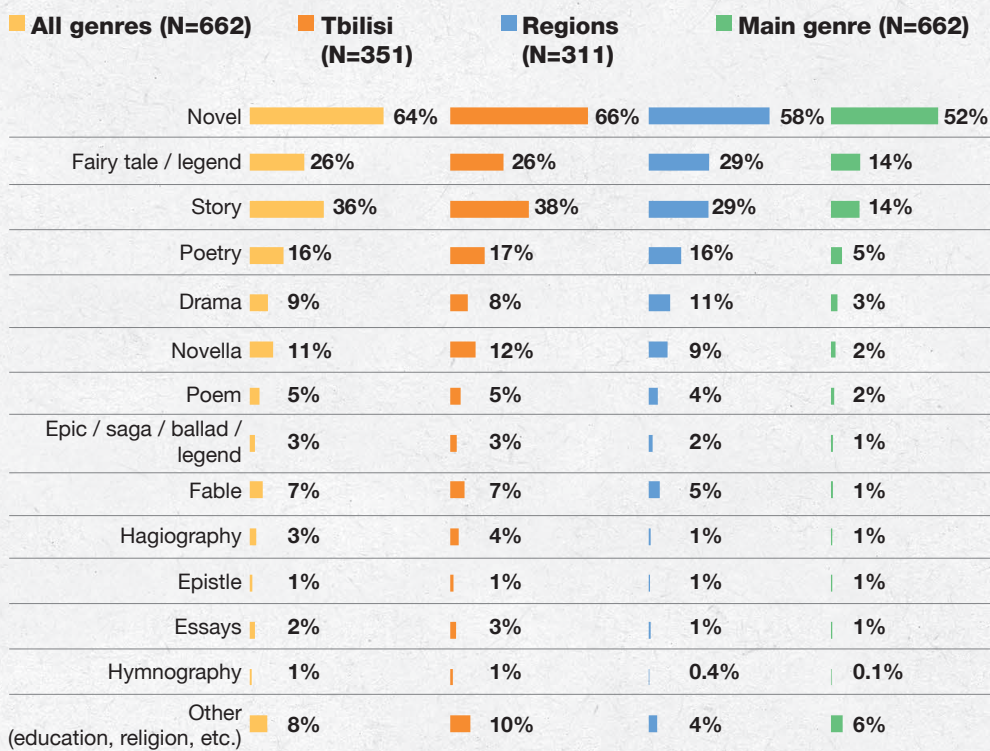
Source: Readers who purchased a book last year (2020) N=662



► Genres of purchased books

Novels are the biggest favorite with readers and buyers. It is notable that 6 out of 10 buyers (64%) seem to be purchasing new novels, and it represents the main genre for every fifth buyer (52%). Stories (36%) and fairy tales (26%) are relatively popular, although they fall far behind novels.

ALL BOOK GENRES AND THE MOST PURCHASED ONES / OVERALL PICTURE³⁴



Source: Readers who purchased a book last year (2020) N=662

³⁴ The total of the data for “all genres” exceeds 100%, as multiple choices were allowed; in case of the “main genre”, there is one choice.



This trend is sustained in all regional cities. Among the purchased books, the importance of novels is even greater in Kutaisi (71%) and Zugdidi (76%), and comparably less - in Batumi (44%). Fairy tales constitute the second most popular genre in all cities, except Kutaisi, where stories are readers' second choice.

| | Kutaisi (N=59) | Batumi (N=59) | Zugdidi (N=58) | Telavi (N=59) | Gori (N=76) |
|-----------------------------------|-------------------|------------------|-------------------|------------------|----------------|
| Novel | 71% | 44% | 76% | 58% | 53% |
| Story | 40% | 20% | 22% | 29% | 32% |
| Fairy tale / legend | 19% | 35% | 28% | 29% | 36% |
| Poetry | 13% | 11% | 22% | 13% | 25% |
| Novella | 13% | 7% | 3% | 8% | 10% |
| Drama | 10% | 19% | 4% | 6% | 1% |
| Fable | 6% | 5% | 6% | 0% | 5% |
| Poem | 4% | 1% | 7% | 6% | 9% |
| Hagiography | 1% | | 1% | | 3% |
| Epic / saga / ballad / legend | 4% | | 3% | | 2% |
| Essays | | 1% | 2% | | 2% |
| Epistle | | | | 7% | 2% |
| Hymnography | | | 1% | | 1% |
| Other (education, religion, etc.) | 2% | 6% | | 12% | 4% |

Source: Readers who purchased a book last year (2020) N=311

The most active tendency of purchasing novels remains unchanged regardless of gender or age. Stories and fairy tales holding the second and third places respectively, significantly fall behind novels. It is not surprising that fairy tales are less purchased among readers aged 16-24. They are more interested in drama.



GENRES OF PURCHASED BOOKS / GENDER AND AGE PERSPECTIVE

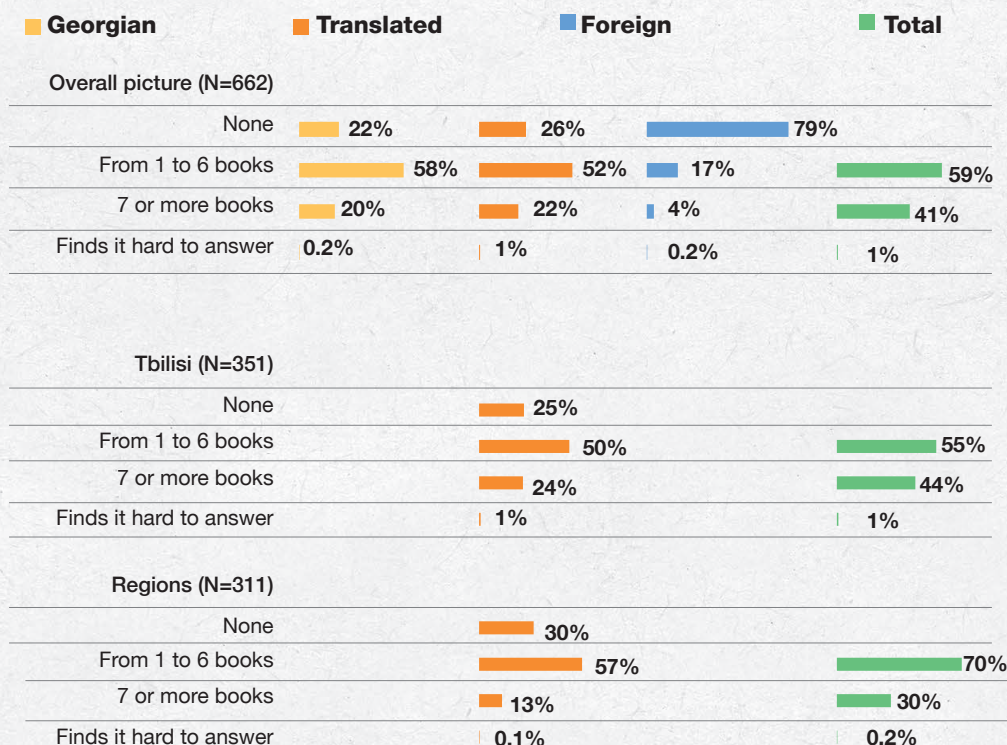
| | Female (N=537) | Male (N=125) | 16-24 (N=151) | 25-34 (N=176) | 35-54 (N=210) | 55 + (N=125) |
|--------------------------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Novel | 65% | 62% | 69% | 66% | 66% | 52% |
| Story | 37% | 33% | 27% | 36% | 41% | 39% |
| Fairy tale / legend | 29% | 20% | 13% | 32% | 30% | 31% |
| Poetry | 18% | 14% | 10% | 15% | 18% | 23% |
| Novella | 13% | 8% | 11% | 7% | 15% | 13% |
| Drama | 7% | 14% | 16% | 8% | 5% | 6% |
| Fable | 8% | 2% | 2% | 7% | 10% | 5% |
| Poem | 5% | 5% | 8% | 2% | 4% | 7% |
| Hagiography | 3% | 3% | 4% | 2% | 2% | 5% |
| Epic / saga / ballad / legend | 2% | 4% | 2% | 3% | 4% | 1% |
| Essays | 2% | 3% | 4% | 3% | 1% | 2% |
| Epistle | 1% | 1% | | 1% | 2% | 1% |
| Hymnography | 1% | 1% | 2% | | 1% | |
| Other (education, religion, etc.) | 7% | 11% | 8% | 10% | 5% | 13% |

Source: Readers who purchased a book last year (2020) N=662

➤ Number and language of purchased books

The research has also found that residents of the capital purchased an average of 13 books last year. More specifically, 78% of them purchased an average of 6 Georgian books. The number of respondents that purchased books translated from foreign languages to Georgian (74%) was almost equal to that of readers who bought 6 books throughout the year. Only one fifth (21%) of the surveyed were interested in books in a foreign language, having purchased only one such book. Similar to the reading frequency, the majority of buyers (59%) purchase no more than 6 books per year. The number of such citizens is even higher in regions (70%).



NUMBER OF PURCHASED BOOKS / OVERALL PICTURE^{35 36}

Source: Readers who purchased a book last year (2020) N=662

The abovementioned trend is recurring regardless of gender and age. In particular, among all reviewed categories, the purchasing capacity of readers is mostly limited to 1-6 books.

35 In case of Georgian books and books in foreign languages, the data in Tbilisi perspective is differentiated from the overall picture in a statistically reliable manner.

36 In case of regional cities, the data is not statistically different from the overall picture for any of the categories (Georgian, translated, foreign language).



NUMBER OF PURCHASED BOOKS / GENDER AND AGE PERSPECTIVE

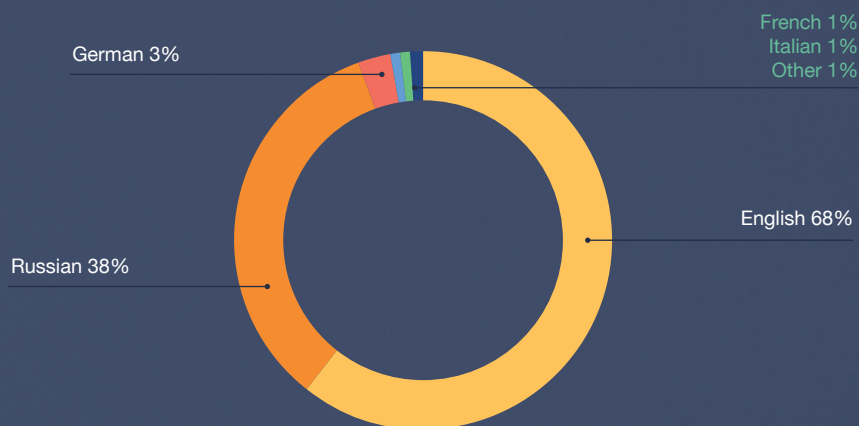
| | Female (N=537) | Male (N=125) | 16-24 (N=151) | 25-34 (N=176) | 35-54 (N=210) | 55 + (N=125) |
|--|--|-----------------------|------------------|------------------|------------------|-----------------|
| Georgian literature | | | | | | |
| None | The data in terms of gender perspective is not differentiated from the overall picture in a statistically reliable manner. | | 33% | 28% | 14% | 11% |
| 1 to 6 books | | | 52% | 55% | 59% | 69% |
| 7 or more books | | | 14% | 17% | 27% | 19% |
| Finds it hard to answer | | | 0.1% | 1% | | |
| | | Translated literature | | | | |
| None | | | 18% | 27% | 24% | 39% |
| 1 to 6 books | | | 55% | 51% | 52% | 47% |
| 7 or more books | | | 27% | 20% | 23% | 14% |
| Finds it hard to answer | | | 0.1% | 1% | 1% | |
| | | Foreign literature | | | | |
| None | | | 65% | 80% | 83% | 88% |
| 1 to 6 books | | | 26% | 16% | 14% | 11% |
| 7 or more books | | | 9% | 4% | 2% | 1% |
| Finds it hard to answer | | | | | 1% | |
| Total (Georgian, translated, foreign literature) | | | | | | |
| 1 to 6 books | 55% | 67% | 60% | 62% | 49% | 67% |
| 7 or more books | 44% | 33% | 40% | 36% | 50% | 33% |
| Finds it hard to answer | 1% | | 0.1% | 2% | 1% | |

Source: Readers who purchased a book last year (2020) N=662



It is no wonder that English books have a significant advantage among books in foreign languages (68%). Second place is held by literature in Russian, which is purchased by 38% of buyers of books in foreign languages. Purchasing books in German, Italian, French, Turkish and Korean languages is less popular.

LANGUAGE OF FOREIGN BOOKS PURCHASED / OVERALL PICTURE³⁷



Source: Sample population of buyers of books in foreign languages N=119

> Frankfurter Buchmesse

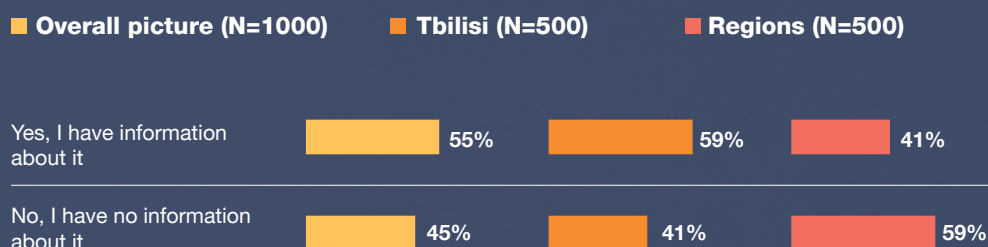
Frankfurter Buchmesse is the largest book fair in the world, where Georgia was presented as the Guest of Honour in 2018. Within the framework of this project, the works of Georgian authors were translated and published in German and other European or non-European languages. Additionally, events, presentations, and meetings with Georgian authors were held in Germany and other German-speaking cities.

³⁷ Due to the scarcity of data, only aggregate results are presented.



The majority of Tbilisi readers (59%) were found to be aware of this fact, although the picture is changing in the regions. Only 4 out of every 10 respondents are informed of this.

AWARENESS ABOUT THE FRANKFURT BOOK FAIR / OVERALL PICTURE (N=1000)



Source: Sample population of readers of fiction / non-fiction, N=1000

The highest level of awareness among regional cities is observed in Telavi (53%), Zugdidi (51%), and Gori (50%), where half of the readers have heard about Georgia's participation in the Fair. Kutaisi and Batumi fall behind them with equal level of awareness (35% -36%).

AWARENESS ABOUT FRANKFURTER BUCHMESSE / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|------------------------------------|--------------------|-------------------|--------------------|-------------------|-----------------|
| Yes, I have information about it | 35% | 36% | 51% | 53% | 50% |
| No, I have no information about it | 65% | 64% | 49% | 47% | 50% |

Source: Sample population of readers of fiction / non-fiction N=500



A minor difference is observed among readers from the gender and age perspective. For example, 6 women and 5 men out of every 10 surveyed people in both gender categories were familiar with this information. The level of awareness also increases along with the age: while only 42% of younger generation (16-24 years old) were aware of this fact, this figure reaches 72% in the 55+ age group.

AWARENESS ABOUT FRANKFURTER BUCHMESSE / GENDER AND AGE PERSPECTIVE

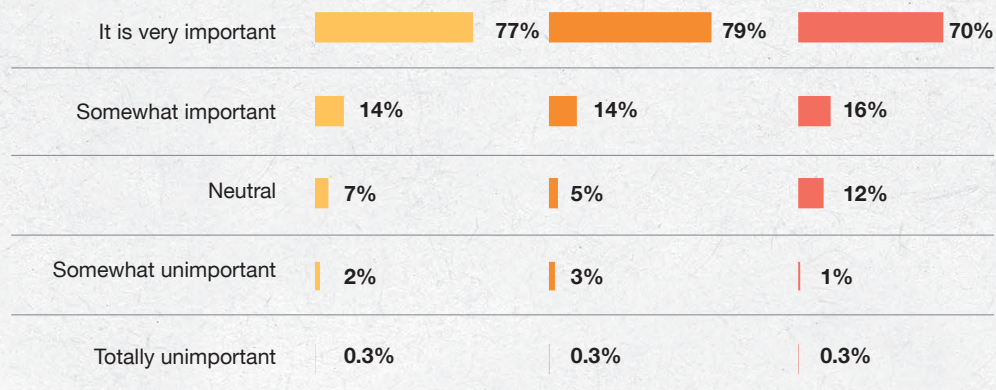
| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|------------------------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Yes, I have information about it | 59% | 46% | 42% | 48% | 56% | 72% |
| No, I have no information about it | 41% | 54% | 58% | 52% | 44% | 28% |

Source: Sample population of readers of fiction / non-fiction N=1000

› Attitude towards participation in international projects

Readers - both in Tbilisi (92%) and in regions (86%) - have a clearly positive attitude towards participation of Georgia in international projects for the promotion of our country's culture abroad. Moreover, in some cities (Gori), there are absolutely no readers with negative attitudes, whilst in other cities their number varies only from 1 to 5%. The essential importance of such events is understood by the majority, regardless of their gender and age.



ATTITUDE TOWARDS INTERNATIONAL PROJECTS / OVERALL PICTURE■ **Overall picture (N=1000)**■ **Tbilisi (N=500)**■ **Regions (N=500)****Source:** Attitude towards international projects / Overall picture**ATTITUDE TOWARDS INTERNATIONAL PROJECTS / REGIONAL CITIES PERSPECTIVE**

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|----------------------|--------------------|-------------------|--------------------|-------------------|-----------------|
| It is very important | 70% | 62% | 54% | 85% | 97% |
| Somewhat important | 22% | 17% | 16% | 13% | 1% |
| Neutral | 6% | 20% | 24% | 1% | 2% |
| Somewhat unimportant | 1% | 1% | 5% | | |
| Totally unimportant | 1% | | | 1% | |

Source: Sample population of readers of fiction / non-fiction N=500

ATTITUDE TOWARDS INTERNATIONAL PROJECTS / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|----------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| It is very important | 83% | 64% | 78% | 74% | 72% | 84% |
| Somewhat important | 11% | 21% | 15% | 17% | 14% | 9% |
| Neutral | 4% | 11% | 5% | 6% | 10% | 5% |
| Somewhat unimportant | 2% | 4% | 2% | 2% | 4% | 1% |
| Totally unimportant | 0% | 1% | 0% | 1% | 0% | 0% |

Source: Sample population of readers of fiction / non-fiction N=1000

› Visiting book sales outlets before the pandemic

The frequency of readers' visits to individual book sale outlets before the pandemic of 2019 makes up an interesting picture. Bookstores seem to have enjoyed the greatest popularity among readers (75%) when compared to book fairs (18%) and libraries (23%). More specifically, 44% of readers visited bookstores at least once every 2-3 months, which is significantly higher than the number of people visiting book fairs (3%) and libraries (14%) with the same frequency.

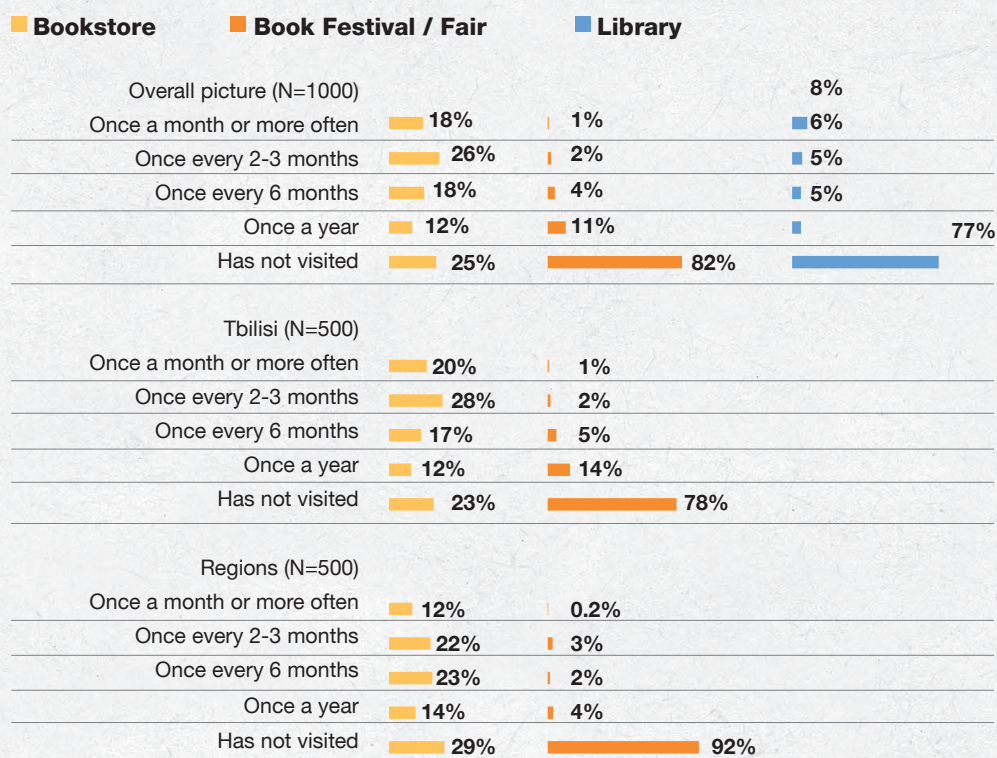
The numbers of bookstore visitors in Tbilisi and regions differ insignificantly (77% and 71% respectively), although almost half of the readers in the capital - as opposed to one third (34%) in the region - visit bookstores with relatively high intensity - at least once every 2-3 months.

The vast majority of readers did not participate in book festivals and fairs in 2019, both in Tbilisi (78%) and regions (92%). The situation is almost equally challenging in all regional cities in this regard (81% -98%). The majority of the attendants visited it once every 6 months or less frequently, which can be explained by the occasional occurrence of such events.



There is a tendency that readers in big cities visit libraries less frequently. This is evidenced by the fact that only one fifth of them (23%) used this service in 2019.

VISITING BOOK SALES OUTLETS BEFORE THE PANDEMIC, 2019 / OVERALL PICTURE³⁸



Source: Sample population of readers of fiction / non-fiction N=1000

38 The library-related data from the perspectives of Tbilisi and regions is not statistically reliable based on the overall picture.



VISITING BOOK SALES OUTLETS BEFORE THE PANDEMIC / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|-----------------------|---|-------------------|--------------------|-------------------|-----------------|
| | Bookstore | | | | |
| | The data for the bookstore from the city perspective is not differentiated from the overall picture in a statistically reliable manner. | | | | |
| | Book Festival / Fair | | | | |
| At least once a month | 1% | | | | |
| Once in 2-3 months | 10% | | | | 1% |
| Once in 6 months | 4% | 1% | | | 1% |
| Once in a year | 5% | 2% | 2% | 4% | 4% |
| Has not visited | 81% | 97% | 98% | 96% | 94% |
| | Library | | | | |
| | The data for the library from the city perspective is not differentiated from the overall picture in a statistically reliable manner. | | | | |

Source: Sample population readers of fiction / non-fiction N=500

Among bookstore visitors, women prevail over men (79% vs 68%). From the age perspective, the turning point starts from 55 years, and the number of visitors is reduced by at least 2 times.

As expected, the majority of festival / fair visitors are young people under 34, and their number declines as the age increases. There is no gender difference between the attendants.

The biggest group of library visitors consists of readers between 16 and 24 - students, who begin using library services in parallel with their university studies; although as they get older, the frequency of their visits declines. According to the library staff,



there is a separate segment of regular visitors, who visit libraries at least once a week to obtain information about relevant topics.

No difference is observed in this regard between women and men, as well as the readers in regions and Tbilisi.

VISITING BOOK SALES OUTLETS BEFORE THE PANDEMIC / GENDER AND AGE PERSPECTIVE

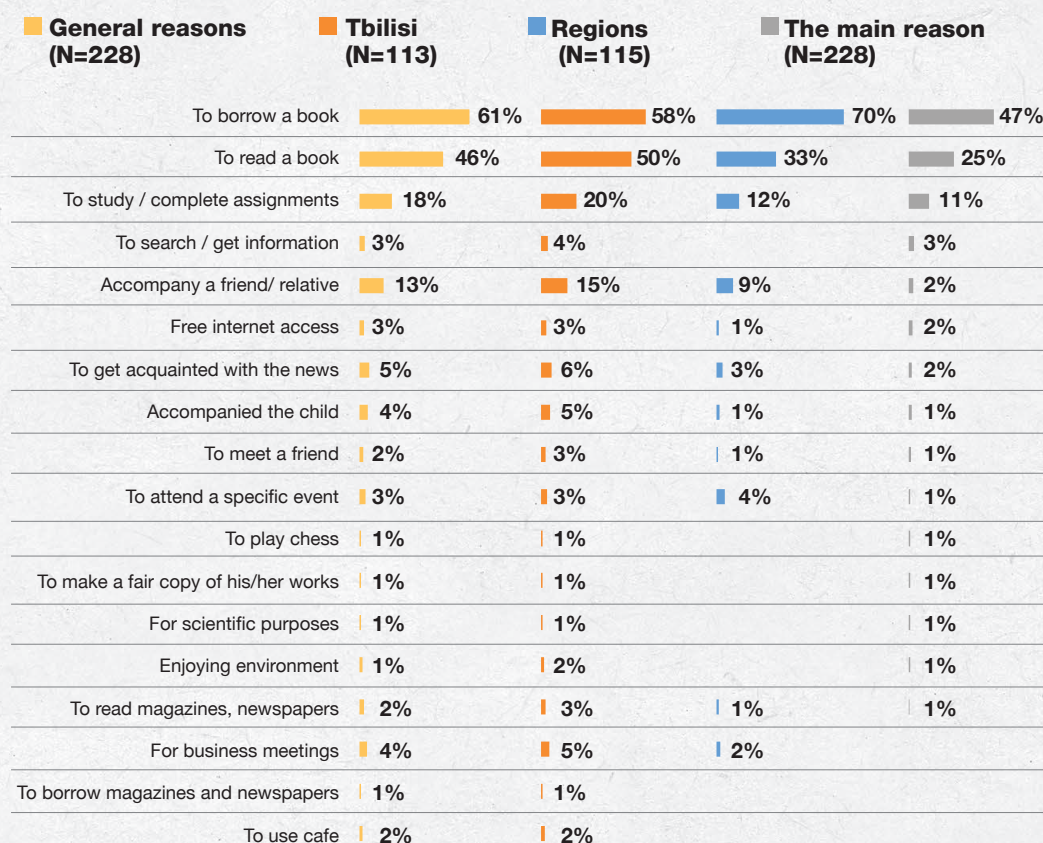
| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|-----------------------|--|-----------------|------------------|------------------|------------------|-----------------|
| Bookstore | | | | | | |
| At least once a month | 21% | 13% | 16% | 18% | 24% | 12% |
| Once every 2-3 months | 27% | 25% | 30% | 32% | 25% | 19% |
| Once every 6 months | 18% | 19% | 18% | 21% | 19% | 16% |
| Once a year | 13% | 11% | 15% | 13% | 12% | 9% |
| Has not visited | 21% | 32% | 22% | 16% | 21% | 43% |
| Book Festival / Fair | | | | | | |
| At least once a month | The data in terms of gender perspective is not differentiated from the overall picture in a statistically reliable manner. | 1% | | 1% | 1% | |
| Once every 2-3 months | | 1% | 3% | 3% | 1% | |
| Once every 6 months | | 6% | 3% | 4% | 4% | |
| Once a year | | 13% | 16% | 8% | 8% | |
| Has not visited | | 77% | 78% | 84% | 87% | |
| Library | | | | | | |
| At least once a month | The data in terms of gender perspective is not differentiated from the overall picture in a statistically reliable manner. | 21% | 6% | 3% | 4% | |
| Once every 2-3 months | | 13% | 5% | 4% | 1% | |
| Once every 6 months | | 11% | 5% | 1% | 2% | |
| Once a year | | 8% | 4% | 6% | 1% | |
| Has not visited | | 48% | 80% | 87% | 91% | |

Source: Sample population of readers of fiction / non-fiction N=1000



The main purpose for visiting libraries: borrow a book (47%); read a book at the library (25%); or study (11%). Although visitors of regional libraries are characterized as retired or unemployed persons who visit libraries to meet people in addition to reading, the research results demonstrated that there is no difference in this regard between Tbilisi and regions.

PURPOSE OF LIBRARY VISIT / OVERALL PICTURE³⁹



Source: Visiting readers of the library N=228

³⁹ Due to the lack of data in regional cities, the results are not presented.



As for gender differences, more than a half (67%) of female readers visit a library to borrow a book, which outranks males in this category (51%). Among visitors that go to libraries for reading, both genders demonstrate equal engagement (46%-46%), although roughly more men than women prefer to study at the library (20% vs. 17%). It is noteworthy that in 2019, a small proportion (6%) of male readers visited libraries for free internet access.

Borrowing a book was the main reason for visiting libraries in 2019 among all age categories. However, as the age increases, readers increasingly prefer to bring books home instead of reading at the library. Naturally, the youngest respondents under the age of 34 visit libraries for studying.

It should be noted that for some readers, library is a place where they get acquainted with the news. In 2019, 16% of readers of 55+ age category visited library for the mentioned purpose. This is the third top reason for this age category after borrowing and reading a book.



PURPOSE OF LIBRARY VISIT / GENDER AND AGE PERSPECTIVE

| | Female (N=168) | Male (N=60) | 16-24 (N=109) | 25-34 (N=41) | 35-54 (N=47) | 55 + (N=31) |
|------------------------------------|-------------------|----------------|------------------|-----------------|-----------------|----------------|
| To borrow a book | 67% | 51% | 64% | 54% | 60% | 59% |
| To read a book | 46% | 46% | 56% | 42% | 31% | 26% |
| To study | 17% | 20% | 23% | 18% | 10% | |
| Accompany a friend / relative | 13% | 13% | 16% | 8% | 15% | 5% |
| To get acquainted with the news | 6% | 4% | 4% | 3% | 7% | 16% |
| Accompany the child | 5% | 4% | | 1% | 20% | 7% |
| For business meetings | 4% | 3% | 2% | 3% | 10% | 7% |
| To attend a specific event | 3% | 3% | 1% | 9% | 5% | 5% |
| To search / get information | 2% | 4% | 4% | 3% | | |
| To use the free internet | 0.2% | 6% | 0.2% | 6% | 7% | |
| To read magazines, newspapers | 4% | 0.2% | 1% | | 3% | 15% |
| To meet a friend, relative | 1% | 4% | 1% | 1% | 7% | |
| To use cafe | 1% | 2% | 1% | 5% | | |
| Enjoying environment | 1% | 2% | 3% | | | |
| To play chess | | 2% | 2% | | | |
| To make fair copy of his/her works | | 2% | | | | 8% |
| To borrow magazines and newspapers | 1% | | 1% | | | |
| For the scientific purposes | 1% | | 1% | | | |

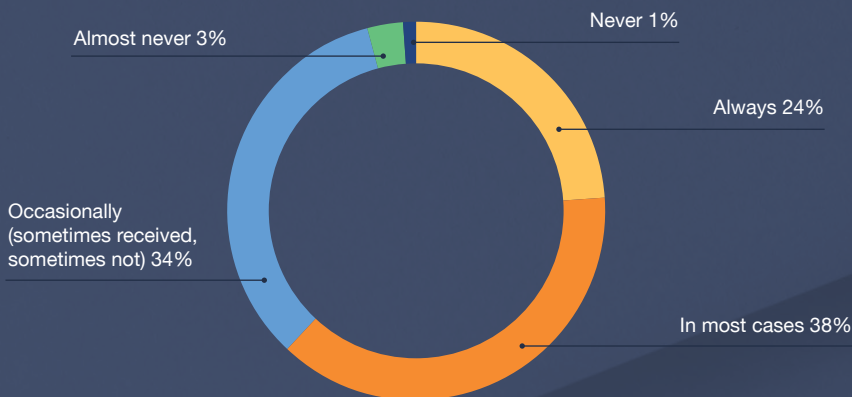
Source: Library visiting Readers N=228



Representatives of the National Library and the Libraries Association outline that over time, the behavior of readers varies depending on on-site services offered by libraries. For example, when regional libraries started to offer services of multifunction printer and internet access along with book resources to its readers, the demand for using libraries has increased.

The satisfaction scale of library visitors in 2019: majority of visitors (62%) have always or somewhat always received a desired service; one third – have received occasionally (34%), while only 3% has almost never received a desired service.

RECEIVING DESIRABLE SERVICE AT THE LIBRARY / OVERALL PICTURE⁴⁰



Source: Library Visitor Readers N=228

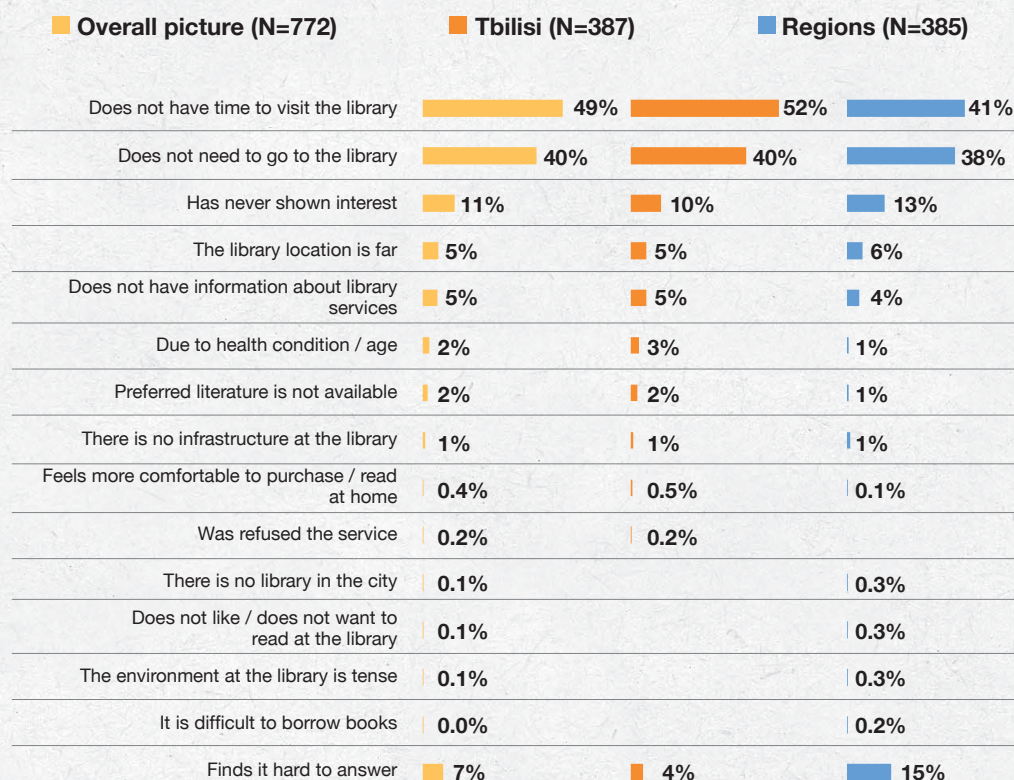
As mentioned above, 77% of readers have not visited a library in 2019. The top 3 reasons for not visiting libraries include the following: half of the respondents (49%) complain of the lack of time, 40% of respondents do not have the need to visit the library as they already have the books they need; and 11% are not interested. Other less important reasons were distance (5%) and lack of information about library services (5%).

⁴⁰ Data by region, city, gender, and age perspective is not differentiated from the overall picture in a statistically reliable manner.



Although often readers do not find library environment comfortable due to damaged buildings, this is less of a reason for them to refuse library services (1%). The same can be said about the offered variety of literature, which, as shown below, is not satisfactory for 2% of the readers only.

REASONS FOR AVOIDING VISITS TO LIBRARY / OVERALL PICTURE



Source: Readers who do not visit the library N=772



These reasons are common for both Tbilisi and regions, although readers in the capital more frequently complain about the lack of time for visiting libraries. This trend is also repeated among regional cities. More specifically, half of the respondents in Kutaisi and Gori who avoid visiting libraries do not have the need of visiting them (48% -49%), whereas in Batumi (43%), Zugdidi (42%), and Telavi (60%) the main reason for not visiting libraries is the lack of time.

REASONS FOR AVOIDING VISITS TO LIBRARY / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=81) | Batumi (N=80) | Zugdidi (N=74) | Telavi (N=75) | Gori (N=75) |
|--|-------------------|------------------|-------------------|------------------|----------------|
| Does not have time to visit the library | 34% | 43% | 42% | 60% | 45% |
| Does not need to go to the library | 48% | 31% | 22% | 30% | 49% |
| Has never shown interest | 7% | 15% | 35% | 12% | 7% |
| The library location is far | 13% | 2% | | 2% | 5% |
| Does not have information about library services | 8% | 1% | 3% | | 7% |
| Due to health condition / age | 1% | | | 6% | 1% |
| Preferred literature is not available | 2% | | | | |
| There is no infrastructure at the library | | 1% | | | 7% |
| Feels more comfortable to purchase / read at home | | | | 2% | |
| Was refused the service | | | | | 2% |
| Does not like / Does not want to read at the library | 1% | | | | |
| The environment at the library is tense | 1% | | | | |
| It is difficult to borrow books | | | | | 1% |
| Finds it hard to answer | 6% | 31% | 13% | 7% | 1% |

Source: Readers who do not visit the library N=385



Lack of time and absence of need to visit libraries are named as the main reasons, regardless of gender and age.

REASONS FOR AVOIDING VISITS TO LIBRARY /GENDER AND AGE PERSPECTIVE

| | Female (N=387) | Male (N=385) | 16-24 (N=107) | 25-34 (N=187) | 35-54 (N=257) | 55 + (N=221) |
|--|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Does not have time to visit the library | 51% | 43% | 41% | 56% | 56% | 36% |
| Does not need to go to the library | 39% | 40% | 37% | 32% | 39% | 49% |
| Has never shown interest | 8% | 18% | 14% | 10% | 14% | 7% |
| The library location is far | 7% | 3% | 2% | 6% | 5% | 6% |
| Does not have information about library services | 3% | 10% | 5% | 6% | 5% | 5% |
| Due to health condition / age | 2% | 2% | | | 0.1% | 8% |
| Preferred literature is not available | 1% | 3% | 4% | 1% | 1% | 2% |
| There is no infrastructure at the library | 1% | 1% | 2% | 0.3% | 1% | 1% |
| Feels more comfortable to purchase / read at home | 1% | | 1% | 1% | | |
| Was refused the service | 0.3% | | | 1% | | |
| Does not like / Does not want to read at the library | 0.1% | | | | 0.2% | |
| The environment at the library is tense | 0.1% | | 0.5% | | | |
| It is difficult to borrow books | 0.1% | | 0.5% | | | |
| Finds it hard to answer | 0.1% | | 0.3% | | | |
| Does not have time to visit the library | 6% | 11% | 11% | 8% | 6% | 7% |

Source: Readers who do not visit the library N=772



The research findings demonstrated that public interest in libraries is quite low, which indicates that there is a need to involve the PR department. The representative of the National Library stressed the importance of strengthening cooperation with district libraries, providing them with modern literature and organizing regular meetings with writers. The needs of existing or potential readers are to be explored to identify [necessary] library services. It is also important to have active collaboration with publishing houses of specific countries.

Regardless of the type of institution we are dealing with, highly qualified human resources are particularly important, especially when it comes to books and libraries. A representative of the Libraries Association emphasizes on the importance of hiring not only tech-savvy and foreign language speakers, but also benevolent, sociable, and sensible people.



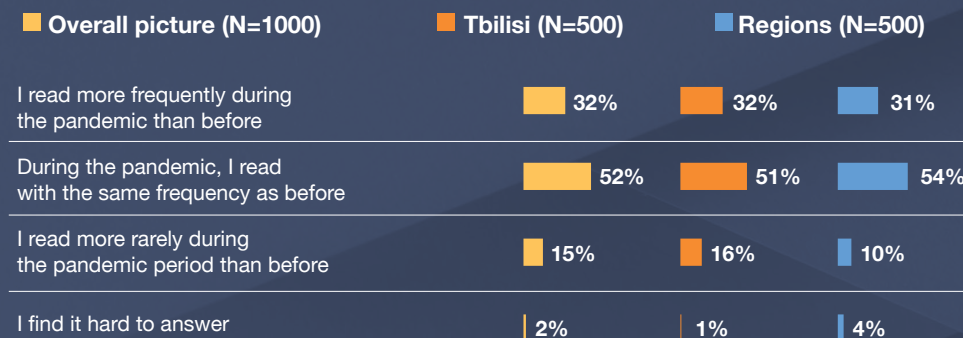
3.9 THE IMPACT OF THE PANDEMIC ON THE BOOK MARKET

► The impact of the pandemic on readers

One of the research goals was to outline how the pandemic of 2020 has affected the reading behavior. The results demonstrate that half of the readers (52%) continue reading with the same frequency as before. As for the third, their reading frequency has increased. Only 15% represent a category that reads less frequently during the pandemic period than before.

It can be said that the pandemic had a slightly more negative impact on reading frequency in Tbilisi. Only 51% of Tbilisi respondents manage to read with the same frequency as before. This figure is slightly higher in regions - 54%. At the same time, 16% of Tbilisi residents have reduced their reading frequency, while only 10% read less in the regions.

IMPACT OF THE PANDEMIC ON READERS / OVERALL PICTURE



Source: Sample population of readers of fiction / non-fiction N=1000



It is noteworthy that more than half of the readers (55% -57%) in almost all regional cities maintained their reading habits (except for 41% in Gori). The pandemic had a somewhat positive effect on Kutaisi (35%), Batumi (32%), and Gori (35%), where one third of respondents increased their reading intensity. Although it had a double effect in Telavi - one-fifth has increased their reading intensity, while the exact same share has decreased it (22%-22%).

IMPACT OF THE PANDEMIC ON READERS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|--|--------------------|-------------------|--------------------|-------------------|-----------------|
| I read more frequently during the pandemic than before | 35% | 32% | 16% | 22% | 35% |
| During the pandemic I read with the same frequency as before | 57% | 55% | 56% | 57% | 41% |
| I read more rarely during the pandemic period than before | 6% | 3% | 24% | 22% | 21% |
| I find it hard to answer | 1% | 9% | 4% | | 2% |

Source: Sample population of readers of fiction / non-fiction N=500

The pandemic has equally affected both women and men, although there was a minor difference between the age groups. During the pandemic, reading intensity was mostly increased among readers aged 16-24.



IMPACT OF THE PANDEMIC ON READERS / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|--|--|-----------------|------------------|------------------|------------------|-----------------|
| I read more frequently during the pandemic than before | The data in terms of gender is not differentiated from the overall picture in a statistically reliable manner. | | 40% | 26% | 33% | 29% |
| During the pandemic I read with the same frequency as before | | | 42% | 54% | 56% | 53% |
| I read more rarely during the pandemic period than before | | | 16% | 18% | 11% | 16% |
| I find it hard to answer | | | 2% | 2% | 1% | 1% |

Source: Sample population of readers of fiction / non-fiction N=1000

> Impact of the pandemic on the selection of literature for reading

It appears that the pandemic did not actually affect the literature read by respondents in Tbilisi or regions. The majority of respondents who report the change in genre are young people (16-34 years old). Readers who changed the genres during the pandemic, most actively began reading the following categories: modern literature (18%), science fiction / fantasy / utopia (16%), and detective / horror / mystery (15%).

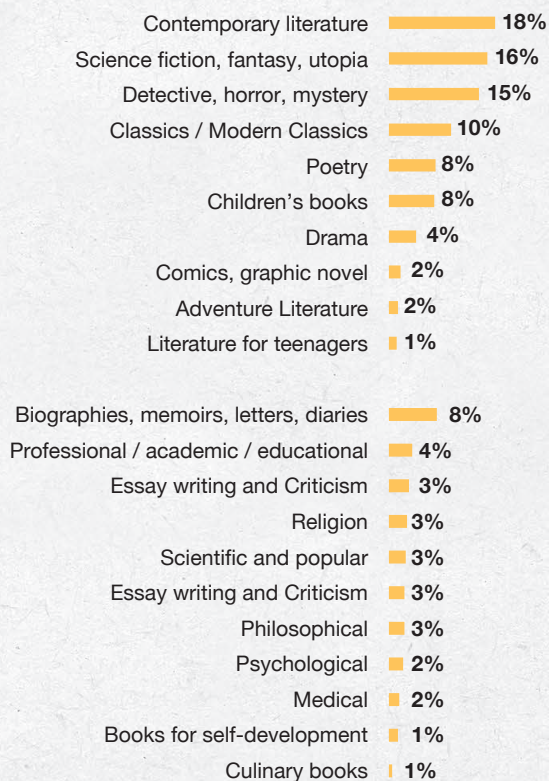


IMPACT OF THE PANDEMIC ON THE SELECTION OF LITERATURE FOR READING / AGE PERSPECTIVE⁴¹

| | Overall Picture (N=1000) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|----------------------------------|-----------------------------|------------------|------------------|------------------|-----------------|
| Yes, preferences have changed | 10% | 14% | 12% | 6% | 6% |
| No, preferences have not changed | 90% | 86% | 88% | 94% | 94% |

Source: Sample population of readers of fiction / non-fiction N=1000

NEW CATEGORIES WHICH WERE READ DURING THE PANDEMIC/ OVERALL PICTURE



Source: Readers, whose preferred book category was influenced by the pandemic N=82

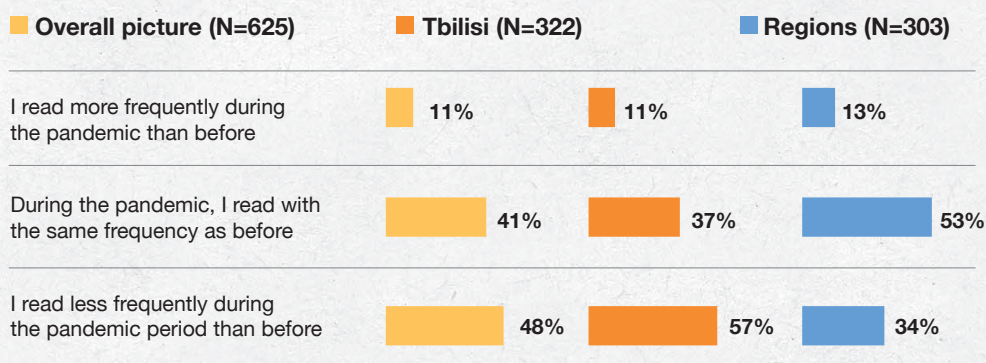
⁴¹ Data by region, city, and gender perspective is not statistically and significantly different from the overall picture.



› The impact of the pandemic on book purchases

The negative impact of the pandemic has affected the sector of book sales. In particular, almost half of the book buyers (48%) purchased fewer books during given period. Current events have not affected 41% of respondents, while the pandemic positively impacted on 11%. The total of purchased books has exceeded the pre-pandemic indicator. It is noteworthy that the pandemic somewhat more negatively impacted Tbilisi residents as compared to residents of regions (52% vs 34%).

PURCHASING FREQUENCY INFLUENCED BY THE PANDEMIC / OVERALL PICTURE



Source: Readers who purchased a book during the pandemic period N=625

Among the regional cities, the pandemic seems to have had a relatively positive impact on reading levels in Kutaisi. In particular, the number of books purchased in this period has increased by one fifth (22%), although, notably, one third (34%) of respondents purchased fewer books. The biggest negative impact was detected in Gori, where more than half of the population purchased fewer books than they did before the pandemic, while the buying frequency increased by only 7%. The situation is almost identical in Zugdidi, where the number of purchased books decreased by 56% and increased by only 4%. The pandemic had the least impact on consumer behavior in Batumi, where the number of books purchased before and during the



pandemic remained unchanged for the majority of respondents (71%). The remaining findings are equally divided into positive and negative results: the number of purchased books increased among 14% of readers, while it decreased in the other 14%. The pandemic did not affect the consumer behavior of more than half of the population in Telavi (57%), although it is noteworthy that the frequency reduced by one third (36%).

CHANGE IN BOOK PURCHASING FREQUENCY INFLUENCED BY THE PANDEMIC / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=57) | Batumi (N=56) | Zugdidi (N=58) | Telavi (N=57) | Gori (N=75) |
|--|-------------------|------------------|-------------------|------------------|----------------|
| I purchased more books during the pandemic than before | 22% | 14% | 4% | 7% | 6% |
| During the pandemic I purchased the same number of books as before | 44% | 73% | 40% | 57% | 40% |
| During the pandemic I purchased fewer books than before | 34% | 14% | 56% | 36% | 54% |

Source: Readers who purchased the book during the pandemic period N=303

A comparison of age categories revealed that the pandemic has significantly changed consumer behavior in each segment. A relatively big negative impact was observed in case of youth (55% - 16-24 years of age) and the elderly (60% - 55+). Although pandemic did not affect the consumer behavior of almost half of the readers aged 25 to 34 (48%), the negative impact among the remaining half of the respondents outweighs the positive. In particular, the number of purchased books increased in case of 12% of respondents, while it decreased for 40% of them. The same trend is observed in 35-54 age category.



CHANGE IN BOOK PURCHASING FREQUENCY INFLUENCED BY THE PANDEMIC / GENDER AND AGE PERSPECTIVE

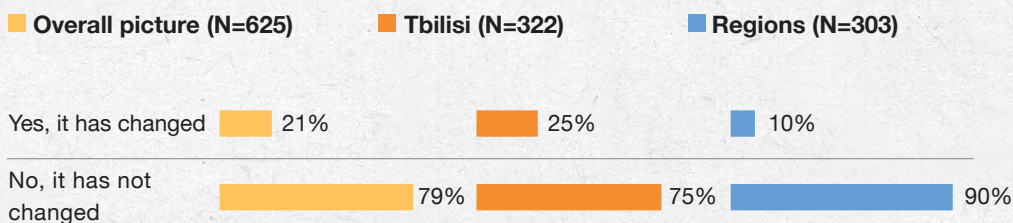
| | Female (N=504) | Male (N=121) | 16-24 (N=148) | 25-34 (N=168) | 35-54 (N=202) | 55 + (N=107) |
|---|--|-----------------|------------------|------------------|------------------|-----------------|
| I purchased more books during the pandemic than before | The data in terms of gender perspective is not differentiated from the overall picture in a statistically reliable manner. | | 16% | 12% | 10% | 2% |
| During the pandemic, I purchased the same number of books as before | | | 28% | 48% | 47% | 39% |
| During the pandemic, I purchased fewer books than before | | | 55% | 40% | 43% | 60% |

Source: Readers who purchased a book during the pandemic period N=625

› The impact of the pandemic on book purchase channels

Pandemic has not affected book purchasing channels for the vast majority of readers (79%). Its impact on readers in the regions is particularly small, with only 10% confirming the change in channels used in the past. This figure is 25% in Tbilisi.

IMPACT OF THE PANDEMIC ON BOOK PURCHASE CHANNELS / OVERALL PICTURE



Source: Readers who purchased a book during the pandemic period N=62



Among the regional cities, the readers of Zugdidi started to use new channels for purchasing books (22%), while the least change was observed in Batumi (5%).

IMPACT OF THE PANDEMIC ON BOOK PURCHASE CHANNELS / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=57) | Batumi (N=56) | Zugdidi (N=58) | Telavi (N=57) | Gori (N=75) |
|-----------------------|-------------------|------------------|-------------------|------------------|----------------|
| Yes, it has changed | 10% | 5% | 22% | 6% | 11% |
| No, it has not change | 90% | 95% | 78% | 94% | 89% |

Source: Readers who purchased a book during the pandemic N=303

IMPACT OF THE PANDEMIC ON BOOK PURCHASE CHANNELS / GENDER AND AGE PERSPECTIVE

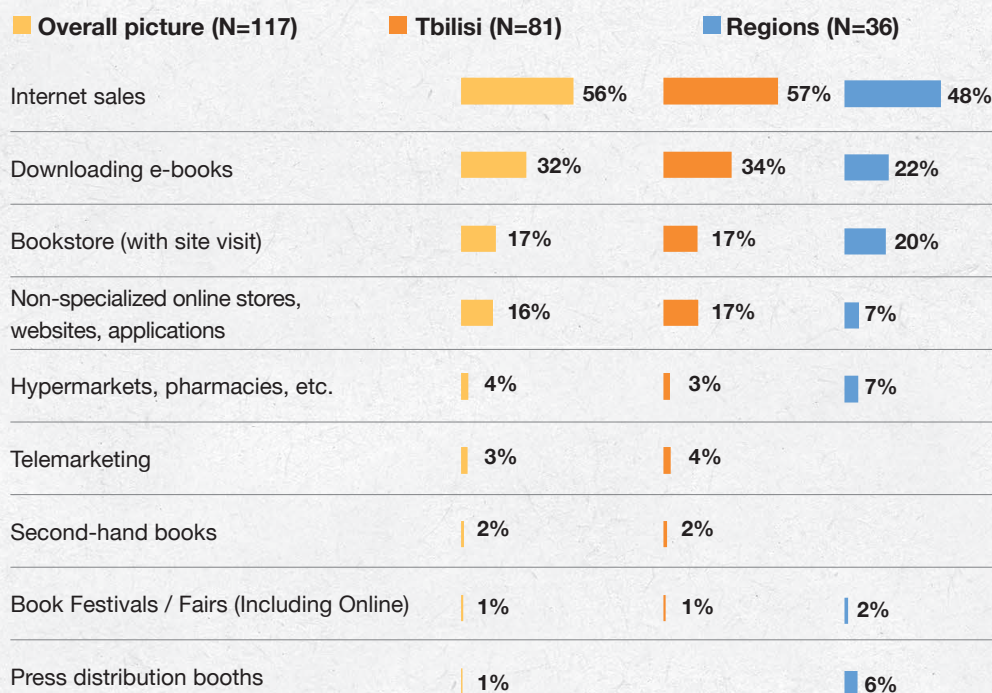
| | Female (N=504) | Male (N=121) | 16-24 (N=148) | 25-34 (N=168) | 35-54 (N=202) | 55 + (N=107) |
|-----------------------|-------------------|-----------------|--|------------------|------------------|-----------------|
| Yes, it has changed | 24% | 16% | Gender-based data is not differentiated in a statistically reliable manner | | | |
| No, it has not change | 76% | 84% | | | | |

Source: Readers who purchased a book during the pandemic period N=625

Websites of bookstores and publishing houses (56%) as well as downloads of ebooks (32%) became the most active alternative sources for book purchase in both Tbilisi and regions. in both Tbilisi and regions. A certain number of readers also started going to the bookstore (17%). The use of non-specialized online stores and applications (e. g. Glovo, Wolt) for book sales became quite popular (16%).



BOOK PURCHASE CHANNELS ACTIVATED BY THE PANDEMIC / OVERALL PICTURE⁴²



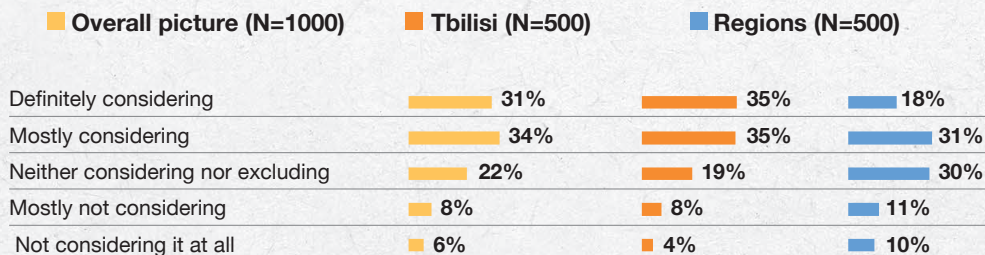
Source: Readers whose book purchase channels were affected by the pandemic N=117

› Future attitude towards purchasing books

Readers' attitude to book purchases for the next one year is a matter of interest. According to the research findings, the majority of respondents (65%) consider purchasing a book, out of whom almost a half (31%) is convinced of this. At the same time, the readiness to purchase a book is higher in Tbilisi. One-fifth (21%) of readers in the regions, and only 12% in Tbilisi completely or partially exclude purchasing a book in the near future.

⁴² Due to the scarcity of data, only aggregate results are presented.



READINESS TO PURCHASE BOOKS / OVERALL PICTURE

Source: Sample population of readers of fiction / non-fiction N=1000

Among regional cities, readers in Zugdidi (62%) and Gori (58%) demonstrate readiness to purchase books. Almost half of the readers express their readiness in Batumi (49%) and Telavi (52%). While in Kutaisi, 40% of respondents are considering purchasing a book during the next 1 year.

READINESS TO PURCHASE A BOOK / REGIONAL CITIES PERSPECTIVE

| | Kutaisi (N=100) | Batumi (N=100) | Zugdidi (N=100) | Telavi (N=100) | Gori (N=100) |
|-----------------------------------|--------------------|-------------------|--------------------|-------------------|-----------------|
| Definitely considering | 12% | 23% | 19% | 12% | 20% |
| Mostly considering | 28% | 26% | 43% | 40% | 38% |
| Neither considering nor excluding | 36% | 28% | 27% | 27% | 25% |
| Mostly not considering | 12% | 11% | 10% | 11% | 12% |
| Not considering it at all | 12% | 13% | 1% | 9% | 5% |

Source: Sample population of readers of fiction / non-fiction N=500



Readiness to purchase books decreases as the age increases. For example, if 74% of people from 16 to 24 are planning to purchase books in the near future, only half of 55+ respondents express their readiness (50%) to do so. There is also a subtle difference between the genders, where women are more likely to consider purchasing a book (68% vs 57%).

READINESS TO PURCHASE A BOOK / GENDER AND AGE PERSPECTIVE

| | Female (N=764) | Male (N=236) | 16-24 (N=216) | 25-34 (N=228) | 35-54 (N=304) | 55 + (N=252) |
|--------------------------------------|-------------------|-----------------|------------------|------------------|------------------|-----------------|
| Definitely considering | 34% | 24% | 35% | 37% | 30% | 20% |
| Mostly considering | 34% | 33% | 39% | 33% | 34% | 30% |
| Neither considering nor excluding | 20% | 25% | 19% | 22% | 24% | 20% |
| Mostly not considering | 7% | 12% | 5% | 6% | 9% | 14% |
| Not considering it at all | 6% | 6% | 3% | 2% | 3% | 16% |

Source: Sample population of readers of fiction / non-fiction N=1000

➤ The impact of the pandemic on book publishers, shops, and distributors

The global spread of Coronavirus since late 2019 has caused major changes around the world, significantly damaging the business sector. The book market is no exception to this, as evidenced by the findings related to the publishing houses, bookstores, and distributors covered in this research. More specifically, the imposed restrictions negatively impacted the vast majority (80% <), decreasing their income by an average of 44% in 2020 as compared to 2019. Publishing houses were relatively hard hit in this regard, with annual revenues almost halving amid sharp decline of bookstores and distributors (their number reduced by a third and a quarter respectively). Surprisingly, the pandemic had a positive influence and yielded financial benefits as well, even if for the extremely limited number of publishing houses.



IMPACT OF THE PANDEMIC ON THE INCOME OF COMPANIES OPERATING IN THE BOOK MARKET

| | Book Publishing Houses | Bookstores | Book Distributors |
|-------------------------------------|------------------------|------------|-------------------|
| Decrease in annual income (average) | (- 54%) | (- 32%) | (- 24%) |

Source: Publishing houses, distributors, and stores participating in the research.

There is a number of important reasons that caused the following negative changes:

- » Changes in public behavior during the pandemic - books became somewhat less important, as the entire focus has shifted to the purchase of food and medical supplies;
- » Low awareness of COVID regulations, which slowed down the processes in companies;
- » Poor preparedness of companies for switching to remote work model – the companies were not ready to meet the costs incurred as a result of website building and delivery services. On the other hand, individual companies were not competent enough to handle online sales. In order to solve the problem, they agreed on the use of various platforms (Booksale, Bookspace), which only required publishing houses to deliver books to partner warehouses. In the meantime, however, books familiar to the readers were sold out, and new editions found it difficult to reach users;
- » There were additional challenges that emerged as part of selling books on partner websites – first, the government imposed a ban on book sales; later, external courier service companies refused to provide such services;
- » Overloaded delivery services, which may have left the customers disappointed with the service quality;
- » Inflation and delays in import, which have negatively affected stores dependent on the import and sale of books in a foreign language;
- » Restricted use of transport and a 5-person limit in shared spaces as book delivery in online shopping requires the full involvement of multiple people;
- » Suspension of festivals - such events are of foremost importance for publishing houses and bookstores for presenting and selling their new books.



The mentioned difficulties notwithstanding and by virtue of continuous communication between the employees, more than half of the publishing houses overcame the important stage of the crisis and managed to implement the scheduled projects for both first editions and reprints partially (min. 50%) or fully. Rapid response to change and the employees' efficient grasp of their new roles and responsibilities proved crucial in achieving the above-mentioned success.

Distribution companies have also succeeded in hitting the target (50-70%). Unlike publishing houses and distributors, the majority of bookstores did not have any projects scheduled for 2020, so the pandemic did not influence their implementation.

Fortunately, despite the crisis caused by the pandemic, almost half of the surveyed companies retained their employees and their respective payment rate. However, the remaining half had to downsize their personnel by 25% and reduce the payroll by 30%. As estimated by the research participants, full compensation of the damages incurred will require 1 to 2 years, maybe even 3-4 years in certain cases.

It is notable that the government provided little to no support for publishing houses, bookstores, and distributors during the COVID crisis. Their recommendations are limited to tax exemptions or the introduction of certain benefits. Full closedown of bookstores and open fairs during the pandemic is also considered a wrong move. State engagement in the process of obtaining copyrights or monitoring copyright infringement is particularly important. The government deemed it appropriate to mediate with banks for long-term interest-free loans or micro grants that would be awarded to relatively small publishing houses. They also place focus on increased funding for voucher projects to supply municipalities, schools, and libraries with books.

In addition to the restrictions imposed during the pandemic, the publishing houses had already suffered from the government's conflicting decision, according to which all public school textbooks are printed at independent printing houses since 2013.

This reform has robbed publishing houses of significant portions of income. Currently, they can sell schoolbooks to private schools only. According to one of the publishing houses participating in this research, the state should not interfere in their activities and restrict their ability to function smoothly and efficiently.

In addition to the number of negative changes and difficulties, companies have been able to adapt to the new "COVID Reality" over the past two years by exploring new channels for book sale (e. g. pharmacies, shops), built and refined their websites, launched online shopping and on-site delivery services, started working on new and resumed abandoned projects, added video call feature to simplify the book selection process, etc. This considered, their current work is not so complicated.



Relatively large publishing houses have switched to the cluster operation mode, which reduces communication between employees and, consequently, the likelihood of spreading the virus. Switching to remote work has proved to be less painful for small companies, as their staff is largely composed of project employees.

Both small and large bookstores are slowly returning to their usual mode of operation. Nowadays, customers can purchase books at shops, which comply with all COVID regulations (disinfection barrier, thermal screening, disinfectants).

Readers are generally empathetic to the current situation, and therefore, do not protest against maintaining distance in long queues in front stores. Anticipating the next waves of the pandemic, they are also trying to provide themselves with more books.

› The impact of the pandemic on the activities of the National Library and Library Association

The COVID-19 pandemic has also negatively affected the work of the National Library and the Library Association. Switching to remote work exposed them to several acute problems: no remote access to databases; technical malfunction; personnel unskilled in using digital services; inability to transition certain services online (e. g. receiving / sorting books, maintaining and building up library stock may require restoration and conservation of materials, which is only possible at the National Library); “book quarantine” (cleaning books for safety reasons before returning them to the shelf).

Another challenge posed by the regulations was that some of the staff (security guards and persons involved in construction activities) still had to come to the library at their own expense due to continuous construction works. Fortunately, with the active support of the government, the pandemic has not affected the salaries of library personnel, although, whenever municipalities face the need to curb their budget in times of crisis, libraries will be the first to suffer from this. COVID-19 regulations put libraries to the additional expense of purchasing [the relevant] accessories (thermometer, disinfection-barrier, disinfectant, etc.) with their limited budget. The situation was further complicated in regions, where the absence of necessary equipment prevented libraries from offering other services (such as copiers and scanners) to their readers. Considering the above-mentioned, online mode worked only for those libraries that had staff with appropriate competence and skills to utilize the equipment and provide electronic services.



The pandemic has also affected the activities scheduled at the National Library - presentations, exhibitions, etc., which were usually held on a daily basis before the restrictions were imposed. These occurrences also hampered the replenishment of the library with newly published books, as publishing activities were also suspended.

In addition to the fact that libraries remained completely closed to readers for a prolonged period of time during the pandemic, the challenge of physical distancing persisted after the restrictions were relaxed. More precisely, admitting only 20 persons to the hall designated for 150 proved inconvenient for readers.

In response to the current situation, the interrupted face-to-face communication has shifted to online communication, and social network (Facebook) has become the main source for sharing news. Readers were given an opportunity to attend online exhibitions and enjoy a virtual tour of the National Library. The latter was attended by about 30,000 guests.

The COVID pandemic has highlighted the importance of having electronic versions of books and speeding up digitalization, which greatly simplifies the document exchange process between municipalities and does not require transportation between different locations. This is further supported by the Library Association project that was implemented 5 years ago and aimed to provide libraries with internet and computers, train staff and improve their technical skills. Currently, the project is suspended due to the pandemic. The automation and software specialists are key human resources, however, their payment remains a problem due the scarcity of financial resources. Moreover, it is important to obtain permission from the publishing houses to use e-books.

This topic is also relevant in the post-pandemic period, as readers are likely to continue / start using online library services, and absence of adequate resources may grow into significant problems (for libraries).

According to the representative of the Library Association, libraries have the potential to offer a variety of additional services to the public. For example, serve as a travel agency in terms of providing information, get actively involved in various training modules, etc.



3.10 OVERVIEW OF GPBA'S ACTIVITIES⁴³

Georgian Publishers and Booksellers Association (GPBA) was established in 1998. Nowadays, around 90% of active Georgian book publishers and booksellers are members of GPBA. The Association defines and protects the interests and copyrights of the book sector; ensures freedom of the press in the field of publishing; holds local book fairs in Tbilisi and other regions of Georgia as well as professional seminars and workshops for Georgian publishing and bookseller organizations. Moreover, over the years, the Association has been committed to participation at various international festivals, presenting the Georgian national stand, expressing common interests of the sector, and protecting the latter based on the international principles of free market and fair competition; GPBA protects freedom of expression and authors' rights, and supports the elaboration and refinement of the legal framework that will foster the development of book industry. In order to improve working conditions for the professionals involved in this field, the Association established the Code of Professional Ethics, and it continues to work intensively on other important legislative initiatives.

The major goal of the Association is to support the development of the literary process and publishing sector in Georgia; enhance the literacy level of people of all ages, including children and youth; promote intercultural dialogue between representatives of various professions associated with literature; popularize book reading and support relevant social institutions.

› Lobbying for the publishing sector

Georgian Publishers and Booksellers Association is committed to protecting the interests of the representatives of the book industry. The Association represents publishers and their interests and negotiates with various state agencies on a variety of issues relevant to the sector, i. e. copyrights, textbooks, or mandatory legislative initiatives.

In 2020, the book industry suffered significant losses due to the pandemic. To rescue the publishing sector and book market in general, the Association developed a 9-stage

⁴³ Source: Georgian Publishers and Booksellers Association



anti-crisis plan (see www.gpba.ge). Individual phases of this plan have already yielded some results, as funded projects provided significant and essential assistance to the publishing sector during the pandemic. Nevertheless, the Association continues to lobby the book sector to gain wider support at the state level.

For years, Georgian Publishers and Booksellers Association has been engaged in fight against the black market, which is one of the main problems and challenges both Georgian and international publishers are facing. Over the years, Georgian Publishers and Booksellers Association has been involved in negotiations with a number of state agencies to improve the legal framework and enforce mechanisms to combat counterfeit publications. Within the framework of the Memorandum of Understanding drawn up with a law firm, the Association has taken a number of measures against the black market and launched an extensive awareness-raising campaign for traders and readers.

Along with the educational publishers, the Association has been actively involved in negotiations with the Ministry of Education. The association has been engaged in several ongoing negotiations and various types of activities implemented over the years to support sound collaboration between the educational publishers and the Ministry of Education since the Ministry gained full discretion of textbook printing as part of the 2013 textbook reform, completely distancing the publishers from this process and violating their copyright. These efforts have yielded certain positive results in recent years, and publishers have resumed work on textbooks as part of the certification competition. However, many problems remain unresolved.

Over the recent months, the Association has also been involved in the revision and incorporation of the Technical Regulation on Toy Safety. The aforementioned regulation was to enter into force on July 1 2021, and, along with other children's products, included children's books. The Association actively discusses the matter with the Ministry of Economy and the Supervision Service. To ensure that the interests of publishers and booksellers are taken into account in the process of enacting regulations, a meeting was scheduled with the representatives of the Ministry of Culture within the framework of the resolution. As part of the negotiations, some problematic issues were identified in the resolution and changes were planned in this regard. Additionally, the decision was made on granting extended deadline to the publishing industry to prepare the sector and fully comply with the new conditions set down by the updated regulations.



› Georgian Publishers and Booksellers Association and the IPA (International Publishers Association)

In 2007, Georgian Publishers and Booksellers Association became the member of the International Publishers Association (IPA). To date, the Association has a close partnership with the International Publishers Association. The Association is a member of important IPA committees, such as the Executive, Freedom to Publish, Inclusive Publications and Literacy Committees. Since 2021, the Literacy Sub-committee of the International Publishers Association is chaired by Gvantsa Jobava, deputy chairperson of the Association.

In 2020, the Educational Publishers Forum of the International Publishers Association was held in Georgia for the first time. The IPA's Educational Publishers Forum is the only global forum that takes place several times a year and brings together professional educational publishers from around the world. Georgian Publishers and Booksellers Association became a member of the Educational Publishers Forum in 2016.

As part of the close cooperation with the IPA, its representatives have visited Georgia several times in recent years. They held meetings with local publishers, as well as representatives of various state agencies on issues critical to the sector.

In partnership with Tbilisi - World Book Capital, the Association held meetings between Georgian publishers and writers and the representatives of IPA and UNESCO, members of the Advisory Committee of this project and guests of honor in April 2021. The workshop with the new President of the International Publishers Association - Bodour Al Qasimi and the Secretary General of the Association - Jose Borghino was held at the National Parliamentary Library of Georgia, specifically for GPBA's member organizations, at which key aspects, interesting and ongoing topics were discussed.

Every year, Georgian Publishers and Booksellers Association organizes a number of important traditional and new projects for the development of the book sector:



» TBILISI INTERNATIONAL BOOK FAIR

Tbilisi International Book Fair is organized by Georgian Publishers and Booksellers Association and has been held annually since 1997. It is one of the largest book fairs in the Caucasus region, with thousands of fans and spectators across the country. It is noteworthy that the number of guests has reached 70,000 in recent years.

The main goal of the fair is to popularize book reading in Georgia and promote the development of the publishing sector. Over the years, Tbilisi International Book Fair has been successful in improving the level of literacy in Georgia, as demonstrated by the growing number of festival visitors, media, and new participants.

The fair hosts thousands of visitors annually and unites about 100 local and international organizations. Embassies, state museums, institutions, international organizations, and foundations of different countries are represented at Tbilisi International Book Fair along with local and foreign publishing houses and bookseller organizations.

For years, writers from different countries have been visiting the fair as the guests of honor. Norway became the first focus country of Tbilisi International Book Fair in 2017. It also inherited the status of Guest of Honour of the Frankfurt Book Fair in 2018 from Georgia. Germany was symbolically named the focus country of Tbilisi International Book Fair in 2018, the year when Georgia was to be presented as the Guest of Honour at Frankfurter Buchmesse. Frankfurter Buchmesse had a stand of its own at the festival. German authors and publishers also visited the book fair, and the festival was opened by Juergen Boos, President of Frankfurter Buchmesse. In 2019, Finland became the focus country of the festival, and the book fair was opened by Hugo Setzer, the current president of the International Publishers Association. In 2020, Turkey obtained the status of the focus country, however due to the pandemic, it will enjoy the status at 2022 festival.

A major part of Tbilisi International Book Fair is the book marketplace, at which participating publishing houses and booksellers offer books, supporting materials and book accessories to visitors at a discounted rate and in special gift packages. In addition, the festival encompasses a number of events related to books, literature, writing and publishing: presentations of new books and introduction of authors, read-aloud events, meetings, and discussions with writers, introducing guests of honor, literary awards, professional seminars and conferences, innovative projects, including Actors for Literature. A children's corner is arranged every year at the festival,



educational and entertaining programs are planned for children of different ages. An exhibition of illustrations and books is also held during the festival.

XXIII Tbilisi International Book Fair was held from June 24 to June 27 2021 and received the visitors at its traditional venue in the pavilions of Expo Georgia. Due to the worldwide pandemic, XXII Tbilisi International Book Fair was held online in 2020 for the first time. In order to return to the traditional format of the event in 2021, the organizing team of the Fair developed the emergency safety protocol and carried out additional work to strictly control all restrictions in accordance with the existing regulations.

» TBILISI NEW YEAR BOOK FAIR

On the initiative of Georgian Publishers and Booksellers Association, New Year Book Fair is held at the end of December and has already become a tradition in Georgia.

The need to set up Tbilisi New Year Book Fair was conditioned by the growing public interest. The number of visitors of the Tbilisi International Book Fair over the last few years has clearly demonstrated the demand for another annual festival.

The slogan of the New Year Book Fair is “New Year with New Books”. It aims to popularize book reading and literary processes in Georgia, enhance literacy and access to education in Georgia. It also helps to establish a tradition of giving books as gifts to family members, friends and loved ones on New Year’s Eve.

The three-day large-scale program of, the New Year Book Fair incorporates a large number of events relating to books and literature.

Within the framework of the New Year Book Fair, Georgian Publishers and Booksellers Association identifies and rewards the bestselling books of the current year in various categories on the basis of information provided by member publishers and bookseller organizations.



» WORLD READ ALOUD DAY

On the initiative of Georgian Publishers and Booksellers Association, World Read Aloud Day is celebrated in Georgia every year. World Read Aloud Day is a world-renowned event that unites 31 million people from 100 different countries around a common motto: “Read aloud. Change the world”. The international organizer of the project is Litworld. This day allows people from all over the world to come together, share the joy of reading the book aloud, and contribute to the popularization of reading. On the initiative of the Association, Georgia joins the international activity and participates in this large-scale global event every year.

Due to the global pandemic, World Read Aloud Day was held online in 2021. The official opening and closing ceremonies of the event were broadcast live on the Association’s social media platforms. Throughout the day, about 70 Georgian writers held online meetings at schools and universities across Georgia, read literary texts with pupils and students, and reaffirmed the importance of literacy. On this day, the traditional award of the Book Supporter of the Year (2021) was granted to actress Nino Kasradze for the most important contribution made in the modern era to the rapprochement of books and cinema / theatre, and for exploring new ways / means in popularizing book reading.

The Book Supporter of the Year award was established in 2016 on the initiative of the Association and has been awarded annually to individuals, projects, or institutions that significantly contribute to raising literacy in Georgia throughout the year. The main condition of the award is that the awarded person or organization were not employed in the book sector. In addition, the development of literature or publishing fields shall not be their direct duty. In previous years, the award was granted to the project “Bookshelf” (2020), Mamuka Khazaradze (2019), Temur Chkheidze (2018), Formula Creative (2017), Levan Berdzenishvili (2016).



» WORLD BOOK AND COPYRIGHT DAY

On April 23, the world celebrates World Book and Copyright Day. Georgian Publishers and Booksellers Association has been holding various cultural events every year on this day since 2003.

Traditionally, the event is celebrated with a day-long exhibition and book fair, bringing together various publishing houses and offering special discounts on literature of all genres. The program also envisages presentations of new books, meetings with authors, and public readings.

The goal of the Association is to highlight the importance of books, promote literature among youth, and involve as many people as possible in the events related to this day.

» RENEWING THE BOOK STOCK OF GEORGIAN REGIONAL LIBRARIES

Georgian Publishers and Booksellers Association has been implementing the project of Renewing the Book Stock of Georgian Regional Libraries for several years. In November 2020, this project was implemented for the eighth time.

The aim of the project is to provide funding for regional libraries and enable them to add the newest books and Georgian publications (printed by various publishing houses) to their shelves. Every year, libraries are free to choose books from catalogs and enrich their collections with new editions. The project promotes the development of libraries and publishing sector in different regions of Georgia and aims to popularize modern literature across the country.

In 2020, the project was implemented by Georgian Publishers and Booksellers Association as part of a pandemic anti-crisis plan in order to raise state funding in support of the book industry. It was meant to be implemented in two phases. In addition to renewing the book stock of the libraries, the project aimed to support the publishing sector and minimize losses for its employees. In 2020, the project was implemented twice in online format, and its total budget was significantly increased. Each of the 64 regional libraries in Georgia received books of their choice with a total price of more than 1,000 GEL (270 EUR).



» GEORGIAN NATIONAL STANDS AT INTERNATIONAL BOOK FAIRS

For many years, Georgian Publishers and Booksellers Association has been organizing Georgian national stands and various events at international book fairs including but not limited to the Frankfurt and London Book Fairs. The Association constantly strives to enable Georgian publishers to become actively involved in the ongoing international processes in the industry and present themselves on international platforms.

Georgia's engagement in international book fairs is an important platform for the promotion of Georgian literature. Local and international activities organized by Georgian Publishers and Booksellers Association as well as their efforts to further develop the industry paved the way for the Georgian publishing sector to acquire the status of Guest of Honour at Frankfurter Buchmesse 2018.

» GUEST OF HONOUR AT THE FRANKFURTER BUCHMESSE 2018 – GEORGIA

In 2018, Georgia was the Guest of Honour at Frankfurter Buchmesse, which was a grand event in terms of recognition of Georgian literature and culture at the international level. The Georgian publishing program was organized by the GPBA's team of professionals.

The publishing program included three national stands and a small stage of the Guest of Honour pavilion. The national stand of Georgia, which is constructed annually at the Book Fair since 2007, was given special importance and status within the framework of the Guest of Honour country project. The stand offered space for book exhibitions and business meetings to about 40 Georgian publishing houses. During the three working days of the fair, business breakfasts and lunches were held at the stand. For four days, the National Stand stage - the main platform of the Guest of Honour publishing program, was dedicated to events that united publishers, Georgian and foreign authors, and writers.

The Georgian stand located in the art and design pavilion aimed to reveal Georgia's potential in the field of art and innovative technologies. Information on Georgian art and design books was available to visitors in the exhibition space. The second space featured a permanent installation - the innovative art project Oraculum 0.1 (Talking



Avatars). In the third space, the interactive stand offered visitors the opportunity to get acquainted with Georgian alphabet and the fonts created by Monotype, which was intended to present the unique element of Georgian culture and the writing system. At the stand, the Georgian calligrapher presented the Georgian alphabet to the visitors, conducted a number of workshops on the art of writing Georgian letters. Within the framework of the mentioned program, a stand of Georgian children's literature was also presented, exhibiting children's books of Georgian publishing houses and illustrations made by Georgian artists. Digital games and apps were available on the stand for younger guests. Up to 50 Georgian children's books were also exhibited in a specific area of the fair - the Frankfurt Children's Lounge.

Within the framework of the publishing program, Georgian literature and the publishing sector were presented at approximately 70 events. The audience had the opportunity to get acquainted with Georgian publishing houses, authors, and artists, and attend the presentation of their projects. The publishing program included the presentation of works of modern and classical Georgian writers.

» PROJECTS OF THE ASSOCIATION WITHIN THE FRAMEWORK OF “TBILISI - WORLD BOOK CAPITAL”

2021 proved special for the capital of Georgia, as Tbilisi has officially inherited the status of World Book Capital of the year from Kuala Lumpur on April 23.

World Book Capital is a large-scale project established in 2001 by the decision of the General Conference of UNESCO. Georgian Publishers and Booksellers Association has developed a number of programs and activities within the framework of this project, led by the team of “Tbilisi - World Book Capital”.

It envisages a residency program for Georgian writers, the main purpose of which is to support modern Georgian literature and, consequently, Georgian authors. The project allows the winners of the competition to work on new literary texts in a calm and comfortable environment. The conditions provided by the project help in boosting motivation of the authors, and result in a fruitful work process and creative activities to help to produce genuinely novel literary works.



Within the framework of the World Book Capital project, the Association has already implemented a voucher project for Tbilisi public school libraries, conducted in two stages in 2020-2021. It encompassed all public schools in Tbilisi. Each of the one hundred seventy-seven (177) public schools in Tbilisi were given the opportunity to select books with a total price of 900 GEL (240 EUR) for their school libraries from among the latest Georgian and foreign publications. This also included the public school for blind children, which received audio books from the e-book store Saba.

The project aims to enrich Tbilisi public school libraries with the latest publications, bring schoolchildren closer to the modern literary process and popularize reading. The Association also organized meetings between Georgian authors and students at public schools in the fall of 2021 as part of the program of Tbilisi - World Book Capital.

Georgian Publishers and Booksellers Association has loyal supporters and partner organizations within the framework of the above-mentioned projects, namely: The Ministry of Culture, Sports and Youth Affairs of Georgia, Writers' House of Georgia, Tbilisi City Hall, National Parliamentary Library of Georgia, Pencenter of Georgia, TBC Bank, LBP Law Firm.



3.11 OVERVIEW OF THE ACTIVITIES OF WRITERS' HOUSE⁴⁴

The main objective of Writers' House is to create an open space to manifest Georgian and world cultural traditions and current literary processes, where Georgian and foreign writers, and artists will have the opportunity to present their work to the public and get actively involved in important literary and artistic processes taking place at the international level. In 2019, the merger of Writers' House and the Georgian National Book Center took place.

The aim of the Writers' House is to popularize cultural heritage and literature, support literary processes, initiate literary competitions and awards, establish interaction with foreign governmental and non-governmental organizations, agencies, and artistic unions, offer attractive and engaging projects to young people interested in literature, and publish a literary journal.

In addition to the above-mentioned important activities (Litera, Litera for Translators, Iakob Gogebashvili Children and Youth Award, Voucher Program for Regional Libraries, Tbilisi International Book Fair), the Writers' House offers a variety of creative, professional projects and programs to the public:

» CREATIVE SCHOLARSHIPS FOR AUTHORS

The goal of the program is to support the creation of new fiction, non-fiction, and children's / youth literature publications in the Georgian language. Works selected for publication belongs to the following genres: novel; prose; poetry; non-fiction (documentary prose, essays); children's/ youth literature.

In 2020, 26 writers received creative scholarships.

» SCHOLARSHIPS FOR TRANSLATORS

The goal of the program is to support the process of translating foreign literature into Georgian. Eleven scholarships were awarded in 2020 as part of the program.

⁴⁴ Source: Writers Houses



» RESIDENCY SCHOLARSHIPS FOR GEORGIAN AND FOREIGN AUTHORS

The residency program is designed for contemporary authors and translators. It allows selected candidates to stay at the residential rooms of Writers' House under the two-week program and focus on writing or translating literary texts.

» BOOK MARKET RESEARCH

Georgian Book Market Research has been conducted since 2013. The main goal of the research is to collect comprehensive statistical data on all components of the book market to assess the market in general, identify weaknesses, and develop specific recommendations for their elimination, work on the strategic plan to ensure the further development of the book industry and increase the number of readers.

» TBILISI INTERNATIONAL LITERARY FESTIVAL

Tbilisi International Festival of Literature (TIFL) has been an important part of the country's literary processes since 2015. The festival is supported by the Ministry of Culture, Sports and Youth Affairs of Georgia, Tbilisi City Hall, and various international organizations. The festival program includes various events: poetry evenings, meetings with authors, book presentations, panel discussions. In addition to open evenings for the public, guest authors are invited to participate in a cultural program that takes place in Tbilisi and outside the city, which aims to turn their travel to Georgia into a memorable experience.

The festival is unparalleled in the Caucasus region, therefore, TIFL is among the activities that turns Tbilisi into a cultural hub. TIFL is a unique event, which - within a single week in spring - harbors both Georgian and world literature and makes literary works more accessible to the audience through entertainment and educational activities.

The project is also special because it is beneficial to many adjacent fields: the festival provides an opportunity to contemporary authors, literary critics, scholars, and translators to get involved in the active and constantly developing international



literary processes. The festival has close connection and ties with literary journals / magazines, publications, and educational institutions. Thanks to this annual literary festival, opinion leaders from all over the world visit Georgia, which also fosters the country's image as a new tourist direction.

Guests of the previous festivals included authors like Charles Bernstein, Viktor Eorfeev, DBC Pierre, Etgar Keret, Ibrahim Al-Koni, Serhiy Zhadan, Tomas Vencelova, Tadeusz Dąbrowski, Julia Fiedorczuk, Nino Haratischwili, Yurii Andrukhovych, Isaac Marion, Vera Pavlova et al - writers that are well known to both literary circles and the public.

» ONLINE LITERARY FESTIVAL FOR ENGLISH SPEAKING COUNTRIES:

Georgia's fantastic tavern. Where Europe meets Asia

Online Literary Festival was held on February 25-28 2021 in collaboration with the British Library and the American Literary Platform Words Without Borders, and it included about 20 Georgian, English and American writers and literary critics. The website www.georgiasfantastictavern.com was created specifically for the festival, which was visited by the audience of 80 countries during the festival. The events were broadcast on the British Library's website. Translations of novels by Georgian authors have been posted to the American International Literary Platform. This was the first precedent of cooperation between the Writers' House and the British Library within the framework of the festival, which proved successful for the popularization of Georgian literature among English-speaking countries. Numerous responses and blogs have been written about the festival: The Guardian, The Calvert Journal, British library blogs.

» ONLINE LITERARY FESTIVAL FOR GERMAN-SPEAKING COUNTRIES:

Georgiens erste Republik (1918-1921). Geschichte. Literatur. Kunst

An online literary festival was held on June 24-27 2021, and it included about 20 Georgian and German writers, literary critics, and artists. Germany plays a key role in recognizing Georgia's first democracy, and the main theme of the event was the longstanding German-Georgian cultural relations.



The festival was broadcast on the Lettrétage online platform of the Berlin Literary House, which provided active access to the events for German-speaking listeners. The events were organized with the support of the Lettrétage of the Berlin Literary House, the Konrad Adenauer Foundation, the Goethe Institute of Georgia, the Embassy of Georgia in Germany and the UNESCO project - Tbilisi – World Book Capital 2021.

» ONLINE LITERARY FESTIVAL FOR FRENCH-SPEAKING COUNTRIES

One of the priorities of Writers' House is to increase the recognition of Georgian literature in French-speaking countries. In November 2020, a large-scale online literary festival was organized for French-speaking countries, which included about 30 Georgian writers and artists. The festival was dedicated to the 100-year history of Georgian-French relations (1921-2021).

» SUPPORTING PROGRAMS FOR GEORGIAN AUTHORS / LITERARY TOURS

In order to popularize Georgian literature abroad, Georgian authors regularly participate in events scheduled at various literary or artistic spaces worldwide. As part of the event, authors talk with well-known moderators to discuss modern translations and organize presentations, which helps to increase their awareness.

» FRANKFURTER BUCHMESSE - SINCE 2007

Since 2007, Georgia and the joint national stands of Georgian publishing houses have been present at numerous international book fairs. Along with the arrangement of the Georgian national stand, literary events were held directly at the fair, as well as at the literary saloons or spaces of the city to popularize Georgian literature and Georgian authors. Frankfurter Buchmesse is among these notable events, in which Georgia has been actively engaged since 2007. Approximately 10-20 literary and professional events are organized annually, which include Georgian writers, translators, and publishing houses.



In 2018, Georgia was a Guest of Honour at Frankfurter Buchmesse, which was a momentous event in terms of international recognition of Georgian literature and culture. As part of the project, 600 literary and cultural events with 89 authors were organized throughout the year in 50 German-speaking cities. The authors participated in about 20 well-known and popular international literary festivals of German-speaking countries. During Frankfurter Buchmesse, about 250 events were held in the Georgian pavilion, the book market area, and the city of Frankfurt. About 7,500 newspaper and online reviews were written in German about Georgian literature and culture.

In addition to Frankfurter Buchmesse, Georgia participates in Leipzig (since 2012), London (since 2013), Bologna (since 2015) book fairs. It is planned to present the national stand at the Guadalajara Book Fair in 2021.

» LITERARY FORUM-DIALOGUE

Georgia hosts an annual literary forum-dialogue for publishing houses, translators, and writers. Its goal is to promote foreign literature in Georgia, as well as raise the awareness of Georgian literature abroad. The event establishes networks and cooperation between Georgian and foreign publishing houses. In 2011-2021, Forum-Dialogue hosted about 130 foreign publishing houses, translators, and literature agents from different countries.

» SEMINARS FOR GEORGIAN PUBLISHING HOUSES

Professional seminars are held annually for Georgian publishing houses with the support of Writers' House and partner organizations, who have the opportunity to share the experience of foreign experts in the publishing sector and develop their professional skills through intensive seminars.

» SEMINARS FOR TRANSLATORS AND TRANSLATION PROGRAM

Promoting translation of Georgian literature into foreign languages is another priority of Writers' House. Since 2014, seminars for translators to foreign languages have



been held in Tbilisi and various European cities to prepare high-quality translations of Georgian literary works. On average, about 10 translators participate in the seminar every year (a total of 90 translators during these years). The seminar is led by experienced foreign experts.

In addition, any local or foreign publishing house can use the translation program of Writers' House to translate and publish Georgian literature in foreign languages or foreign literature in the Georgian language. In 2010-2021, about 90 books were translated into the Georgian language, and more than 550 books by Georgian authors were published in 40 countries.

» CATALOGS: BOOKS FROM GEORGIA

Catalogs which present information about the works of Georgian authors, bibliography, foreign translations, and test translations are being published annually since 2014. The catalogs are designed for foreign publishing houses and provide detailed information on copyrights for works of Georgian authors as well as publication of these works in different languages. The catalogs include fiction, poetry, and non-fiction. The catalog of children's literature is published separately.

» ILLUSTRATORS' WORKSHOPS

One of the priorities of Writers' House is to support Georgian illustrators. Approximately 10 projects - both in Georgia and abroad - were implemented from 2014 to 2019, uniting Georgian and foreign illustrators.

» MEDIA TOURS FOR FOREIGN JOURNALISTS

Approximately 30 well-known journalists, literary critics, and bloggers from different countries of the world have visited Georgia to get acquainted with Georgian literature and culture. During the visit, the journalists met Georgian authors, literary critics, representatives of various art fields. They visited literary institutions, museums, art centers and cultural organizations.



After the visit, a number of articles and blogs about Georgia were published by journalists and bloggers participating in the program, which contributes to the promotion of Georgian culture and literature abroad.

» DAVID SARAJISHVILI MEMORIAL MUSEUM

In 2020, Davit Sarajishvili Memorial Museum was opened at Writers' House. The building of Writers' House was built by Davit Sarajishvili in 1903-1905. The museum is located in two rooms on the second floor of Sarajishvili's house. The opening of the museum is an attempt to do historical justice to the memory of the undeservedly forgotten Davit Sarajishvili and his wife Ekaterine Porakishvili. Wall inscriptions at the museum provide detailed information about the life and work of the couple.

» MUSEUM OF REPRESSED WRITERS

In 2021, Writers' House plans to open a museum of repressed writers. Writers' House, with its rich and eventful past, harbors the greater part of Georgia's recent history. Under the decree (February 28, 1921) of the Soviet Revolutionary Committee (RevCom), the house of Davit Sarajishvili, then owned by Akaki Khoshtaria, was handed over to the Union of Writers and Artists. Notwithstanding the fact that the Revcom awarded the building to writers and artists, most of the renowned poets and authors – the first members of the Union – fell victim to the Red Terror. That is why it is important to open the museum dedicated to the memory of repressed writers at Writers' House.

» WRITERS' HOUSE NEWSPAPER

In 2013, *the Literary Newspaper* [“*literaturuli gazeti*”] joined Writers' House, which is published twice a month and is sold across Georgia. It presents modern Georgian literature and provides a space to newbie authors and their debut texts.



» COMPETITION FOR THE PUBLICATION OF LITERARY PERIODICALS

Existence and promotion of literary periodicals is vital to the development and promotion of contemporary literature. It helps to discover and introduce new authors to the reader. Keeping an eye on modern literary processes and being in the midst of these processes accredits literary periodicals with the most important role of literary studies. To this purpose, Writers' House has been announcing a competition for publishing diverse types of literary periodicals for several years.

The following periodicals have won the competition and obtained funding in 2020: "Dila" (children's magazine); "Shokoliti" (Children's Magazine); "Tsiskari"; "Arili"; "Akhali Saunje"; "Affinage" (regional magazine - published in Zugdidi); "Ebguri" (regional magazine - published in Kutaisi).

» UNESCO PROJECT - "TBILISI - WORLD BOOK CAPITAL 2021"

Writers' House implements several projects within the framework of the UNESCO project - Tbilisi - World Book Capital 2021: Literary Forum-Dialogue for foreign publishing houses and literary agents; online literary festivals for German and French speaking countries; residency program for writers; opening of the Museum of Repressed Writers, participation in the Guadalajara Book Fair and presenting the Georgian national stand.

» EUROPALIA - BRUSSELS - 2022

Europalia is a large cultural forum - Art Festival, which is held every two years in the EU countries. The festival opens in Brussels and encompasses multiple European countries. It was planned to present Georgia as a guest country in Europe in 2022, however, no specific measures have been taken in the field of literature at this stage.



» GEORGIA IS A GUEST COUNTRY AT THE PARIS BOOK FAIR - 2025

Georgia has received an official invitation to attend Paris Book Fair (Salon du Livre) as a guest country in 2025. Georgia will be in focus throughout the year and will have the opportunity to organize events in the French literary and cultural spaces to present centuries-old literary traditions and cultural heritage of Georgia. Participation in Paris Book Fair as a Guest of Honour will strengthen the process of translating Georgian literature to the French language and raise awareness of Georgian authors in francophone countries.

4. RECOMMENDATIONS

Based on the results of the Georgian book market research, the following conclusions and recommendations can be made:

- Similar to the rest of the world, Georgian book market is quite complex and combines a number of components (publishing houses, bookstores, distributors, libraries, readers, etc.), whose activities are related to the development of the field. In order to analyze the current situation on the market and take future steps, it is essential to conduct periodic surveys similar to this one. The willingness of companies to participate in the research and discuss their current achievements or problems is equally important. Georgian Book Market Research has been regularly conducted since 2013, and it allows the sector to get a clear picture of market trends; however, some companies revealed they did not fully trust the research. Many organizations were quite reluctant to share their data and information needed for the study despite the guarantee of non-disclosure. The lack of statistical data on activities or complicated process of data administration in individual companies also constitute a major challenge. Consequently, this report is based on the data from most, but not all key market players. Therefore, the findings do not accurately reflect the market situation, although they are as close as they can be. **In order to conduct a more in-depth study of the book market in the future, it is recommended that the members of the field produced comprehensive, annual statistics of their activities and readily shared them [with research analysts]. More detailed research will enable organizations interested in the development of this field to form a clearer picture of the current problems and plan appropriate steps to solve them.**
- Although the diversity and availability of books keeps growing every year, book prices were also found to be soaring based on the data provided by the publishing houses, sellers, and bookstores participating in the research. Readers may use libraries completely free of charge or use a cheaper alternative (e.g., download e-books), however, according to the research findings, the latter cannot compete with printed book purchases. Consequently, over time,



progressively increasing book prices may prove harmful for our readers. This opinion is supported by the fact that a large part of book buyers ($\approx 70\%$) spend no more than 100 GEL per year on books. **Therefore, it is recommended that publishing houses, bookstores, and booksellers maintain reasonable prices on books and / or offer certain marketing activities (discounts, exclusive offers and deals) to encourage readers to purchase more books of their choice.**

- Ilia Chavchavadze National Parliamentary Library of Georgia is the major library of the country, which maintains the most accurate records of the number of books produced in the country based on their ISBN. It is vital for publishing houses to assign an ISBN to each printed book and send a mandatory copy to the library. As of today, the latter is regulated by the law. On the other hand, the library itself must ensure that all received books are properly recorded and included in their online catalogs available to readers. **This database is the best source of statistical data on books produced in Georgia. Therefore, its continuous update by the National Library is vital. It is recommended to arrange and maintain the existing databases properly (including those at municipal level) and improve the reporting standard for storing the most comprehensive information about all books received in the future.**

- A somewhat complex situation is observed in the process of renewing book stocks of regional libraries. Libraries are not allowed to purchase books independently without tenders, which in turn is complicated by multiple procedures and bureaucracy. In many cases, the only way to obtain new books is to receive one-time vouchers as part of various programs. Due to fact that when using the vouchers, the category and genre of books are not predetermined, the selection of new books depends on the literary taste of individual librarians. **Therefore, several issues become relevant: it is necessary to increase the intensity of replenishing book stocks in regional libraries with the involvement of state and private structures, as well as provide maximum information to regional libraries about new publications to meet the tastes and requirements of local readers. It is essential to have a thorough description of readers' book preferences at every library. The process would be further simplified by maintaining similar statistical databases in digital format.**



- One of the most important segments of this research included readers and their reading habits; based on their study, the following trends were explored:
 - » More than half of the population spends time reading fiction or non-fiction at least once a week, out of which 19% are intensive, daily readers;
 - » When choosing a book for reading, readers are most influenced by the advice of relatives and friends, the content and review of the book as well as the previous impression of the author;
 - » 86.5% of readers mostly read fiction. More specifically, contemporary literature and classics;
 - » The most popular genre is novel, named to be the major choice by 6 out of 10 readers;
 - » The average number of books read by the population of Tbilisi is twice as high as in regions (15 books vs 7);
 - » Georgian readers take equal interest in both Georgian and translated books;
 - » The main source of books read by respondents is a personal or family library;
 - » 67% of readers purchased various categories of literature during 2020;
 - » The vast majority of readers (86%) had not spent more than 200 GEL to purchase books last year;
 - » Book stores are unconditionally leading among the book sales outlets;
 - » Readers tend to buy books mainly out of their interest;
 - » Similar to readers, the share of book buyers interested in fiction exceeds that of those preferring non-fiction;
 - » Last year, the public has mostly purchased from the following categories of fiction: modern literature, classics, and children's books;



- » Novel is the most actively read and purchased genre by readers;
 - » Last year, readers living in big cities purchased an average of 13 books (mostly Georgian and translated);
 - » 44% of readers had visited bookstores at least once every 2-3 months before the pandemic, and 14% visited the library. The main reasons for refraining from going to the library include the lack of time and absence of such need;
 - » A small portion of readers (23%) who visited libraries before the pandemic, went to libraries to borrow books, read, or study.
- » It was also interesting to learn about the extent and direction of the impact on the book market caused by the restrictions imposed by the Covid pandemic:
- » Small majority of readers (52%) continue reading with the same frequency as before the pandemic, 33% are reading more intensely, while 15% give less time to reading. The pandemic had virtually no effect on the proportion of literature read.
 - » The pandemic has had a negative impact on book purchases. about a half (48%) of buyers purchased fewer books during pandemic as compared to their past behavior, 41% were not affected by current events, and 11% have increased the number of purchased books. The pandemic has not much affected book purchase channels. The majority of the population is still considering buying books within the next one year.
 - » The pandemic had a considerably negative impact on publishing houses, bookstores, and distributors involved in the research, sharply curbing their income. The above-mentioned was conditioned by internal problems within the companies (lack of preparedness to switch to remote services, lack of finances for implementing changes, insufficient competence to adapt to the new working conditions, etc.) as well as external factors (delayed delivery of information, declining demand on books, etc.). It can be argued that the pandemic has also had some positive impact on the book market, as it accelerated a number of important processes in companies, without which the development of the field in the modern world is hardly imaginable (introduction of online services, improvement of websites, quality assurance of services, etc.).





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