14. Marketing

Developing a marketing strategy to effectively promote publications and enhance their impact in the scholarly landscape.

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Key issues

Developing a Marketing Strategy

Marketing in the landscape of open access publishing faces several significant challenges. First, many small open access publishers face limited resources, including tight budgets and staffing constraints, which can hinder the execution of comprehensive marketing campaigns. Second, raising awareness about the advantages of open access publishing among researchers and institutions remains a hurdle, affecting presses' ability to attract authors and readers. Thirdly, competition from both traditional publishers and other open access initiatives necessitates innovative differentiation strategies to stand out. Finally, building and nurturing an engaged academic community can be challenging and time-consuming, as it requires the establishment of trust and credibility within the scholarly community. Nonetheless, practical solutions such as strategic planning, content marketing, collaborations, engagement efforts, and community recognition can help address these challenges and enhance marketing endeavors in open access publishing. Using an adaptable multifaceted marketing approach enables publishers to effectively promote their publications and enhance their impact in the scholarly landscape.

In this toolkit section, we highlight established resources such as the Jisc NUP Toolkit and Cookbook for open access books, provide insights from OBC's own outreach work about effective marketing strategies, and provide testimonials from several small scholar-led publishers.

The Jisc NUP Toolkit and Cookbook serve as an excellent starting point for learning about marketing from the perspective of a scholarly publisher. These guides argue that an effective marketing strategy is more than just promoting titles to readers; it should also focus on the press as an entity including its community, ethics, and values. In summary, they advise that marketing plans are crucial in focusing dissemination efforts and allocating resources efficiently.

Section 3.12.2 of the Cookbook specifically advises that press-level marketing strategies should aim to strengthen the community of press followers, and formal recognition of their contributions plays a crucial role in fostering a sense of community. There are different models for doing so. The Cookbook mentions that Language Science Press formally acknowledges all advisory board members, editorial board members, and proofreaders who have worked on at least one published book because it 'creates a strong link with the community'. In our interviews with publishers, we found that Mattering Press, similarly, acknowledges those who contribute to design, proofreading, and copy editing in their book's credits.

The Jisc NUP Toolkit, which focuses on university and library presses, emphasizes the importance of marketing transparency for institutional stakeholders (universities). Many universities will have an interest in the promotional strategies of their own university press and its activities. This transparency and alignment, as well as good cooperation with the university marketing team, are essential for effective collaboration.

Both the Jisc NUP Toolkit and the OBC's [blog about outreach](#) address the obstacles faced by new presses or presses on a limited budget that often lack dedicated marketing staff. Considering these constraints, both guides point to creative approaches to developing a viable marketing strategy, including labor approaches with minimal effort that cover the essentials of marketing, collaborating with institutional marketing teams (in the case of university presses), and involving authors or hiring external providers. The choice of approach depends on the press size and goals; outsourcing and institutional support (if available) can be effective for smaller presses, while larger ones will benefit from dedicated in-house staff for a comprehensive marketing strategy. It's important to remember that many marketing activities are low-cost or free, but demand staff or author involvement, tailored to the press's size, budget and objectives.

Ultimately, an effective marketing strategy for open access publishers is centered around building awareness, engaging with academics (readers, authors, and reviewers), showcasing the value of open access, and fostering collaborations.

A well-defined marketing strategy will usually consider most of the following key elements, providing a roadmap for achieving marketing objectives:

- Educational Content: Content marketing in open access publishing often begins with content aimed at educating readers on specific aspects of the (open access) publishing landscape. This can include blog posts, articles, or videos that explain the principles of open access publishing, its benefits, and how it works. Such content aims to inform researchers and institutions about the advantages and disadvantages of different approaches to disseminating research.

- Highlighting Research: Content marketing showcases open access research and publications. Publishers can create summaries, infographics, or short videos that introduce specific books or studies to make them more accessible and enticing to a broader audience.
- Author Spotlights: Featuring authors in content marketing is a common strategy. Publishers can conduct interviews, write profiles or produce videos that provide insights into the researchers behind the publications. This humanizes the research and connects the audience with the authors.
- Community Engagement: Engaging with the academic community is vital. Content can include coverage of conferences, events, and discussions related to open access publishing. This helps build a sense of community among researchers and institutions.
- Trends and Insights: Publishers can create content that analyzes current trends in open access publishing, such as the growing popularity of preprints, shifts in funding models, or developments in open peer review. This positions the publisher as an innovator and authority on open access matters.
- How-To Guides: Content marketing can include practical guides and resources on open access publishing, including topics like manuscript submission, copyright, and compliance with open access policies. These resources provide value to authors and institutions.

- Promotion of Books: This is the most obvious form of content marketing for a book publisher. This can involve creating content around the themes or topics covered in these publications extracts of reviews of the text, and providing a teaser or overview to draw in readers.

Social Media

Dissemination of a publisher's content can be leveraged through social media platforms like Mastodon, X (formally Twitter), LinkedIn, and Facebook. Publishers should consider using relevant keywords, meta descriptions, Alt text, and other SEO techniques to improve visibility and accessibility.

In the context of open access publishing, social media serves a dual purpose: educating academic communities about open access principles and promoting the press and its specific publications. One aim will be for publishers to establish themselves as trusted information sources, by creating content that resonates with likely readers. This works particularly well when publishers do more than simply 'broadcast' content, but emphasize genuine interaction – for example, through quote retweets, publishing threads on relevant topics, and highlighting successes/contributions from community members. With such approaches, ensuring timely responses to community inquiries is important to underscore a publisher's responsiveness and commitment to issues of shared concern.

Although not a publisher, the OBC itself has used similar approaches. It employs a dynamic and strategic approach to social media, currently primarily centered on X, although gradually increasing engagement via other platforms (e.g. Mastodon), as capacity allows. Recognizing the significance of social media in reaching our audience, the OBC has established clear internal policies for content moderation, ensuring transparency and accountability. The OBC's strategy follows a rule of thirds, where approximately one-third of content is original, promoting the platform and attracting audiences; another third is curated from the broader OA community, sharing ideas, stories, and successes; and the final third focuses on engagement, actively participating in discussions, responding to comments, and building relationships within the OA community. The OBC is attentive to accessibility standards, using alternative text for images and captions for videos. We actively employ multimedia, particularly video and images, to enhance engagement, and we carefully adhere to copyright and licensing regulations when sharing content.

Case Studies

Some examples of how different small and academic-led presses describe their marketing strategies.

- Mattering Press writes:

> Our primary marketing activity focuses on social media, and Twitter in particular. For some books, we create custom marketing campaigns, with a budget of up to £300. In an ideal world, this is a practice we would extend to all of our books, but often don't due to capacity issues. Marketing budgets are used in different ways, but recently we have often used them to generate custom images that are used to support social media campaigns.
>
> In addition, we use two large science and technology studies conferences — EASST and 4S — to promote our publications, and the press, and to engage with a global community of science and technology studies scholars. This has included stands at these conferences, as well as focusing specific social media campaigns around these events. (Business Models for OA Books)

- punctum writes:

> punctum books mainly uses social media (mainly Twitter and Instagram) to announce their publications and has a periodical newsletter via email. (Business Models for OA Books)

 punctum books has a more dynamic social media presence than some other scholar-led publishers and has a particular emphasis on community engagement, including reflections on the wider politics of open access publishing.

- Open Book Publishers writes:

> Review copies are sent to leading and subject-specific journals. At the time of publication, each book is promoted through email notices to libraries and

personalized messages to academics. Every new title is featured on our website and marketed via social media. OBP encourages authors to actively engage in the promotion of their books: they have an opportunity to write a blog post about their books and to post podcasts and videos. OBP also prepares, promotes, and hosts collaborative events and online book launches with authors (open for everyone) (Business Models for OA Books).

- Helsinki University Press (HUP) writes

HUP makes a marketing plan for each title, based on conversations with the author who is asked to identify potentially interested audiences, networks, and mailing lists that could be used. Social media platforms are the most prominent tool for marketing. HUP also sends print copies of their books to be reviewed by a journal relevant to the book's topic. Marketing activities are done completely in-house. (Business Models for OA Books).

Question to guide good practice

- Who is your target audience? Have you defined and understood the specific audience you want to reach with your open access publications?
- What are the unique selling points of your open access publications? What makes them attractive and valuable to readers? How can this knowledge be translated to your overall marketing strategy?
- How can you improve the content marketing strategy? Are there any gaps or opportunities to enhance your content marketing strategy? Certain hashtags or content formats like video or images that might broaden your engagement?
- How can you leverage social media platforms to engage with your target audience? What platforms are most relevant to your audience and how can you create meaningful interactions and conversations?
- Are there opportunities for collaborations and partnerships, for example, with libraries, research institutions, scholarly societies, and funding agencies? Does your approach to distributing digital versions of your books and book metadata [link to relevant area of Toolkit] support your site's discoverability?
- Are you tracking and analyzing the impact of our open access publications? Are you collecting and analyzing relevant data, such as download statistics, citations, and social media mentions? How can you leverage this data to demonstrate the impact and value of your publications?
- How can you foster continuous improvement in our marketing strategies? Are you regularly evaluating the effectiveness of your strategies, gathering feedback from your audience and adapting your approaches accordingly?
- If your press is affiliated with an academic institution, have you considered liaising with the institution's marketing team to see how they can help you with your marketing efforts?
- Do you involve authors in designing your content marketing strategy? Do you ask them to suggest platforms, blogs, social media channels and conferences where their book should be promoted? Do you encourage them to be active in promoting their new books throughout their professional networks and/or to experiment with promoting texts through diverse media (interviews, short videos etc)?

Resources

- OBC Outreach Strategy blog: Building Effective Outreach Strategies for Open Access Book Initiatives: Lessons Learned from the Open Book Collective
- Business Models for OA Books
- Cookbook, chapter 3.13-3.15
- JISC NUP Toolkit, Marketing
- Jisc & OAPEN Publisher information on open access monographs updated Feb 2016 Short title: Jisc & OAPEN Publisher Information