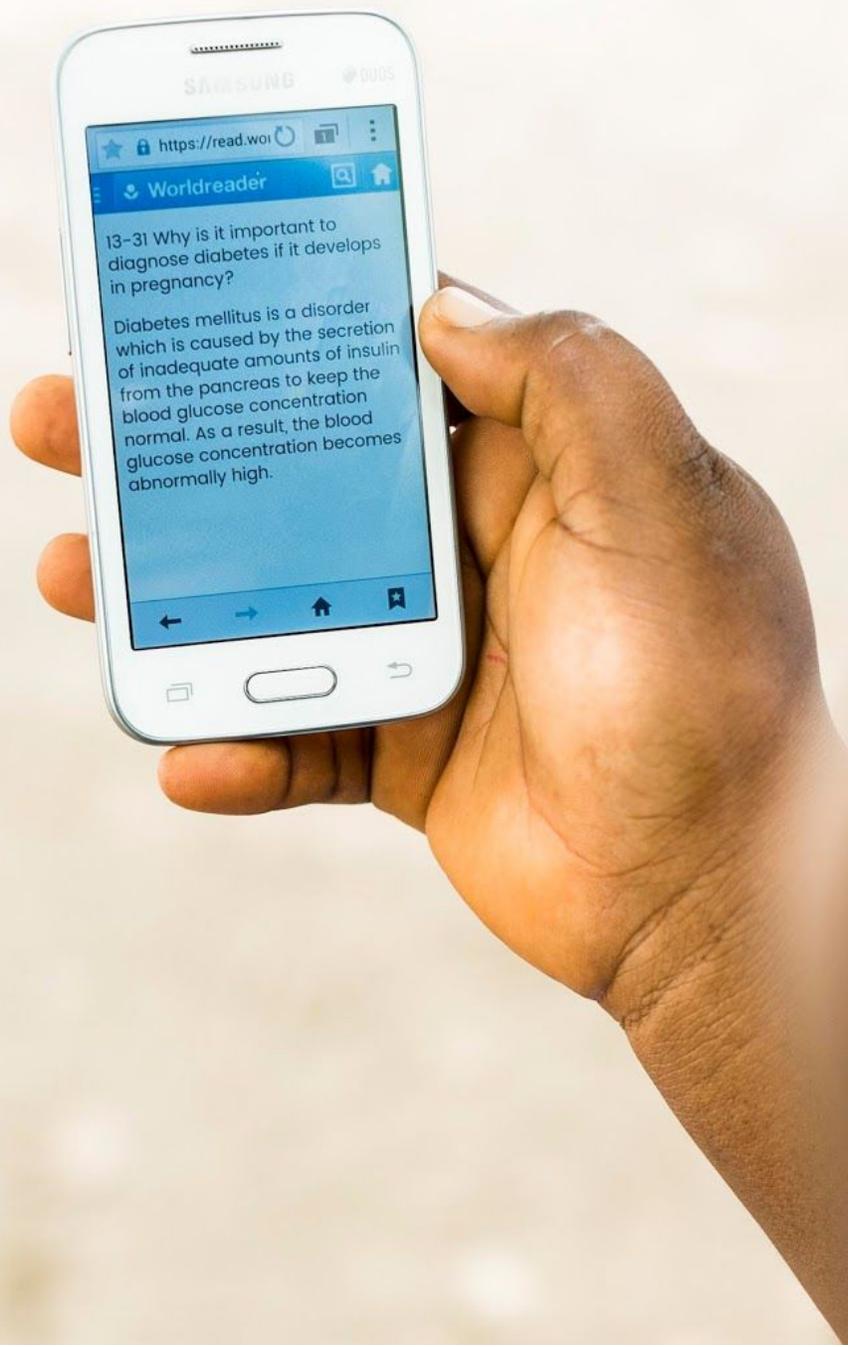
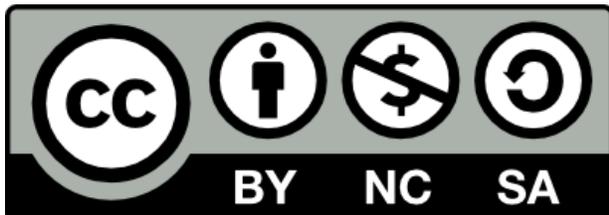




THE STATE OF DIGITAL PUBLISHING: FACTS AND FIGURES FROM GHANA, KENYA, AND NIGERIA





Worldreader, 2018

Copyright by Worldreader. *The State of Digital Publishing: Facts and Figures from Ghana, Kenya, and Nigeria* is made available under a Creative Commons Attribution 4.0 International License: <http://creativecommons.org/licenses/>
Published by Worldreader.org

Worldreader.org
40 Ringold Street
San Francisco, CA 94103

Recommended citation:

Brown, N & Heavner, R. (2018). *The State of Digital Publishing: Facts and figures from Ghana, Kenya, and Nigeria*. San Francisco: Worldreader.

Preface

The success of any reading program relies on the strength of the local book supply chain. Worldreader was founded in 2010 with the notion that digital reading devices could be leveraged to provide reading opportunities at scale. As a small pilot project with little funding, this approach began by loading e-readers with readily available digital books and distributing them to schools in Ghana. The team quickly realized that the plan was flawed, because all of the available content was made for audiences in the Global North. Worldreader approached local publishers to figure out a way to acquire and convert digital content that was made for Ghanaians by Ghanaians to drive reading inside and outside of the classroom.

Through early collaborations with these publishers and trial and error, we built a model of social responsibility and sustainability, reaching out to local publishing partners in each geography and providing incremental revenue to them based on the distribution of their books. We realized that the success of digital reading relies on the self-reliance of local book ecosystems. We worked closely with local publishers and authors to build this supply chain and support their capacity building and growth as both business and learning partners.

This revenue model was a departure from the development standard at the time, which was to commission content and rely on project funds for distribution and dissemination. This new digital publishing model provided a longer shelf-life because of the commercial benefits to the local book supply chain. Since that time we have created a library of over 35,000 titles through partnerships with 425 publishers globally, including 162 African publishers. We have digitized several thousand book titles and further supported a number of our publishing partners to build digital into their business plans. A number of these publishers have started to successfully produce and sell digital copies of their books commercially.

As this paper demonstrates, publishers in the three focus countries (Ghana, Kenya, and Nigeria) have started to realize small but increasingly significant revenue streams and other advantages of digital, like learning from data and reaching broader and more diverse audiences across borders. This reflection on the current state of digital publishing marks a baseline for future growth and collaboration with our global network of publishers.

Acknowledgments

The authors of this paper would like to thank Kezia Agbenyega, Joseph Botwey, Darina Lucheva, and Muthoni Muhunyo for their tireless data collection and valuable editorial contributions to this piece. We would further like to thank all of the publishers and authors who took the time to respond to our survey or sit with us in interviews, and for their continued partnership in building stronger book supply chains in their communities. Lastly, special thanks to Susan Rimerman and Zev Lowe for their constant support and editorial and professional guidance.

Authors

This report was produced by Associate Director of Global Content, Nancy Brown and Global Insights Manager, Rachel Heavner.

Table of Contents

Introduction	4
Methodology and Limitations	5
Survey Findings: Production Costs, Revenue Streams, Challenges and Opportunities	6
Finding 1: Reduction in production time and costs	6
Finding 2: Revenue for digital books remains low, albeit a fledgling market...	8
Finding 3: The largest challenges with digital publishing are adapting new digital marketing strategies, understanding and maintaining new technologies...	10
Finding 4: Publishers perceive the biggest benefits of digital publishing as access to international markets, access to a wider audience, revenue generation...	11
Country Profile: Spotlight Nigeria	12
Nigerian reading culture and current use of ebooks	12
Country-specific scope of opportunity for digital publishing	13
Barriers	13
Current digital publishing initiatives	14
Recommendations and opportunities for digital market growth	15
Country Profile: Spotlight Kenya	15
Publishing scene	15
Kenyan reading culture and current use of e-books	16
E-book adoption	17
Country-specific scope of opportunity for digital publishing	17
Barriers	17
Current digital publishing initiatives	18
Recommendation and opportunities for digital market growth	19
Country Profile: Spotlight Ghana	20
Ghanaian reading culture and current use of ebooks	21
Country-specific scope of opportunity for digital publishing	21
Barriers	21
Current digital publishing initiatives	22
Recommendations and opportunities for digital market growth	22
Conclusion and Next Steps	23
References	24
Resources	25

Introduction

As the countries of modern Africa move into a new era of development, local African writing is finally receiving the attention it has long deserved. Publishers all over the continent are breaking free from colonial legacies, establishing their own voices, and providing a platform to local writers and those in diaspora. While the opportunity is great, many African publishers are still struggling to break free from textbook markets due to strict government policies that withhold funding for more varied content production and mandate high import and export taxes on paper and books. For trade publishing, there are challenges from limited reading cultures and low levels of literacy. Yet, with the help of digital tools and a globalizing world, African publishers are establishing themselves on the international publishing scene.

Starting in 2013, when the European market saw explosive growth in digital, a few local digital distribution networks in Africa began to emerge, including Okada Books in Nigeria, eKitabu in West and East Africa, Mazwi in Zimbabwe, and Kalahari in South Africa. While their presence is still limited to a handful of countries, a variety of international ebook providers have also expanded to reach African markets in the past few years including Amazon, Kobo, Google, and Apple iBooks. This market growth and accessibility has meant that publishers across the continent now tend to be keenly interested in going digital. But what are the real benefits of doing so?

With an eye for working with publishers to create sustainable book supply chains, Worldreader set out in 2017 to better understand the publishing ecosystem and potential for digital in three of our partner countries: Nigeria, Kenya, and Ghana. A survey was sent to 65 publishers across three countries with a range of questions that aimed to outline the digital publishing landscape, from a publisher's production costs in print to perceived barriers and opportunities for digital growth.

When analyzing the results of the survey there were themes that existed across all three markets, like reduced production costs and shortened timelines through digital. Digital is making it cheaper and easier to create and produce content. Other themes were large educational publishers maintaining a stronghold on the market, and economies of scale for production of physical books making it prohibitive for smaller trade publishers to enter the market. However, publishers are beginning to embrace digital to strip away the need for minimal print runs, thus diversifying the types of books brought to market that would not have been possible before. Publishers across the board see the potential for digital books. All respondents identified new markets and a wider audience as the greatest reward for going digital, but publishers also identified reaching these new audiences as digital's greatest challenge.

Through the three surveyed markets we are able to identify where there is need among publishers in the region for further support to successfully embrace digital, and where

opportunities exist to leverage digital publishing to build more robust and varied publishing ecosystems across the continent.

Methodology and Limitations

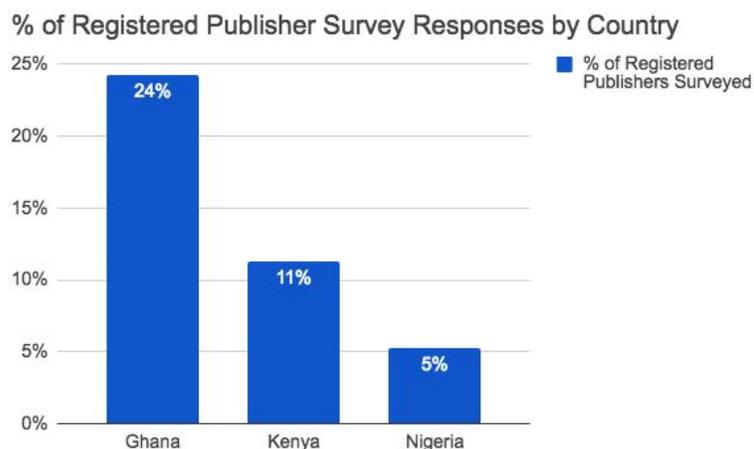


Figure 1

In order to collect data on the digital publishing landscape, Worldreader sent a 38-question survey to 65 publishers across three countries including some Worldreader publishing partners, and some who are not Worldreader partners. In Ghana, 30 publishers received the survey and 17 publishers responded. As outlined in Figure 1, this sample represents roughly 24 percent of the 70 member Ghana Publishers Association. The majority of the Ghanaian publisher sample were surveyed in person by a volunteer and Worldreader staff to provide more comprehensive feedback.

In Kenya, 20 publishers received the Worldreader survey and nine responded. A further seven Kenyan authors were sent a shorter questionnaire of eight questions to get a more diversified response. We received four responses from the author group and conducted in person interviews with the Kenyan Publisher Association (KPA) chair, Mr. Lawrence Njagi, as well as an interview with the former KPA chair, Mr. David Waweru and his partner at WordAlive, Ms. Caroline Muinga. This publisher sample accounts for 13 percent of the 80 publishers registered with KPA.

Finally, we were not able to conduct extensive in-person follow up with publishers in Nigeria, the country with the largest of the three markets. As a result, our sample of Nigerian publishers is smaller and less representative of the landscape. In order to account for these limitations, insights garnered from surveys in Nigeria have been matched with further background research. Eight Nigerian publishers received the survey in Nigeria and seven responded, only one of whom produces textbooks. We were able to collect further

feedback from direct conversations with the Nigerian Publisher Association (NPA) chair, Mr. Gbadega Adedapo. With 402 publishers registered in Nigeria this sample only accounts for 2 percent of Nigerian publishers or 5 percent of NPA members. Nigeria hosts the largest population, and most vibrant publishing landscape with 152 members in the Nigerian Publishers Association and a further 250 non-registered small-scale publishers (Goethe Institute, 2012), thus survey responses from Nigeria should be considered with these limitations in mind and not interpreted as fully representative.

Survey Findings: Production Costs, Revenue Streams, Challenges and Opportunities

Finding 1: Reduction in production time and costs

*“The lower cost and easy access of digital make books much more accessible.”
—David Waweru, Kenyan Publisher and Director at the Kenya Copyright Board*

As a development organization, Worldreader employs digital publishing to lower costs in content creation, printing and dissemination, to increase efficiency by reducing turnaround for content edits and revisions, as well as to address the track and trace burden in content delivery. We thus started our analysis by looking at estimated production costs and time associated with print vs. digital book production.

Findings show that the average time it takes for a finished bound book to be printed and arrive in a publisher’s warehouse for shipping is 2.18 months with 2.5 months or more reported by 56 percent of respondents. By contrast, a conversion from a print file to ebook - when a digital book is ready for digital distribution - was reported at an average of 2.06 months, with 55 percent of respondents citing less than a month of turnaround time. Thus the majority of publishers reported that digital production takes less than half the time of print production and shipping to the publisher warehouse.

This print production time is exacerbated by the fact that the majority of publishers are printing their books internationally. Just one third of publishers interviewed reported printing their books exclusively in their own country. The majority are outsourcing at least some portion of their printing to Asia, the Middle East, Europe, or another African country.

Print. vs. Digital Production Costs



Figure 2

There are also cost savings with digital production compared to print production. Publishers were asked to estimate the average cost of producing a single trade book and a single textbook. Responses ranged from 2 cents to US\$20 per book with an average of \$5.96 for trade books and \$5.33 for a textbook (though estimated production costs for a single textbook ranged widely, from \$1 to \$40). When multiplied by 500 copies, which is the reported size of an average initial trade book print run, this comes out to an average of roughly \$2500 for both an initial trade book and an initial textbook print run. These findings are displayed by country in Figure 2 with textbooks in orange and trade books in blue. For the sake of comparison, we assumed the same print run for textbooks, although textbook print runs are typically in the thousands¹.

In contrast, the average production cost of a digital file for a single trade book title is roughly \$40 and a single digital textbook file is roughly \$200². The digital files have no limitations on the number of times they can be reproduced. Thus, these one time production costs correspond to a small fraction - 1.6 percent to 8 percent - of the reported cost of print production. While there are other costs associated with digital production, such as software tools and training, and while consumers need to have a tool like a mobile phone to engage with digital content, it is hard to argue with that level of cost-efficiency for production, and it makes experimenting with digital content that much more interesting for publishers.

Finding 2: Revenue for digital books remains low, albeit a fledgling market is developing

The survey asked publishers to provide approximate ranges of revenue they brought in from printed and digital trade books and textbooks in 2016. Results show, unsurprisingly

¹ See Read, 2015, *Where Have All the Textbooks Gone?* p. 49 for more information on textbook print runs and economies of scale.

² These averages are based off of the digital conversion costs that Worldreader has accrued for titles from its Sub-Saharan African publishers over the past 8 years.

that printed textbooks are the primary form of revenue for publishers. However, some interesting data indicate that digital books have potential to dominate trade book markets, with particular success in Ghana and Kenya, and room for growth in Nigeria where a large individual consumer market exists. The majority of textbook publishers bring in US\$50K or more from annual textbook sales, while printed trade books on the other hand bring in far less in most countries other than Ghana ranging from \$7,500 in Nigeria to \$25K in Kenya and \$42K in Ghana on average, with outliers from some of the largest publishers removed³.

Avg. Revenue from Print Books in 2016

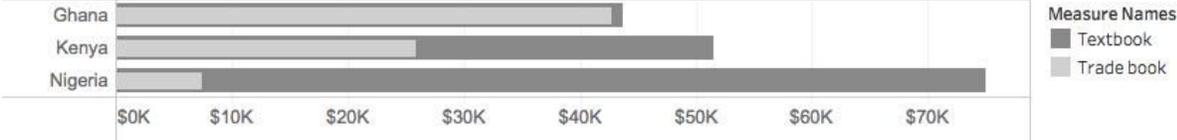


Figure 3

When looking at ebook sales, this dynamic between textbook and trade is almost flipped. Highlighted in Figure 3, publishers in all three countries, on average, are bringing in more revenue from digital trade books than digital textbooks. It is worth noting that the majority of the publishers selling ebooks are partners of Worldreader and our partnership is responsible for a large portion of this revenue generation and prevalence for digital trade book sales. The lack of digital infrastructure in the majority of schools and government policies to support digital textbooks is the primary barrier to these sales.

Avg. Revenue from ebooks in 2016



Figure 4

To dig a bit deeper, we also examined the primary customers for ebooks within these countries. Publishers were asked to identify what type of customers they had for print trade books vs. ebooks. As shown in Figure 4, the majority of publishers listed individuals, NGOs and private schools as their top consumers of digital content. This indicates that the most prominent revenue stream for digital content is direct-to-consumer sales through a variety of online platforms.

³ Large outlier publishers sighted revenue in the tens of millions of dollars annually from print textbook publishing and 200K annually from digital books (print and trade) - demonstrating that large revenue streams are available, but dominated by a few.

Customers for eBooks

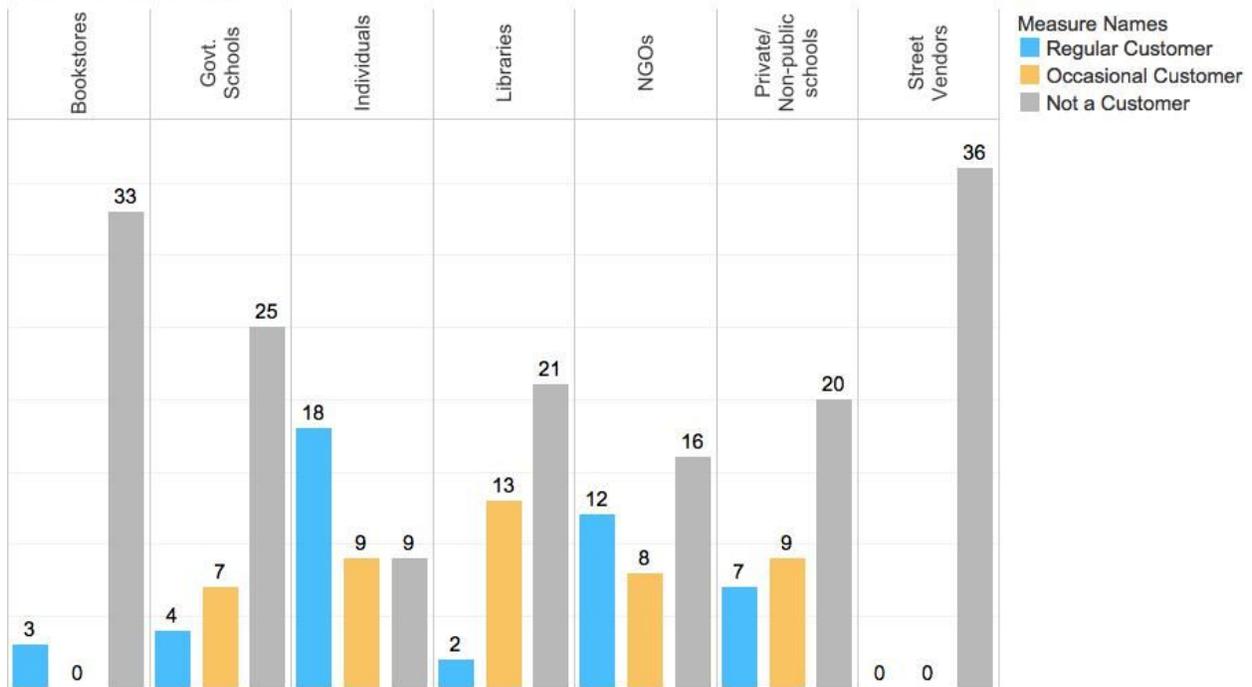


Figure 5

When compared to customers for print trade books, you can see where the most potential for digital growth lies. As displayed in dark orange in Figure 5, bookstores are by far the biggest regular customer for trade books followed by private schools and individuals. Bookstores will remain customers for print trade books, but there is certainly potential to sell more digitally to individuals and private schools that are equipped with devices. The trick will be identifying and reaching these customers in an effective way. This brings us to a few of the challenges associated with digital publishing in these geographies and how they might be addressed.

Customers for Print Trade Books

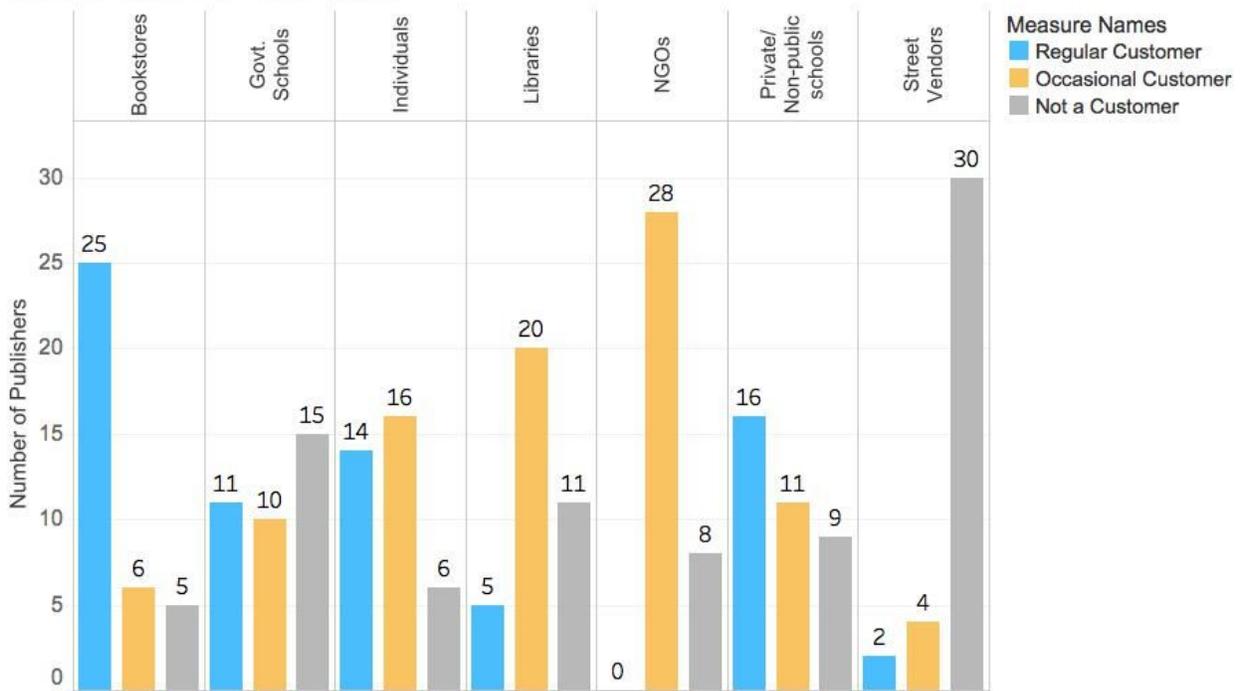


Figure 6

Finding 3: The largest challenges with digital publishing are adapting new digital marketing strategies, understanding and maintaining new technologies and identifying consumer markets

When asked to identify the biggest challenges with digital publishing a few themes stood out — a need for greater technical capacity building among publishers to manage new digital tools and systems, including support to properly manage digital rights, and a desire for support in marketing digital books and identifying consumer markets. With schools as their largest revenue stream, many publishers highlighted a need for great advocacy in education to support digital programs.

Challenges with Digital Publishing

	Highly Challenging	Somewhat Challenging	Not Challenging
Understanding and Maintaining new technologies	16	9	11
Digital Rights Management	14	10	12
Identifying consumer markets	14	14	8
Adapting new digital marketing strategies	12	18	6
Increased risk of book piracy despite digital rights managemen..	10	8	18
Metadata Maintenance	10	13	13
Digital Payment Processing	5	5	10

Figure 7

Worldreader has worked to address some of these issues during annual digital reading summits held in Ghana for our West African partners and Kenya for our East and Southern African partners. During these summits, a publisher track gathers publishers around a variety of trainings and workshops to facilitate their digital publishing workstreams and build a community of practice. Similarly, eKitabu has begun putting together an Accessible EPUB Toolkit and supporting trainings for publishers on how to build EPUBS that meet accessibility standards and allow the use of text-to-speech and other accessibility features. This is all part of eKitabu’s “Content Development Challenge,” which encourages Kenyan publishers to create more accessible content for learners with visual impairments and other accessibility needs⁴.

For publishers, an advantage of working with organizations like Worldreader and eKitabu is their direct pipeline to consumers through programmatic partnerships in schools and libraries primarily, as well as payments to push content through their mobile reading platforms. However, reaching other markets has proven difficult for many publishers. Worldreader has begun to work with select publishers to help promote their content on Amazon and other digital marketplaces to gather some data on what type of promotions work and how content and metadata can be optimized to improve digital sales. This is certainly an area for further growth and experimentation.

Finding 4: Publishers perceive the biggest benefits of digital publishing as access to international markets, access to a wider audience, revenue generation, and the creation of accessible content

The highlighted challenges associated with digital publishing are particularly interesting in light of the perceived opportunities associated with digital as conveyed by publishers, both those who publish digitally and those who currently do not. Ninety-four percent of

⁴ For more information on this program visit <https://www.ekitabu.com/index.php/impact/toolkit/>

publishers listed access to international markets as a major benefit to publishing books digitally, closely followed by access to wider audiences and revenue generation. Given the challenge many associated with identifying consumer markets, publishers have nonetheless seen the benefits of the access that selling digital books provides, without incurring massive shipping costs.

Benefits of Digital Publishing

	Major benefit	Somewhat of a benefit	Not a benefit	Unsure
Access to international markets	34	2		
Wider audience	31	4	1	
Revenue generation	27	8	1	
Creation of accessible content	26	9		1
Expanding your catalogue	24	11	1	
Reduction in print distribution costs	24	7	4	1
Reduction in book piracy due to digital rights management	19	8	3	6
Building national identity	17	11	6	2
Production in new languages	12	11	10	3

Figure 8

Publishers are hopeful that with time, these benefits can be leveraged to further open international markets for them and better reach people in the diaspora and beyond. One Kenyan publisher we spoke to had produced a book about a former Prime Minister, who happened to be travelling to the United States and wanted to bring copies with him to sell. With Worldreader’s support, instead of shipping the books, they were able to convert the files to digital and make them available for sale in the United States through Amazon, at great cost-savings to the publisher.

Country Profile: Spotlight Nigeria

Nigerian reading culture and current use of ebooks

Looking a little more closely at each country’s book market, Nigeria stands out as a good place to start since it is a market that is new to Worldreader. Worldreader has few existing publishing partners in Nigeria, yet with roughly 335,000 monthly readers, Nigerians are the largest consumers of books on Worldreader’s free mobile reading web application. This is not a huge surprise, since Nigeria is the second most populated country in Africa with an estimated population of 180 million. As noted in the methodology section of this document, the Nigerian Publishers Association quotes 152 publishers in Nigeria, a further 250 non-registered small-scale publishers, 4,000 bookstores and 1,500 printing presses (Goethe Institute, 2012).

Compared to Kenya and Ghana, there is evidence of a budding consumer market in Nigeria. For example, while survey results from Nigeria shouldn't be considered representative given the small number of textbook publishers surveyed, 100 percent of survey respondents marked bookstores and individuals as purchasers of their print content. A contributing factor to consumer growth could be the rise of publishers in Nigeria focusing on trade. In an overview of publishing in Nigeria, Shercliff (2015) notes, "there is a small but growing market for general books (religion, self-help, business, non-fiction, fiction and children's books), and a new generation of publishers (e.g Farafina Books [now Kachifo], Cassava Republic Press, Parresia Publishers) has arisen in the past ten years to publish specifically for this consumer market" (p. 54).

While there seems to be an investment on the creation and production side for more trade books, there remains resistance among consumers who are still drawn to curriculum. While the survey was limited in its insights into textbook markets in Nigeria, there is evidence of a dominant textbook market in Nigeria. Shercliff (2015) notes that, "Not more than ten percent of the population buys books after they have left school or university, 'because people here read to pass exams.' Reading is associated with learning and not something that is done for pleasure" (p. 57). Given the high cost of books, readers often have to choose between textbooks and trade. Textbooks carry a weighted importance because of the perceived role they play in advancing one's formal education and therefore fall in favor with readers.

Digital has a role to play in cutting these costs both on the production and consumer side. Based on the survey all publishers have less than 25 percent of their catalogue in digital, all digital production is outsourced and the majority of publishers are converting their titles to digital after being published in print. While this may be a different story for those publishers not surveyed, there was evidence through conversations with the NPA chair that there are some barriers to going digital in Nigeria. In an interview with Mr. Adedapo, he cites "technical know-how and erratic power supply" as a deterrent to growth, as well as a fear that readers will download free books instead of directly compensating authors and publishers.

Country-specific scope of opportunity for digital publishing

Barriers

From a production standpoint the Nigerian publishers surveyed cite metadata maintenance and knowledge of new technologies as the biggest challenges to publishing digitally. Post production the biggest barriers are: identifying the audience, payment mechanisms for the end user and internet accessibility among readers.

Outside of our survey data, industry experts echo the same concerns around accessibility and technical literacy, “a significant barrier still remains in accessing these electronic publications, especially when one considers the financial constraints involved in having access to them, in terms of policy agreements, purchase, subscription, technical know-how and technologies required for easy access” (Ikponmwoosa, Schorlastica & Ngozi, 2013, p. 44). One of the publishers interviewed explicitly mentioned challenges with accessing e-reading devices in Nigeria, other than the mobile phone. Amazon does not

currently sell in Nigeria, and many of the digital payment platforms make it really difficult for Nigerians to pay for books and have devices shipped.

Current digital publishing initiatives

The agility of small publishers and authors sets Nigeria apart from other countries and also makes its consumer market promising at this stage of its digital development. The last decade has seen a new generation of Nigerian publishing houses grow the body of contemporary fiction in the country (Shercliff, 2015b). Digital amplifies this forward momentum, allowing small publishers and authors to reach farther and wider.

Digital platforms such as online literary magazines are changing the publishing landscape in Nigeria to account for a void left by physical distribution challenges. Shercliff (2015b) notes *Saraba Magazine*, *Jalada*, and Ankara Press whose content showcase inspiring and entertaining content for Nigerians and by Nigerian writers that is now available for purchase around the globe. She highlights *Jalada*'s 2014 sex anthology, which, “showcases confident African writing that needs no affirmation by the West” (Shercliff, 2015b, para.14). This demonstrates a growing space in the Nigerian book market for digital sales that can both build national identity and engage regular audiences both at home and abroad with the right content. When asked in an interview, Mr. Adedapo, the chair of the Nigerian Publishers Association, clearly outlined some of the benefits of digital publishing in the country, listing:

- A. *Digital publishing has increased book circulation*
- B. *It has also helped in limiting the barrier of distance, logistics involved in sending/ buying physical books*
- C. *It has reduced the cost of distribution*
- D. *It has increased the coverage level as there's no geographical barrier*
- E. *It has increased the product life span for some books and has revived many dying titles*
- F. *It has created additional revenue sources*⁵

It's not just small publishers that are gaining momentum from the digital wave. Writers in Nigeria are recognizing the benefits and reshaping their process accordingly. They are increasingly turning to self-publishing on digital platforms like Amazon Kindle Direct and

⁵ Worldreader personal communication, February 25th, 2018.

Okadabooks. Some have even been relatively successful, setting examples of how to build an audience online. Others have embraced digital magazines and online blogs such as Sentinel Nigeria to showcase their work and gain exposure (Shercliff, 2015, p. 57).

Recommendations and opportunities for digital market growth

How quickly publishers and authors in Nigeria adopt to digital models for delivery and consumption of books will determine future growth. Given the survey results, there are three focus areas for industry leaders:

- readers as consumers;
- leveraging self-publishing platforms;
- adopting a Pan-African lens.

Publishers cited individual buyers as one of the primary book consumer entities in Nigeria. Digital opens this up with the new ability to really understand reader's habits, tastes and preferences by using the power of digital data to track book opens and book engagement and creating space to leave instant feedback on books through online comment forums and ratings on ebook platforms. Digital allows producers to laser focus on customer needs and self-publishing authors know this better than anyone. 86% of surveyed publishers cited access to international markets and wider audiences as an advantage of digital publishing. Better leveraging digital marketing tools to identify these consumer markets would provide access to a large customer base of individual buyers for Nigerian publishers. Mobile phone advertisements and leveraging social media to sell digital books in Nigeria would be a great place to start.

Country Profile: Spotlight Kenya

Publishing scene

Kenya has a vibrant and healthy publishing market. The size of the market has seen significant growth: between 1977-1997, the number of publishing houses in Kenya increased by 60 percent, of which 95 percent were indigenous by nature (Makotsi and Nyariki, 1997). The market thrives under the leadership of the Kenya Publishers Association. The KPA is a prominent leader with their primary aim of facilitating knowledge sharing and promoting advocacy for books and the people and systems that create them. Currently the KPA has 40 members, ranging from small presses to large educational publishers.

Textbook and educational content lead the market in terms of size and growth. The structure of the textbook market in Kenya is part state owned, foreign owned and local indigenous publishers (Hamisi, 2011, p. 4). Textbook publishing is very profitable for local

publishers. The average revenue of textbook print sales in 2016 among the local textbook publishers in Kenya was 53,000 USD, with the largest revenue listed at 15,000,000 USD (removed from the average since it was such an outlier). When it comes to production of print books, educational publishers see lower costs compared to trade publishers because their initial print run is typically in the thousands making printing, warehousing and distribution costs under 1.00 USD per book. This cost per book for a small trade publisher is five times that amount.

However, one of the bigger cost barriers to these publishers is mandated curriculum updates, which happen on average every 3-4 years. As a result, publishers frequently have to update and re-print curricular materials and textbooks at a large overhead cost every 3-4 years in order to maintain its education markets.

Kenyan reading culture and current use of e-books

There are a number of factors that contribute to a strong reading culture, but chief among them are: access to books, relevant content, and positive attitudes towards reading.

Access to books remains a strong barrier to reading in Kenya. One thing that disparages reading is the high cost of books. The government has placed a high VAT (value added tax) on books that affects bookshops and therefore drives up the cost for the consumers (Abrams, 2016). This VAT affects schools just as it affects individual consumers. For example, many schools have an allocated budget for buying books and because the VAT prices means a decrease in number of purchased books, the budget is usually used exclusively for textbooks only. The priority among teachers are books that are examinable (Lang'at, 2016). While Kenyan policy mandates VAT on ebooks as well, the government has yet to figure out a way to effectively implement this policy and collect these taxes.

Defining relevant content is challenging, but we know that a big part of relevance starts with having books in local languages. It's hypothesized that children who learn to read in their mother tongue possess a keener ability to acquire knowledge in the early stages of their education (Hamisi, 2011, p. 7). Local publishers are working to generate more content in East African languages. From our survey, 23 percent of publishers are producing books in local Kenyan languages with 60 percent producing books in Kiswahili, one of Kenya's official languages. Kiswahili is a Bantu language spoken in East and Central Africa. It is spoken by approximately 100M people in East Africa and 16.6M Kenyans⁶. While Swahili is widely enough spoken to have a stable demand for content, the market for less prolific local language books is often limited to small batch print-runs for specific education programs. As noted earlier, the cost of producing this content in print greatly outweighs the cost of producing digitally, thus there is room for Kenyan publishers to leverage digital books in the local language space.

All this however, is obsolete without a demand for books from those who see a value in

⁶ <https://www.ethnologue.com/language/swh>

reading as a priority. The Director of the Kenyan National Library Service summarized the issue nicely in an interview from 2015: “Income of most working people is not enough to make Kenyans engage in reading for recreation. There is a serious battle between reading and need for basic necessities driven by the levels of income and the standards of living” (Oruko, 2015, para.6). Along with engagement from the government to prioritize and support lifelong learning opportunities, publishers need to continue to do their part to market reading as a social and public good that will drive growth and economic opportunity.

E-book adoption

For the past seven or so years, digital has been an ongoing wave of change in Kenya’s publishing community. The adoption rate to new technologies and formats has been overwhelmingly positive. From our survey, 70 percent of publishers have at least half their catalogue available in digital formats. New technologies and digital books have opened up frontiers and more possibilities, but digital is also forcing the industry to address barriers that have historically not existed in the print space.

Access to wider audiences is one of the positive effects of digital listed by the 13 surveyed publishers. Distribution costs and challenges are mitigated making publishers less averse to risk taking and making it easier to reach readers outside of the local market. The biggest barrier to e-book adoption is the newness of it all. Publishers are still understanding how to market e-books to their readers and how this differs from marketing for print content. Among any great wave of change still lies a level of skepticism.

Country-specific scope of opportunity for digital publishing

Barriers

Barriers to digital publishing in Kenya exist at the creation, distribution and consumption levels. In terms of creation, publishers are still unlocking production mechanisms and learning how to streamline that process and overall technical expertise. Currently most publishers are converting their books to digital after the books have been published in print. According to our survey it’s an even split among publishers for digital conversions in house versus outsourcing to a conversion service.

In terms of distribution, while platforms like eKitabu exist, the market is still nascent when it comes to platforms and mechanisms to reach readers. One of the bigger distribution barriers listed by the surveyed publishers is platform hosting fees. This is an added cost that discourages publishers from using certain platforms for digital distribution. As noted earlier, identifying consumer markets for digital books has been challenging for these

publishers. The majority of Kenyan publishers interviewed continue to market directly to schools, libraries and other customer outlets through regular visits and showcases of their books and new curriculum materials. This method has proven difficult for marketing digital books. They have primarily continued to market their paper books, even via social media, and only mention the sale of digital when a potential customer or author inquires after digital content.

In a conversation with Lawrence Njagi, the current chair of the Kenya Publishers Association (KPA), he suggested a need for teacher training and acceptance in order to address the barriers to digital publishing. The slow acceptance on the part of teachers and other end users has made uptake slow. His publishing house, Mountain Top Publishers,

has begun to showcase their digital content during teacher workshops that are held annually to train teachers on new curricular materials.

However, reaching readers with digital books has added challenges when taking into account barriers for end users who often have low internet connectivity, low levels of ICT literacy, and concern over information security (Namande, 2012, p. 8). As part of the data collection process, Worldreader sent eight questions to a few Kenyan author partners to get their take on the digital landscape. The authors listed social media as both a barrier and area for opportunity when it comes to digital publishing. Some saw it as a distraction that was taking readers away from reading longform digital book content, while others appreciate that they can now see reader reactions to their books through online media and digital networks that have space for commenting, and appreciate that digital media has made self-publishing much easier. That being said, some authors face the same concerns around digital publishing as the publishers - everything from fear of piracy to lack of awareness and low penetration of ereaders and viable micro-payment systems for content.

Current digital publishing initiatives

“Digital will penetrate and reach an entire new generation in the country; even in Standard One, digital devices for reading are being introduced to kids. They will grow up comfortable with the medium.” — Tony Mochama, Kenyan Author

Thanks in large part to its advanced mobile banking system, Kenya has become an ICT hub in Sub-Saharan Africa with the quick expanse of innovation and a multitude of Nairobi startups. As such, it is one of the leaders in digital publishing, especially in education. The Kenyan government has set mandates on ICT in education as part of its Vision 2030. As part of its efforts to meet the objective on an ICT ready workforce, the strategy includes: “Trained ICT teachers capable of enhancing teaching of primary and secondary school children with technology” and, “Development of digital content for all education levels using multimedia technologies” (Ministry of Information Communications and Technology, p. 42). In line with this push, a number of ICT training programs, local digital reading

platforms and education apps have arisen in Nairobi, now considered East Africa's Silicon Valley.

Following suit, Kenyan publishers have risen to the challenge and welcomed digital publishing with open arms. Although there continue to be widespread concerns around digital rights management and book piracy, there is a more direct pipeline to schools and education systems than observed in either Ghana or Nigeria. 85 percent of Kenyan publishers named private schools and institutions as regular or occasional customers for ebooks, and Kenyan publishers continue to seek opportunity for digital sales abroad with 100 percent listing access to international markets as a benefit of digital. Despite the barriers to reaching these markets listed above, Kenyan publishers have faith that the international consumer market will grow over time.

Worldreader makes a point of sending regular publishing reports to its publishing partners to show them where their books are being read on mobile phones and which schools and libraries are receiving their content on e-readers. This adds great value to the partnership for publishers, since they rarely get this type of data back from other digital platforms where they sell their books. Publishers are often impressed to see their books performing in other African countries. Njagi listed sales in Nigeria and Ghana as particularly strong as a result of their digital books and partnership with Worldreader. Even sales in the United States have increased through a streamlined web presence and access to their content on Amazon.com, a perk of Worldreader's partnership.

In conversations with David Waweru of WordAlive Publishers, a former chair of KPA, he confirmed that whereas sales from the United States used to be bought primarily by NGOs for distribution in Kenya, through digital they are seeing more direct to consumer sales to foreign buyers who are consuming their content in other countries, rather than buying them for consumption in Kenya. The challenge for Kenyan publishers, as with all publishers, is how to compete with the magnitude of content outside of Kenya and convince the international community that their books are worth buying. As noted by author Isabella Kamau, "Publishing has become easier and any one can do it. You don't need to be a publishing company. It's no longer the publishing companies determining what the people should read, but it's the people reading what they like through accessing the books online"⁷.

Recommendation and opportunities for digital market growth

As Kenya raises a new generation of digital natives, access to locally produced digital content to support its ICT Masterplan will become increasingly important. Demand for digital content is growing, but publishers in Kenya are asking for support in a few key areas:

- support in leveraging digital book data so that it translates into sales;

⁷ Worldreader personal communication, October 17th, 2017.

- developing market content so that customers want to buy digital content, especially in the education space where the largest market for books exists.

These questions are not unique to Kenya. As a start, Worldreader can better support its publishing partners to understand its data and conduct trainings for publishers on business models, marketing, and sales projections for digital books. Interviewed authors and publishers both feel continued school outreach to promote digital books, media campaigns, promoted social media posts and digital contests will help bring digital books into Kenya's future. As noted by author Alex Nderitu, "E-books and print on-demand systems are the wave of the future. Traditional methods are so expensive, slow and cumbersome that digital publishing is considered a 'savior.' Without digital publishing, hundreds of new-generation writers would simply disappear into other professions"⁸.

While there is a ways to go before this vision becomes a reality, the evidence suggests Kenya's authors and publishers are wise to continue building their capacity to lead in the face of the digital wave. As part of its Vision 2030, the Kenyan government should continue its investments in support for publishers, by financing ICT-based reading initiatives in Kenya's classrooms that lead to cost-efficiencies for content provision, and to build awareness around the availability of digital content through mobile devices and public hotspots.

Country Profile: Spotlight Ghana

Ghana has seen growth in book development since its independence in 1957. "The appearance of the Ghana Publishing Corporation (GPC) introduced a new dimension on the publishing scene. Brown, writing on the GPC, observes that the picture in Ghana before 1965 showed an entire absence of indigenous publishing houses, absence of foreign-owned publishing houses and a heavy dependence on the importation of books and educational materials" (Cabutey-Adodoadji, 1984, 140-141).

While Ghana's growth remains a pacesetter in Sub-Saharan Africa, it is not immune to the barriers that plague its neighbors. The domination of educational content that we see in Kenya and Nigeria exists in Ghana as well. Eighty percent of survey respondents publish textbooks. The publishers that are in the business of trade books are up against economies of scale. The two trade publishers surveyed quoted significantly higher production costs than the textbook publishers, whose print runs exceeded 500 titles.

There are many metrics that can define the viability of an industry, but one thing that propels Ghana's growth is an investment in local language. Over 60 percent of survey respondents publish books in local Ghanaian languages. A government mandated policy drives much of the high investment in local language content in Ghana. In 2010 the

⁸ Worldreader personal communication, November 2nd, 2017.

government rolled out a program called the National Literacy Acceleration Program (NALAP) across the nation's schools (Rosekrans, Sherris, & Chatry-Komarek, 2012).

This literacy initiative orchestrated by the Ministry of Education and funded by USAID aimed to improve reading skills and learning outcomes among students. The evidence on higher levels of literacy and mother tongue language was compelling enough to power this program. In addition to this government initiative, Ghana had language of instruction as mandated by the Ministry of Education: "The Ghanaian language of instruction policy stipulates the use of the local language as the medium of instruction from Primary 1 to 3 and English language as the medium of instruction from primary 4 onwards" (MoESS, 2008, p.343). This led to the adoption of 11 mother tongue languages as the primary languages of instruction for Primary grades 1-3 of 80 recorded languages in Ghana (Hartwell, 2010).

Survey respondents listed private institutions as their main purchaser of local language content, which suggests the industry at large is responding to a need and so long as local language instruction is a priority, publishers will continue to have a growing readership.

Ghanaian reading culture and current use of ebooks

The value placed on reading in Ghana is similar to Kenya and Nigeria in that knowledge acquisition remains the primary motivator to reading, over entertainment. One of the highest barriers to building a culture of reading is identifying the consumer market. Based on survey results, publishers believe this is a more pervasive problem in print and digital offers a new opportunity to identify and understand the reader with more fluidity.

While the production of digital content is growing among publishers, there is still the struggle of reaching readers. Ghanaian publishers cited payment gateways as the biggest blocker to selling digital books. While Ghana has developed mobile banking systems, it is blacklisted by Paypal and certain other payment platforms that are commonly required by sites like Amazon books in order to sell content. These regulations often act as a barrier for Ghanaian publishers looking to sell their content internationally.

Country-specific scope of opportunity for digital publishing

Barriers

Aside from barriers associated with the lack of digital payment platforms in Ghana, a number of Ghanaian publishers named low market demand and resistance from the education sector as major barriers for digital publishing. While these themes carried over from Kenya and Nigeria, Ghanaian publishers most commonly cited infrastructure to

support digital publishing as a barrier. Infrastructure concerns included inadequate devices to access digital books, lack of infrastructure for digitizing books and maintaining digital platforms, power supply issues, and one third of the respondents listed low internet availability and use as a barrier.

A few publishers further elaborated on struggles with low reading culture and limited support from the government for e-learning programs in their responses about barriers for digital publishing. One publisher stated that the biggest barrier was, “The inability of the educational system to integrate e-learning into the mainstream educational curricula.” Others listed government legislation and lack of policy as barriers. One publisher suggests sensitization and advocacy to address the challenge of low cultures of reading and encouraging digital reading. This would entail the creation of programs and platforms to emphasize the value in reading, and encourage digital reading. They see hope in the fact that even those who are largely illiterate are able to use their digital devices for financial transactions.

Current digital publishing initiatives

New digital technologies have and will continue to change the publishing landscape both in Ghana and abroad. There is little indication that digital books will soon replace print book markets; however, digital offers an entrepreneurial path for publishers. The high cost associated with print runs keeps publishers from experimenting with content that is not either high-grossing or high volume. Digital removes these cost barriers leaving publishers less hesitant to experiment with different types of content.

Local content and local language content are beneficiaries of the rise of digital. Preserving local heritage is not something that immediately comes to mind when thinking about the strength of digital. However, ensuring local language content remains relevant in the world of storytelling is an opportunity digital affords. Worldreader, in partnership with the African Libraries and Information Association (AfLIA), digitized content in three Ghanaian languages to be added to e-readers for a large scale library project in Ghana. Many of the titles were converted to digital for the first time. This was a worthy investment, but an investment that was significantly cut in both time and cost because of digital. Additionally, Worldreader is partnering with the Bureau of Ghana Languages to digitize print copies of local language content that was damaged during a flood. In the absence of soft copies for these books, digital provides a cost-efficient opportunity to preserve local heritage.

Recommendations and opportunities for digital market growth

Ghana shows opportunity for growth in two main areas:

- the digital trade book space above the digital textbook arena;
- focusing digital content on preserving and expanding cultural heritage and indigenous languages.

Experimenting with new audiences near and far is now less risky as a result of digital. These tools can and should be further leveraged to support Ghana's mother tongue language policies in the early years, and foster a habit of reading among underserved language populations. This will require further advocacy at the government level to support digital reading programs in classrooms. Finally, there is growing potential for Ghanaian publishers with trade book sales both locally and abroad. Publishers and authors in Ghana should continue to export their content via large distribution platforms, like Amazon but also platforms closer to home, like Okada Books in Nigeria. Worldreader will continue to work with publishers to optimize their content and build up their capacity to produce and market content for these diverse digital platforms.

Conclusion and Next Steps

At a glance, there are a number of societal and infrastructural barriers to overcome before digital publishing has a huge market in these three countries. However, there are certainly opportunities at hand, particularly when it comes to testing and vetting content, where digital books can save publishers money and gain exposure in foreign markets. As most publishers foresee, these opportunities will continue to grow as more digital devices proliferate the continent, and education systems begin to turn towards digital initiatives in their classrooms.

Digital changes are coming, and coming at scale. Those publishers who are ahead of the curve and ready to support the digitizing market will be a guiding force through this transition and can help guide local ebook policies and drive their local book supply chains into the future.

References

- Abrams, D. (September 27, 2016). Kenya Publishers Association Cites Concern for Reading Culture. *Publishing Perspectives*. Retrieved from <https://publishingperspectives.com/2016/09/kenya-publishers-reading-culture/>
- Cabutey-Adodoadji, E. (1984). Book development and publishing in Ghana: an appraisal. *Libri*, 34(1), 130-155.
- Hartwell, A. (Aug. 2010). National Literacy Acceleration Program (NALAP) Implementation Study. Education Development Center. Retrieved from <http://www.web.net/~afc/download3/Education%20Research/NALAP%20Study/EQUALL%20NALAP%20Implementation%20Study%20Final%20Report.pdf>
- Ifeduba, Emmanuel. (2012). PUBLISHING IN INDIGENOUS NIGERIAN LANGUAGES: A STUDY OF TRENDS. Retrieved from https://www.researchgate.net/publication/323029771_PUBLISHING_IN_INDIGENOUS_NIGERIAN_LANGUAGES_A_STUDY_OF_TRENDS
- Lang'at, P. (September 19, 2016). Kenya: Publishers Appeal to Counties, State to Promote Reading Culture. *The Daily Nation*. Retrieved from <http://allafrica.com/stories/201609190168.html>
- Ministry of Information Communications and Technology. (2014). *The Kenya National ICT Masterplan 2014 - 2017*. Retrieved from <http://icta.go.ke/pdf/THE%20NATIONAL%20ICT%20MASTERPLAN%202017.pdf>
- Ministry of Education, Science and Sports [MoESS]. (2008). *Education Sector Report*. Accra:MoESS.
- Oruko, I. (Aug. 10, 2015). Strong reading culture key to achieving Vision 2030. *The Star*. Retrieved from https://www.the-star.co.ke/news/2015/08/10/strong-reading-culture-key-to-achieving-vision-2030_c1182927
- Read, T. (2015). *Where Have All the Textbooks Gone? Toward Sustainable Provision of Teaching and Learning Materials in Sub-Saharan Africa*. World Bank Group: Washington D.C.
- Rosekrans, K., Sherris, A., & Chatry-Komarek, M. (2012). Education reform for the expansion of mother-tongue education in Ghana. *International Review of Education*, 58(5), 593-618
- Shercliff, E. (Dec. 9th, 2015b). The changing face of Nigerian literature. *Voices Magazine*. British Council: UK. Retrieved from <https://www.britishcouncil.org/voices-magazine/changing-face-nigerian-literature>
- Shercliff, E. (2015). Publishing in Nigeria: Context, challenges, and change. *Logos* 26,3. pp.51-60. DOI: [10.1163/1878-4712-11112083](https://doi.org/10.1163/1878-4712-11112083)

Resources

Critchley, A. (June 28th, 2018). Three Panelists: How Reader Analytics Can Support Publishers' Decisions. *Publishing Perspectives*. Retrived from <https://publishingperspectives.com/2018/06/three-interviews-reader-analytics-2018-contec-mexico/>