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## Statistical Analysis of the Book Publishing Industry of Ukraine: 1917–2017

A broad statistical analysis of the book publishing industry over 1917–2017 is performed, with focus on the dynamics of industry indicators in 1991–2017. It is shown that throughout this period the average annual growth in the number of books and brochures produced by the book publishing industry made 620 units, or 5.13%. But the circulation had overall negative dynamics: its average annual decline made 3310 thousand, or 3.9%. The largest absolute decline in the circulation is recorded in 1993, 1999, and 2015. It is revealed that the per capita output in the industry was 1.5 books in 2013, 0.8 in 2015, and 1.1 in 2017. It is stressed that because books constitute a culture component and contribute in the moral enrichment of the society and book reading enhance the education level of a nation, the book supply of the population observed throughout the period of the Ukraine's independence is unacceptable. A fact raising concern is that reading ranks fifth as a way of recreation in the Ukrainian society.

It is demonstrated that the assumption about minor significance of a printed book in the digital era is fallacious and ungrounded. Transformations in science and technology, politics or economy have been persisting in Ukraine, but its people remain to be book readers. A book may change the format or production methods and materials, but a book is an integral attribute of the humanity. The events in Ukraine, both positive and negative, had strong impact on the development and change of socio-economic paradigms, which had implications for the book publishing industry. The development of any industry cannot be considered in isolation, by taking its dynamics off the context of socio-political processes and phenomena. It is shown that in the present-day conditions, when the living standards of the population are largely dependent on the salary rate or the household income, the need to purchase books had lower priority than meeting vital necessities of daily life. The importance of a further in-depth study of the external factors with impact on the industry development is stressed.

**Key words:** *statistical analysis, book publishing industry, reading, book supply of the population, Ivan Fedorov Book Chamber of Ukraine.*

**Introduction.** According to the study performed as part of the project “Ukrainian Reading and Publishing Data 2018”, the most common form of recreation among the Ukrainian residents is watching TV programs (with 58% of respondents watching TV each day). The second and the third ranks by the popularity are shared by reading mass media publications (including Internet ones) and online network activity (with, respectively, 31% i 30% of respondents involved each day), and the fourth rank is with listening radio (22%). Book reading has only the fifth rank: printed books are read each day by 8% of respondents and online books or audio books – by 4% [1].

Sometimes it can be heard from skeptics that a printed book is about to end its existence. But this opinion needs to rest on an actual evidence rather than emotional speech. The evidence can be obtained from a study of book publishing over

a long time and a monitoring of its cyclicity in times of socio-economic or political change. Because book publishing, like any other economic activity, features cyclicity reflecting economic, political or demographic events and phenomena with impact on the future development in a country.

Neither historic nor present-day period of the domestic book publishing has been fully investigated by researchers. The book publishing industry used to be considered as uninformative segment for an in-depth study and, in a way, a non-representative one. Apart from the economic component, the cultural aspect needs to be accounted for, as the book publishing development constitutes an important element of the cultural development and a factor of moral enrichment of the society, which can hardly be monitored. When the industry's activity is high, will enhance the education level of the society, foster a conscious and highly intellectual nation and increase

the human capital. An analysis of the processes involved in the industry development is extremely important for understanding its current performance and evaluating its evolution specifics. But the background and characteristics of the current book printing performance have not been fully elaborated.

The above mentioned justifies the importance of a statistical analysis of the book printing industry in Ukraine over 1917–2017, which has to be a starting point for a more comprehensive studies of selected issues of book publishing or its history as a whole. The article's objective is to investigate the formation and development of the book publishing industry in Ukraine, with outlining the principal factors determining this industry's trends.

**Literature review.** The book publishing industry in Ukraine has been investigated by industry experts and researchers in economics: O. Afonin, N. Baranovska, T. Hrynivskiy, K. Indutna, Ya. Isaievych, V. Molotkina, A. Murakhovskiy, O. Osadcha, A. Sadovska, M. Senchenko, B. Khlymonenko, V. Shliakhetko, V. Shpak, A. Shtanhret, L. Shvaika and others. A review of their books makes us believe that some of their theses pertaining to the book publishing history need a closer look.

N. Baranovska and O. Haliatovska say: "While in the years of World War I the book publishing activity in Ukraine was undergoing a deep crisis, with the beginning of the National Revolution in 1917 and in the following years the book publishing and book learning activity was boosting in Ukrainian cities. This was encouraged by legal acts on books and press issued by the Central Rada, the Hetman Government and the Directory of the Ukrainian People's Republic. It was but in the years of the Ukrainian Revolution that the system of books and periodicals publishing was actually created" [2].

Talking about the history of the public research institution "Ivan Fedorov Book Chamber of Ukraine" (referred to hereafter as Book Chamber), M. Senchenko emphasizes that Book Chamber operated in Kharkiv from 1922 till 1989, being the chief science bibliography and information institution of Ukraine, the center of the national bibliography. State directories like "Annals of Books" (published since 1924 and on), "Annals of Journal Articles" (since 1936 and on), "Annals of Reviews" (1936–1990), "Annals of Notes" (since 1954 and on) etc. were produced. As of 2004, the Book Chamber archive contained 12.7 million storage units. It is the most complete collection of books, newspapers, journals and paper products in Ukraine, issued since 1917 [3].

Ya. Isaievych, investigating the book publishing development, observes that after the defeat of the First Liberation Movement and imposition of the soviet system in the East Ukraine, the book publishing industry was almost entirely centralized and nationalized, along with establishing the

unprecedentedly strict political censorship [4]. 20s of the past century were also investigated by V. Molotkina, with reference to the materials of the Central State Archive of Supreme Power Bodies and Administration of Ukraine. Talking about private publishing houses in 20s of the twentieth century, she argues that the three whales on which the Ukrainian patriotic community rested were private publishers "Rukh", "Drukar", and "Slovo". Successfully competing with the Chief Publishing Department, they were destroyed, because they created "great threat by winning the mass readership" [5].

According to the authors [6] who investigated the factors of economic development of the printing & publishing industry, three periods in its history can be outlined: the first period covers the time from the beginning of book publishing till 20s of the twentieth century; the second period – 1920–1990, and the third period – since 90s of the twentieth century and on. T. Hrynivskiy, when analyzing the book publishing industry, offers a more sophisticated chronology, by outlining several phases of the national self-establishment, which were the landmarks in the history of the Ukrainian nation: 1917–1920; early 1990s; 2004–2005 [7].

O. Afonin observes that in 1990, a year before the proclamation of Ukraine's independence, more than 7000 new titles of books were printed in Ukraine, with the total circulation of 176800 million copies, making 3.4 copies per resident of Ukraine in that time [8].

Talking about the current performance of the book publishing activity (by use of data for 2016), S. Dolynchuk and B. Khlymonenko emphasize that in Ukraine it "... has little to do with orientation on profit-making and great incomes. It so happened in soviet times. It was believed for years that seeking for earnings from books was either immoral or unreal. But everything changed in the last year" [9].

The significant role of a printed book in the context of the advanced technology dissemination, online and audio-books in particular, is stressed by K. Kazak when investigating the performance and prospects of government support to the book publishing industry in Ukraine [10].

In an overview of the domestic book publishing from the soviet era till 2013, A. Murakhovskiy sums up that "the people of our country have lived through the era of dramatic change which essence is in the rapid, comprehensive and deep transformation of the society. An impressive illustration is transformations in the book publishing sector that passed in these years the way from being a front-line ideological resource of the socialist state to the full-fledged actor of the market economy in independent Ukraine" [11]. However, V. Shpak, when analyzing the transition from the command and administrative to the market-based management system, says that the book publishing industry had to witness radical change in

the latest two years amidst the essential change of the overall information market. The industry develops in the conditions of serious competitive struggle, first and foremost with a foreign printed product [12].

The argument of A. Sadovska is worth attention, that a printed book is a factor fostering ideological and value orientations, morality, education potential of the country and the intellectual capital of the nation [13].

**Materials and methods.** In view of the above, we believe that the starting point of our study needs to be the year of 1917; and the landmark periods of the book publishing should be added by another one, not less significant for the history of modern Ukraine, i. e. 2014–2018, which is the period of ideological self-identification of the nation and the actual realization of the Ukrainian statehood.

As mentioned above, Book Chamber stores the statistical data on the number of books and brochures (printed units) and their circulation

(thousand copies) in Ukraine since 1917 till today [14]. These indicators are taken as the basis for our study. Due to such a long duration of time series, an analysis becomes more valid, results more reliable and conclusions better grounded. Using the series over one hundred years, we are able to monitor the cyclicity of the book publishing, reveal and assess the impact of events and phenomena on its development, i. e. to find out which events made the indicators decline and which ones made them grow. Like any other industry, the book publishing is conditional on economic, political and social processes taking place in a country. Yet, unlike most of the other industries, it lays the background required for fostering intellectual skills of the population, enhancing the education level and building the human capital. The dynamics of book publishing indicators in 1917–2017 reflects the industry’s response on political or socio-economic change (Figure 1).

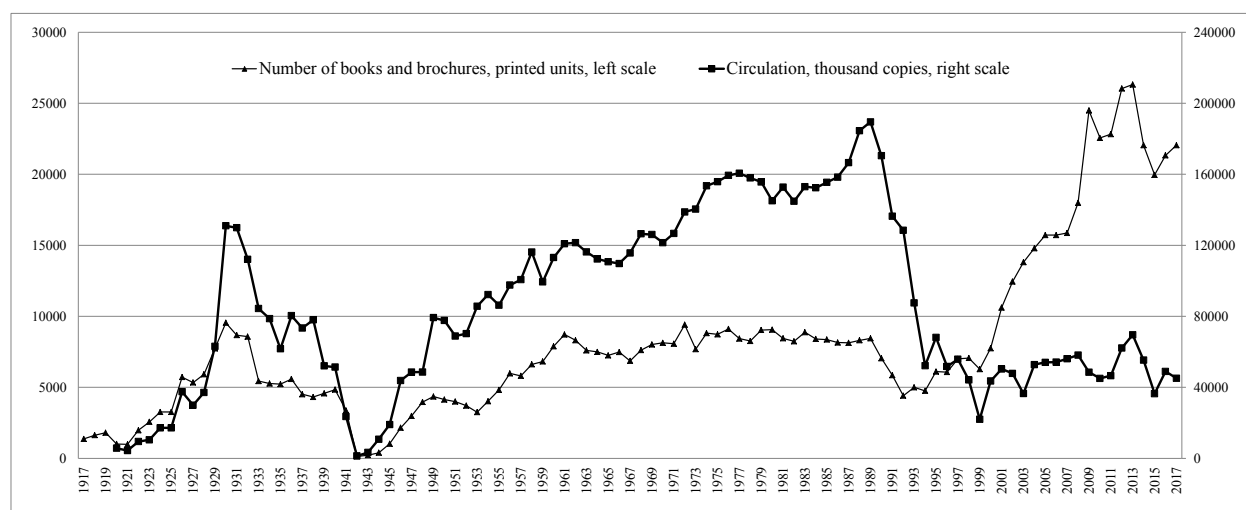


Fig. 1. The dynamics of book publishing development in Ukraine, 1917–2017

Source: data from Book Chamber

Results and discussion. The period from 1917 till 1921 became a landmark for Ukraine on the whole and the book publishing industry in particular. The Ukrainian Central Rada was established, followed by the Hetman State, with the renewal of the Ukrainian statehood launched. Obviously, these optimistic state-building stances were manifested in the so called renaissance of the book publishing industry, which is illustrated by the boosting figures (see Figure 1). The archive sources evidence that due to the cheapness of products and rapid execution of contracts the printing & publishing industry of the Ukrainian Soviet Socialist Republic could serve printing & publishing needs of other soviet republics. There were several categories of publishing houses on the Ukrainian territory in that period: state-owned publishing houses; publishing houses at administrative departments and government

offices; publishing houses of research institutions; publishing houses of communist party organizations; publishing houses of professional, cooperative and other public and private associations and persons; mixed publishing houses; publishing houses of unknown origin; out-of-Ukrainian publishing houses. It is known that as of 1917, 1370 units of books and brochures were printed on the Ukrainian territory (data on the circulation do not exist). In 1919 the Ukrainian Book Chamber was founded, at which the Bureau of Printing Statistics operated. From the statistical reports of Book Chamber is it known that in 1923–1924 the most productive publishing houses were ones at administrative departments: they printed 923 titles of publications (compared with 696 printed in this period by state-owned publishing houses). However, the state-owned publishing houses had the largest circulation: 6 129 470 printed units, compared

with 3 664 250 units printed by the publishing houses at administrative departments. Publishing houses, printing shops and book stores were questioned in order to collect the data on the development of book publishing in Ukraine and beyond (in America, Far East etc.) [15].

The book publishing indicators plummeted in 1932–1933. The famine had the devastating and disastrous impact on the demographic and socio-economic condition of Ukraine. It is clear that the book publishing issue could not be a matter of concern in that time. The industry indicators rapidly fell: from 8570 printed units and 112 135 thousand copies in 1932 to 5436 printed units and 84 360 thousand copies in 1933. Another period of the rapidly declining book publishing indicators is World War II: from 4573 printed units and 52 084 thousand copies in 1939 to 1028 printed units and 19061 thousand copies in 1945.

The postwar evolution of any country is characterized by rapid growth, which was also the case of Ukraine. For the book publishing industry it was the period of revival: over five years following 1946, the book publishing indicators grew from 2151 printed units and 43 841 thousand copies to 4136 printed units and 77 649 thousand copies in 1950.

It should be noted that two years before gaining independence, i. e. in 1989, the book publishing indicators in Ukraine amounted to 8449 printed units and 189 505.5 thousand copies. After the independence was proclaimed, the industry witnessed a recession, quite logical and expected. This was a period of

destabilizing political, economic and social links and increasing centrifugal tendencies. In 1992 the number of printed units made 4410, but the circulation was 128 470.7 thousand copies. The decreased number of printed units can be attributed to the partial loss of book publishers and changing education orientations. It should be noted in passing that the number of per capita copies in Ukraine was 2.5, which is an important parameter of the education level of the population. The period of 2001–2012 is admittedly the one of the flourishing domestic book publishing. Beginning with 2001, the number of titles (10614 printed units, the circulation of 50 324.5 copies) was growing year by year till 2012 (26036 printed units, the circulation of 62 120.5 thousand copies).

We believe it appropriate to elaborate on the present-day period of the book-printing development. The events of 2014 in Ukraine had destructive effects and provoked the crisis condition, destabilizing a delicate balance in the country. They affected the book publishing industry which indicators were lower in 2014 and the following years than in 2013. It should be noted that the population of Ukraine also rapidly declined: from 45 372 692 in 2013 to 42 414 905 in 2017 [16]. Accordingly, the number of books per capita made 1.5 in 2013, 0.8 in 2015, and 1.1 in 2017. Our calculations (Tables 1, 2) show that throughout 1991–2017 the average number of books and brochures in the book publishing industry grew by 620 units a year, or by 5.13%. But the circulation had negative dynamics: the average annual decrease was 3310 copies, or 3.9%.

Table 1

Dynamics of the output of books and brochures in Ukraine, 1991–2017

Year	Number of books and brochures, units	Absolute growth, units		Rate of growth, %		Absolute value of 1% growth, units
		chain	benchmark	chain	benchmark	
1	2	3	4	5	6	7
1991	5855	x	x	x	x	x
1992	4410	-1445	-1445	-24.68	-24.68	44.1
1993	5002	592	-853	13.428	-14.57	50.02
1994	4752	-250	-1103	-5.00	-18.84	47.52
1995	6109	1357	254	28.56	4.34	61.09
1996	6074	-35	219	-0.57	3.74	60.74
1997	7004	930	1149	15.31	19.62	70.04
1998	7065	61	1210	0.87	20.67	70.65
1999	6282	-783	427	-11.08	7.29	62.82
2000	7749	1467	1894	23.35	32.35	77.49
2001	10614	2865	4759	36.97	81.28	106.14
2002	12444	1830	6589	17.241	112.54	124.44
2003	13805	1361	7950	10.94	135.78	138.05
2004	14790	985	8935	7.14	152.60	147.9
2005	15720	930	9865	6.29	168.49	157.2
2006	15867	147	10012	0.94	171.00	158.67
2007	17987	2120	12132	13.36	207.21	179.87
2008	24040	6053	18185	33.65	310.59	240.4

Table 1, Continuation

1	2	3	4	5	6	7
2009	22491	-1549	16636	-6.44	284.13	224.91
2010	22557	66	16702	0.29	285.26	225.57
2011	22826	269	16971	1.19	289.85	228.26
2012	26036	3210	20181	14.06	344.68	260.36
2013	26323	287	20468	1.10	349.58	263.23
2014	22044	-4279	16189	-16.26	276.50	220.44
2015	19958	-2086	14103	-9.46	240.87	199.58
2016	21330	1372	15475	6.87	264.30	213.3
2017	22047	717	16192	3.36	276.55	220.47

Source: [14]

Table 2

Dynamics of the circulation of books and brochures in Ukraine, 1991–2017

Year	Circulation, thousand copies	Absolute growth, units		Rate of growth, %		Absolute value of 1% growth, units
		chain	benchmark	chain	benchmark	
1991	136415.9	x	x	x	x	x
1992	128470.7	-7945.2	-7945.2	-5.82	-5.82	1364.159
1993	87567.0	-40903.7	-48848.9	-31.84	-35.81	1284.707
1994	52116.0	-35451	-84299.9	-40.48	-61.80	875.67
1995	68156.0	16040	-68259.9	30.78	-50.04	521.16
1996	51777.1	-16378.9	-84638.8	-24.03	-62.04	681.56
1997	55841.3	4064.2	-80574.6	7.855	-59.07	517.771
1998	44150.0	-11691.3	-92265.9	-20.94	-67.64	558.413
1999	21985.6	-22164.4	-114430.3	-50.20	-83.88	441.5
2000	43562.9	21577.3	-92853	98.14	-68.07	219.856
2001	50324.5	6761.6	-86091.4	15.52	-63.11	435.629
2002	47862.9	-2461.6	-88553	-4.89	-64.91	503.245
2003	39462.9	-8400	-96953	-17.55	-71.07	478.629
2004	52804.7	13341.8	-83611.2	33.81	-61.29	394.629
2005	54059.8	1255.1	-82356.1	2.37	-60.37	528.047
2006	54209.6	149.8	-82206.3	0.28	-60.26	540.598
2007	56111.7	1902.1	-80304.2	3.51	-58.87	542.096
2008	58158.1	2046.4	-78257.8	3.659	-57.37	561.117
2009	48514.4	-9643.7	-87901.5	-16.58	-64.44	581.581
2010	45058.3	-3456.1	-91357.6	-7.12	-66.97	485.144
2011	46565.7	1507.4	-89850.2	3.35	-65.86	450.583
2012	62120.5	15554.8	-74295.4	33.40	-54.46	465.657
2013	69575.7	7455.2	-66840.2	12.00	-48.50	621.205
2014	55312.0	-14263.7	-81103.9	-20.50	-59.45	695.757
2015	36409.8	-18902.2	-100006.1	-34.17	-73.31	553.12
2016	48978.1	12568.3	-87437.8	34.52	-64.10	364.098
2017	45127.2	-3850.9	-91288.7	-7.86	-66.92	489.781

Source: [14]

The economic crisis, warfare on the country's East, the decreasing standards and quality of life, and uncertainty about the future provoked economic instability and increased migration from Ukraine. The massive exit of Ukrainians, especially woman, abroad has been on along with the decreasing birth rate and increasing morbidity resulting from the overwork and the increasing occurrence of premature deaths among

migrants. Only the two classes stand out in Ukraine, the very rich and the very poor one, whereas the middle class is actually missing if compared with European countries and America, where its share is higher than the half of the population (by income structure) [17]. "The inequality that crossed 'red line' long ago shrinks the effective demand and oppresses the development of production", say L. Furdychko et al. [18].

The crisis-ridden economy hit all the industries, including the book publishing. The average rate of currency devaluation being incompatible with the rate of growth in the nominal salary, the purchasing power of the population changed to shrink the demand, including the one for printed products. Given this situation, the need in book purchase and reading is far less significant for Ukrainians than vital necessities.

As regards the population's solvency, the book price has to be born in mind. Book publishers mentioned in earlier interviews that the average price of a Ukrainian book did not change essentially in the dollar equivalent in the recent years (2016–2017), amounting to 3.0–3.5 USD [20]. But the latest study shows that as of the end of 2018 the average book price was 135 UAH (or nearly 4.7 USD), which equals to the average price of a lunch bill in a Kyiv cafe. So, the book price grew nearly twice over four years, because, as shown by the results of the study performed in 2014, the average book price was 50 UAH in 2014 [1].

**Conclusions.** To sum up, it can be argued that the life standards of the Ukrainian population are now determined mostly by the salary rate or the household income, and the purchasing power of the population is very low.

The current period of the domestic book publishing industry is characterized by operation with cautious expectations for positive dynamics. According to O. Afonin, president of the Ukrainian Association of Book Publishers and Book Distributors, "... it refers to the severe deficit of domestic literature that contributes in the development of human potential,

fostering professional skills, qualifications and up-to-date knowledge in all the human activities. But preparation, translation and publishing of this literature requires additional and very large financial resources that are not in possession of domestic book publishing entities now" [19]. In the meantime, enforcement of the Law of Ukraine "Amendments to Some Laws of Ukraine to Limit Access of Foreign Printed Products with Anti-Ukrainian Contents to the Ukrainian Market" has brought to naught the imports of books from the Russian Federation [20]. According to Mr. V. Kruhlov, director-general of "Ranok" publishing house, the main reason for the growing number of Ukrainian publications, including translated ones, is a vacuum that occurred on the market in the last year and the grown demand for home-made books; in view of this, the number of contracts for Ukrainian translation of foreign authors increased by 300–400% [21].

Our statistical analysis leads us to say that transformations in science and technology, politics or economy have been persisting in Ukraine, but people remain to be book readers, although the reading format may change in time. The events in Ukraine had great impact on the evolution and change of socio-economic paradigms, which had its implications for the book publishing industry. It is demonstrated that its development cannot be considered in isolation, by taking its dynamics off the overall context of socio-economic events and phenomena. Therefore, further studies will focus on a more detailed analysis of the external factors that have impact on this industry.

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### **Статистичний аналіз книговидавничої галузі України: 1917–2017 рр.**

Проведено загальний статистичний аналіз книговидавничої галузі за період з 1917 по 2017 рік. Акцентовано увагу на аналізі динаміки показників галузі у 1991–2017 рр. Показано, що протягом цього періоду показник кількості книг та брошур у книговидавничій галузі щорічно зростав в середньому на 620 од., або на 5,13%. Водночас показник тиражу мав загалом від'ємну динаміку, а саме, щорічно знижувався в середньому на 3310 тис. або на 3,9%. При цьому найбільші абсолютні річні скорочення тиражу мали місце у 1993, 1999, 2015 роках. Визначено, що книгозабезпеченість українців складала 1,5 книги на одну особу у 2013 р., 0,8 книги – у 2015 р., та 1,1 книги – у 2017 р. Зроблено наголос на тому, що книги є складовою культури та відповідають за духовне збагачення суспільства, читання підвищує рівень освіченості нації, а отже, показник книгозабезпеченості населення, який має місце протягом усього періоду розвитку України як незалежної держави, є неприпустимим. Занепокоєння викликає та обставина, що читання книг займає п'яте місце серед способів проведення дозвілля в українському суспільстві.

Обґрунтовано хибність і безпідставність твердження про те, що в епоху цифровізації, друкована книга стане неактуальною. Трансформаційні зміни в науці, техніці, політиці чи економіці повсякчас відбуваються в нашій країні, а люди і досі читають книги. З часом змінюються лише формати читання, адже книга – це один із тих атрибутів, який постійно супроводжує людство в його розвитку, змінюючи (іноді – суттєво) свій зовнішній вигляд та матеріал виготовлення. Події в Україні, як позитивні, так і негативні, справили значний вплив на розвиток і зміну соціально-економічних парадигм, що, відповідно, вплинуло і на книговидавничу галузь. Розвиток будь-якої галузі, не можна розглядати окремо, вивчаючи динаміку його показників із контексту суспільно-політичних процесів та явищ. З'ясовано, що за сучасних умов, коли рівень життя населення значною мірою оцінюється за рівнем заробітної плати або ж за доходом домогосподарств, необхідність придбання книг поступається задоволенню щоденних життєво необхідних потреб. Вказано на важливість подальшого поглибленого дослідження зовнішніх чинників впливу на розвиток галузі.

**Ключові слова:** статистичний аналіз, книговидавничі галузі України, читання, книгозабезпеченість населення, Книжкова палата України імені Івана Федорова.

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