

**AN ANALYSIS OF TRENDS IN DIGITAL BOOK PUBLISHING AMONGST
EDUCATIONAL PUBLISHERS IN KENYA: A CASE STUDY OF LONGHORN
PUBLISHERS**

By

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requirements for the award of a Master of Arts degree in Communication Studies**

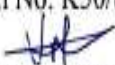
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DECLARATION

I hereby declare that this is my original work and has not been presented to any other university for a degree award or anywhere else for academic purposes.

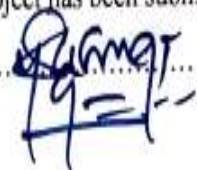
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This project has been submitted for examination with my approval as the appointed supervisor.

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DEDICATION

This research project is dedicated to my parents Mr. and Mrs. Murage for working tirelessly to ensure that I had a strong academic foundation. This has enabled me to come this far academically and be in a position to make relevant contributions to the field of communication in general and book publishing in specific through this study.

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Abstract

This study aims at analyzing the trends in digital book publishing in Kenya with a focus on educational book publishing. The objectives of the study are: to analyze the trends in digital book publishing in the Kenyan educational book publishing industry, to determine how government policies are influencing digital book publishing in Kenya and to explore the Kenyan educational book publishing business environment with regard to digital book publishing. The study uses the theory of diffusion of innovation and the theory of disruptive innovation to explain, predict and help to understand how Kenyan educational publishers are adopting digital book publishing, how they perceive it, their experiences with it and the effect digital book publishing is likely to have on book publishing in Kenya. Chapter three of the study provides a roadmap on how the researcher collected data in order to answer the research questions and achieve the study's objectives. The study uses descriptive research design to describe and interpret different aspects of digital book publishing relevant to the study and qualitative research approach. Data was collected from the sample case using document analysis and semi-structured interviews. After a thorough data analysis and interpretation, the researcher concluded that Kenyan educational book publishers have adopted most of the trends in digital book publishing which include: eBooks, audiobooks, video animated storybooks, digital distribution channels and self-publishing. They have also put in place strategies that will help them to seize the opportunities presented by digital book publishing, enjoy its benefits, handle challenges it presents and avoid potential problems and threats. The study recommends a review, implementation and heightened monitoring and evaluation of the government policies that are influencing digital book publishing in Kenya. Further, it recommends, that Kenyan publishers should: consider setting up an autonomous business unit to deal exclusively with the digital publishing, recruit staff with the right skills to handle digital publishing and train them appropriately, invest in research and development to be able to understand all aspects of digital publishing hence make informed decisions, keep an eye on audiobooks since its becoming a global trend and improve the accessibility of eBook by consumers through the development of an eReader that is compatible with all the formats of digital books. Finally, the study suggests further research that will involve more publishers as part of the sample size so as to minimize on the generalization of data which may not be true for some publishers when case study research method is used.

List of Abbreviations

| | |
|---------|---|
| KPA | Kenya Publishers Association |
| JKF | Jomo Kenyatta Foundation |
| OUP | Oxford University Press |
| EAEP | East African Educational Publishers |
| KLB | Kenya Literature Bureau |
| NICTSET | National Information and Communication Technology Strategy for Education and Training |
| ICT | Information and Communication Technology |

CHAPTER ONE

INTRODUCTION

1.1 Overview

This chapter provides the background information to the study. This include describing the context of the study, stating the problem, outlining the research objectives, posing the research questions, explaining the scope and limitation of the study and giving the rationale and significance of the study. Additionally, a brief history of book publishing in Kenya and an overview of digital book publishing in Kenya has been provided.

1.2 Background of the study

This study is about digital book publishing amongst educational publishers in Kenya. The term, ‘digital publishing’ has been defined variously by different authors. Gaigher (2012) defines it as the physical process of publishing a book by digital means to be consumed electronically on a digital device such as a computer, smart phone, tablet or a dedicated e-reading device. This means that the entire book development process; that is writing, editing, illustrating and page layout and design are carried out using digital technologies and thereafter the products (in this case digital books which may be inform of e-books or audio books) are distributed to the end user electronically.

Albert (2009), on the other hand, defines electronic publishing as the writing in digital form that is disseminated on the World Wide Web (WWW). Apart from digital book publishing being dependent on the WWW as its communication channel, Liu and Rao (2005) add that in digital book publishing, digital content is produced and distributed online with the provision for the establishment for digital asset management that allows for future re-use of content (Liu & Rao, 2005). The working definition of digital publishing in this study therefore is, ‘the use of digital technologies to develop content which maybe inform of a book, distribute it via the Internet to be accessed and consumed by the target audience electronically’. With this in mind, this study will focus on the development and distribution (how and in what form) of books and content by book publishers and the way consumers access and consume these books and content. It is important to note that the terms ‘digital publishing’ and ‘electronic publishing’ have been used interchangeably in this study.

We cannot talk about digital book publishing without mentioning digital revolution because the latter it is real and its impact is being experienced across all business sectors. It has brought about industrial transformations in various industries hence book publishers cannot ignore it. What comes to mind when we talk of industry transformations as a result of technology are the banking sector, music and photography industries. Think about how easy it has become to transact using mobile and Internet banking from the comfort of our homes and at our convenience; the shift from CDs to MP3s and currently cloud computing in the music industry and the complete shift from film-based photography to digital photography. Closer to the topic is the impact that new media has had on conventional media. As noted by Salma et al (2011), the coming of the new media has changed the role of the receiver in that, though they have been on the receiving end of one-way mass communication, they have now increasingly become producers and transmitters of information (Salman, Ibrahim, Hj.Abdullah, Mustaffa, & Mahbob, 2011). They can also participate in giving direct feedback to the producers. This was predicted by Skinner when he noted that, “the future is a world where individuals create content and share it with each other without the need for traditional broadcasters and distribution channels” (Skinner, 2007, pg. 19). This has been enabled by the Internet, encouraging the general public to collect, disseminate and analyse news and information, especially through social media. More often than not, we get to know about what is happening around us through social media, courtesy of citizen journalism.

Citing Briggs and Burke (2006), Rodrigues, Chimenti, Ramos, Nogueira, Hupsel and Repsold (2014) state that the book publishing industry is, therefore, no exemption as it is already facing the most significant change in its history since the 15th Century when Gutenberg unveiled the printing press. Technological advancements and domestication of technology has evidently changed the way books are produced, distributed, consumed and stored. These changes have necessitated the adoption of new publishing technologies among different publishers across the world hence, digital book publishing.

Bradley and Bartlett (2012) note that new models of producing, distributing and consuming books have emerged. Though not sure about the future of digital book publishing, publishers across the world are embracing it by producing digital books alongside print books. A digital book is basically an electronic version of a printed book that can be read using digital devices such as desktops, laptops, tablets, smartphones or electronic devices that have been designed for reading

purposes (e-readers), thereby eliminating the need for printing the content (Bradley and Bartlett, 2012). Digital books can be inform of e-books or audio books. Although this study borrows the definition of digital book as given by Bradley and Bartlett (2012), it also acknowledges that technological advancement has made it possible for publishers to produce and distribute digital books without having the print version first – a strategy well known to book publishers as ‘digital first’.

Most of the publishers produce the print version of the book first then convert it into various digital file formats. However, in July 2019, Pearson Publishers announced its ‘digital first’ strategy. This means that the publisher will be producing digital version of a book first and only provide a print version later; probably on need basis – print on demand. Given that Pearson Publishers is considered one of the world’s largest publishers in the book publishing arena, this should make other publishers across the world, Kenyan publishers included concerned about what it is that Pearson Publishers have foreseen about the future of digital book publishing.

Research that has been done in different countries in regard to digital book publishing, for example, in South Africa, India, Singapore, Sweden, Australia and Brazil reveal that book publishers are still struggling to embrace the concept of digital book publishing. Some of them still think that digital publishing is a hype that will come and go and that it may not affect the traditional book publishing to a great extent. However, as technology continues to drive development in the publishing industry, publishers across the world are now showing a renewed interest in digital book publishing. This is because none of them can afford to miss out on the opportunities that digital publishing continues to present. Additionally, though it is not clear when and to what extent publishers will move into digital publishing and when the market will embrace the use of digital books; what is clear is that digital publishing is a potential disruption in the book publishing industry.

As Gaigher (2012) puts it, “when considering the changes necessitated by the digital developments in the publishing industry, it is constructive to consider digital publishing as a potential disruptive technology” (Gaigher, 2012, pg 3). The term ‘disruptive technology’ was first coined by Clayton Christensen in his book titled, *The Innovator’s Dilemma: When New Technologies Cause Great Firms to Fail*. He examines the reasons why when firms are faced with new technologies, some fail while others succeed. He argues that in its initial stages, a disruptive

technology only serve a niche market but eventually displaces the current technology in the mainstream market (Christensen , 1997). Since digital book publishing is now a reality, publishers should be careful not to face the same risks and make the same mistakes that Kodak and the music industry made when they were faced by a disruptive technology. They should not fall into the ‘watch and wait’ trap that most firms get into when faced with uncertainties brought about by emerging technologies (Shoemaker & Day, 2000).

According to (Shoemaker & Day, 2000), firms get into four traps when faced with uncertainty about the eventual success of a disruptive technology and yet they must take a stance; ranging from passive to highly aggressive with regard to that technology. The first trap is delayed participation. This is where firms decide to ‘wait and see’ if a technology will prevail or not before embracing it. The second trap is where firms decides to stick to the familiar. This is as a result of aversion to uncertainty and risk. The fact that firms are not sure about the future of the emerging technology makes them tend to have an inclination to the current technology instead of embracing the new one hence maintaining the status quo and preventing the detection of opportunities presented by the new technology.

The third trap is the reluctance for firms to fully commit to a new technology. This means that though some of the firms may decide to embrace the new technology, they do so reluctantly. (Shoemaker & Day, 2000) note that this may be caused by lack of capabilities, underestimation of the emerging technologies’ potential and new market needs, or by the difficulty of balancing the demands in the markets already known and the requests for emerging technologies. Another factor that can lead to reluctance to fully commit is the fact that an emerging technology will initially serve a niche market that firms may not find profitable to the business (Christensen , 1997). This leads us to the last trap which is lack of persistence by firms. The initial enthusiasm may be replaced with skepticism about when and if the emerging technology will become a profitable business reality. At this point, the only thing that can help a firm not to give up on an emerging technology which has a potential to disrupt the industry is the conviction that this new technology defines the future of the industry. With this in mind, book publishers should be careful not to find themselves entrapped as they try to navigate their way through new and emerging publishing technologies which may eventually disrupt the industry.

1.3 History of book publishing in Kenya

Publishing in Kenya started in 1887 when the Christian Missionary Society (CMS) set up printing presses in order to publish religious materials (Makotsi & Nyariki, 1997). CMS published its first book in 1894 (Chakava, 1996). Since its inception in Kenya, publishing remained in the hands of missionaries until in the 1940s when the mission presses came together to form Ndia Kuu press. This was the first locally based educational publishing firm, the in Kenya. The Press published schoolbooks, adult literature and fiction which was meant to cater for the increasing demand for quality education by Africans. It also published Christian literature.

With time, there was an increased interest for quality education by Africans. This brought about the establishment of more publishers who focused more on publishing educational materials for the Kenyan market. In 1947, the East African Literature bureau was established to produce educational and literacy materials and to develop materials in local languages to cater for the needs of the growing literate population. Longman Green entered the publishing scene in Kenya in 1950, followed by Oxford University press in 1952. They were later followed by Thomas Nelson, Evans brother and in 1965 by Heinemann (Makotsi & Nyariki, 1997).

Although the pioneering multinational publishing firms; Longman and Oxford University Press were publishing educational materials for the Kenyan market, they were doing so from their headquarters in London and Oxford respectively. They later opened up branches and started full operations in Kenya in 1963. Heinemann, Macmillan, Evans Brothers, Thomas Nelson, Pitman and Cambridge University press followed suit. Other companies such as Collins and McGraw Hill set up distribution agencies. These companies did not specialise in textbooks but published general books which acted as agents for other publishers (Makotsi & Nyariki, 1997).

The first indigenous publishing firm, the East African Publishing House, was established in 1965. During this year, the Government of Kenya was keen to cater for the reading needs of the Kenyan following the Ominde commission. This led to the establishment of The Jomo Kenyatta Foundation (JKF) which cooperated with the East African Literature Bureau (EALB) in its publishing programmes. The two publishers (EALB and JKF) split after sometime and each became autonomous since they could not agree on the roles each organization should play. Although the two state parastatals had an upper hand in the publishing industry, other indigenous publishers emerged as competitors in the textbook market (Chakava, 1996).

The book publishing industry in Kenya has grown over the years and become vibrant. Currently, there are about 70 publishers who are registered with The Kenya Publishers Association (KPA); which is the umbrella body for book publishers in Kenya. These include educational publishers, trade publishers and university presses. This study will focus on educational publishers which include Jomo Kenyatta Foundation (JKF), East African Educational Publishers (EAEP), Kenya Literature Bureau (KLB), Oxford University Press (OUP), Longhorn Publishers, Phoenix Publishers, Spotlight Publishers, Mentor Publishers and Story Moja Publishers among others.

Most educational publishers in Kenya survive on the sales of textbooks particularly for primary and secondary schools. As Chakava notes, “textbooks are without a doubt the bread and butter of the Kenyan publishing industry” (Chakava, 1996, p. 17). He further adds that Kenyan educational publishers derive about 90% of their revenue from the sales of textbooks. In terms of production, established educational publishers’ catalogues reveals that more than 60% of their titles are textbooks. These are titles that are meant to be used as course books for pre-primary, primary and secondary schools levels. Apart from publishing textbooks for the Kenyan market, some publishers have ventured into other markets that they refer to as regional markets. These are book markets in other countries across Africa. Some publishers have published books for countries in East and West Africa such as Uganda, Tanzania, Rwanda, South Sudan, Zambia and Malawi. We could say that the lucrative nature of textbook publishing business is the main motivation, which has informed this expansion.

Unlike in the past where most educational publishers concentrated their efforts on publishing only textbooks and a few literature books, the stiff competition in the publishing industry has resulted to publishers venturing into other publishing areas. Apart from publishing textbooks, educational publishers have also ventured into revision books that are meant to help learners prepare for their examinations. In fact, upcoming educational publishers find it easy to enter into the book publishing industry by first publishing revision books. This is because frequent market share research undertaken by various publishing firms and the Kenya Publishers Association show that publishers have already taken their positions in the market for different subjects offered at both primary and secondary school levels. This makes it hard for upcoming publishers to publish textbooks since they can hardly penetrate in the market. However, curriculum reforms; for example, change of curriculum from 8-4-4 to 2-6-6-3 curriculum presents an

opportunities for these publishers to venture in textbook publishing because the new entrants and established publishing firms starts on a level ground in terms of the development of textbooks and penetrating the market for these books.

In order to enhance and improve reading habits amongst learners, educational publishers have also published readers in both Kiswahili and English readers. Others have ventured into publishing of subject readers which are meant to enhance the teaching and learning of various subject areas at primary school level. Overall, the book publishing industry in Kenya has grown and continues to grow in terms of product development and market expansion. This can be associated to a growing demand for educational materials.

1.4 Digital book publishing initiatives in Kenya

Publishing and book development in Africa have always been, and will continue to be, closely influenced by development in general (Zell, 2008). Zell (2008) further notes that the book sector is inevitably tied to government policies or, in many countries, the lack of policies. In Kenya, the publishing industry is under the Ministry of Education, Science and Technology (MOEST). This means that MOEST policies affect publishers either directly or indirectly. As noted earlier on in this report, educational publishers rely a lot more on textbooks; meaning any policy affecting the development and procurement of textbooks in Kenya directly affects the textbook publishing business. For instance, the one book directive that was declared by the then Cabinet Secretary of Ministry of Education, Science and Technology; Dr. Fred Matiang'i in 2017 had a huge implication on educational book publishing as it changed the procurement of textbooks in Kenya; making the government the main customer for textbooks for all public schools; whether or not this is sustainable in the long run is not a concern of this study.

Having said this, let us now focus on initiatives by the Government that would influence digital book publishing in the country. For many years since publishing was introduced in Kenya, publishers have been producing books in print format. However, with the revolution and domestication of technology, the development and distribution of textbooks has been and will be affected. In 2006, The Ministry of Education, Science and Technology came up with National ICT Strategy for Education and Training (NICTSET). This policy was meant to integrate ICT in education and training for improved teaching and learning in Kenya. One of the key strategies

highlighted in NICTSET is the development of digital learning materials. By virtue of being key stakeholders in matters education in the country, Kenyan educational publishers are expected to develop eBooks and other digital learning material without which the Ministry of Education Science and Technology cannot achieve the expected outcomes in regard to integrating ICT since the development of digital content is among the priority areas highlighted in this policy (The Ministry of Education, 2006).

“Since the 1980s integration of ICTs in education has been compulsory in the developed nations. This is not so in developing nations such as Kenya, where ICT integration in education is considerably more recent, small-scale and experimental in most of the developing countries including Kenya” (The Ministry of Education, 2006,). However, the Government of Kenya is determined to support digital education (use of digital devices in teaching and learning). While the formulation of NICTSET was a great stride towards the realization of digital education, the Government has put a lot of effort in rolling out digital literacy programme in various counties. The Digital Literacy Programme (DLP) is a Government initiative that was introduced in public primary schools to ensure pupils in Kenya have the ability to use digital technology and communication tools in learning.

In an effort to support digital education, KICD launched a platform called Kenya Education Cloud to allow book consumers access digital content at their convenient time and place. This platform offers digital content for early years of education, primary school and secondary schools. Book publishers are supposed to submit books that have been approved by KICD in digital format after which they are uploaded in the Kenya Education Cloud. In as much as this initiative helps book publishers to embrace and adopt digital publishing, it has posed a challenge as publishers are expected to offer their eBooks and digital content for free hence not sustainable since publishers should reap the benefits of offering their digital products to consumers via the Kenya Education Cloud.

Currently, Kenyan educational publishers are partnering with eRetailers such as eKitabu, Snapplify, World Reader and Amazon to distribute their eBooks. These eRetailers provide a platform for Kenyan publishers to distribute their eBooks to consumers. Individual publishing firms have also made various strides towards digital book publishing. For example, Longhorn Publishers have an e-learning platform where end users can access the company’s eBooks and

digital content, the publisher also have Book Apps for some of its books; Oxford University Press, in partnership with Standard Group also launched a platform called ‘Tutor soma tu’ to enable learners to access revision materials such as past papers; Kenya Literature Bureau, on the other hand, recently launched its Book App which can be downloaded on Google play to be able to access the publisher’s eBooks.

1.4 Problem statement

Although digital publishing has been the topic of interest for over 30 years (Gaigher, 2012), there is little research that has been done in this field across the world. The scholars who have undertaken research in digital publishing in their respective countries cite lack of research and empirical knowledge in this field as one of the limitations to their study. They also indicated that their studies were the first ones in digital publishing in their countries (for example, Gaigher, 2012; Tian, 2008). Similarly, in Kenya, there is no research that has so far been done on digital book publishing hence this study comes in handy to provide Kenyan educational publishers with more insight and empirical knowledge to base their decisions on transition and transformational strategies on. This study will be the first one on digital book publishing in Kenya hence contributes new knowledge in the publishing industry.

Considering the effects disruptive technologies have had on other industries, pundits in the book publishing industry believe that publishers should avoid making the same mistakes as the music industry (Price Waterhouse Coopers, 2010). This calls for book publishers to make decisions on how to transition from traditional book publishing to digital book publishing. It demands that book publishers plan successfully for the future by establishing digital book publishing strategies that will help them stay abreast of the digital times. However, much as publishers are aware about the evolution of book publishing and regard digital book publishing as a disruptive technology, the speculation on how future changes will affect the industry has left book publishers floundering without a clear vision of what to expect (Keh, 1998). In fact, research that has been done in different countries in regard to digital book publishing, for example, in South Africa, India, Singapore, Australia and Brazil reveal that book publishers are still struggling to embrace digital publishing. Similarly, Wang’ombe and Nguyu (2015) points out that transition within the publishing industry in Kenya from print to digital has been sluggish.

This study will focus on digital publishing in the Kenyan educational book publishing industry. It seeks to provide insight on the trends in digital book publishing in the Kenyan educational book publishing industry and how Kenyan educational book publishers are reacting to the trends in digital book publishing, determine how government policies are influencing digital book publishing in Kenya and explore the Kenyan educational book publishing business environment with regard to digital publishing. The data gathered together with the recommendations of this study will surface book publishers not only in Kenya but also across the world with vital information and strategies that will help them to stay versed in digital book publishing and make informed decisions that will make them succeed in the digital era.

1.5 Research objectives

1. To analyse the trends in digital book publishing in the Kenyan educational book publishing industry.
2. To determine how government policies are influencing digital book publishing in Kenya.
3. To explore the Kenyan educational book publishing business environment with regard to digital book publishing.

1.6 Research questions

1. What are the trends in digital book publishing in the Kenyan educational book publishing industry?
2. How are government policies influencing digital book publishing in Kenya?
3. How is the Kenyan educational book publishing business environment with regard to digital book publishing?

1.7 Rationale and justification

There is an academic gap in the area of digital book publishing because no study has so far been undertaken that is related to this area of study in Kenya. This study will, therefore, be the first one and provides insights and empirical knowledge that will come in handy for book publishers as they try to navigate and find a stance around digital book publishing. It will help also them have a better understanding of digital book publishing. Educational book publishers in Kenya need literature and empirical knowledge on what is happening in other parts of the world and even within the country in regard to the development and provision of digital books and content. This information is crucial

to the publishers because it will enable them to make informed decisions in regard to technologically driven transition and transformations within the book publishing industry. A review of the government policies that are influencing the development of digital book publishing is also critical since government policies or lack of policies affect the development of the book publishing industry (Zell,2008). This study has reviewed these policies, provided findings and recommended what should be done in order for these government policies to influence digital book publishing positively.

The study was conducted at a time when the world was facing Covid-19 pandemic. Schools in Kenya were closed due to the pandemic hence learners were slowly adopting to e-learning and the use of digital books and content. There is a possibility that teachers and learners adapted to e-learning and used digital content and digital books more than they used to during that period. This presented a chance for digital books and content market to grow. As observed, domestication of technology has led to a shift in consumer behaviour and demand during the pandemic and it is affecting the nature and volume of digital books being published. This is, therefore, the opportune time for publishers to showcase what they have done in regard to digital book publishing and reap the benefits of the same.

1.8 Significance

The findings of this study will be of great importance to education stakeholders in Kenya. This includes the Ministry of Education Science and Technologies (MOEST), publishers and teachers. To start with, the literature review will help book publishers in Kenya to have a glimpse of what other countries are doing in regard to transforming and transitioning their publishing business towards a digital environment. This will help them to develop useful strategies to help them stay abreast of the digital era. They will also be exposed to opportunities that digital book publishing presents to them as well as challenges and barriers they are likely to experience as they embrace hence come up with ways to overcome them. The findings of this study will also contribute to the discourse on changes in the book publishing industry as a result of digital revolution in the academic sphere.

Second, a review of available government policies that not only influence digital publishing but also the development of book publishing industry in Kenya will provide MOEST with important information that can be used to review existing policies and maybe come up with new policies with an aim of influencing and supporting the development of digital book publishing in Kenya. MOEST

will also get a lot of insight pertaining the availability of digital products and platforms by Kenyan educational publishers hence understand the extent to which educational publishers are supporting digital education. This is vital especially in the implementation of 2-6-6-3 curriculum where the government is emphasizing on the integration of ICT with education by using digital devices as learning tools in all areas of study at primary and secondary school level.

Finally, the consumers of educational materials; this includes teachers, learners and parents will get to know what is available for them in terms of digital products and platforms as they strive to keep up with the changing digital environment and embrace e-learning.

1.9 Scope and limitation

This study will only focus on educational publishers in Kenya using Longhorn Publishers as the case study.

1.10 Operational terms

- Publisher – a company that receives manuscripts from authors and prepares them in order to produce a book.
- Electronic/digital publishing – the use of digital devices to produce and distribute digital content that is consumed by the target audience electronically.
- Domestication of technology – how new technology is appropriated by its users and integrated in their day-to-day life.
- Orange Book – a book that provides a list of books approved by KICD for use in Kenyan primary and secondary schools, ECDE and P1 teacher training institutions.
- KICD – a Government institute whose mandate is to develop curricular for all levels of education below university. It also evaluates, vets and approves curriculum support materials for basic and tertiary education.
- EBook – is a book in electronic format. It is downloaded to a computer, PC, Mac, laptop, tablet, smartphone or any other kind of reading device, and is read on the screen.

CHAPTER TWO

LITERATURE REVIEW

2.1 Overview

This chapter helps to situate the topic of study within the relevant subject, discipline and field. It further provides insights and contributions of various scholars with respect to book publishing in general and narrows down to digital book publishing. The literature included will help the reader to have an understanding of the book publishing industry particularly how digital revolution has changed the way book publishers are producing and distributing content to the end user. It also highlights the shifts in demand by book consumers as a result of technological advancement.

2.2 Situating the study within the field, discipline and subject

This study analysis the trends in digital book publishing with a focus on educational book publishing in Kenya. The topic of study is in the field of communication, discipline of publishing and the subject is book publishing. Figure 2.1 shows how I have placed the topic of study within the relevant subject, discipline and field of study.

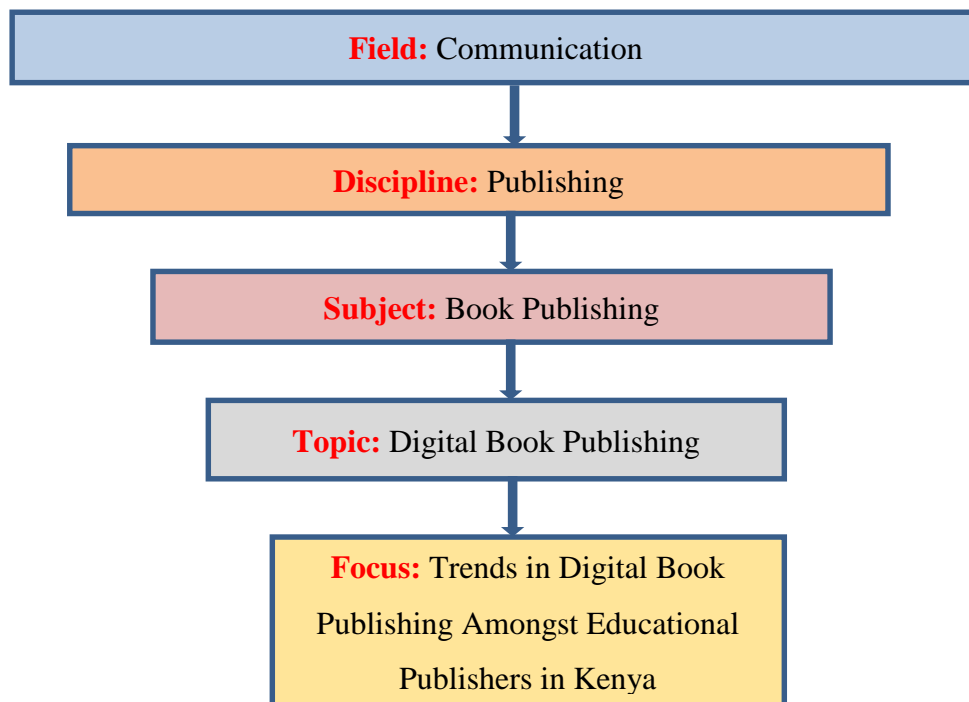


Figure 2.1: Situating the study within the field, discipline and subject

Book publishing is an area of study within the broader field of communication. As Altbach and Hoshino (2015) put it, “book publishing remains one element of communications” (Altbach & Hoshino, 2015, p. 275). The term communication is derived from a Latin word ‘communis’ which means ‘common’; thus, to communicate means to make common, to make known or to share (Velentzas & Broni, 2014). In communication, the sender, who is essentially the source of information, shares thoughts, ideas or knowledge with the target audience who is referred to as the receiver. Communication can be defined as, “the act of making common and known is carried out through exchange of thoughts, ideas or the like. The exchange of thoughts and ideas can be had by gestures, signs, signals, speech or writing (Velentzas & Broni, 2014, pg.117). In other words, the term communication can be defined as the act of sharing knowledge or information either in writing or orally. As a field of study, communication is multi-disciplinary in nature and it involves several academic disciplines and professional specializations. One of these disciplines is publishing.

According to the North American Industrial Classification System publishing industry is an industry that produces a variety of publications, which include magazines, books, newspapers, and directories (Tian, 2008). This means that indeed a form of communication which entails the sharing of information in written form. This study will focus on book publishing and narrow down to educational book publishing. As (Altbach & Hoshino, 2015) rightly put it, the process of book publishing, printing and distribution are central to communication. This is basically because communication entails the transmission of messages (in this case content in a book) from the sender to the receiver. In book publishing terms, the sender is referred to as an author. This is the person who comes up with the ideas or concepts to be conveyed to the intended audience. Receivers, on the other hand, refer to the readers or intended audience of a particular book.

To support the discourse on books being a media of communication, (Altbach & Hoshino, 2015) argue that books have been the primary means of written communications for millennia and they remain the major means of scientific communications worldwide. Keh (1998) further notes that books are a form of communication media in which ideas (brain children of authors) are given a concrete shape so as to be conveyed to the intended audience (Keh, Evolution of the book publishing industry: Structural changes and strategic implications, 1998). This shows that the publishing industry uses the same communication process as other mass media as illustrated in

Figure 2.2 below. In book publishing, feedback refers to change in attitudes, competencies, level of knowledge and behaviour as a result of reading content contained in a book. It can also refer to book reviews or readers' opinion about a book and how they rate it.

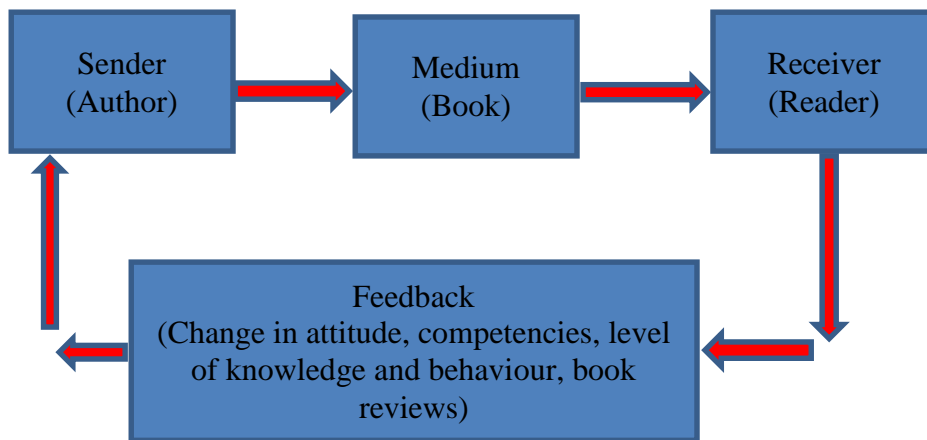


Figure 2.2 Process of communication

Books remain the primary means of communicating knowledge. They are central to providing information, entertainment, analysis and education to millions throughout the world (Altbach P., 1997). This is another argument which supports book publishing industry being an element of communications based on the role played by books. Different books play different roles which range from educating, informing and entertaining. Readers buy books to entertain themselves, for self-improvement, professional development as well as children advancement (Bammel, 2017). The purpose of textbooks and other educational materials developed by publishers is to educate and inform. Professional books play the same role. However, readers buy fiction books purely for entertainment.

2.3 Book publishing

The place of book publishing in the development of a nation is pivotal. It is for this reason that Makotsi and Nyariki (1997) describes the book publishing industry as, “the heartbeat of every nation” (Makotsi & Nyariki, 1997, p.1). The duo is however quick to mention that though the book publishing industry claims only a small portion of the national budget, its far-reaching effects to a nation cannot be ignored. The book is the major vehicle of knowledge transfer in the society. People in different levels in the society depend on books to acquire knowledge and information

about life, culture, health and other issues and different ideas in all aspects of life. Udenze and Uche (2014) adds that the book publishing industry plays a great role in advancing knowledge and promoting teaching and learning (Udeze & Uche, 2014). It would be very difficult for teaching and learning to take place in all levels of education without textbooks and other learning materials that are published by book publishers. Other books such as professional books, general books, reference books among others also contribute to the knowledge base of people in a society.

As Altbach notes, book publishing involves coordinating various processes needed to bring a book from an idea in the mind of an author to a printed product available for distribution to the relevant audiences (Altbach, 1992). To take care of changes in technology that are being experienced by book publishers worldwide, and that are also influencing how the consumers are accessing information contained in a book, I would be quick to add the aspect of digital products being availed to consumers by book publishers to Altbach's description of book publishing. Hence, talk about the transformation of the author's idea into printed or digital products available for distributions to consumers.

2.3.1 The book publishing process

The publishing process starts with the writing phase. This is where the author writes the content that he or she wishes to share with their target audience (Altbach P. , 1997). The final product after the writing phase is referred to as a manuscript; this is the author's handwritten or typed text that is yet to be published. Manuscripts are categorized into two: solicited manuscripts (unsolicited) manuscripts. Solicited manuscripts are those that an author writes after being commissioned by the publisher to do so. Unsolicited manuscripts, on the other hand are not commissioned by the publisher. Instead, the author writes then approaches the publisher with a ready manuscript which then goes through evaluation by the publisher to determine if it is fit for publication.

Once the manuscript is complete, the editing process starts. A book editor works closely with the author to improve the manuscript and also oversees the entire publication process (Potter, 1990). At the editing level, the manuscript goes through two sub-stages which are substantive editing and copy editing. The edited copy is then handed over to a graphics designer for page layout and design. This is also the stage where illustrators come in to provide relevant pictures and

diagrams to be used in the book. After the page layout and design, an editor or a proofreader reads through the book to correct any grammatical mistakes after which the book is taken to press for printing for the physical book or converted to various formats for digital books, ready to be distributed to the end user.

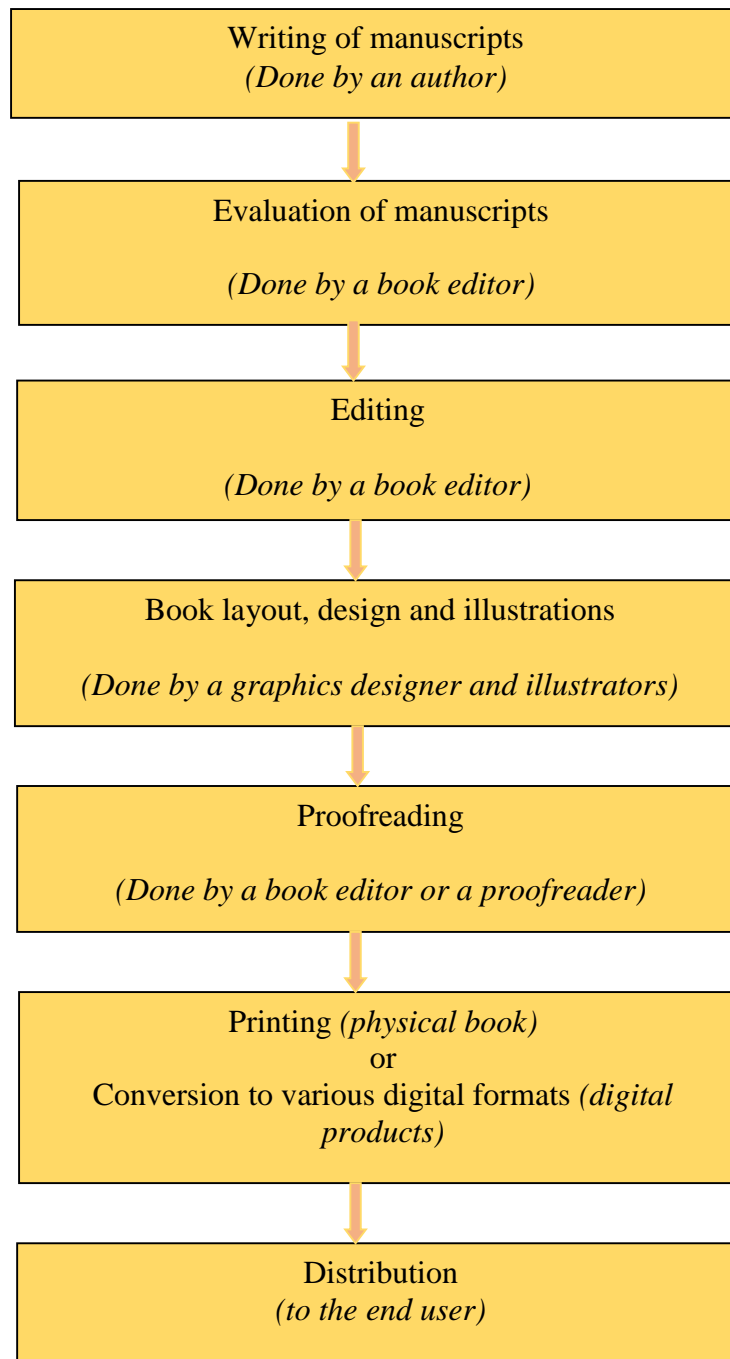


Figure 2.3 Book publishing process

2.3.2 Types of book publishers

There are different types of book publishers: educational publishers, religious publishers, academic publishers and trade publishers. Educational publishers are concerned with textbooks and other learning materials used by learners at different levels of learning; this include pre-school, primary school, secondary school and tertiary education institutions. These books conforms to the curricula. In Kenya, textbooks and other learning materials are evaluated, vetted and approved by KICD for use in pre-school, primary and secondary schools. Kiai and Maroko (2013) observes that teachers are not supposed to buy any learning materials that have not been approved by this government institution (Kiai & Maroko, 2013).

The second type of publishers are academic publishers. Academic publishing involves publishing of books written by scholars for other scholars. Academic books are research oriented and are more often than not published by university presses (Greco, Milliot, & Wharton, 2014). Academic books are sold to scholars in the same field and are often sold to university libraries.

Religious publishers develop, print and make religious books to their target audience. These are books that are aimed at affirming religious values. Word Alive Publishers is an example of religious or Christian publisher in Kenya.

Last but not least is trade publishers who publish trade books. These are books that are meant for general audience. The most common genres for trade books are fiction, general interest non-fiction, and children literature. They include novels, thrillers, biographies, books on history of certain things and books on how to do various things, for instance a book on how to cook.

2.4 Educational publishers in Kenya

As noted earlier, educational publishers are concerned with developing textbooks and other learning material for the Kenyan pre-primary, primary and secondary schools and tertiary education institutions. Educational publishers in Kenya falls under two categories: indigenous and multinational companies. Though there are about 15 educational publishers in Kenya, market survey reports by various educational publishers and KPA reveal that the most popular ones with customers are KLB, JKF, Longhorn, OUP, EAEP, Moran and Spotlight publishers. KLB and JKF

are state parastatals while the others are private publishing firms. Six of the mentioned educational publishers are indigenous publishers while OUP is a multinational company.

Multinational publishing firms are those that have offices in more than one countries and are controlled from their head offices. As at 1998, the Kenyan book market was dominated by multinational publishing companies with parent companies in the UK (Khorana, 1998). According to (Altbach P. , 1992), multinational publishers were able to penetrate and dominate publishing in many developing countries because of their economic and staff resources and their global reach.

The situation has however changed since most of these companies withdrew from the Kenyan market, for example, Longman Kenya, which is a part of Pearson Publishers UK. Other multinational publishing firms, on the other hand, sold their equity to indigenous publishers. This was the case for Macmillan Publishers which was bought by Moran Publishers. Currently, only OUP exists in Kenya as a multinational publishing firm. It has its head office in South Africa.

2.5 Digital book publishing

As mentioned in Chapter one, this study defines digital book publishing as the use of digital devices to produce and distribute digital content that is consumed by the target audience electronically. Tian (2008) notes that the Internet and other advances in technology have impacted greatly on content production and distribution in the book publishing industry.

The whole idea on digital book publishing is on how publishers not only produce content for the consumers but also how this content is distributed and consumed. According to a survey that was undertaken in the United Kingdom, 80% of publishers used their website for content delivery rather than just for information purposes (Department of Trade and Industry, 2002). Many publishers have borrowed a leaf from Amazon and now have an eBook store. This has made it possible for consumers are able to access digital products from the publishers' websites. This include purchasing eBooks either on one off purchase or subscription basis. Other publishers have an eLearning platform, for instance, Pearson Publishers and Longhorn Publishers that enables consumers to access digital content that is packaged in different digital formats.

As the world continues to experience digital revolution, book publishers, like other business are re-aligning their operations and offerings to fit the digital era. They are still redefining

themselves taking into consideration this revolution. Although the future of digital book publishing is still uncertain, none of the publishers can afford to be left behind (Gaigher, Roux , & Bothma 2014). Many book publishers worldwide are embracing digital publishing in their efforts to keep pace with technological advancements.

As Hall (2013) puts it, “the digital world offers a great revolution in publishing terms since the invention of printing press” (Hall, 2013, p.56). House further notes that the world has changed and will continue changing with the advent of digital technology. He lays emphasis on the way advancement in technology has brought about immense changes to the global book industry (House, 2013). In traditional book publishing, publishers are used to producing books in print format, however, with the digital revolution which has eventually changed end user’s needs, they have no choice but to provide digital content to their consumers if they want to stay relevant in the business.

For publishers, there are two sides of a coin in regard to digital publishing. That is, in as much as it is presenting lots of opportunities, publishers are facing challenges related to digital book publishing. It is, therefore, important for publishers to carefully evaluate the digital sphere and come up with strategies that will enable them to reap the benefits in the digital marketplace while managing or avoiding likely challenges.

2.5.1 The state of digital book publishing in Kenya

Brown and Heavner (2018) observe that Kenya is one of the leaders in digital publishing, especially in education in Sub-Sahara Africa. As such, Kenyan educational publishers have embraced digital book publishing. Most of them showcase their digital products during Nairobi International Book Fair every year since the wave of digital transformation hit the Kenyan publishing industry. In 2015, the theme for the Nairobi International Book Fair was, ‘Twende Digital’ which means ‘Lets go digital’. This was a call by KPA to all book publishers in Kenya to showcase their digital books and other digital products and actually fully embrace digital book publishing as none of them can afford to be left behind. In 2020, the Nairobi International Book Fair was virtual due to Covid 19 pandemic. The theme for the book Fair was ‘Any book, Anywhere’ further calling on book publishers to delve deeper into digital book publishing and

ensure that they provide the consumers with a wide variety of digital books that can be accessed from any part of the world at any time. The 2020 Nairobi International Virtual Book Fair also encouraged consumers to visit publishers' virtual booths and get to know about various digital products that Kenyan book publishers are offering.

2.5.1.1 Creation of digital products

Brown and Heavner (2018) note that, "in terms of creation, publishers are still unlocking production mechanisms and learning how to streamline that process and overall technical expertise" (Brown & Heavner, 2018, p.17). As noted earlier, most of the Kenyan publishers have embraced digital book publishing, they started by converting print books in their front and backlist into digital files. A survey that was conducted by Worldreader in 2018 revealed that 70% of Kenyan book publishers have converted at least half of their catalogue in digital formats with all of them converting their books to digital formats after they have been available in print format (Brown & Heavner, 2018). Most of the publishers outsource for digital conversion of books. However, with the trainings offered by their partners, for example, eKitabu, some publishers have invested in capacity building of their staff to be able to handle inhouse digital conversions.

2.5.1.2 Distribution of digital products

Book publishers in Kenya partner with eRetailers such as Amazon, Worldreader, eKitabu and Snapplify to distribute their digital products; particularly eBooks. While Amazon, Worldreader and Snapplify are multinationals, eKitabu is an indigenous company. The eRetailers offer publishers a platform to distribute their digital products at a fee. In as much as these platform help publishers to reach a greater audience; both nationally and internationally, Kenyan publishers are discouraged from using some of the available platforms due to high hosting fee (Brown & Heavner, 2018).

Apart from just providing a distribution channel for digital products, eRetailers, for example, Worldreader also provide publishers with regular publishing reports that contain data on which part of the world each of their titles is being read and the schools and libraries that receive their content on eReading devices. This is a value addition to the eRetailer-Publisher relationship and aid in making data driven decision by publishers.

Notably, Longhorn Publishers and Kenya Literature Bureau have their eBook stores where consumers can buy their eBooks directly from the publishers' websites. Additionally, Longhorn Publishers also has a digital distribution platform to enable access of digital products by consumers. This is a great stride towards digital book publishing that can be applauded.

2.5.1.3 Adoption of digital products

Ebook market in Kenya is still in its embryonic stage. There has been a slow adoption of eBooks and other digital products despite the fact that digital publishing has been an ongoing wave in Kenya's book publishing industry for close to a decade (Brown & Heavner, 2018). According to Namande (2012), as quoted by Brown and Heavner (2018), the slow adoption may be as a result of challenges that limit access to eBook and other digital products by consumers. These challenges include: low Internet connectivity, low purchasing power of eReading devices, low levels of ICT literacy and concerns over information security.

Brown and Heavner (2018) also note that book publishers are having challenges in identifying a market for digital products. Publishers are confused on how they should market their digital products. Most of them are marketing the digital products directly to schools, just the way they market print books. This marketing strategy has proven difficult for digital products hence publishers has resulted to mention about digital products only when a customer show interest. This could also be contributing to the low adoption of digital products as publishers may not be creating enough awareness about their digital offerings. This situation has, however, changed with Covid 19 pandemic as book publishers were left with no other option but to publicize their digital offerings since all academic institutions were closed hence they could not visit these institutions to market and sell their print books.

In Kenya, private schools and institutions are the main customers for eBooks and other digital products offered by book publishers (Brown & Heavner, 2018). Publishers also get sales from international markets through eRetailers.

2.5.1.4 Government initiatives to promote digital book publishing

The Government of Kenya seeks to integrate ICT in education and training as part of its vision 2030 (The Ministry of Education, 2006). It is for this reason that the National ICT Strategy for Education and Training and Information Communications Technology in Education and Training Policy were developed in 2006 and 2014 respectively. The two documents identify the development

of digital educational content, improving infrastructure, connectivity and Internet access across the education system and capacity building for teachers as key areas that will enable the integration of ICT in education (Ministry of Education, 2014; The Ministry of Education, 2006). From our definition of digital book publishing, it is evident that these initiatives will promote the creation, distribution and access of digital products if well implemented.

2.5.2 Opportunities and advantages of digital book publishing

According to House (2013), digital book publishing has major opportunities to book publishers. He cites the ability for book publishers to reach a wider audience for their products while in digital format as compared to print format as one of the major opportunities of digital book publishing (House, 2013). As observed with most, if not all book publishers across the world, the move towards digital book publishing starts by first digitizing the print book hence having the same book in different formats which serves a wide range of target consumers. Digital products can be accessed by consumers from anywhere at any time.

To book publishers, digital book publishing is actually a new revenue stream as it serves not only the local market but also international markets in the digital market place. This translates to an increase in sales and revenue by publishers. However, Atwell (2009) is quick to mention that at the initial stages, the increased revenue is not directly proportional to profit because the initial cost of setting up a digital publishing system may outweigh the sales of eBooks and other digital products (Attwell, 2009). Since digital products are new products in the book publishing market, they are expected to take time before they can achieve full consumers' approval and acceptance just like other products. Book publishers should, therefore, be patient with the new market niche and not expect as much profits in the initial stages. However, when the market niche grows in size and scope, the profits will definitely grow. As Gaigher (2012) rightly puts it, digital book publishings potential for greater profits as consumers continue to get used to digital products hence an increased demand for the same (Gaigher, 2012).

In regard to supply chain, digital book publishing offers a shorter supply chain which is to the advantage of both the publisher and the consumer. Unlike in the traditional book publishing business where a consumer could hardly procure a printed book directly from the publisher but

had to buy from a bookseller, digital book publishing provides a direct channel of distribution from the publisher to the consumer. As mentioned earlier, a consumer can purchase digital products or access these products on subscription basis directly from the publisher. To agree to this discourse, Gaigher, Roux and Bothma (2014) say that, “the opportunities and advantages inherent in a move to a digital publishing process relate mainly to the shortened supply chain that would result from digitization” (Gaigher, Roux , & Bothma, 2014, p.12).

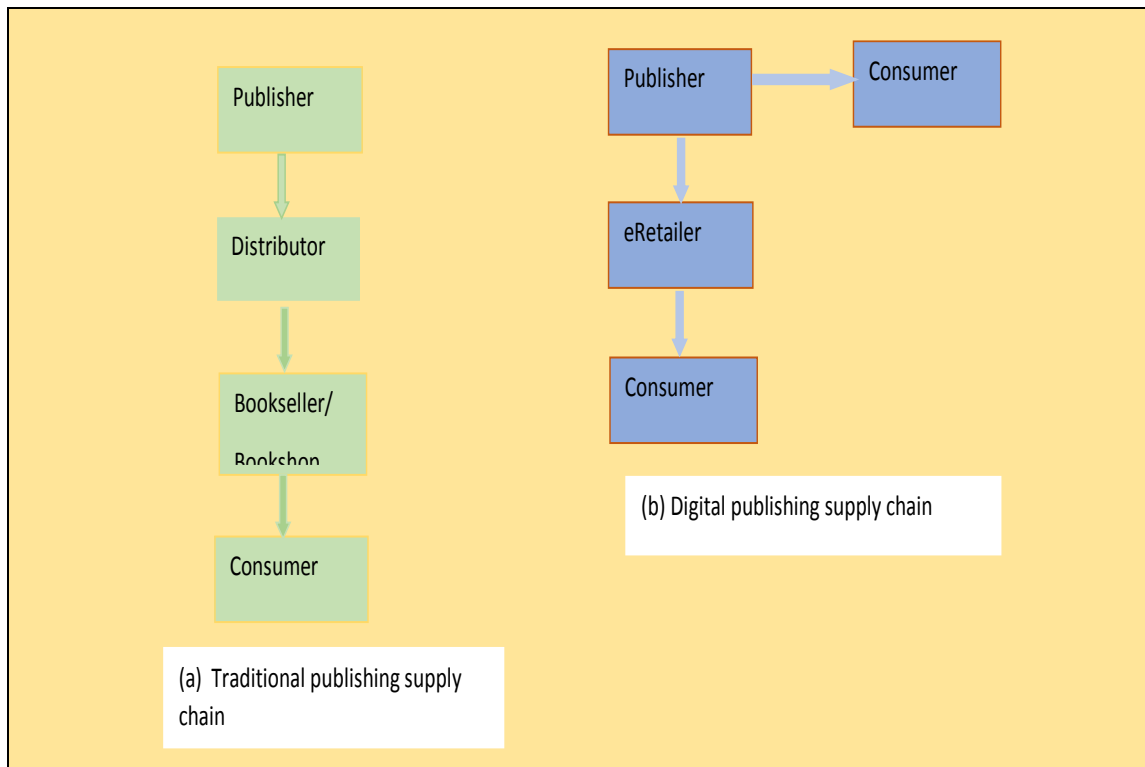


Figure 2.4 A comparison between traditional publishing supply chain and digital publishing supply chain

Digital book publishing also saves publishers costs such as warehousing and physical distribution of books that are related to printed books (Gaigher, 2012). Publishers often suffer from growing level stocks that eventually become deadstock. This increases the cost of warehousing, consequently increasing a publisher’s overheads. Given that digital products are stored and distributed in electronic form, this saves publishers warehousing and physical distribution costs.

It is apparent that digital products are not taken to the press for printing since they are consumed electronically. This lowers the cost of production since a publisher does not incur printing cost. A lower supply chain also contributes to low cost of production. Additionally, once a digital product has been availed on the World Wide Web by a publisher, the same file can be accessed by as many consumers as possible and for the longest time. This is unlike printed books which can go out of stock hence keep on attracting reprinting cost. The fact that digital products are available for consumers to access anytime, anywhere is a great advantage to publishers who struggle to deal with out of stock issues.

In regard to the time spent to produce or update a digital book, House (2013) notes that it takes less time to develop or update a digital book and make it available to the consumer compared to the time taken for a printed book to be available to the consumer (House, 2013). The delays to make available printed books to the end user are more often than not caused during the printing process. You realise that most book publishers do not own printing press, they instead outsource this service. Notably, in Kenya, only KLB owns a printing press; although it does not have the capacity to print all her books and other educational materials hence KLB also outsource for this service where need be. The reliance on outsourced printing services is a major cause of delay since publishers must fit into the printer's schedule. Conversely, once a digital file is ready, it is deemed ready for distribution to the consumers without much delays.

Updating of digital books, on the other hand, is equally faster. Ideally, publishers should ensure that their books whether in digital or in print are up-to-date. However, this is not always the case for print books since publishers always avoid having dead stock. Consequently, most print books may remain outdated for a period of time as publishers buy time to ensure that all the printed copies have been sold out before they can update and print revised editions of a book. Digital book publishing, on the other hand, allows publishers to update their digital books and other digital products anytime there is a need and with a lot of ease.

Consumers are always excited by new, attractive and interesting products. Digital book publishing allows publishers to explore new levels of creativity, flexibility and interactivity of content (Attwell, 2009). This enables publishers to provide consumers with new interesting

products in various formats and with a variety of exciting features. For instance, the use of multimedia improves digital products hence making them more captivating.

While protection of intellectual property rights is still an uphill task for book publishers both in traditional publishing and digital publishing, digital rights management is making it a little easier for publishers to have control over their content (Bammel, 2017). This may reduce the rate of piracy as compared to traditional book publishing where publishers have barely no way to protect themselves from piracy. Sometimes, Kenyan educational publishers experience piracy even before a book get to the market. This explains the risk that outsourced printing services expose publishers to. It increases chances for piracy because publishers must share files for camera ready copies with the printer. If these copies fall into the hands of an employee who does not observe printers work ethics, such people can easily pirate books. Accusing printers for book piracy is not a Kenya case but a phenomenon that is experienced by publishers in other countries. For instance, in Nigeria, (Udeze & Uche, 2014) points out that it is common for publishers to accuse printers and book sellers for piracy.

Digital book publishing also helps publishers to avoid risks related to theft and damage of printed books (Gaigher, Roux , & Bothma, 2014). In fact, it would make more financial sense for a publisher to release a digital book first and only print copies on demand. This would save the company such risks and also the risk of depreciation.

Finally, it is possible to track, monitor and predict consumer habits and buying patterns in digital book publishing (Attwell, 2009). Online platforms used by publishers to distribute content are able to give data on how consumers are accessing the provided content hence publishers are able to make data driven decision in the production and improvement of their products. Since these platforms connects publishers and consumers directly, publishers can also include a way in which they can get feedback directly from the consumers for continuous improvement of their offerings to the end users. This actually strengthens research and development in publishing firms to the advantage of the publisher.

2.5.3 Challenges and disadvantages of digital book publishing

Gordon, Kung and Dyck (2008) as quoted by Gaigher (2012) state that, “for a traditional publishing company to change into an electronic publisher demands a huge reorganization and investment” (Gaigher, 2012, p. 159). This is the main challenge book publishers are facing in regard to transition to digital book publishing as all the initiatives available for them in their move towards digital book publishing; right from the cost of digitizing already existing books to employing digital platforms that can allow for electronic distribution of digital content, are capital intensive.

It is costly to transition from traditional to digital book publishing. The initial cost of acquiring a digital platform for distribution of digital books and other resources is quite high. Digitization of books also attracts a high cost as most book publishers outsource for this service. Capacity building is also required to ensure that relevant staff are equipped with necessary skill to handle digital book publishing. “Other expenses are related to digital archiving and development of systems” (Gaigher, Roux , & Bothma, 2014, p.67). Additionally, new systems are required for archiving and distributing digital books and other digital products. This means that in readiness for the transition from traditional publishing to digital publishing, book publishers should deliberately allocate adequate resources. This, to some extent, explains why publishers the move to digital publishing by publishers across the world have been gradual (Gaigher, 2012).

Another challenge in the digital book publishing sphere is related to digital rights management. In as much as DRM measures taken by publishers are helping them to prevent piracy and copyright violation, some of the measures limit the way digital books are consumed (Burk , 2001). For instance, some publishers use territorial rights which only makes digital books and other digital products only available in certain territories (regions in the world or countries). This means that consumers outside the set territory cannot access the digital products.

Although eReaders allows consumers to carry and read thousands of books in one single device (Hviid, Jacques, & Sanchez, 2017), the lack of a standard eReader poses a challenge to them. Despite the fact that eReaders have been in the market for quite some time, the book publishing industry is yet to discover an eReader that will make it convenient and affordable to the consumers in terms of access to eBooks and other digital products. Like Mierzejewska (2008) puts

it, “the book publishing industry needs a device that does for eBooks what iPod did for music; that is, to make eBooks and other digital products easily accessible and completely portable” (Mierzejewska, 2008, p.102). You realize that the existing eReaders, for example, the kindle, are yet to be affordable and user friendly enough hence discouraging consumers from using them. As it is, a specific eReader can only support a particular format of eBook; for instance, a kindle can only be used to read eBooks in Mobi format. This means that consumers require more than one eBook readers to help them access ebooks that have different formats.

The existence of different eBook formats is another challenge on its own. It limits book consumers on what to read since they must consider the compatibility of their eReaders or other digital devices with the available eBook formats. As mentioned earlier, Herther (2005), as quoted by Gaigher (2012) notes that each eReading device comes with its corresponding eBook format. In order to make well informed choices on the best choice of eBook formats to adopt and reading devices that can support their eBook formats of choice, publishers need to invest in research and development in order to understand their user needs and capabilities.

Pricing of eBooks is always a dilemma for publishers. This is as a result of trying to balance consumers’ expectation on the price of eBooks (they argue that eBooks should be cheaper than their print version or even given to them free of charge) and the cost of digitizing the books. Gaigher, Roux and Bothma (2014) notes lack of a standard pricing model in digital book publishing brings confusion to both the publisher and the consumers. To overcome this challenge, book publishers should try to come up with a standard pricing model that not only meets consumers’ expectations in regard to pricing of eBooks but also takes care of their margins considering the cost of digitizing books and providing other digital products.

Lastly, book consumers are still struggling with nostalgia for print (Gaigher, 2012). Consumers still hold dear the experience of reading printed books. They still enjoy perusing pages. Considering limitations that come with eReading experience, consumers might just prefer to use print books instead of their electronic version. Clark (2008) cites this as one of the major barriers to the adoption of eBooks and other digital products hence contributing to the gradual adoption of digital book publishing by publishers (Clark, Goodwin, & Coker, 2008).

2.6 Trends in digital book publishing

This section discusses the trends in digital book publishing across the world. These trends include eBooks, digital audio books, self-publishing, digital content creation and digital distribution channels.

2.6.1 eBooks

(Rao, 2004) defines an eBook as a book text converted into digital form for reading on a screen. A similar definition of an eBook is that by Zubac and Tominac (2014) who define it as, “a digital version of the traditional printed book” (Zubac & Tominac, 2014, pg.127). They further note that the content of an eBook is distributed from the publisher to the consumer (end user) through the Internet or it can be made physically available on an electronic medium, for example, a CD. To be able to access and read the content of an eBook, the consumer may use an eBook reader, personal computer, smartphone, tablet or a tablet. The working definition of an eBook in this study is, ‘a book published in electronic format that can be accessed over the Internet and read on the screen’. This definition stands not only for printed books that are converted to electronic or digital versions but also eBooks that are published as digital versions first. eBooks come in different formats which include PDF, Epub, Mobi, AZW, AZW3 and IBA.

In their effort to embrace digital book publishing, book publishers start by digitizing titles in their frontlist and back list. It is only recently when Pearson Publishers – one of the leaders in the book publishing industry globally according to industry reports – introduced ‘digital first’ strategy. According to this strategy, the publisher releases the digital version of their books first before the printed book; in fact, their plan is to only print books on demand. The idea of digitizing printed books as a way of starting off digital book publishing is backed by McILroy (2015) who notes that in the United states, book publishers got into digital book publishing by digitizing the existing textbooks and putting them online in order to observe consumer behaviour towards digital books before they could engage in digital book publishing full throttle.

Gilbert (2015) posit that eBooks are not new since they have been in existence since 1971 when Gutenberg launched a project that aimed at creating a digital library of books. He, however notes that before the launch of Amazon Kindle in 2007, eBooks occupied a very small niche in the book publishing industry. The Kindle, was introduced in the book market as a result of the Internet.

It offered consumers with a comfortable reading experience and offered them Amazon's inventory of books which they could download and read at the comfort of their homes. As mentioned earlier, other eReaders have emerged making the access of eBooks even much easier. The growth in eReaders increased the sales of eBooks and the number of eBooks available in the book market (Hviid, Jacques, & Sanchez, 2017). According to Bergström et al (2017):

After influencing many other media such as newspapers, television and films, digitization has reached the book, which, in its printed form, has been unchallenged for almost five centuries. The eBook has, after a rather short period, become established in most countries (pg.13).

The observation by Bergström et al (2017) that the eBook market has become established in most countries shows that technological advancements and domestication of technology are influencing book consumers' acceptance and use of eBooks. In fact, "the e-book market continues to grow as a global phenomenon" (Bergström et al 2017, pg.14). They seem to be gaining momentum in the market with consumers citing a number of advantages that eBooks have over printed books. First, eBooks have interactive features thus improving a consumer's experience. Such features include "search and cross reference functions, hypertext links, bookmarks, annotations, highlights, multimedia objects and interactive tools" (Vasileiou and Rowley, 2008, p.19). Lamb (2011) further notes that although some eBooks have linear content just like a printed book, others:

"Contain additional tools, such as highlighters, dictionaries, virtual bookmarks, and note-taking tools. Search tools allow readers to easily locate words and passages. Some e-book readers give users control over screen resolution, text and background color, font size, and display orientation. In some cases, users can even insert or remove text, mark up pages, add comments, insert notes, attach files, and record audio to e-books. Enhanced e-books for the iPad, iPhone, and other multimedia devices contain multimodal features such as images, web links, and embedded media – within the linear text. These media elements have been particularly popular in nonfiction books. Increasingly, audio and video are integrated into books with a movie tie-in" (Pg. 13)

The additional features on eBooks gives them a value proposition and makes them more attractive to consumers. Second, eBooks are also easily accessible since a consumer can access them from any part of the world at any time as long as they have a digital device and Internet connectivity. They are also portable and gives consumers a chance to carry as many eBooks as possible so long as their device memory can allow. This is unlike physical books which are bulky. This study will reveal whether or not the Kenyan eBook market is already established and if consumers have embraced the use of eBooks.

2.6.2 Electronic reading platforms

The emergence of digital textbooks can be traced back in the mid-1990 when publishers started distributing digital versions of printed textbooks using CDs as the medium of delivery (Fernandes, 2012). For e-textbooks to be used in schools, it meant that schools had to invest in computers to help teachers and learners access the content (e-textbooks) saved in CR-ROM format. Due to technological advancements, a manifestation of digital devices, platforms and user behaviour have been witnessed in the last decade up to until present. This has and is still changing the way books are accessed and consumed. Bradley and Bartlett (2012) note that eBooks and electronic content, software interface – where the eBooks and e-content is downloaded from; for example, mobile Apps and websites) – and hardware – these include eBook readers, tablets, computers and smartphones – have created an entirely new platform that has been transforming the book publishing industry and may be considered a point of no return. Here, Bradley & Bartlett (2012) is referring to three concepts that publishers regularly mix up; these are – the resource, the platform and the device. It is important to make it clear that the resource refers to eBooks and e-content, the platform is the software interface that present eBooks and e-content to end users and mediate the interaction while the device is the physical medium that help to access the platforms and resources. Notably, it is not possible to discuss about the digital reading platforms without talking about the resources and devices since the three enhances the user experience hence impact on digital book publishing. Some of the prominent digital platforms by book publishers, their characteristics and features are shown in Table 2.1. The information presented in Table 2.1 is important to Kenyan

educational publishers at the point of developing or making a decision to acquire a platform for the distribution of their eBooks and e-content.

Table 2.1 Some of the prominent digital platforms by book publishers, their characteristics and features (Borrowed from Fernande, (2012))

| Platform name | Description | Basic features | Unique features | Device availability | Cost |
|---------------------------|---|---|---|-------------------------------------|--------------------------------------|
| Apple iBooks 2 | A free application to Apple iPad tablet, that uses multi-touch gestures to navigate. | Highlighting; note-taking; “study cards” | Videos; 3D animations; interactive illustrations | iPad | Access to free and paid textbooks |
| Barnes & Noble NOOK Study | NOOK Study is a free application, directed toward students and instructors, which delivers eBooks and e-textbooks, compiling all the study materials in one location. | Highlighting; note-taking; color tags | Dual book view; “questions” to instructors; “word look up” | Web; PC; Mac; iPad; iPhone; Android | Access to free and paid textbooks |
| CafeScribe | Offers a digital shop to buy digital textbooks but the most valuable feature is the reader application that works online and offline. | Highlighting; bookmark; note-taking | Allows to create reading communities | Web; PC; Mac; iPad; Android | Access to free and paid textbooks |
| Cengage MindTap | A cloud based solution designed for students and educators in higher education institutions. It allows them to access their learning from anywhere on any device. | Highlighting; bookmark; note-taking; “flashcards” | Google Docs integration; learning platform (students and instructors) | PC; Mac; iPad | Paid access; Demo version by request |
| Cengage YouBook | An intelligent online bookstore and digital learning center that provides students a way to buy, rent or access textbooks, | Highlighting; bookmark; note-taking | Students: discussion board; instant messaging. Instructors: embedding | Web; PC; Mac; iPad | Paid Access |

| | | | | | |
|--------------------|--|---|--|-----------------------------------|---|
| | “eChapters” (product from Cengage that is basically a way to access/buy chapters from books), e-textbooks and study tools. It can be used also in mobile devices and students can access content also in an offline mode. | | videos; changing text passages | | |
| CourseSmart | A platform for students and instructors that has a collection of e-textbooks and digital course materials and has implemented HTML5 for offline technology for e-textbooks. | Highlighting; bookmark; note-taking | Students: Side-by-side; zooming. Instructors: edit offline | Web; PC; Mac; iPad | Paid Access |
| Dynamic Books | A platform directed to instructors and students and accessible for online or offline using VitalSource Bookshelf reader application. | Highlighting; bookmark; note-taking | Students: online tests. Instructors: add animation, audio and video | Web; PC; Mac; iPad; iPhone | Paid Access; two- week demo |
| Ingram VitalSource | Offers a wide pack of platforms: Bookshelf (e-textbook platform); vPage (ebook application); vLessons (e-whiteboard applications development); and FLOE (Flexible Learning Object Editor to create HTML5 learning objects based on XML). VitalSource Bookshelf platform is distributed either in | Highlighting; bookmark; note-taking | Read-aloud (vPage); search options by words and/or pictures (Bookshelf) | Web; PC; Mac; iPad; Android | Free (Bookshelf) |

| | | | | | |
|------------------------------|---|---|---------------------------------|-----------------------------|---|
| | desktop, or online and mobile versions. | | | | |
| McGraw-Hill Create & Connect | Has two different platforms: Create and Connect. <i>Connect</i> is a digital learning platform for the higher education market accessible on personal computers and mobile devices. It connects students and professors to a range of engaging interactive content in a personalized model where students have individualized learning plans. Tests, quizzes and chapter books are all related along with images, videos and other interactive content. Instructors can track each student and classroom visual reports. and can provide early intervention to students who are at risk of failing. <i>Create</i> is self-service platform that provides instructors to create custom course materials, as digital textbooks, combining various types of resources. | Digital learning platform: tests; quizzes; videos | | Web Trial 21 days (Connect) | Free access under registration (Create) |
| Pearson MyLab | MyLab is a platform from Pearson publisher, described as a free platform for | Highlighting; bookmark; note-taking | Text-to-speech; LMS integration | Web; PC; Mac | Access to free and paid textbooks |

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|--|---|--|--|--|--|
| | educators and students that enables personalized learning and improves results. | | | | |
|--|---|--|--|--|--|

It is also important to note that eBook formats are read on different eBook readers such as Amazon Kindle, Kobo eReader and Barnes and Nobel Nook. As mentioned earlier, the growth in eReaders increased the sales of eBooks and the number of eBooks available in the book market (Hviid, Jacques, & Sanchez, 2017). This means that book consumers are getting comfortable with the use of Ebook readers and embracing new reading experiences which is as a result of technological revolution hence an increased sales of eBooks.

In order to secure the future of their businesses, book publishers across the world have little choice to make over whether to embrace new publishing technologies such as electronic reading platforms or not. The finding of this study will help us have a grasp of what Kenyan education publishers have done to adopt to these technologies. A survey that was conducted in the United Kingdom revealed that about 80% of the publishers used their websites as the software interface where their customers could download their eBooks (Department of Trade and Industry, 2002).

2.6.3 Audiobooks

An audiobook can be defined as a digital recording of a book (Allmang, 2009). The narrator reads aloud the content of the book for the consumer hence it is also known as ‘a talking book’. Audiobooks are not very popular with consumers as they are still a small niche in the book publishing market. This is confirmed by Lee (2020) who notes that “audiobooks are still a relatively small segment of the book publishing market when compared with print and e-books”. According to Lee (2020), audiobooks come third in the book publishing market after print books and eBooks. In terms of audiobooks market, US is the leading audiobooks market followed by China; these two countries actually make up about 75% of the global audiobooks market (Ibid).

Historically, audiobooks have been associated with children, the visually impaired and people with dyslexia. People considered audiobooks as compensatory to help such people overcome their inability to read books. Pedersen and Have (2012) note that this is no longer the case as the emergence of digital audio media and portable computerized sources has made it possible for people to download and stream audiobooks from the Internet hence making

audiobooks more appealing to new and broader user groups. Notably, when audio books first came to the book publishing scene, cassettes and compact disks were used as the primary media; this has changed with time as digital audiobooks can now be accessed through the Internet.

The Internet and other technological advancement have led to a significant growth of audiobooks for the past five years. In fact, according to Lee (2020) audiobooks have taken the publishing industry by storm. A number of book publishing industry reports reveal that book publishers are embracing audiobooks production as a way of adopting to the changes in the book publishing industry as a result of technological advancement. According to a sales survey that was conducted by US Audio Publishers Association, there was a notable increasing trend of the number of audiobooks published by book publishers between 2014 and 2018 as shown in Figure 2.5 (Audio Publishers Association, 2018).

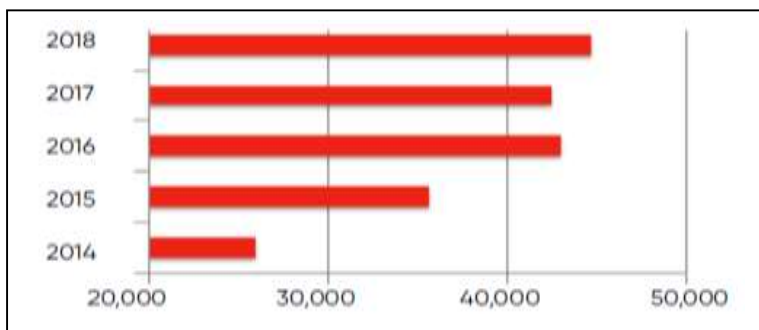


Figure 2.5 Audiobooks titles published in the US between 2014-2018 (Source: 2018 APA Sales Survey Data from Management Practice Inc)

“Growth in titles is not just a US phenomenon but has been mirrored globally” (Lee, 2020, p.3). This statement by Lee (2020) has been supported by a number of industry reports. For instance, a survey that was carried out by Livres Canada in 2018 confirmed that the number of audiobooks titles published globally has been skyrocketing with book publishers not only converting their frontlist titles into audio format but also the titles in their backlist (Cobb & Desrosiers, 2018). This shows that audiobooks are gaining popularity with consumers with time. This can be attributed to domestication of technology that is allowing consumers to take advantage of digital devices at their comfort. This has allowed consumers to listen to audiobooks even when they are engaged with other activities in their homes that do not require their full attention. They are also able to listen to audiobooks when commuting. To support this argument, Lee (2020) notes that changes

in consumer habits in the way they access and listen to audiobooks has fueled the growth of audiobooks.

Advances in technology has also contributed to the growth in audiobooks. Notably, digital devices such as smartphones, smartwatches, smart speakers and other connected devices have made it easy for people to integrate audiobooks with their lifestyles more than ever before (Lee, 2020). The use of these digital devices is allowing consumers to have new listening opportunities and experiences in new environments. They are now able to multitask while listening to audiobooks hence giving them an opportunity to ‘read’ more books. To put more emphasis, Lee (2020) quotes Amanda D’Acierno, the President and Publisher at Penguin Random House audio Publishing group who says that:

“Digital technologies, from iPods, to smartphones, tablets, and smart speakers, have allowed audiobooks to reach anyone, anywhere, at any time. As more listeners adopted the audio format, they formed new habits that went beyond the traditional use case of listening on their commutes and road trips: audiobook devotees can and do listen while doing the dishes, folding the laundry, working on a craft project, running on the treadmill or to wind down before bed ” (Pg.5).

Another trend that has been experienced in the audiobooks market in past decade is the wave of new digital distributors (Lee, 2020). Although Audible.com, which was founded in 1995 has dominated the distribution market of audiobooks, other audiobook distributors have been launched for the past few year. These include: Bookbeat, Scribd, Storytel, Kobo, Playster, Napster and Nextory. Having a wide variety of audiobooks ditributors has broadened the consumer reach of audiobooks making them more popular. The new digital distributors have led to new sales model, while Audio.com used the doownload model, the latter introduced subscription streaming services (Lee, 2020). In Germany, a digital distributor known as Zebralution offers book publishers the chance to increase their revenue by placing their audiobooks at the heart of music streaming services. This makes the audiobooks avails audiobooks and makes them easily accessible on various online platforms. Consumers are more comfortable with streaming audiobooks than downloading them since with streaming, the file is not saved in the device memory hence

consumers are not limited by the storage space in their devices hence they can access more audiobooks as compared to downloading model which is limited by a device's storage space.

Another trend that is making audiobooks more accessible to consumers is spreading them to online music streaming platforms such as Apple Music, YouTube, Spotify, Deezer, Tencent and Tidal (Lee, 2020). These sites were previously targeting music listeners and podcast listeners but with time, they are capturing audiobooks consumers. A report by Zebratulations revealed that more than two million music streaming subscribers were playing audiobooks (Dyussebayeva, 2020). This approach to distribution of audiobooks may increase the revenue of a publishing firm since subscribers are guaranteed and the online music streaming platforma are tried and tested.

2.6.4 Self-publishing

For the longest time, publishers have always been the link between authors and consumers (Hviid, Jacques, & Sanchez, 2017). As mentioned earlier, the publishing process starts with the writing phase whose end product is a manuscript. The author then approaches a publisher to have their works published. However, some of the manuscripts end up being rejected by publishers since the latter act as the gate keepers to decide on what should be published. This decision is based on the financial viability of the manuscript. This is no longer the case as the advent of the Internet has changed this as authors are now able to avail their content directly to the consumer through self-publishing. Self-publishing has been enhanced by the emergence of eBooks and eBook readers.

With self-publishing services, authors by-pass publishers hence making it possible for them to avail their books (in print or digital version) faster (Hviid, Jacques, & Sanchez, 2017). Understandably, publishers take longer to publish a manuscript because: first the publishers is serving many authors and could be having many projects at any given time. Second, the manuscript must be evaluated (this stage takes a considerably longer time) to determine if the manuscript is fit for publication and the time taken by the manuscript at various stages of book development. With this in mind, it is true to say that self-publishing has the advantage of speed to market compared to traditional publishing. It also offers authors greater freedom, control and pricing of their book. You realize that in traditional book publishing, much as the book belongs to the author, book editors interfere with the content as they are improving on the manuscript. The designers too, have a say when it comes to the book design and presentation of content in a book. This denies an

author full control and freedom over their final product which makes self-publishing more appealing to authors. Notwithstanding, traditional publishing has its advantages over self-publishing. This is because publishers have the financial ability and experience to produce, promote and distribute books.

The Internet has led to the emergence of internet-based services which have made self-publishing a viable choice for authors. To start with, eRetailers such as Amazon and Barnes and Nobel provide authors with self-publishing platforms which gives them direct access to the consumers. Amazon's self-publishing platform is called Kindle Direct Publishing (KDP) while that by Barnes and Nobel is called Barnes and Nobel Press (Kim, 2020). Secondly, there are a number of intermediaries who have entered the book publishing market over the last 10 years and are offering services to authors to help them to convert a manuscript into an eBook (or even a printed book on print-on-demand basis). Such intermediaries also offer software and support to enable the author to publish the eBooks themselves (Hviid, Jacques, & Sanchez, 2017).

2.7 Changes in consumer behaviour

2.7.1 E-learning in primary and secondary schools

Kiilu defines e-learning as a purposeful use of electronic systems to support the teaching and learning process (Kiilu, 2012). The current trends in education in both developed and developing countries stresses the need to integrate ICT to the teaching and learning process in primary and secondary education systems (Hubalovska, 2014). It would make no sense to talk about digital publishing without talking about e-learning; reason being, educational publishers develop books for use in schools. Therefore, any changes and advancement in the education sector including e-learning definitely affect educational publishing.

Digital advancements have of course had an impact on teachers and learners as, just like any other person, they are living in a digital environment. If their needs change, it would mean that educational publishers reinvent new ways to satisfy their end user needs. There is no other way to satisfy a need for e-learning materials in schools that just actively producing digital textbooks and other learning materials to be used in schools.

By virtue of being key stakeholders in education, educational publishers have a vital role in supporting e-learning. Advantages of digital publishing in education include access of e-Textbooks and other digital learning materials quickly. One accesses an eBook or any other learning materials almost instantly after purchasing it. Additionally, eBooks are interactive and accommodates a lot of features such as sound, movies, animations and hyperlinks which enhance learning. They also encourage self-learning as a learner can navigate easily through the eBooks because of its interactivity.

Compared to print books, eBooks are much cheaper. They also come with other options of for instance buying the eBook only for a specific period of time or just buying the section of a book that one is need of therefore making it even cheaper for the learner to access learning materials. Lastly, eBooks allows learners to carry with them and access many books anywhere since eBook readers accommodates several titles.

2.8 Theoretical framework

This study used Everett Rodgers diffusion of innovation theory and the theory of disruptive technology.

2.8.1 Diffusion of innovation theory

The theory of diffusion of technology was developed in 1962 and it explains how and why innovations are adopted over a period (Al-Jabri & Sohail, 2012). It focuses on factors that determine the adoption of innovation by members of a group. This research proposes to employ this theory to investigate the educational publishers' adoption of digital publishing in the textbook market in Kenya.

In *Diffusion of Innovations, 5th Edition*, Rodgers identifies five attributes of innovations that determine the rate at which innovations are adopted. They include relative advantage, compatibility, complexity, trialability and observability. This study adopts and applies Rodgers' procedure of adopting innovation to explain the adoption of digital publishing in the Kenyan textbook market.



Figure 2.1 Factors that determine the adoption of digital book publishing

(Rodgers, 2003) defines relative advantage as, “the degree to which an innovation is perceived as better than the idea it supersedes.” Since book publishers are in business, it is very vital for them to consider the relative advantage of digital publishing over traditional publishing (producing books in print format). As noted earlier on, digital publishing offers book publishers many advantages, among them: reduced cost of production, distribution and storage, expanding the market for their products within and outside the country, consumers can access eBooks anytime, anywhere and increased sales and profitability. Relative advantage will increase the rate of adoption of digital publishing in the textbook market in Kenya.

“Compatibility is the degree to which an innovation is perceived as being compatible with existing values, past experiences and the needs of potential adopters.” In order for book publishers to be convinced to adopt digital publishing, this innovation should work well in terms of book development, distribution and reading.

Sanson (2004) further notes that in order to increase chances of adoption of innovation, the new idea must address an issue that the adopters perceive to be a problem. For instance, in the publishing industry, digital publishing should be able to address the issue on piracy which has been

a main challenge to all publishers worldwide. This study will reveal the uptake of digital publishing amongst Kenyan educational publishers hence help to assess the compatibility of this innovation in the publishing industry.

The third attribute is complexity which refers to the degree to which an innovation is considered difficult to use and understand (Rodgers, 2003). If an innovation is complex, the adopters take long to embrace it. On the contrary, if it is easy to use and understand, there will be a high uptake level of the innovation. In digital book publishing context, the complexity or ease of use and understanding can be viewed in terms of the way books are developed, distributed and read. Previous literature in this study indicates that digital publishing makes the process of book development and distribution easier and efficient. Also, it is easier for end users to acquire, store and carry many eBooks as opposed to print books.

The issue of trialability is very important for every new innovation. If an innovation does not give room for it to be tested and modified by the potential adopters, then adopters may take much longer to embrace it. This is because, positive results after testing an innovation gives potential adopters confidence to embrace it. On the other hand, if testing results are negative, the potential adopter finds out ways the innovation can be modified so that it can work well for them.

According to McILroy, educational publishers in the United States started by first digitizing the existing textbooks and putting them online in order to test if the idea of digital publishing would work (McILroy, 2015). This involved converting the textbooks in print format to PDF. Digitizing existing titles saves publishers time and resources that they would have otherwise used when developing eBooks from scratch. This study will reveal if Kenyan educational publishers have tested digital publishing and if it is working for them. Book publishers' experience with digitizing titles that exist in print format first helps them to make informed decisions on the level to which they can embrace digital publishing.

Finally, Rodgers notes that for potential adopters to easily be persuaded to embrace a new idea, the innovation must be observable. That is, its results must be visible to others. For instance, for Kenyan educational publishers to be convinced that digital publishing will offer them great opportunities not only within the country but also outside the country, they must have witnessed its benefits to other publishers across the world. As McILroy notes, "The year-to-year increase in sales of eBooks in the US encouraged observers to invest in eBook market." Meaning, book

publishers who had reservations on digital publishing found out that those who embraced it were benefiting from it to a great extent. Having learnt from others, they followed suit to also reap the benefits of digital publishing.

The element of observability results to differences in the uptake levels of any innovation by potential adopters. Diffusion of innovation theory recognizes that not all individuals or groups adopt a new idea at the same time and rate. This may be the case of Kenyan educational publishers. According to (Rodgers, 2003) these categories include innovators, early adopters, early majority, late majority and laggards.

Innovators are eager to try out new ideas. This is driven by their imaginations of the possible benefits they are likely to get from the innovation. Only a few individual or groups belong to this category. Early adopters, on the other hand, wait to see if the innovation will work for the innovators. They only adopt the new idea if it turns out to be effective for the innovators.

The rate of adoption of innovation increases with time and this leads to the category of early majority in which most individuals or groups adopt to the new idea after observing the benefits the innovators and early adopters are enjoying from the innovation. Those who had reservations about the innovation but eventually implements it belong to this category (Rodgers, 2003).

The late majority are those who are very doubtful about the innovation and only get to adopt it after the early majority while the laggards drag behind others. Such individuals or groups are conservative and very skeptical of change and only embrace innovation when pressurized by other adopters. Rodgers theory of diffusion of innovation will therefore help the researcher to place the case publisher into the adopter category which the publisher belongs to.

2.8.2 The theory of disruptive innovation

The theory of disruptive innovation was advanced by Clayton Christensen in 1997 in his book *The Innovator's Dilemma: When New Technologies Cause Great Firms to Fail*. This theory is relevant to this study because it considers digital book publishing as a disruptive technology in the book publishing industry. The theory of disruptive innovation is one of the most popular theories for explaining the predicament of the incumbent firms facing a disruptive technology. The theory sets out to analyze how companies cope with technology disruption (Lucas & Goh, 2009). This study

will reveal whether or not Kenyan book publishers perceive digital book publishing as a disruptive technology and what they are doing in order to cope with the new technology. Note that this study uses the terms ‘disruptive innovation’ and ‘disruptive technology’ interchangeably.

Although Christensen argues that large established firms struggle to adopt and integrate new technologies while entrants are able to invest in such technologies and flourish, critics disagree with him. Yu & Hang (2010) argues that, “disruptive innovation does not always imply that entrants or emerging business will replace the incumbents or traditional business; it does not imply that disruptors are necessarily start-ups” (Yu & Hang, 2010, pg. 439). Since disruptive technologies first serve a small niche market that is less profitable, it is possible for an established firm to ignore it and concentrate on the mainstream market that is more profitable. This gives a chance to the entrants to invest in any new technology in that industry. However, this does not mean that established firms cannot take the role of disruptors.

Incumbents can actually take advantage of their accumulated transformational experience from the past and be the first ones to invest in the new technologies. In fact, they also have stronger financial muscles to invest as compared to entrants. This notwithstanding, incumbent firms find it difficult to invest adequate resources in disruptive technologies since they have lower profits and the fact that at the very initial stages, their customers have not embraced the products created as a result of disruptive technologies. In most instances, incumbents only start embracing these new technologies when their customers want them; which is unfortunately too late (Christensen, 1997).

To avoid this, Christensen advises that established firms should consider setting up an autonomous organization or business unit charged with building a new and independent business around the disruptive technology. This is meant to free of the power of the customers in the mainstream market and establish a different set of customers; those who want the products of the disruptive technology. Through this study, we will be able to know if incumbents in the Kenyan publishing industry are struggling to adopt to digital book publishing or they have taken the role of disruptors. We will also get to understand the strategies they have put in place in preparation for the technological disruption. The findings of the study will also reveal if there are new entrants in the industry and have a glimpse of what they are doing in regard to digital book publishing.

Disruptive technologies bring to the market a very different value proposition than what the customers are used to (Christensen, 1997). Digital book publishing has enabled publishers to

produce and distribute books in digital formats that consumers can easily access using their digital devices such as smartphones, laptops, tablets, ipads and even digital televisions. This innovation has also improved the book in terms of features that are available to the consumers hence making ebooks more attractive to the end users as compared to the printed book. Such features include read aloud features and interactive elements; ebooks can be embedded with audios, videos and external links hence enriching the content in the books. Consumers are also able access ebooks anytime and anywhere making it more convinient for them. Despite the attractive features brought about by the new technology, Christesen further nothes that, during the initial stages of the technology's development, its performance underperforms established products in the mainstream market. This study will reveal how products of digital book publishing are performing in the market compared to printed books.

Another element that Christensen (1997) highlights in regard to disruptive technologies is the likelihood for firms to put a lot of effort in the new technology so as to provide better products than their competitors hence end up giving consumers more than they need or are willing to pay for. This will establish the strategies that Kenyan educational publishers have put into place in order to respond to digital book publishing. Publishers will give information on the extent to which consumers have embraced the use of eBooks and digital content in the market.

Since disruptive technologies penetrate the market from niche to mainstream (Yu & Hang, 2010), incumbent firms prefer using a 'wait and watch' approach so that they start investing in these technologies once their mainstream customers have embraced products of these technologies. They justify such kind of an approach as not being a rational financial decision for the company because first, the disruptive products are simpler and cheaper hence lower margins; second, disruptive technologies are first commercialized in emerging or insignificant markets and finally because at the initial stages, mainstream customers are yet to embrace disruptive technologies products. More often than not, the 'wait and watch' approach leads to the failure of established firms in the future when eventually the products of disruptive technology become popular with customers and other industry players have penetrated in the market. This study will establish if Kenyan educational publishers have fully embraced digital book publishing as a disruptive technology or they have decided to 'wait and watch'.

CHAPTER THREE

RESEARCH METHODOLOGY

3.1 Overview

Research methodology is an operational framework within which facts are placed so that their meaning may be seen more clearly (Khamadi, 1991). This chapter, therefore, provides a roadmap of how the researcher collected data in order to answer the research questions and achieve its objectives. It describes the research design, research approach, research methods, population and sampling and data collection and analysis of the study. It also outlines the ethical considerations that the researcher observed during the study. Simply put, the chapter aims at helping the researcher to explain the how of the study.

3.2. Research design

This section presents an advance plan of the methods adopted for the collection of relevant data as well as the techniques that were used in data analysis, keeping in mind the objective of the study. Creswell and Clark (2007) defines a research design as the ‘procedures for collecting, analyzing, interpreting and reporting data in research studies’ (pg. 58). Put another way, the research design is a plan that shows the procedure on the required data, the methods that will be applied in collecting and analyzing this data, and how all of this is going to answer the research question (Grey, 2014) as quoted by (Boru, 2018). In other words, a research design is a blueprint that a researcher uses to make crucial decisions in regard to the kind of data that needs to be collected, where it will be collected, when, by what means, how much it will cost and how this data will be analysed.

There are four types of research design based on the purpose of the research; these include exploratory, descriptive, explanatory and experimental (Robson, 2002). This study used descriptive research design. According to Best and Kahn (2014), “a descriptive study describes and interprets what is. It is concerned with conditions or relationships that exists, opinions that are held, processes that are ongoing, effects that are evident or trends that are developing. It is primarily concerned with the present, although it often considers past events and influences as they

relate to the current conditions” (Best & Kahn, 2014, pg. 118). With this in mind, this study describes digital book publishing, expounds on: the trends in digital book publishing sphere, digital products and platforms that are as a result of ongoing processes, the effects of digital book publishing on Kenyan educational publishers and how publishers perceive the future of digital book publishing.

Descriptive research design is used to study the current situation and aims at identifying and explaining the characteristics, frequencies, trends and categories of the situation under study (Akhtar, 2016). This study explores the current state of digital book publishing in Kenya and how Kenyan educational publishers are responding to the technological revolution in the book publishing industry and also to the shifting customer demands as a result of domestication of technology.

3.3 Research approach

This study used qualitative research approach which Williams (2007) refers to as, “a holistic research that involves discovery (Williams, 2007, p. 67). Indeed, the study involves finding out the current situation in the digital book publishing arena in regard to: current trends, government policies influencing digital book publishing and Kenyan book publishing business environment with regard to digital book publishing. In support of the argument by Brikci and Green (2007) that in qualitative research, the researcher and their reader are able to have a deeper understanding of the issue at hand (Brikci & Green , 2007), it is true that the literature reviewed especially on digital book publishing across the world together with the findings of this study provide empirical knowledge and important insights to the reader. This will enhance the reader’s understanding of digital book publishing.

Qualitative research approach is based on inductive rather than deductive reasoning (Williams, 2007). This means that the research starts with observations and moves backwards to generalizations and theories as opposed to starting with a hypothesis which needs to be tested to see if it is true. To support this, Leedy and Ormrod (2000) states that in qualitative research, there is no established assumptions from which research can begin (Leedy & Ormrod, 2000). As you must have already realized, the researcher has not highlighted any assumptions to the study in chapter one, instead data was first collected and analysed after which a general conclusion was drawn on trends in digital book publishing among education publishers in Kenya and the book

publishing business environment based on the data collected from Longhorn Publishers. Also, conclusions on how government policies are influencing digital book publishing were drawn from the analysis of specific government policies affecting book publishing in Kenya.

Zegeye et al. (2009) notes that sometimes data collected from qualitative research may be subjected to less rigorous quantitative treatment provided the goal is to look for meaning (Zegeye, Worku, Tefera, Getu, & Sileshi, 2009). As you will notice in chapter four, some of the data that was collected has been presented in form of numbers and figures as opposed to words as expected in qualitative research. The researcher has done this in an effort to give more meaning to the current trends in digital book publishing.

3.4 Research method

There are several research methods that are recommended in conducting qualitative research. These include, case studies, ethnographies, content analysis, grounded theory and phenomenological (Williams, 2007). This study used case study method as described below.

3.4.1 Case study research method

A case study, is a form of qualitative research which involves an in-depth examination of one or more individuals (Zegeye, Worku, Tefera, Getu, & Sileshi, 2009). In a case study a single case or a small number of units are subjected into an intensive study in order to shed light on members of the population (Gerring, 2007). In this study, a single case was studied; that is, Longhorn publishers to help in understanding the trends of digital book publishing among educational book publishers in Kenya and the book publishing industry business environment. The researcher chose Longhorn Publishers since it is listed by the Nairobi Stock Exchange (NSE) hence its annual reports are available in the public domain, therefore, the required data for the study will be readily available. Further, this selection was inspired by the fact that most of the information contained in a company's annual financial reports is considered as top secret and, therefore, these are the best documents to gather crucial information related to the topic of study. Many publishers would not reveal such information.

Case studies are more appropriate when, “there is need to learn more about a little known or poorly understood situation” (Leedy & Ormrod, 2000, p. 149). This explains why the research settled for case study method. As noted in chapter one, although digital book publishing has been a topic of interest for over 30 years, little research has been undertaken on this topic hence little

empirical knowledge that book publishers can rely on. This inadequacy has resulted to book publishers and the general public knowing little or having a poor understanding of digital book publishing and related issues.

The intensiveness and comprehensive nature of case study method comes in handy in providing insight on the topic under study. Although there is little known about digital book publishing and the fact that it is relatively a new concept in Kenya despite its debates being in the global book industry space for more than three decades, the literature review and the comprehensive findings of this study will help publishers and general public gain a deeper understanding of the same.

3.5 Population and sampling

3.5.1 Population

According to Mugenda and Mugenda (2003), a population is an entire group of individuals, events or objects having a common observable characteristic. Since this study focuses on educational book publishers in Kenya, all the educational book publishers that are registered with KPA forms the population of the study. Notice that KPA has registered other categories of publishers, for example trade publishers, Christian publishers and academic publishers but the study narrows down to only educational book publishers since members of a population must have common characteristics and the fact that the researcher was only interested in this category of publishers.

Marczyk, DeMatteo, and Festinger (2005) define a population in simpler terms, “The population is all individuals of interest to the researcher” (Pg.18). It is so far clear that in this study, the researcher was interested in not just book publishers but all the educational book publishers in Kenya hence making the target population for this study.

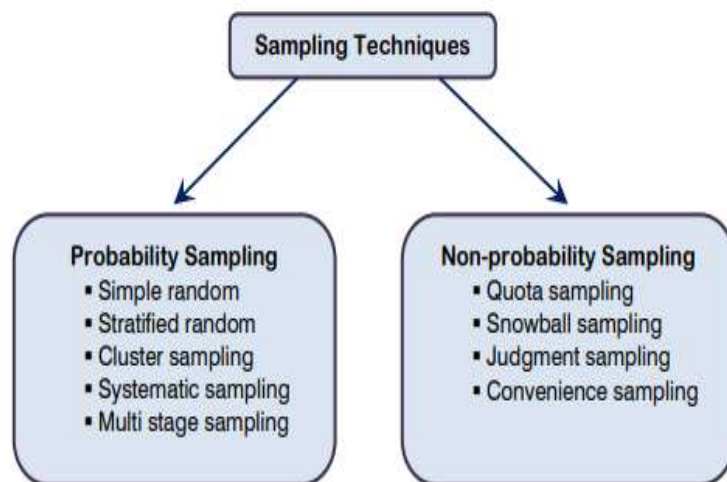
3.5.1 Sampling

More often than not, researchers are not able to study the entire population because of different factors, for instance, limitation in time available for the study (Marczyk, DeMatteo, & Festinger, 2005). They, therefore, have to make a decision to study a subset or subgroup of the population in a process referred to as sampling. Sampling involves selecting a sample from the population (Mugenda & Mugenda, 2003). A sample is defined as a subset or subgroup of a population. As

noted further by (Marczyk, DeMatteo, & Festinger, 2005) studying a sample allows a researcher to draw valid inferences about the population. This means that if something is true about a sample, it is probable true of the population. In our case, the findings of this study drawn from the sample and as recorded in Chapter Four are likely to be the findings from the other members of the population.

As earlier on indicated in section 3.4.1, the researcher selected Longhorn Publishers out of the 15 educational publishers registered by KPA as the case sample. This decision was informed by Taherdoost (2016) who argues that it is not a must for a sample of cases or participants to be representative but there must be a clear rationale behind the inclusion of some cases or participants in the sample rather than others. The rationale for selecting Longhorn Publishers is clearly explained in section 3.4.1.

One may ask the criteria that was used to reach at this decision. Well, in research, a researcher has to choose a sampling technique that will be used in the study. According to Taherdoost (2016), sampling techniques can be broadly categorized into probability (random) sampling or non-probability (non-random) sampling. These two broad categories of sampling techniques are further divided into various types of sampling techniques as shown in Figure 3.1 below.



*Figure 3.1 Various types of sampling techniques
(Borrowed from (Taherdoost, 2016))*

In probability sampling, all the cases or items in the population have an equal chance of being chosen as a sample while in non-probability sampling, other factors other than random chance are considered (Taherdoost, 2016). This means that non-probability sampling is biased in nature since cases or items that make up the target population are not given an equal chance to be studied. Taherdoost, (2016) notes further that non-random sampling is best suited for qualitative research and case study research. Up to this point, it is now clear that the researcher used non-probability sampling technique. Specifically, this study used judgement or purposive sampling to arrive at Longhorn publishers as the case sample.

Maxwell (1996) as quoted by Taherdoost, (2016) states that, “Purposive or judgemental sampling is a strategy in which particular settings, persons or events are selected deliberately in order to provide important information that cannot be obtained from other choices” (Pg.23). Since educational book publishers are in competition, it would have been hard for any of them to provide crucial information that they may deem as classified to the researcher. However, this information was easy to access from Longhorn Publisher’s financial statements. Other strengths associated with this type of sampling technique is that it is low cost, convenient and not time consuming. However, as Malhotra and Birks (2006) as quoted by Taherdoost, (2016) states, purposive sampling maybe subjective and does not allow generalization. This may not be entirely true for this study since the choice of the sample case was objective. However, the researcher may not guarantee that the findings of this study can be generalized to the entire target population; as earlier on indicated, the findings are only likely to be true for the other members of the population.

3.6 Data collection method

Ong’ondo and Jwan (2020) state that data in qualitative research is made up mainly of words and some will exist in written form. The data collected in this study was made up of both words (in oral form as participants spoke them) and written form (from the specific documents that were reviewed). To collect relevant data, the researcher used qualitative data collection methods which included document analysis and interviews as explained herein.

3.6.1 Document analysis

Document analysis involves a systematic procedure that aims at reviewing or evaluating printed or electronic documents (Bowen, 2009). Citing Bassey (1999), Ong’ondo and Jwan (2020) posit

that documents are important sources of data in case study research. Documents are also deemed as potential sources of empirical data for case studies that help the researcher to uncover meaning, develop understanding and discover insights relevant to the research problem (Mills, Bonner, & Francis, 2006). Documents that were reviewed and evaluated in this study include: Longhorn Publishers annual reports for the years 2013 – 2020 to gather relevant information on trends in digital books publishing and relevant government policies that provided data on how government policies are influencing digital book publishing.

The major advantage of using document analysis in this study was that the researcher was able to access information that would not be possible to get in any other way since any book publisher would categorize it as company's classified information. For instance, some of the information available in Longhorn Publisher's annual reports could be treated as the company's top secrets but since the company is listed by NSE, this information is made available to the public in their annual reports.

Data that emanate from the review and evaluation of documents in qualitative research requires to be examined and interpreted so as to give it meaning, gain a deeper understanding and develop empirical knowledge (Corbin & Strauss, 1998). After reviewing documents, it is important for a researcher to take time to understand what the information collected from the documents means in relation to the topic of study and how it helps achieve the objectives of the study. The researcher then interprets and presents this information in a way that a reader can understand; this is undertaken during data analysis and interpretation stage of a research. Chapter 4 of this research report presents the findings of the study and discusses them to make out meaning out of the information collected from various documents; this has been presented in a way that the reader will understand.

As Bowen (2009) rightly puts it, "Document analysis is often used in combination with other qualitative research methods as a means of triangulation" (Bowen, 2009, p. 28). This means that the researcher uses more than one sources of evidence to seek convergence and collaboration by using different sources of data and methods. Apart from analysing documents, this study also employed the use of semi-structured interviews as a data collection method. This was important because some of the information contained in the documents suggested some issues that needed to be clarified by the relevant people as part of the research.

3.6.2 Interviews

Interviews are a qualitative method of research that are used to gather relevant information from people about anything (MacDonald & Headlam, 2011). To define an interview, Jwan and Ong'ondo (2020) citing Cohen et al (2007, pg. 269) defines it as a method of data collection that, “involves gathering data through direct verbal interactions between individuals” (pg. 134). For an interview to be used in order to collect data, there must be an interviewer – the person seeking to collect data or the researcher – and an interviewee – the person providing the information or a participant. The researcher has to get the right people from whom they will get the information which they seek to find. Once the right participants are identified, the researcher makes appropriate arrangements to engage the participants verbally during an interview. Note that the interviews can be conducted face-to-face, on the telephone or virtually.

Interviews are an essential and practicable method of data collection when dealing with individual case studies (Gillham, 2000). He further adds that interviews are used when: the number of expected participants is small, the participants are easily accessible and not widely dispersed, the participants are ‘key’ and the researcher cannot afford to lose any, and the interview questions are open and, “requires an extended response with prompts and probes from the researcher to clarify the answers” (pg.62). This explains the reason why the researcher preferred interviews to collect data for this study. The number of participants was quite small as only three people from Longhorn Publishers were involved. These are the people that the researcher deemed as key informants and could not have afforded to lose them because of their practical knowledge and understanding of different aspects of digital book publishing – that is, development, distribution and marketing of digital publishing products. The research questions were also open and the researcher required to interrogate further in order to get much more information and clarify answers from the participants; this could not have been achieved using any other data collection method.

Jwan and Ong'ondo (2020) argue that interviews on their own may not offer adequate information and, therefore, it is important for a researcher to employ other methods of data collection in order to supplement interviews. Some of the reasons why interviews need to be supported by data from other sources may include inaccuracy of information from the participants

and sometimes, the researcher's biasness. To take care of this, the researcher analyzed Longhorn's financial statements in order to gather more information and supplement the one collected from participants.

There are three types of research interviews; structured, semi-structured and unstructured interviews. In structured interviews, a list of predetermined questions are asked to the participants with no room for further interrogations or further follow-up questions to responses given. It is for this reason that Gill et al (2008) refer them to as 'verbally administered questionnaires. Unstructured interviews require little or no organization hence referred to as informal interviews (Gill, Stewart, Treasure , & Chadwick, 2008). The lack of organization in terms of having a list of questions to act as a guide on what to talk about during the interview makes unstructured interviews difficult to manage and participate in. Semi-structured interviews, on the other hand, "consist of several key questions that help to define the area to be explored but also allows the interviewer and the interviewee to diverge in order to pursue an idea or response in more detail" (Gill, Stewart, Treasure , & Chadwick, 2008, p. 291) in semi-structured interviews, both the researcher and the participant enjoys the flexibility to explore more information about the topic of study since they have the freedom to seek further elaboration. This gives helps a researcher to gather as much information as possible about the topic of study in an organized manner. In order to enable the researcher explore the full breadth of the topic at hand, the study used semi-structured interviews.

3.6.2.1 Semi-structured interviews

According to Nunan (1992) as cited by Jwan and Ong'ondo (2020):

"In a semi-structured interview, the interviewer has a general idea of where he or she wants the interview to go and what should come out of it but does not enter the interview with a list of predetermined questions. Topic and issues rather than questions determine the course of the interviews..." (pg135).

In view of the above, the researcher chose to conduct semi-structured interviews as opposed to structured or unstructured interviews. Having gathered significantly enough knowledge on the topic of study through the review of relevant literature, the researcher had a general idea of the direction she wanted the interview to take and the expected results. She wanted to be able to manage the interview process in an organized way while giving room for elaborations and further

probes on responses from herself and the interviewee. In order to guide what to talk about during the interview, a list of topics and issues as opposed to pre-determined questions was prepared (see appendix 1) thus making it easy for the interviewer to manage the interview and the interviewee to participate.

As stated earlier, in semi-structured interviews, the researcher and the participants have the freedom to diverge in pursuit of a better understanding or clarity of a response or question asked. They, therefore, discuss in detail issues and topics arising during the interview and are not tied to any predetermined format or set of questions. This is exactly what the researcher and the participants enjoyed during the interviews scheduled for this study. To support the choice of use of semi-structured interviews, Jwan and Ong'ondo (2020) posit that this type of interviews is the most preferred in qualitative research since it helps the researcher gather as much information from participants as possible hence have a better understanding of the topic of study.

3.7 Data collection

Data collection took place between July and September 2020. This means that the findings of this study are as at September 2020. The two sources of data that the researcher relied on were key informants from Longhorn Publishers and documents (Longhorn financial statements for 2013 – 2020 financial years and government policies relevant to the topic of study which include: National Textbook Policy (June 1998), National ICT Strategy for Education and Training (2006) and Information Communications Technology in Education and Training Policy (2014). For each of these data sources, a specific research tool was prepared to aid in data collection.

3.7.1 Documents

In order to collect information that would help to achieve objective two on how government policies are influencing digital publishing; The National Textbook Policy (June 1998), National Information, Communications and Technology (ICT) Policy (2019), National Information and Communication Technology (ICT) Strategy for Education and Training (2006) were reviewed and analysed. First, the research prepared a document analysis guide that was used as a guide during data collection and helped the researcher to record relevant information collected. In the document analysis guide, the researcher included the date during which particular documents were read and

reviewed and recorded all the information relevant to the study. A template document analysis guide is provided in the appendices (see Appendix 2).

3.7.2 Key informants

According to Kumar (1989) an interview that involves key informants is one where individuals who are likely to provide needed information, ideas and insights on a particular subject are selected. The researcher can use their own judgement to select potential key informants that they deem vital in providing useful data for the study (Brikci & Green , 2007). To kick off data collection process and following the suggestion by Brikci and Green (2007), the researcher identified three key informants from Longhorn Publishers to be interviewed with an aim to understand the trends in digital book publishing amongst educational publishers in Kenya and also the business environment in relation to digital book publishing. The selection of these three people was informed by the roles they play in digital book publishing. These participants were drawn from Publishing, IT and Product Development Department and Marketing departments; their names and positions are, however, withheld for ethical purposes.

After the selection of key informants, the researcher requested for an interview appointment with them. This was done through the email and followed up by a telephone calls. The researcher also prepared an interview schedule (see a template interview schedule at the end of this report; Appendix 1) that was used as the research tool to aid in data collection. However, it is important to note that the actual interviews did not follow any predetermined pattern of questions or themes listed in the interview schedule but rather issues were addressed as they emerged in the interview. This means that the interview schedule was only used as a guide. The questions in the interview schedule were open ended and general in nature. However, they were formulated in a way that they led to a more intense discussion with the interviewee. Another important point to note is that the initial plan was to have a face-to-face interviews, however, due to Covid-19 pandemic, the interviews had to be conducted virtually via Zoom platform.

3.7 Data analysis and presentation

This study used thematic approach of data analysis. Thematic analysis looks into all the data to identify themes or common issues that recurs (Brikci & Green, 2007). The researcher first read through the data collected while giving explanations or comments. Next, themes were identified

to help in grouping related data together. The third step involved developing a coding scheme. This is a list of all themes and the codes that applied to the data. Lastly, the researcher applied the codes to the whole set of data. Once this was done, the researcher proceeded to the next stage of data interpretation which has been done in a narrative form in this research report.

3.8 Ethical considerations

In their book *Business Research Methods*, Bryman and Bell (2011) outline principles of ethical consideration that a researcher should endeavour to observe. In this study, the researcher observed a number of these principles. To start with, the researcher informed the targeted key informants of the purpose of the study and how the findings will be used. This enabled the participants to make an informed consent (Bryman & Bell , 2011). Second, the participation was voluntary, in that, the participant was given the freedom to withdraw from the participation anytime without affecting future interactions with the researcher.

The researcher also ensured that she declared her affiliation with the publishing industry in Kenya. As Bryman and Bell (2011) note, the researcher should declare their affiliations in any forms, sources of funding, as well as any possible conflicts of interests. This was important because it helped the participants to make an informed decision on whether or not they would want to be involved. Again, the participants would not feel cheated in the event that they learn about the interviewer's affiliations. Additionally, this was meant to enhance the participants' trust in the researcher as a result of her honesty and also want to share their experience since they have something in common and could actually learn from each other's experiences in regard to the study.

On confidentiality, the researcher handled the data with utmost confidentiality and only used it for the purpose of this study as promised to the participants. Lastly, the researcher protected her sources by proper use of anonymity.

CHAPTER FOUR

FINDINGS AND DISCUSSION

4.1 Overview

This Chapter presents the findings of the study after a thorough data collection was undertaken between July and September 2020. As mentioned in Chapter Three, data was collected using unstructured interviews and document analysis methods. As Ong'ondo and Jwan (2020) notes, “presentation of findings entails explaining to the reader in a narrative, accessible way what the researcher found out in relation to what they set out to do” (pg.205). In this study, the researcher explains in a narrative way what she found out in relation to the objectives of the study, guided by the research questions posed at the beginning of the study.

This study uses thematic style of data presentation. As noted by Dornyei (2007), one of the advantages of using thematic data presentation style is that the reader is given the whole picture of the research findings at once and therefore they are not left to collate the findings for themselves. The researcher has carefully put together data collected from document analysis and interviews and presented it in an organized way. Although (Stake, 2010) cites the tendency to over-simplify findings while using thematic style, the researcher was careful not to do this.

The chapter merges discussion with findings; this approach to discussion of findings is referred to as embedded discussion style (Ong'ondo & Jwan, 2020). This is where the researcher presents the findings on different themes and discuss them in the same section. The advantage of using this style of discussing findings is that the researcher discusses the findings while they are still fresh on their mind and the reader's mind. It also helps the reader not to lose track when reading the discussion since specific issues arising from the findings are discussed immediately after the findings are presented. Additionally, the chapter brings out the relationship between the theoretical framework cited in Chapter 2 and the findings clearly.

It is paramount to mention that although the study was qualitative in nature, some of the data presented herein (for example, in Figures 5.1, 5.2, 5.3 and 5.4; the percentage of Longhorn's digitized products are in form of numbers and figures as opposed to words as expected in a qualitative study. As mentioned in Chapter Three, data collected from qualitative research may be subjected to less rigorous quantitative treatment provided the goal is to look for meaning (Zegeye, Worku, Tefera, Getu, & Sileshi, 2009). You will, therefore, realize that the sole reason

such data has been presented in numbers and figures form is in pursuit of meaning hence a better understanding of the issue being discussed.

4.2 Profile of the case study publisher

As mentioned in Chapter three, this study used Longhorn Publishers as the case study. Longhorn Publishers Plc is an educational publishing firm in Kenya and is publicly listed by Nairobi Securities Exchange. The company was founded in 1965 as Longman Kenya Limited. In the 1980s, Longman UK sold its shareholding to Kenyans and the company's name changed to Longhorn Kenya Ltd. Later, in 2013, the company name changed to Longhorn Publishers Limited.

The company has grown its dominance in the publishing industry and has established its presence throughout the African region. Longhorn Publishers operates established subsidiaries in Kenya, Uganda, Rwanda and Tanzania. It has further expanded its operations through establishment of distributor partnerships in Zambia, Malawi, South Sudan, Cameroon, Namibia and Senegal.

4.3 Digital book publishing at Longhorn Publishers

4.3.1 The inception of digital book publishing at Longhorn

On realizing that digital publishing is a major disruption to the traditional book publishing business, Longhorn Publishers embarked on the journey towards digital books publishing in 2015. This clearly shows that Longhorn Publishers did not fall into the first two traps cited by Shoemaker and Day (2000) that firms get into when faced with uncertainty about the eventual success of a disruptive technology as discussed in Chapter 1. The fact that the Publisher made a stance to venture into digital book publishing shows that the company overcame the first trap of delayed participation where a company decides to 'wait and see' if the technology will prevail. Also, Longhorn avoided getting into the second trap of sticking to the familiar where firms faced with a technological disruption decided to stick to what they know, in this case traditional book publishing. Instead, much as the digital sphere was unfamiliar to book publishers in Kenya and there were and still are a lot of uncertainties around digital book publishing, Longhorn decided to take the bull by the horns and embraced it.

As Rodgers (2003) suggests in the diffusion of innovation theory, not all individuals or groups adopt a new idea at the same time and rate. This is the case of Kenyan educational publishers since Book publishing in Kenya industry reports reveal that Longhorn Publishers was the first to venture into digital book publishing and continues to make great strides in the digital sphere. Longhorn can therefore, be categorized as an innovator as innovators are eager to try out new ideas. This is driven by their imaginations of the possible benefits they are likely to get from the innovation (Rodgers 2003).

4.3.2 The critical milestone of digital book publishing at Longhorn Publishers

Longhorn Publishers 2018 financial report reveal that in 2015, the company launched Longhorn digital platforms and mobile applications (Kamusi Android applications) to distribute digital products to the consumers. “This was crucial since by this time, the company had ready digital products that needed to reach the target customers electronically. This content was initially distributed using compact disks (CDs) which was not convenient and this technology was being overtaken by technological advancements in the industry” (Key informant 2). The report further reveals that since then, Longhorn has made great strides in digital book publishing. Through intensive market research, Longhorn has noticed that the demand for digital content is growing significantly hence the, “the company has made significant investments in digital publishing and is keen to ensure that the end user is provided with relevant and high quality materials” (Longhorn Publishers Plc, 2018, pg.14).

According to the company’s financial reports, Longhorn is one of the leading publishing firms in digital book publishing. As noted by the Group Managing Director, “The Company is currently in a race to be the leading provider of innovative learning solutions in Africa” (Longhorn Publishers Plc, 2019). So far, the company has grown its digital offerings. Its two digital distribution platforms (Longhorn eLearning platform and Longhorn eBookstore) enable consumers to access the company’s eBooks and other digital products. Longhorn has also partnered with digital partners and eRetailers who distribute and sell the company’s digital products and learning solutions. Some of these partners include Amazon, Worldreader, eKitabu, and Mymlango.

The 2019 Longhorn financial report further reveal that as at June 2019, the company had digitized over 60% of its products and was using the strategy of releasing physical books concurrently with their digital versions. This will help the company to have a continuous growth of its digital products. Longhorns digital products are availed in different formats which include: Epubs, interactive eBooks, audio books, video-animated stories and mobile applications. Figure 5.1 shows the number of Longhorn Publishers’ digital product types as at June 2019; although the data has been presented in form of numbers, this is meant to help the researcher show how far along the publisher had gone in the journey of digital publishing as at June 2019.

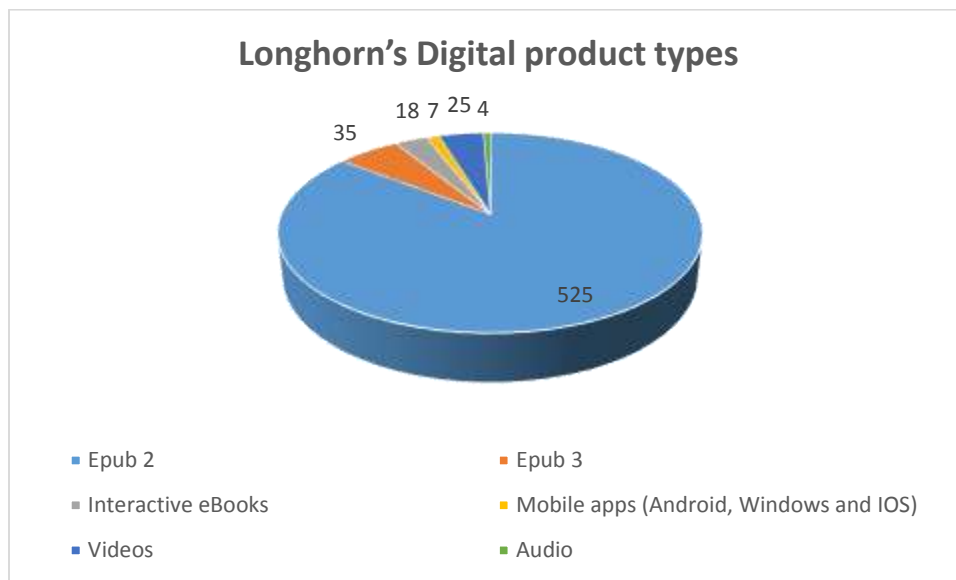


Figure 5.1 Number of Longhorn’s Digital product types as at June 2019

Apart from providing learning materials to support formal education, Longhorn introduced a new digital platform in August 2020 known as ‘Somo’ which supports learners and young adults to learn various skills from experts in their field of interest.

Launching the digital distribution channels and the efforts to provide digital products, which was quite expensive for the company shows that by this time, the company had done its market research and had a conviction that although digital publishing was a disruptive technology, that’s where the future of book publishing lies. Longhorn, therefore avoided falling into the last two traps cited by Shoemaker and Day (2000); that is, the reluctance for the firm to fully commit to the new technology and lack of persistence by firms. The company’s financial reports quoted above reveals that Longhorn has so far made significant investment in digital publishing and is

determined to be the leading digital book publisher not only in Kenya but also in Africa. This means that though there are still some uncertainties surrounding digital book publishing, the publisher still has its eyes fixed on the prize; that is, to reap the benefits of digital publishing. This is in fact, the true definition of innovators in Rodger's diffusion of innovation theory.

Although the theory of disruptive innovation by Christensen suggests that large established firms struggle to adopt and integrate new technologies while entrants are able to invest in such technologies and flourish, this has not been the case in the Kenyan educational publishing industry. The fact that Longhorn, is an established firm and made a decision to embrace digital book publishing and keep at it by allocating significant resources for its success proves Clayton's theory of disruptive innovation wrong. This is because according to this theory established firms tend to fail and are often overtaken by entrants when faced with a disruptive technology since such firms find it difficult to invest adequate resources in disruptive technologies because initially, products of disruptive technologies serve a niche market and are not profitable.

To answer a follow up question on what drives the company to risk its resources in digital publishing despite the industry players still deeming it as uncertain, Key informant 2 stated that, "Longhorn management envisions a digital future where consumers will demand for more and more of digital content as the world continue to undergo digital transformation across all aspects of life. The company management is, therefore, determined to secure the future of the company in the midst of digital revolution." Looking at this statement, Longhorn Publishers can be grouped in the innovators category of firms; this is a group of firms that according to Rodgers in his theory of diffusion of innovation that are driven by the imagination of possible benefits that a firm can reap from an innovation and are eager to try out new ideas. Clearly, Longhorn Publishers has been aligning itself over the years to reap the benefits of digital publishing and the management cannot imagine what would happen to the company if the future of book publishing indeed turns out to be digital.

4.3.3 The financial contribution of Longhorn digital products to the company revenue

Figure 5.2 presents data on how much the digital products contributed to the company's total revenue for the years between 2013 and 2018. Again, this data is inform of numbers and figures, not for quantitative analysis purposes but to help make meaning in terms of the performance of digital products in the market and understand customer behaviour towards digital products.

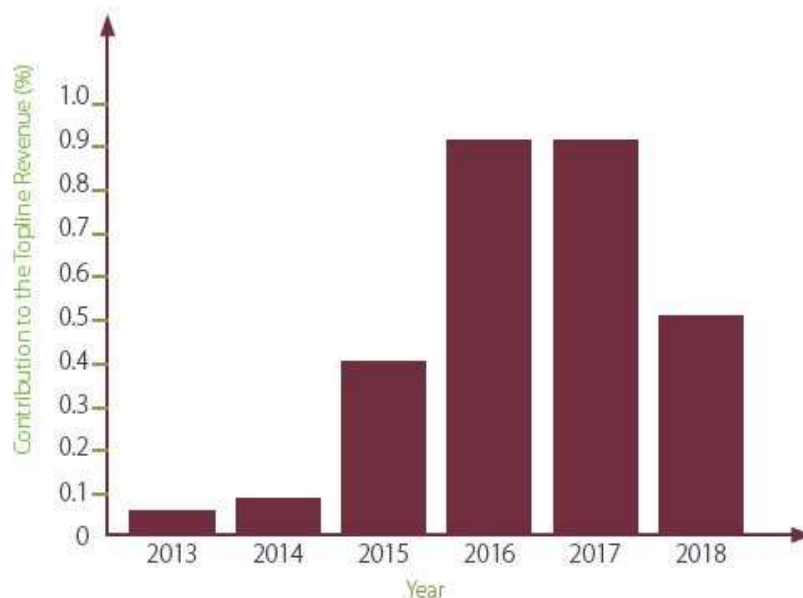


Figure 5.2 Contribution of digital products to the total company revenue (Longhorn Publishers Plc, 2019)

As Christensen (1997) argues, any disruptive technology serves a niche market at its initial stages but eventually displaces the current technology in the mainstream market. Looking at the contribution of digital products to the total company revenue as shown in Figure 5.2, it is true to say that digital publishing in Kenya is still in its initial stages since its contribution to the company’s total revenue for the given years was insignificant. However, it is noticeable that the performance of digital products was on upward trajectory from 2013 to 2017. This shows with time, customers were getting used to these products and probably enjoying their value proposition hence an increase in their reception and consumption. As Key informant 3 noted, “the consumption of Longhorn digital products highly increased in 2020 as a result of COVID 19 since most parents subscribed to Longhorn digital platform so that their children could continue accessing educational content at the comfort of their home since the schools had been closed indefinitely.”

Although Clayton suggests that with time, products of a disruptive technology eventually move from a niche market to mainstream market; the question on whether or not digital products will displace print books in the market and when this will happen is a question that time will answer.

4.4 Trends in digital book publishing in the Kenyan educational book publishing industry

4.4.1. eBooks

According to Longhorn Publishers 2019 financial report and as confirmed by Key informant 1, the company has digitized about 60% of its print books and has grown to a level where the print book is released concurrently with the physical book. Like other publishers across the world and as noted by McILroy (2015) book publishers get into digital book publishing by first digitizing their existing titles. Notably, this also applied to Kenyan book publishers. Although Longhorn is yet to digitize all the titles in its front and backlist, the fact that it has digitized 60% of these books and is now releasing printed books with their digital versions at concurrently shows how serious the company is in providing eBooks to its market. Although Key informant 3 noted that book consumers are still struggling to accept and embrace the use of eBooks especially in schools during the teaching and learning process, he was quick to add that the demand for eBooks is gradually increasing. This means that much as the market niche for eBooks is currently small, nobody knows about its future; that is, when the consumers will fully embrace and accept the use of eBooks. However, what is certain is that digital technologies will continue to influence not only the way books are published but also how they are consumed. In view of this, it is advisable that book publishers continue to prepare for the future however uncertain it may be by ensuring that most of their books if not all are available in digital formats. This will cover them from getting into a business pitfall that players in the music industry and Kodak got into when they were faced with disruptive technologies and failed to embrace them.

“Our eBooks are in different digital formats; that is, PDF, ePub2, ePub3, interactive eBooks and video animated stories. They are distributed through Longhorn eBook store which can be accessed through the company website, Longhorn mobile apps and through eRetailers’ platforms, that is; Amazon, Worldreader and eKitabu.” Key informant 2. When asked how the eBooks are accessed, Key informant three stated that book consumers can use computers, tablets, smartphones and Longhorn eReader app to access eBooks using the indicated platforms. Here, the three concepts that most publishers mix up according Fernandes, (2012) came out clearly; that is the resource (eBooks), the platforms (company website, Longhorn mobile apps and through

eRetailers' platforms) and the devices (computers, tablets, smartphones and Longhorn eReader app).

In regard to pricing eBooks, Key informant 1 noted that the company has a standard pricing model that sets the price of eBooks at 20-30% less than their counterpart print books. This shows that Kenyan educational publishers have overcome one of the major challenges that most book publishers struggle with across the globe; that is, the lack of a standard pricing model as noted by Gaigher, Roux and Bothman (2014).

4.4.2 Audiobooks

According to Longhorn Publishers Plc 2019 financial report, the company had four audiobooks as at June 2019. Key informant 1 further noted that plans to publish more audiobooks are underway.

In as much as Longhorn publishers have taken up the production of audio books as a way of adopting to the changes in the publishing industry, the number of audio books (four) that were available as at June 2019 reveal that audiobooks are still not popular with Kenyan educational publishers. This confirms what Lee (2020) says on still being a small niche in the book publishing market. Although Lee (2020) further notes that audiobooks has taken the publishing industry by storm and that there was a notable increasing trend of the number of audiobooks published by book publishers between the years 2014 and 2018, this was not been the case for Kenyan educational publishers within the same given period. This observation on the production of audiobook by Kenyan educational publishers does not also agree with Cobb and Desrosiers (2018) survey which revealed that as at 2018, audiobooks published globally were skyrocketing with book publishers not only converting their front list titles into audio format but also books in their backlist.

Following the research findings by Lee (2020) and Cobb and Desrosiers (2018) on the growth of the production of audiobooks and audiobooks markets globally, Kenyan educational publishers should take up the challenge and venture into audiobooks production since the global audiobooks market is ready and growing significantly. As noted by Lee (2020) who quotes Amanda D'Acierno, the President and Publisher at Penguin Random House Audio Publishing Group, digital technologies have made it possible for audiobooks to reach anyone, anywhere and at any time and that more and more consumers are forming new habits and adopting to listening

to audiobooks as they engage in other activities such as commuting, walking, doing laundry and working on a craft project among others.

4.4.3 Video animated stories

“The video animated stories are meant for young children” Key informant 2 said. He further noted that although Longhorn Publishers 2019 financial report indicates that the Publisher had developed 25 video animated stories as at June 2019, “development of more of such products is in the pipeline and they will be released in due course of time.”

4.4.4 Digital content creation

In pursuit of taking up the digital space in the publishing industry, Longhorn publishers has not only ventured into publishing digital books in form of eBooks and audiobooks but it has also gone far and beyond what other book publishers are offering in the digital space (Key Informant 1). Longhorn has borrowed a leaf from Pearson Publishers and McGraw-Hill who have digital learning platforms that offers digital content to educators and students. Pearson MyLab digital platform enables personalized learning and improves results while McGraw-Hill Connect and Create platform connects students and instructors to a range of engaging interactive content in a personalized model where students have individualized learning plans. Tests, quizzes and chapter books are all related along with images, videos and other interactive content (Fernandes, 2012).

According to Longhorn Publishers 2020 financial report, “Longhorn recognizes that the future of publishing lies in the provision of digital content using innovative user friendly channels” (pg.19). It is for this reason that the publisher, “established a digital publishing unit in 2016 and employed highly qualified and dedicated team to exclusively deal with the development and provision of comprehensive digital content for learners at primary and secondary school levels. This content include short notes, interactive e-learning content, assessments and equizzes (that are marked instantly, graded and provides instant marking guide explaining the answers)” Key informant 1 stated.

Longhorn Publishers 2020 financial report further reveal that the company is providing pre-recorded and live virtual classes to support learning and keep learners in Kenya and Tanzania engaged; an opportunity that Longhorn saw and decided to invest in as a result of closure of schools due to COVID 19 pandemic.

4.4.5 Electronic reading platforms

To answer a question on how customers access Longhorn digital products, Key informant 3 noted that the company has established digital distribution channels that enable consumers to access eBooks and other digital products. These include Longhorn eBook store, Longhorn eLearning platform, Longhorn mobile applications, dedicated USSD code and Somo. All these are software interfaces that enable book consumers to access digital books and content using various digital devices.

4.4.5.1 Longhorn eBook store

Longhorn eBook store is the largest digital library in the African region and allows consumers to access the publisher's eBooks (Longhorn Publishers Plc, 2019). Key informant 2 also added that, "the eBook store has been integrated with eLearning content, educational books, fiction and non-fiction materials for learners at all levels of learning and also general readership eBooks." This is a software interface that allows consumers to access resources via the company website using different devices.

4.4.5.2 Longhorn eLearning platform

"This digital platform has been developed to deliver specialized eLearning materials that are in various digital formats. The eLearning allows access to interactive educational content which include virtual classes that support learning through subscriptions. Learners are also able to take assessments and get real time results. The platform also provides graphical representation of a learner's performance and comprehensive progress reports. All these features aim at improving the consumers' experience with the platform and enjoy maximum utilization of Longhorn's digital platform. Figure 5.3 shows the subscriber base for Longhorn eBook store and eLearning platform.

Digital Platform and Subscriber Base



Figure 5.3 Subscriber base for Longhorn eBook store and eLearning platform as at June 2019

(Longhorn Publishers Plc, 2019)

The financial statement for the year that ended in June 2020, reveals that the subscriber base the eLearning platform had grown to 620, 600 subscribers. There was a huge growth in subscriptions between March to June 2020 which can be attributed to COVID 19 pandemic which led to the closure of schools hence a lot of learners were using the eLearning platform at home (Longhorn Publishers, 2020). This growth in subscriber base during the said period can be associated with domestication of technology in that since learners were not going to school during this period, they used technology to learn at the comfort of their home. They therefore had to look for learning solutions and platforms where they could access digital books and content. Luckily, Longhorn Publishers had made this available to them through Longhorn eLearning platform. This also shows an increased acceptance of use of digital books and content by end users hence an increased demand for the same; the trend will enhance the growth of digital book publishing in Kenya.

4.4.5.3 Mobile applications

On mobile applications as a software interface to allow access of digital books and content, Key informant 2 said, “we have developed seven mobile applications that can be supported by android, windows and IOS mobile phones. The most popular mobile apps are Kamusi ya Karne ya 21 app, Kamusi Kuu ya Kiswahili app, Longhorn eReader app and Longhorn eLearning platform app. The mobile apps can be downloaded from Google play store and Microsoft store.”

4.4.5.4 Dedicated USSD code

“In order to provide content on the go, Longhorn introduced a dedicated USSD code *864# in 2019. This enables consumers to access digital content through smart phones and feature phones”

Key informant 2.

4.4.5.5 Somo

In order to grow the company’s digital presence, Longhorn launched a digital platform dubbed ‘Somo’ in August 2020 (Longhorn Publishers, 2020). Key informant 2 noted that this platform is aimed at providing experiences that will help consumers to develop skills and passions that interest them. Its target audience is learners at different levels of learning and young adults.

4.4.6 Partnership with digital partners and e-Retailers

According to Longhorn 2019 financial report, the company relies on digital partners and e-Retailers to sell and distribution of the company’s eBooks and other digital products through their established platforms or devices. These digital partners include Samsung East Africa, myMlango and Kytabu among others while e-Retailers include Amazon, Worldreader and eKitabu. The growth in digital partners and e-Retailers is as shown in Figure 5.4.

Going by the growth in numbers of digital partners and e-Retailers as shown in Figure 5.4, it is true to say that Longhorn digital books and content are becoming more accessible and readily available to consumers.

Growth in Digital Partners/eRetailers

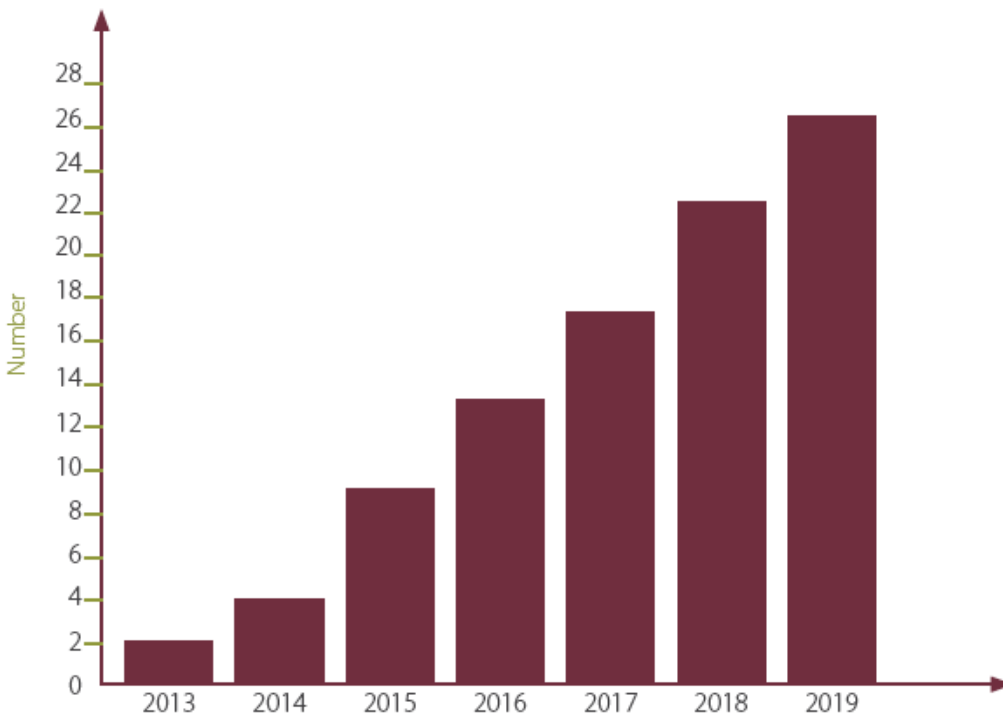


Figure 5.4 Growth in digital partners and e-Retailers (Longhorn Publishers Plc, 2019)

4.4.6.1 eBooks on Worldreader

Worldreader is a non-profit organization whose mission is to distribute digital books to children in third world countries; Kenya included. Longhorn has partnered with Worldreader to help in the distribution of the company's eBooks in Sub-Saharan Africa through World reader programmes.

4.4.6.2 eBooks on Amazon

Amazon has a global audience hence Longhorn has partnered with the organization to sell and distribute Longhorn eBooks. As at June 2019, Longhorn had more than 250 eBooks on the Amazon eBook store (Longhorn Publishers Plc, 2019).

4.4.6.3 eBooks on eKitabu

eKitabu is an East Africa's and global eBook store that allows consumers to buy, download and read eBooks through eKitabu online portal (eKitabu.com) and free Android application. Longhorn has over 250 eBooks on eKitabu platform. Here, consumers can access different categories of Longhorn eBooks which include: ECDE, primary and secondary school course books and revision

books, novels, readers, novellas, reference books and books for general readership for Kenya, Uganda, Rwanda and Tanzania.

4.4.6.4 Kytabu

Kytabu is an education digital application where consumers access educational content from educational publishers and other content creators. Longhorn has partnered with Kytabu to distribute the company's eLearning solutions. Unlike Longhorn applications where consumers subscribe to access digital content, Kytabu has introduced a new technology in the Kenyan market that is making it possible for consumers to rent content at a low cost; as low as two Kshs per day.

4.4.6.5 myMlango

myMlango is an eLearning platform that provides KICD-aligned eLearning content for primary and secondary schools. Longhorn has partnered with myMlango to facilitate the access of her eLearning content.

4.4.7 Self-publishing

On self-publishing, Key informant 1 had this to say, "the company is now offering self-publishing services to authors at a cost. Authors choose the kind of services they would like the publisher to offer to them; for instance, editorial, illustrating and page layout and design." He noted that some authors may opt to bring to the publisher already edited work hence only get page layout, design and illustrations services from the publisher. "Once illustrations are ready and the book layout and design complete, the author can choose to have the book in digital or print format. If he or chooses to have the book in digital format, the eBooks is uploaded on Longhorn eBook store for distribution. Printing the book comes with two options: either the author choose to get the service from the publisher at a cost or they get the final file and have it printed by a printer of their choice and pay for the printing service. It is important to note that for printed books, it is the author's responsibility to market their books and distribute them to their customers; in other words, the publisher is not in any way involved in the marketing and sales of self-published printed books." He concluded.

From the above observation on how self-publishing happens in Kenya, it is evident that Kenyan authors still rely on book publishers for various services in order to have their books self-published. This means that authors who take this route of self-publishing have not been able to take full advantage of the Internet and publishing technologies. As Hviid, Jacques and Sanchez (2017) note, the Internet has enabled authors to by-pass book publishers and publish their work on

their own by using self-publishing platforms such as Kindle Direct Publishing and Barnes and Nobel Press. Using such platforms helps authors enjoy different benefits of self-publishing which include: having their books get to the market faster than they would have could they have used a publisher, make more money through royalties, for instance, Amazon gives authors 70% of total sales as royalties for self-published books – compared to what Kenyan publishers give authors as royalties, this percentage is way too high as most Kenyan publishers give 10% - 12% of total sales, authors also get to keep control of their rights – for instance, they decide when to publish the books and update them as well as set prices for their books.

What is clear about self-publishing trend in the book industry in Kenya is that book publishers are yet to adopt digital transformations that are driving this trend by offering authors a ‘self-service’ self-publishing platform like the ones offered by Amazon and Barnes and Nobel. Such a platform could be another revenue stream for publishers since though they are not involved in the development of the books, they still earn some money from the sale of self-published books through the platform.

4.4.8 TV series

“Longhorn is re-purposing one of its novel which is a set book at the time known as *Blossoms of the Savannah* into a TV series” Key informant 1 stated. He further noted that an audiobook for this novel is already available at Audible.com.

4.5 Government policies that are influencing digital book publishing in Kenya

4.5.1 National Policy on Textbooks Publication, Procurement and Supply for Primary Schools (1998)

The Textbook policy was formulated in order to articulate government policy on the key issues of access, equity and quality of education (Ministry of Education and Human Resource Development, 1998). Of interest to this study are the guidelines provided in this policy document on the development, publishing and distribution of digital books and products.

A review of the National Policy on Textbooks Publication and Supply for Primary Schools reveal that the policy provides that book publishers publish and promote textbooks and other educational materials in print format for use in schools and Kenya Institute of Curriculum Development focuses on curriculum development, receiving and evaluating books from publishers, vetting and approving of textbooks to be used in schools. This is unlike in the past where KICD was the sole author of Ministry of Education books which were used in primary and

secondary schools. In regard to the distribution of books, the policy provides that schools should buy approved textbooks and other education materials from booksellers (Ministry of Education and Human Resource Development, 1998).

Although educational book publishers in Kenya not only publish books for primary schools but also for secondary schools and institutions of higher learning, the policy's only focus is on books and educational materials for use at primary school level. Notably, the policy is silent on digital books as there is no mention of how digital books should be developed and distributed to schools. This is as noted by Ramaiah (2006) that, "even today, the laws elated to e-publications are not fully established compared to those covering print publications" (pg.149). The Ministry of Education should therefore review this policy in order to incorporate digital books make provisions on how such products should be developed and distributed not only in primary schools but also in secondary schools and if possible even in institutions of higher learning. According to Key informant 1, "the review of the National Textbook policy is long overdue since a lot of things have changed since 1998 including the use of technology in the teaching and learning process."

4.5.2 Information and Communications Technology (ICT) in Education and Training Policy (2014-2019)

"This policy sets out the Ministry of Education's goals, objectives, principles and values to provide strategic direction to the integration of ICT in education and training at all the stages recognized in the legal frameworks on education and training" (Ministry of Education , 2014, pg.5). Among the strategic policy areas established by this policy that are of interest to this study include: infrastructure and connectivity, integrating ICT in teaching and learning, open educational resources, licensing and enhancing capacity building and professional development of relevant stakeholders.

In order to improve infrastructure and connectivity, this policy seeks to enhance access to ICT through: ensuring reliable connectivity and Internet access across educational institutions, improvement of basic infrastructure at classroom level so as to enable the use of ICT devices, develop strategies to encourage ownership of individual mobile devices; for example, subsidizing the devices, encourage a culture of bring your own device and exploring the possibility of pre-loading open content in lieu of textbooks in order to offset the cost of the devices. To answer the question on how this policy is influencing digital book publishing, Key informant 3 said that if

what is provided in the policy is implemented to the letter, then this will greatly benefit publishers since their customers and end users (learners) will be enabled to purchase and own mobile devices and access digital books and other digital products with a lot of ease hence increase their acceptance and use of digital products. However, “as we speak, low internet connectivity, consumers’ low purchasing power for digital devices and low ICT skills by end users is still a challenge that we are facing” (Key informant 3).

Additionally, this policy provides for the integration of ICT in teaching and learning. It emphasizes on the need for institutional-based review on how best to improve the teaching and learning of the national curriculum through ICT and the ability of educational institutions to maximize the use of available ICT resources. If this is achieved, a demand for digital books and other digital educational content will increase as teachers will be expected to integrate ICT in the teaching and learning process. This would mean that book publishers also provide digital products that will make it easy for the integration. For instance, the use of enhanced eBooks in which videos, images, audio and web links have been embedded, audiobooks and video animated storybooks will come in handy.

Embracing technology comes with its own challenges. It is therefore expected that people will have challenges to use technology in their various capacities. It is for this reason that this policy seeks to enhance capacity building and professional development of relevant stakeholders; these include: Ministry of Education officials, head teachers and principals, teacher educators, educators at all levels, learners, parents and general public. Under this strategy, the policy provides that curriculum and assessment developers should be trained on changes in pedagogical practices related to ICT tools, competencies and development of digital content. It also provides for the capacity building and professional development of teachers at all levels including pre-primary and lower primary levels. This will ensure effective integration of ICT at all levels of learning. Again, this is to the advantage of book publishers since it will become easier for customers to embrace the use of digital products they provide hence increase demand for such products and their acceptance amongst the end users.

Finally, the policy also seeks to explore the possibility of licensing in order to improve access to learning and teaching materials. Its calls for government commitment to invest in open access to educational materials produced in the country through licensing for all teaching and

learning materials produced with government funds. “The government through KICD launched a platform called *Kenya Education Cloud* with an aim to provide digital educational content (eBooks include) to the learners. Publishers are supposed to avail approved eBooks and other digital educational content to KICD for it to be uploaded in the platform. However, we have been reluctant since KICD is not clear on how the publisher will benefit financially from such kind of an arrangement.” (Key informant 1 explained. This is a genuine concern from publishers since they are in business and there is no way the government can expect them to give their digital products free of charge so that it can be availed for open access to end users. The provision in the policy that government funds be used to avail digital educational materials for open access to the end user should be implemented. Part of these funds should be used to acquire digital books and other educational learning materials from publishers and not expect publishers to surrender such materials without any financial gain. Such an arrangement will motivate publishers to produce more digital books and content.

4.5.3 National Information, Communications and Technology (ICT) Policy (2019)

“This policy is designed to realize the potential of the digital economy by creating an enabling environment for all citizens and stakeholders” (Ministry of Information, Communications and Technology, 2019). It acknowledges that technological developments, evolving global trends and fast changing public needs in the ICT sector necessitated the review of 2006 ICT Policy. One of the policy objectives that is of interest to this study is the creation of infrastructure in order to enable the use of reliable high-speed wireless Internet across the country. The second objective is on positioning the country to be able to take advantage of emerging trends by enhancing the education institutions and people’s ICT skills. This policy focuses on four key areas which are: mobile first, market, skills and innovation and public service delivery. The first three are of interest to this study.

The mobile first approach as provided in this policy shows that the government is cognizant of the global trend which shows that the world is ‘going mobile’ and that people want to access the Internet anywhere and at any time. With this in mind, this policy provides for a continuous investment by the government in mobile and wireless infrastructure to ensure that every citizen have access to reliable, high-speed, wireless data connectivity. This policy notes that, “the heavy investment by government in Internet connectivity infrastructure has enabled access by 99.9% of

our citizenry, mostly via mobile phones” (Ministry of Information, Communications and Technology, 2019, pg.6). While this study cannot prove if this statement is true or not, what is important to note and is related to the study is that Improved Internet connectivity is an enabler to the success of digital book publishing. This is due to the mere reason that book consumers can be able to access digital books and other digital products offered by publishers from any part of the country.

On market, the policy envisions an estimated population of 66 million with over 200 million devices connected to the Internet by 2030. It further states that by this time, all aspects of our lives, including education will be fully integrated into the digital economy. “The policy envisages that citizens will use a wide variety of devices: smartphones, tablets, computers and Internet of Things devices. However, the basic properties required of all these devices are that they should be affordable, secure, internet-enabled, identifiable and should promote mobility” (Ministry of Information, Communications and Technology, 2019, pg.16). Considering this, the policy seeks to ensure that every Kenyan can afford a device that can access Internet, access free advice on digital technology choices for their needs and has the skill to use these technologies. It also mandates the deployment of Internet exchange points in order to strengthen the local Internet ecosystem hence improving the quality and affordability of the Internet in local communities.

The policy envisions that by 2030, “every Kenyan will be computer literate and able to profitably engage in the digital economy and earn a good living” (Ministry of Information, Communications and Technology, 2019, pg.33). To prepare for this, the policy provides for the enhancement of people’s skill and innovation. To achieve this, the government will integrate ICT in the curriculum at all levels of education, interconnect schools and other educational and training institutions to each other and to relevant knowledge center through a nationwide e-Education, improve the digital literacy of the general public and establish educational networks for sharing educational resources and promote eLearning at all levels.

4.6 Book publishing business environment in Kenya with regard to digital book publishing

4.6.1 Opportunities

As reported by Key informant 2, “some of the opportunities that Longhorn publishers is enjoying as a result of digital book publishing include: reaching a wide market/audience, increased revenue

as a result of the new market niche, provision of new, interactive and interesting products for the consumers, and new marketing and distribution opportunities.”

Digital book publishing is indeed an opportunity to the publishers and it opens up a new revenue stream for them. This is mostly because digital books and content are a new product line altogether that reaches a wider market (both local and international) compared to print books. This confirms what House (2013) says about product and market diversification that is as a result of digital book publishing. Also, digital products offer a new value proposition hence appeal to customers and therefore an increase in revenue. As Attwell (2009) posits, digital book publishing allows publishers to explore new levels of creativity, flexibility and interactivity of content. Key informant 2, supported this argument by stating that, “digital technologies have indeed enabled Longhorn to provide to the consumers with new and interesting products that come in various formats and with a variety of exciting features.”

When asked if the increase in company’s revenue as a result of digital book publishing is directly proportion to the margins, Key informant 2 response was similar to the argument by Attwell (2009) that during the initial stages (which she believes Longhorn Publishers is still in) of digital book publishing, profits derived from digital book publishing is not directly proportional to the revenue gained since during this phase, the company is yet to break even since the cost of putting up a digital publishing system, digitizing books and digital content creation outweighs the sale of digital products. This notwithstanding, publishers should not be discouraged to embrace and invest in digital book publishing since Gaigher (2012) gives them hope by arguing that digital book publishing has a great potential hence greater profits as consumers continue to embrace and get used to the use of digital technologies to access and use books and educational content. However, publishers should also be prepared not to make a kill from digital publishing during the initial stages hence they should be patient with it.

In regard to supply chain, Key informant 2 indicated that the company is already enjoying a shortened supply chain for the digital products. Digital book publishing allows customers to access eBooks, audiobooks and other digital materials directly from the publisher without having to go through other people. Much as this is a direct benefit to the consumer, the publisher also benefits since the company does not share profits with intermediaries such as booksellers.

“Another advantage of digital book publishing is that it saves the company printing, warehousing and physical distribution costs.” Key informant 2 stated. “With digital publishing, the publisher also do not incur losses that are as a result of deadstock and stock outs.” She added. Printing, storage and physical distribution of printed books are some of the huge costs that publishers incur in traditional book publishing. Digital books that especially released before their print version is out (the strategy earlier on referred to as ‘digital first’) saves a publisher printing cost. Digital books also do not require a physical warehouse where they can be kept hence publishers saves on warehousing costs. Also, publishers are saved on any losses that are likely to emanate from the destruction of printed books while in the warehouse. As earlier on mentioned, digital books are distributed and accessed by the customers through the Internet, this means that the publisher is saved on the cost of distributing such books to customers as it is with printed books.

On the issue of reduced piracy, Key informant 1 stated that, “the use of digital rights management has made it much easier for publishers to control books piracy in digital books publishing.” He added that it is much easier to control piracy of digital books than printed books.

4.6.2 Challenges

As Gaigher (2012) posit, transitioning from traditional to digital publishing requires huge reorganization and investment. This is one of the main challenges that Key informant 1 cited, “digital publishing is capital intensive. The initial cost of acquiring a digital platform for electronic distribution of our digital products was quite high, digitizing books is expensive and we also incur hosting fee which is also a lot of money.” As expected, when the company management made a decision to take up digital book publishing, more resources needed to be allocated towards this project. Part of this was to, “recruit a digital publishing team” Key informant 1. While digital book publishing undertaken in India and Singapore revealed that publishers are experiencing personnel issues in their effort to embrace digital publishing – in terms of getting staff who possess the right skills to fit into digital book publishing – Longhorn does not seem to have a challenge in attracting and maintaining the right professionals since according to the company’s 2019 financial report, “the company has invested in a well-trained, highly knowledgeable and dedicated team of digital publishers, content providers and digital sales and marketing team that work on the development and provision of digital content” (pg.19).

According to Key informant 2, “the return on investment in digital book publishing is not immediate.” This supports the argument by Christensen (1997) in his theory of disruptive innovation that during the initial stages, disruptive technologies serve a niche market that is less profitable which can discourage incumbents from investing in such technologies until proven to be profitable. While Longhorn Publishers has been putting in efforts into digital publishing since 2016 when the company decided to embrace the innovation and started its digital publishing operations, the comment by Key informant 2 reveals that though about four years had lapsed at the point of making this comment, the company can still be said to be in the initial stages of digital book publishing and has a long way to go. Luckily, as revealed by the company’s 2018 financial report, “the company has made significant investments in digital publishing and is keen to ensure that the end user is provided with relevant and high quality materials.” This shows how committed and determined Longhorn is to succeed in digital book publishing. The company’s management seems to be driven by the imagination of possible benefits the company is likely to reap in the event that the innovation succeeds and is well embraced by the customers. As mentioned earlier, this makes Longhorn fit in the group of innovators as Rodgers (2003) classifies different firms in his theory of diffusion of innovation.

In business, a firm must invest in research and development in order for it to succeed. Kenton (2021) defines research and development as activities that a firm undertakes in pursuit of innovation, to introduce new products and services in the market and help it remain ahead of the competition. This means that for any firm to succeed, especially in innovation and remain at the top of the competition, then it must invest in R &D. Key informant 1 cited the need for a lot of research in order to keep up with the trends in digital publishing and user needs as one of the challenges the company is facing. Understandably, business research is time consuming, involving and expensive not forgetting that research activities do not generate immediate returns as Kenton (2021). Longhorn has realized that R&D is inevitable if the company is to succeed in digital publishing and has invested in it regardless of the challenges associated with it. Infact, going by Maxwell Wahome’s – the then Longhorn Group Managing Director – statement as recorded in Longhorn 2019 financial statement which affirms that, “the company is currently in a race to be the leading provider of innovative learning solutions in Africa” (pg. 27); then R&D is inescapable at Longhorn however challenging it may prove to be.

“Technology problems is another challenge that we are facing.” Key informant 2. She expounded by saying that more often than not, they experience downtime as a result of many users using the platforms at the same time and users also have problems navigating through the platform. This is a challenge that they will overcome with time as the company and the users get used and comfortable to the technology. However, as suggested by Brown and Heavner (2018), “there is a need for greater technical capacity building among publishers to manage new digital tools and systems, including support to properly manage digital rights” (pg.10).

When asked if there are any challenges the marketing team is facing in regard to digital publishing, Key informant 3 confirmed the findings of the research by Brown and Heavner (2018) which reveals that identifying consumer markets for digital markets is such an uphill task for them. Ideally, publishers market their printed books in schools since schools are the main customers for their educational learning materials. Although the digital products the company is offering are also educational materials, most schools are yet to embrace the use of technology in their teaching and learning process hence not ready to embrace and recommend the use of digital books to the learners. Quoting one of the teachers who posed to him a question when he was marketing digital books, Key informant 3 asked, “at what point in the teaching process is a teacher supposed to stop using the printed book and use the eBook given that both of them contain the same information?” Reasonably, it is difficult for schools to embrace the use of eBooks in class since they are just a digital version of the printed books. To avoid such a challenge and be able to persuade teachers to incorporate the use of eBooks in class, publishers should invest more in enhanced eBooks since they are more interactive and contain exciting features such as video, audio, animations and web links which can make teaching and learning more exciting. Also, audio books and video animated stories can be used alongside the printed book.

Although Gaigher, Roux and Bothma (2014) cite lack of a standard pricing model for eBooks as one of the challenges that publishers across the globe are facing, Longhorn seem to have found a solution to this and it is not a challenge to them as they have a standard pricing model for their eBooks. The company is also enjoying management goodwill in regard to digital book publishing unlike some publishers in other countries that Choo, Ramaiah and Foo (2003) say that their, “senior management is more comfortable with the familiar tried and tested p-publications and ambivalent, apprehensive or even not supportive of e-publications” (pg.7). In every business,

management goodwill is key for the success of any project that the business engage in, Longhorn's commitment in digital publishing reveal that the company's management is in full support of the innovation and has so far helped the company to side-step the four pitfalls that most established firms are likely to get entrapped in upon the emergence of a disruptive technology as presented earlier on in this report. These pitfalls include: delayed participation, sticking with the familiar, reluctance to fully commit and lack of persistence (Shoemaker & Day, 2000). The success of digital book publishing at Longhorn so far can, therefore, be accredited to management goodwill and support.

4.6.3 Barriers

The study looks at the barriers as the obstacles preventing the provision and access to digital books and other digital products. When asked about the barriers to digital book publishing in Kenya, the interviewees had the following to say: bureaucracy in approval of digital platforms and products and content by KICD (Key informant 1); low Internet connectivity, consumers' low purchasing power for digital devices and low ICT skills by end users (Key informant 3).

In Kenya, it is expected that book publishers submit all the educational materials they publish to KICD for vetting before they can release them for use by customers (learners). This is done as a way of gatekeeping to ensure that books and other educational materials released to the market are of the right quality and standard. While this process is expected to be seamless, publishers feel that in regard to approval of digital platforms and products, KICD's delay is a barrier to their operations.

In as much as the *Information Communications Technology (ICT) in Education and Training Policy (2014-2019)* and *National Information, Communications and Technology (ICT) Policy (2019)* provide that the government is keen to enhance access to ICT amongst its citizens by: improving infrastructure in order to enable the use of reliable high-speed wireless Internet across the country, positioning the country to be able to take advantage of emerging trends by enhancing the education institutions and people's ICT skills, ensuring reliable connectivity and Internet access across educational institutions, improving the basic infrastructure at classroom level so as to enable the use of ICT devices and developing strategies to encourage ownership of individual mobile devices (Ministry of Education , 2014; Ministry of Information, Communications and Technology, 2019); Key informant 3 still felt that low Internet connectivity,

consumers' low purchasing power for digital devices and low ICT skills by end users are the major barriers in digital book publishing. This means that the provisions in the two policies are yet to be implemented to the letter. If this is achieved, there is no doubt that it will highly influence digital book publishing since: reliable connectivity and Internet access across the country and improved infrastructure in educational institutions will enable book consumers to access and read digital books and content anytime and anywhere; strategies to encourage ownership of digital devices such as laptops, tablets and mobile devices will make it easier and affordable for parents and schools to purchase these devices for use by their children and learners respectively and finally, if people's (teachers, parents and learners) ICT skills are enhanced, then they will be in a position to accept and embrace the use of digital books and content.

CHAPTER FIVE

CONCLUSION AND RECOMMENDATIONS

5.1 Overview

This chapter presents a summary of issues emerging from the study in relation to the topic of study as guided by the research objectives and the research questions posed at the beginning of the study. It also includes recommendations and suggestions for further research.

5.2 Conclusions

The researcher set out to analyze the trends in digital book publishing amongst educational publishers in Kenya using a case study of Longhorn Publishers. Additionally, the researcher sort out to determine how government policies are influencing digital book publishing in Kenya and also to explore the Kenyan educational book publishing business environment in regard to digital book publishing. Overall, the findings of the study reveal that Kenyan educational publishers view digital book publishing as a disruptive technology which must be embraced to avoid the negative impact of digital advancements and technologies in their business like their counterparts in the music industries. Publishers seem to believe that the future of book publishing is digital hence they must do what it takes for them to be aligned to the digital future. However, the issue of digital book publishing is uncertain although educational book publishers in Kenya are laying out strategies on how to succeed in the digital sphere in book publishing.

Kenyan educational book publishers have adopted most of the trends in digital book publishing although most of these trends are work in progress and publishers are still trying to align their operations in order to incorporate digital publishing as they continue with traditional book publishing. Some of these trends include: eBooks, audiobooks, video animated storybooks, digital distribution channels and self-publishing. Notably, as noted with other book publishers in various countries in the literature review, it has not been a walk in the park for Kenyan educational publishers in their effort to embrace digital book publishing. Much as they have embraced it and are putting strategies in place, it is still a struggle for them as it is for publishers in other countries as noted in the literature review.

The opportunities that come with digital book publishing seem to be attractive to book publishers; these include a wider audience reach – international and local book consumers; market and product diversification hence more revenue and also securing the future of the business. Also,

with digital book publishing, publishers: save on distribution costs since digital products are distributed electronically, enjoy ease of updating digital books and content, save on warehousing costs and are much able to control the piracy of digital books using digital rights management compared to printed books. On the other hand, book publishers are facing challenges and barriers that are slowing down their rate of embracing digital book publishing. These include: transitioning to digital book publishing is capital intensive since the cost of setting up a digital publishing system – this includes the initial cost of buying a digital distribution platform, cost of digitizing books and re-aligning resources; since digital book publishing in Kenya is still in its initial stages, revenue from this niche market is still negligible and less profitable, slow uptake of digital books and other digital offerings owing to challenges that limit the access and use of digital books and content – for example, low Internet connectivity, low purchasing power of digital devices and inadequate ICT skills.

It can be concluded that there is a gap in the *National Policy on Textbooks Publication, Procurement and Supply for Primary Schools (1998)* since the policy is silent about digital books and content. A review of this policy is long overdue, alternatively, a new policy with provisions for book publishing in the digital era should be introduced and implemented. Notably, although the *Information Communications Technology (ICT) in Education and Training Policy (2014-2019)* and *National Information, Communications and Technology (ICT) Policy (2019)* have good provisions that can influence digital book publishing by empowering book consumers to be able to access and use digital books and content, these provisions are yet to be implemented fully in a way that can really make a significant impact on digital book publishing.

Lastly, and related to the diffusion of innovation theory, Longhorn Publishers can be categorized as an innovator following Rodger's categorization of firms in relation to uptake of technology. Interviews with key informants and Longhorn's financial statements revealed that the company has so far made huge investments in digital book publishing and is determined and committed to be the leading publisher in digital book publishing not only in Kenya but in Africa.

5.3 Recommendations

In this section, the researcher calls for actions to be taken with regard to policy, practice and theory by giving suggestions that she deems appropriate to the topic of study and the objectives of the

study. The recommendations are based on the literature reviewed – that is, what other people have written about the topic of study, – the theories used in the study and the findings of the study.

To start with, since government policies influence every sector of the economy, book publishing included hence the issues that emerged on the reviewed policies cannot go unmentioned if digital book publishing is to succeed in Kenya. First, there is need for a review of *National Policy on Textbooks Publication, Procurement and Supply for Primary Schools (1998)*. As noted earlier, this policy have no provisions for digital books and content. It also focuses only on the procurement of books for primary schools. The policy should be reviewed to include not only the procurement of digital books and content but also the development and distributions of such to the book consumers across all levels of education – pre-primary, primary, secondary, secondary and tertiary levels. Alternatively, a new policy that focuses on digital book publishing can be developed. Second, the *Information Communications Technology (ICT) in Education and Training Policy (2014-2019)* and *National Information, Communications and Technology (ICT) Policy (2019)* can influence digital book publishing in Kenya if well implemented. As provided in these two policies, the government should improve infrastructure mainly in educational institutions, enhance connectivity and Internet access across the country, and empower people (teachers, learners and general public) with ICT skills hence impact on digital book publishing positively. Monitoring and evaluation of the implementation of these two policies should also be heightened to ensure maximum achievement of the provisions given.

On issues of practice and as suggested by Christensen in his theory of disruptive technologies, publishers should consider setting up an autonomous business unit charged with building a new and independent business around the disruptive technology. This approach to embracing disruptive technology will help publishers to still focus on traditional book publishing which is currently their bread and butter while still focusing on digital book publishing in an effort to publish for the new era and secure the future of their business since the future might just be digital. Resources should be allocated adequately for the different business units including the digital publishing unit for the success of each of the units. Once the unit has been set up, it is important for publishers to recruit staff with the right skills to handle digital book publishing and train them appropriately on issues and trends in digital book publishing right from product development to marketing and distribution of these products. A standard pricing model for digital

books and content should be established by the digital team to avoid the challenges faced by book publishers in relation to setting prices for their digital books and content.

Another issue that emerged and publishers should take into account is investing in research and development. Business research is very vital in any business especially when dealing with a new phenomenon in the industry; this is part of business intelligence process which aid in decision making. Research and development will help publishers to: determine whether their company will succeed in digital book publishing, understand their customers' needs, capabilities and expectations in regard to digital products and content, identify their competitors in digital book publishing and understand what they are doing hence spot marketplace and industry trends and to avoid potential problems related to digital publishing. R&D will help publishers understand all aspects of digital book publishing hence succeed in it with minimal problems.

Kenyan educational publishers should keep an eye on audiobooks. Although the findings of this study reveal that Kenyan publishers have not done much in production of audiobooks, the literature reviewed indicate that audiobooks are a global trend and that there is an increased demand for audiobooks globally. Although the Kenyan book market may still not be ripe for audiobooks, Kenyan publishers can target the international audiobook market. Concerning the distribution of audiobooks, publishers should research on possible collaborations with digital distributors such as Audible.com, Bookbeat, Scribd, Storytel and Kobo. They should also consider and do more research on online music streaming platforms such as Apple music, Youtube, Spotify, Deezer, Tencent and Tidal since this is a trend that is making audiobooks more accessible to consumers.

The issue of accessibility of eBooks is a challenge facing book consumers especially because of eBooks-eReaders compatibility issues. To overcome this challenge, book publishers should work towards innovating an eBook reader that “will do to eBooks what iPod did to music” (Mierzejewska, 2008, pg. 102). That is, to make eBooks and other digital products easily accessible and completely portable. This can be achieved by establishing an eReader that can support different formats of digital books (bot eBooks and audiobooks) as opposed to the currently used eReaders which only support a particular format; for example Amazon kindle only supports eBooks in Mobi format.

Finally, Kenyan publishers should explore self-publishing trend using the standard set by Amazon; that is, invest in an online platform that can allow authors to undertake all the publishing processes on their own without involving the publishers. The publisher earns from the sale of every book published by authors on the platform hence a new revenue stream for the publisher. As it is now, publishers in Kenya are still involved directly to help authors self-publish their works. This means that authors still do not have full control of their works.

5.4 Suggestions for further research

Since this study used case study research method which provides grounds for generalization of data, the findings of the study may not be entirely true for all the educational publishers in Kenya in regard to the topic of study. Chances are that, Longhorn Publishers being an innovator as concluded by this study is doing much more in the digital sphere compared to other publishers. In view of this, the researcher, therefore, suggests that another research be conducted with a bigger sample size to help get a much clearer picture of trends in digital book publishing amongst educational publishers in Kenya. Such a study will help in knowing where other educational publishers lie in terms of their pace and level of embracing a new innovation as explained by Rodgers in his theory of diffusion of innovation. It will also be clearer on whether or incumbent firms struggle to adopt to a disruptive technology hence being overtaken by entrants and that they are likely to fail when faced with a disruptive technology as argued by Christensen in his theory of disruptive technology.

Consumer behaviour towards digital books and content cannot be ignored to help understand the market for these products and predict the future of digital book publishing. With this in mind, a research on consumer needs, capabilities, expectations and behaviour in relation to digital books and content should be conducted to help book publishers understand their consumers better hence spot opportunities in the digital market place and improve on their digital offerings.

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Appendices: Research tools

Appendix 1: Interview Schedule

1. The current position of digital publishing in the company
 - a. Whether or not Longhorn Publishers is already engaged in electronic publishing.
 - b. What year the organization start publishing electronically.
 - c. Number of books currently in digital format and how many are converted or released per year since inception.
 - d. Categories of Longhorn digital products.
 - e. How Longhorn distributes its digital products to consumers.
 - f. Percentage contribution of digital products towards the total organization's revenue.

2. Trends in digital book publishing
 - a. Current trends in digital book publishing.
 - b. What Longhorn in the digital book publishing sphere.

3. Company's experience so far with digital publishing
 - a. Whether or not the company has reaped any benefits yet.
 - b. Opportunities of digital book publishing.
 - c. Challenges faced so far in the effort to embrace digital book publishing.
 - d. Barriers to digital book publishing in Kenya.
 - e. Personal views on the future direction of digital book publishing.

4. Digital books market
 - a. How Longhorn's digital products are promoted.
 - b. Market reception for the digital offerings.

5. Government policies influencing the development of digital book publishing
 - a. Government policies that are influencing digital book publishing.

- b. How the policies are influencing digital book publishing.
- c. If the policies are sufficient or not and what need to be done.

Appendix 2: Document Analysis Guide

| | Policy | Date read and reviewed | Data collected |
|----|--|-------------------------------|-----------------------|
| 1. | National Information and Communication Technology (ICT) Strategy for Education and Training (2006) | | |
| 2. | National Textbook Policy (June 1998) | | |
| 3. | National Information, Communications and Technology (ICT) Policy (2019) | | |