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JAMES LAPPEMAN'S OPEN TEXTBOOK JOURNEY

Grantee: James Lappeman (with colleague and co-editor Paul Egan)

Position: Senior Lecturer

Department: UCT Liberty Institute of Strategic Marketing, School of Management Studies

Faculty: Commerce

Course: Marketing

Degree level: Undergraduate

Title of initiative: Marketing to the South African Consumer

Title of open textbook: *Marketing to South African Consumers*

Introduction

Dr James Lappeman, a Senior Lecturer in the University of Cape Town (UCT) Liberty Institute of Strategic Marketing, specialises in consumer behaviour and has experience teaching both undergraduate and postgraduate students in a range of marketing disciplines.

He has lectured and convened courses at UCT's School of Management Studies and Graduate School of Business, as well as various other prominent marketing and advertising agencies and schools.

After years of dreaming about developing their own first-year marketing textbook for UCT and all students of Africa to enjoy, James and his colleague Paul Egan received a grant from the Digital Open Textbooks for Development (DOT4D) project for the period March 2019 – February 2020 in order to undertake production and publication of the *Marketing to South African Consumers*¹ open textbook.



¹ <https://openbooks.uct.ac.za/uct/catalog/book/29>

The Digital Open Textbooks for Development (DOT4D) project in the Centre for Innovation in Learning and Teaching at the University of Cape Town (UCT) provided grant funding and implementation support to 10 open textbook projects in the period from March 2018 – March 2019, as well as implementation support to an 11th initiative. The Open Textbook Journeys series tells the stories of the people driving these initiatives, their teaching and publishing processes and what inspires them to do this work. These case studies were developed in collaboration with and reviewed by the open textbook authors profiled.

This is the story of James and his many collaborators who put in extensive work to produce their open textbook, and the partners that helped them reach their goal. James was the primary Editor-in-Chief of the process and is the focus of this case study.

This case study draws on:

- James and Paul's grant proposal to the DOT4D project.
- James and Paul's grant report to the DOT4D project.
- Field notes of the DOT4D Publishing and Implementation Manager.

What is the problem James is trying to address?

The *Marketing to South African Consumers* textbook addresses two main problem areas: (1) traditional marketing textbooks are very expensive, more than most South African students are willing or able to pay and (2) those textbooks are typically delivered from a Global North perspective. As such, they are financially prohibitive and rarely represent local experiences and realities.

Compounding this, students often only use a small portion of a marketing textbook, making them a poor investment. These books can also become quickly outdated, as the rate of practical change often outstrips the rate of curriculum evolution.

Textbook conventions in the discipline

The undergraduate Marketing degree at UCT has traditionally relied on a prescribed textbook. Over the last 20 years, the main textbook for Marketing 1 was *Principles of Marketing: Global and Southern African Perspectives* by US-based authors Kotler and Armstrong. The first edition of this book was published in 1980 (recent edition, 2016) and is a global staple in many classrooms. There is a South African edition. In January 2021, the cost of this book at South Africa's largest online retailer was R719 (\$52) and the average class size for the Marketing 1 course was 675 students over a full year. The net textbook expense was therefore R485,325 if all students purchased this edition at the quoted price.

Many sections in the 700-page book are not used and thus constitute a waste for students ... In reality, many students do not purchase it, which compromises their learning experience

The Kotler and Armstrong textbook is very comprehensive, with content that far outreaches the scope of the Marketing 1 course. Many sections in the 700-page book are not used in Marketing 1 and thus constitute a waste for students, given the expense of the book. In reality, many students do not purchase it, which compromises their learning experience. In 2018, a cheaper book was prescribed, but this did not meet the curriculum requirements of the course.

The extent to which the Kotler and Armstrong textbook is 'fit for purpose' is another challenge for prescribing this work in South Africa. While the localised edition is more appropriate when compared to the global edition, there is a lack of local theory and mainly a transfer of case studies from international to local context. In a country as diverse as South Africa, the imposition of Western models is appropriate for only a minority of the market, and the lack of emphasis on the informal sector and lack of understanding for the South African consumer landscape is often evident. The marketing courses at UCT are both theory-heavy and in need of practical application. Neither arm can be compromised in a robust marketing education.

James' open textbook journey

Original plan

As part of a continued drive to educate students and marketing practitioners, James and Paul envisioned working with a network of academics, marketing practitioners and students to create an open textbook. The original thinking behind producing the textbook was underpinned by the following principles:

1. **Inclusivity:** The authorship approach had to represent various sectors of society and give consideration to gender and culture dynamics. The textbook would be guided by the reality that consumer behaviour in South Africa is a diverse and complicated subject, and that low-income consumers and the informal sector needed to be well represented.

2. **Balance:** There had to be a balance between theory and application (and therefore a mix of academic and practitioner perspectives). Merely asking academics to contribute content, as is the norm in the current textbook offering, would compromise the practical element; whereas working solely with practitioners may weaken the theoretical aspect. The key theme behind each chapter was relevance and a solid theoretical base.
3. **Relevance:** The textbook needed to serve as a foundation for Sub-Saharan African expansion, as there is currently a deficit in marketing resources catering to the local context. The plan was to eventually extend this publication process into other Sub-Saharan countries through the editors' university networks, and beyond. Once the complete South African manuscript was finalised, the editors aimed to guide academic partners to adapt the South African content in order to produce local textbooks that have a practical and theoretical foundation already provided.

Authorship approach

James adopted a 'lead author as editor-in-chief with student and colleague co-authors' approach in the *Marketing to South African Consumers* production process. Working with Paul Egan, as well as colleagues Gillian Rightford and Thabang Ramogase as co-editors, he invited authors who were experienced in various elements of the book's contents. Each author was given a brief and worked with the editors over 18 months to craft the 21 chapters of the textbook.

The selection of chapters was informed by a ground-up approach where existing marketing theory was incorporated without being bound to traditional marketing textbook structures. A major emphasis was placed on localised context. Marketing practitioners, academics and students were involved in the writing, editing and peer reviewing process.

After assessing 15 local and international marketing textbooks, the editors developed a vision for a book that included more contextual chapters than usual, which sometimes meant sacrificing theory for application. They made sure to be true to sound marketing fundamentals that form the backbone of the discipline and which are practiced by the world's leading organisations. In line with this, the *Marketing to South African Consumers* textbook is aimed at providing a base for a number of undergraduate marketing courses. The marketing curriculum at UCT is currently under a multi-year review process and this textbook is an aspect of the discussion.

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The content development process and student involvement

Authors produced first drafts of chapters in various stages of readiness. Once these drafts were received, the DOT4D Publishing and Implementation Manager (PIM) copy-edited the text and worked with James to establish cohesion across chapters. This was a time-consuming task, as the 22 authors involved had varying authorship styles and approaches to content delivery. The process also required a nuanced approach in order to retain the various authors' voices and perspectives, while still having the level of cohesiveness and rigour required for a professionally published scholarly work.

Working collaboratively throughout, James and the DOT4D PIM undertook the following content development process:

1. Editors commissioned chapters from authors.
2. Authors submitted first drafts of chapters to editors for review.
3. Editors commented on chapters.
4. The PIM edited chapters and submitted tracked changes files with comments/queries to James.
5. James reviewed edits, resolving some comments/queries, accepting/rejecting some edits.
6. James sent chapters back to authors with tracked changes and outstanding queries.
7. Authors addressed queries and returned content to James.
8. James administered the peer review process.
9. Following peer review, content went back to authors who addressed reviewer comments.
10. James and the PIM prepared the full first draft manuscript for professional proofread.

A handful of chapters diverted from this workflow due to the fact that they required a deeper level of editorial intervention and developmental editing. This resulted in an interactive process where multiple versions were exchanged between James, the PIM and authors. A dynamic, flexible approach was therefore required in dealing with multiple versions of content being in circulation at any given time.

As part of his process, James included students in the authoring and research team. As the end users of the textbook, their voices were considered an important addition. As an inclusive project, the editors also wanted to give students a platform to participate in a publication that may boost their confidence and enhance their CVs during the early stages of their careers. Most chapters with student involvement were monitored, with much assistance given in order to ensure quality. The editors were very proud of the student contributions.

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Publishing process

Institutional partnerships for publishing

The *Marketing to South African Consumers* publishing process formed part of a pilot exploration between the Centre for Innovation in Learning and Teaching (CILT) and UCT Libraries as part of an ongoing collaboration between these two entities to support open education at UCT and in the Global South more broadly. Within the context of this collaboration, the DOT4D project operated under the auspices of CILT.

As part of its commitment to address Sustainable Development Goals (SDGs), UCT Libraries has positioned itself as an open access publisher and online content host in order to promote access to scholarship produced in Africa. To further this ambition, it established a Continental Platform² in 2019 for open access publishing, built on Public Knowledge Project's Open Journals System and Open Monograph Press software.

The Libraries' publishing approach was originally focused on journal publication, but later expanded to include teaching and learning content.

The CILT/UCT Libraries open textbook collaboration is premised on CILT functioning as a partner to academics in pedagogical and content development, while UCT Libraries functions as the publisher. The combined, central focus promotes the imperative to support transformation in teaching and learning at UCT and promote visibility of African scholarship.

The third partner in the publishing process was the UCT Liberty Institute of Strategic Marketing, the department in which James and Paul were based. The Institute was regarded as the co-publishing entity with UCT Libraries, in that it was the primary driver and owner of the content development process. In this three-pronged approach, the academic department and UCT Libraries were positioned as co-publishers, while CILT/DOT4D was the facilitating intermediary.

Production and publishing

Part of the Marketing to South African Consumers approach to accessibility and inclusion was the ambition to have a professional, clear and accessible content design approach. The DOT4D grant proposal budget (and eventual grant) was therefore focused solely on design and typesetting services.

In other institutional publishing collaborations, UCT Libraries has undertaken the typesetting of content using standard templates in the Open Monograph Press platform. This was, however, deemed inappropriate for this content, as the publishing team desired a more dynamic approach.

To this end, the PIM commissioned an external graphic designer who did cover and page design as well as the typesetting of the book (including processing multiple rounds of author corrections). The graphic designer was on board with the objectives and ethos of the publication and became an important partner in the publishing process.

The text/page design process was guided by the objective for content to be clear and visually appealing. It also had to abide by UCT Libraries' accessibility guidelines, which include provisions for optimal disability access.

Given the fact that graphic design and the typesetting process was outsourced, the process had two components:

- **Production (design and typesetting)** – undertaken with an external service provider and managed collaboratively by James and the PIM.
- **Publishing** – undertaken by the UCT Libraries Scholarly Communications and Publishing team.

² <http://www.openaccess.lib.uct.ac.za/oa/continental-platform>

The category that has been the last frontier in terms of online sales growth has been fresh and dry (single unit) groceries. There is no app that can squeeze an avocado to check it is ripe. Until 2019, the only retailers that attempted to sell perishable (fresh and frozen) food online were Pick n Pay (launched in 2001) and Woolworths (launched in 2011).

This is largely due to how complex and costly it is to deliver small units of relatively low margin items to individual consumers. Providing a fresh offering requires a well-managed cold chain with refrigerated delivery vehicles or a short distance (travel time) between product picking and delivery point, with someone physically present to accept the delivery. This last stage of the delivery of the product into the hands of the consumer is known as 'the last mile'. For retailer's the term 'last mile' is defined as,

the end-stage logistics involved in getting orders to customers, as well as accepting returned goods.²³

In their efforts to grow sales and improve the profitability of online grocery sales, e-retailers have explored a range of last mile delivery solutions. We look at these trends in more depth later in the chapter and in the supply chain discussion in Chapter 15.

Figure 6.10: A snapshot of e-retailers in South Africa²⁴



Key online retailers in SA

There are two types of e-retailers in South Africa: pure-play e-retailers, such as Takealot.com; Zando.co.za and NetFlorist.co.za, and 'bricks-and-clicks' e-retailers such as Makro.co.za and Picknpay.co.za. We look at the definitions of these terms in more depth in Chapter 15. Figure 6.8 shows some of the e-retailers that sell consumer goods online. These range from multi-category retailers, such as Takealot.com, bid-or-buy.co.za and Makro.co.za, to specialist e-retailers which focus on selling products in specific categories, such as pet care or health and wellness.

In the 'pure-play' arena, Takealot.com (established in 2011) is the largest e-retailer in South Africa and one of the largest on the African continent.²⁵ It trades across multiple categories, including electronics, lifestyle, media & gaming and fashion products. Since inception, Takealot has invested significantly in developing its logistics and distribution infrastructure.

In the (formal) bricks-and-clicks arena, retailers include Pick n Pay, Makro, Woolworths and Checkers. All offer home or selected drop-off point deliveries and click-and-collect services, where the consumer opts to collect the product in-store. Makro added conveniently located locker pick-up points as additional convenient solutions for their online shoppers. We explore these innovative solutions in more detail in Chapter 15.

The shaping of South Africa's retail landscape – looking back

The South African retail sector is an example of how significantly an industry can be shaped by a political context. In Chapter 1, we looked at consumer marketing in South Africa and explained the background to some of the consumer phenomena that were shaped by the South African consumer's context. Similarly, each of these phenomena had a fundamental impact on consumer goods retailing in South Africa. This section is divided into subsections Apartheid (1948–1994), democracy pre-financial crisis (1994–2008) and democracy post-financial crisis (2008–present) where we explain the impact of these phenomena on retailing and the retail landscape in the 2020s.

Retail landscape in South Africa during Apartheid (1948–1994)²⁵

During the Apartheid era of 1948 to 1994, the majority of SA's population endured an enforced process of segregation, with white people living, for the most part, in suburban enclaves and Black people being removed to high density townships or quasi-independent rural homelands. Townships were essentially sleeper suburbs for a cheap labour force, and as such had no commercial districts.

Sample pages from the *Marketing to South African Consumers* textbook

Production process: Design and typesetting

1. An external professional academic editorial service provider proofread the first draft manuscript.
2. James resolved proofreading queries, where possible, and went back to authors for clarification and resolution where required.
3. The second draft manuscript was prepared for typesetting.

Publishing process: UCT Libraries online publishing

1. UCT Libraries' Scholarly Communications and Publishing team published PDFs on Continental Platform (first phase).
2. UCT Libraries' Scholarly Communications and Publishing team published EPUB and HTML versions on Continental Platform (second phase).

In addition to having the textbook openly available online in multiple formats to boost accessibility, James also felt it was important to have a print version of the textbook in order to more effectively market it. This would also help with promoting the development of further textbooks building on this edition amongst the marketing academic and practitioner community. James also felt it was important to explore the prospect of print-on-demand options in order to get a sense of what the process would be (and what it would cost) if students wished to have a print version of the book.

To this end, the PIM engaged the services of a South African open access publisher and academic publishing services provider. Two hundred copies of the book were printed at a cost of R23,834 (\$1,699), which equaled a unit cost of R120 (\$8) each. Some decisions (and compromises) were required around paper stock, given the size of the work and the ambition to keep it affordable.

Working with the publishing services provider, the publishing team was able to arrive at a printed product that was light in weight, adhered to best practice guidelines on accessibility principles, and was relatively affordable.

Content development and publishing tools

All content was developed and edited in MS Word. James and the PIM relied on Google Drive for sharing project management documents.

Graphic design and typesetting was done using Adobe InDesign. Adobe Acrobat was also utilised in the process to convert InDesign files to RTF format for online publication and to produce print files.

The publishing process was done using Open Monograph Press.

Copyright and licensing

In cases where third-party figures and graphs were used, content was redrawn and original author(s) attributed. For the stock images used in section-divider pages of the final layout, the relevant photo stock libraries were accredited in line with their licensing requirements.

The final published *Marketing to South African Consumers* textbook is licensed under a Creative Commons Attribution 4.0 International licence. All authors retained their copyright.

The peer review process took additional time but was valuable in ensuring a quality product

Quality assurance and sustainability

James incorporated a peer review process in order to ensure that content met industry and academic standards. Academic experts and industry leaders were approached by both the authors and editors in order to proofread chapters and provide input in terms of possible missing content and appropriateness of terminology. The peer review process took additional time but was valuable in ensuring a quality product.

The partnership with the DOT4D project, particularly as relates to the role of the PIM, was also an important quality assurance aspect, as the PIM provided extensive editorial guidance, proofread all chapters and managed the publishing process in collaboration with James. Coupled with this, the activities of the professional designer and typesetter formed important aspects of the textbook's quality assurance process.

The co-publishing partnership with UCT Libraries was another important aspect of the textbook's quality assurance process, in that it provided access to a team of content publishing professionals who could format content for delivery across a range of devices according to international best practice.

In terms of sustainability, the *Marketing to South African Consumers* textbook provides an indication of what is required in terms of the resourcing to produce an open textbook. In this publishing scenario, the original DOT4D grant of R35,000 (\$2,495) was bolstered by R73,834 (\$5,263) in additional funds made up of a supplementary DOT4D grant, funding from the Liberty Institute and money from James's personal research fund.

Status at grant closure

At the end of the formal DOT4D grant period (February 2020), James and the PIM were still in the process of editing chapters and working with authors to ready content for peer review. James and the PIM collaborated on the production and publishing processes described here until December 2020, when the online version of the textbook was published and print copies were delivered.

Challenges experienced and lessons learned

Difficult to manage busy contributors

James expressed that while he had published journal articles and edited a textbook before, there was a steep learning curve in working with interested stakeholders outside of a traditional external, proprietary publishing model. The editors struggled with accountability to the project as authors had various competing priorities. It was also a challenge to manage the large group of contributing authors, as they all had their own personal agendas and professional commitments, which made setting and keeping to deadlines difficult.

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Support is everything

At the point of grant closure, James expressed that he saw the need to be more organised and to create stronger systems of accountability. He did, however, also acknowledge that a process of this kind is organic and expressed that having so many moving parts is difficult to manage. He viewed partnerships as being key to the process, and expressed that the support from DOT4D, CILT and UCT Libraries was the game changer for a project that the editors had been passionate about for years, but had become 'a little stuck' until 2018 when the DOT4D grant opportunity arose.

Budget

Overview of the original budget submitted to DOT4D as part of 2018 grant application, with actual expenditure.

Budget projected at proposal phase

Design expenses:

- Graphic design and page layout: R20,000
- Proofreading: R10,000
- Publishing and legal costs: R5,000

DOT4D grant amount: R35,000

Budget at grant closure

Design expenses:

- Cover design
- Page layout
- Figure and table design

DOT4D grant amount: R35,000

Additional resourcing

- Proofreading: R20,000
(DOT4D supplementary grant)
- Typesetting: R30,000
(UCT Liberty Institute contribution)
- Print: R23,834
(UCT Liberty Institute contribution)

Total expenditure: R108,834