Arts, Humanities and Social Sciences Monographs

A Report on Publishing Trends

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October 2021

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1. Executive Summary

A survey of English language academic publishers in the UK, Europe and North America was undertaken in February to March 2021 by staff at the Oxford International Centre for Publishing at Oxford Brookes University. The objective was to gather data on the current landscape of academic monograph publishing in the arts, humanities, and social sciences and to identify trends. Respondents were asked about their monograph publishing activities, sales, distribution, and about the future direction of their programmes. This was a timely exercise as it preceded the release in August 2021 by UKRI of its new Open Access Policy.

It should be emphasised that this report uses responses from publishers as to their monograph publishing activity and, as such, offers a representation of publishers' views and experience in an area which, we acknowledge, is of great interest to many other stakeholders, including academic researchers, research funders, policy makers and librarians. We hope that the report will offer some independent analysis of publisher information that may be helpful in informing the debate among stakeholders as to the future of the publication of long-form research in the arts, humanities and social sciences.

In total 25 university press and commercial publishers responded to the survey, together representing output in 2020 of approximately 32,600 monograph titles in the arts, humanities and social sciences. This is estimated to be approximately 75% of total English language monograph output across the industry. The responding publishers included the larger commercial and university presses as well as numerous small and medium sized ones. Publishers with Open Access publishing models formed part of the responding group.

The survey showed that long-form monograph publishing is a vibrant area of academic publishing. Title output continues to increase year-on-year, driven especially by increased output from commercial publishers. The responses indicate that larger commercial presses have been able to deploy economies of scale across wide publishing programmes, containing costs and achieving operational efficiencies.

Digital channels and platforms are now the predominant means of dissemination. Many publishers report that Covid-19 has driven an acceleration in the uptake of digital monographs. That said, print sales remain important especially for some university presses. Print-on-demand has made it possible for publishers to maintain the availability of ever greater numbers of titles, yet in ever smaller numbers per title.

Volume print sales have continued their historic decline. Most publishers reported that monograph sales in the first three years after publication are fewer than 200 copies of a title. Some university presses indicated that paperback sales of a monograph title were more usually in the 200 – 400 copy range.

Commercial presses appear to apply higher price points than university presses. This is apparent from responses as to average volume prices and average price per page.

Open Access (OA) models for publishing monographs are gaining some traction, signalled by the development of OA lists by traditional publishers and the emergence of OA specialist presses. But most publishers report that their Open Access releases comprise less than 10% of their total monograph output, and they report relatively low levels of author interest in being published under an OA model.

Policies regarding the inclusion of monograph content in authors' own institutional repositories vary widely across the industry. The resulting landscape is confusing both for authors and readers. It is suggested that the industry might be well served by the development of best practice guidelines. The roll-out of funder OA policies, such as UKRI's Open Access Policy August 2021 will, no doubt, help to galvanise this process.

Publishers expect long-form academic monographs to remain an essential means of scholarly communication over the next decade, with digital as the dominant form of dissemination. Verbatim comments by publishers suggest that the potential for OA monographs may only be realised through the provision of dedicated funding for OA monograph publication.

Greater standardisation in the use of metadata for monographs would contribute both to increased discovery of content and to improved consistency and transparency in online monograph usage analytics.

Further study is needed to develop some of the areas highlighted in the survey. These areas include, but are not limited to, work into monograph sales cycles, monograph usage, bibliometric data, researcher preferences, and funding models.

2. The Background to the Survey

In recent years transatlantic monograph publishing has been subjected to technological, economic and institutional pressures, and the Covid 19 pandemic has added to these pressures. Some aspects of monograph publishing have been transformed, notably digital distribution, whilst others have remained unchanged. There is a vigorous global debate around possible monograph futures, involving policy-makers (including Coalition S and UKRI), funding agencies, research institutions and librarians. The UKRI Open Access Policy, which was announced in August 2021 (UKRI, 2021), requires that 'in-scope' monographs, book chapters and edited collections that are published after 1 January 2024 must be free-to-view and to download within 12 months of publication. This announcement marks a significant moment in the debate about the transition to Open Access monograph publishing.

Publishers both large and small, commercial and not-for-profit, have joined the debate with varying degrees of enthusiasm and confidence, but one thing that has emerged is the lack of publishing data about the recent past, upon which to base decisions for the medium term and beyond. Such a paucity of hard monograph statistics is not new – it was one of the principal issues that Professor Geoffrey Crossick encountered in his 2015 report on *Monographs and Open Access*. It was also identified in the 2017 study by Michael Jubb*, Academic Books and their Futures: A Report to the AHRC and the British Library* (Jubb, 2017). It is hoped that the information gathered in the survey and reported here may inform the debate on monograph futures.

We recognise that the term monograph is often used purely to refer to a long-form academic book on a single research topic, normally written by a single or, on occasions, several authors. But for the survey we extended the usage, following Geoffrey Crossick (Crossick, 2015), to include edited collections of research essays, critical editions of texts and other works, short-form monographs, academic/trade cross-over titles and other outputs of research other than journal articles. Textbooks and pure trade titles were outside the scope. The UKRI Open Access Policy announced in August 2021 (UKRI, 2021) uses a more narrow definition, describing an academic monograph as 'a long-form publication which communicates an original contribution to academic scholarship on one topic or theme and is designed for a primarily academic audience; an academic monograph may be written by one or more authors'.

3. The Objectives of the Survey

In the context of the growing demand for Open Access, from institutions and funders, the aim of the research project was to establish a picture of monograph publishing activity in the arts, humanities and social sciences. This was done by gathering and analysing data from publishers as to (1) actual monograph publishing activity in 2019, 2020 and 2021, and (2) key themes shaping publishers' activity as identified in the Crossick (2015) and Jubb (2017) reports, including peer review, OA business models, OA licensing, third party rights, and dissemination.

Aspects of monograph publishing explored in the survey included the current volume of publishing activity and title output, monograph sales and dissemination, the growth of digital sales, monograph pricing practice, the current status of open access publishing, and various operational dimensions of monograph publishing.

It is hoped that the research will provide a base line against which future developments can be measured and evaluated.

4. The Methodology

A web-based survey was developed by the Oxford Brookes University team, using the platform Typeform, and was tested by several industry experts. In total the survey included some 60 different questions across a range of topics pertinent to the publication of academic monographs. Publishers of English language academic monographs in arts and humanities and social sciences in the US, the UK and Europe were approached in February/March 2021 with an explanatory email and were invited to complete the survey online.

25 different publishing organisations gave their responses to the survey. Although this does not represent the entire universe of academic monograph publishers, we are confident that the responses are representative of the full range of publishers, both commercial and university press, and both large and small. Furthermore, by totalling the given 2020 output of the responding publishers we believe that it constitutes approximately 75% of the sector's monograph publishing. All respondents completed the survey and we are grateful to them and for the support of the industry.

The data from the survey were anonymised and the results analysed. The resulting research report is being made available to participating publishers and to interested industry bodies.

Certain limitations apply to the survey. In order to preserve the anonymity of the respondents and to make the survey as easy as possible to complete, pre-set ranges were given for many of the questions. This meant that for certain questions it is not possible to draw precise figures as to revenue/turnover or publishing output.

5. The Findings

5.1 Monograph Publisher Profiles and Publishing Patterns

5.1.1. The monograph publishers that responded to the survey ranged widely in size: seven over £5 million in annual revenue and 18 smaller than £5 million. Commercial presses constituted the majority of the former group and university presses the majority of the latter. The survey responses are believed to represent approximately 75% of monograph output and indicate that commercial presses, when taken together, publish up to seven times as many monograph titles as the university presses.

There were 25 responses from monograph publishers: being 15 university presses, 9 commercial presses and 1 society.

Respondents were asked to indicate their size, both in annual sales revenue and annual publishing output, using pre-set ranges. The results showed some polarisation - a small number of large publishers and a larger number of small publishers. There is an understandable correlation between revenue size and publishing output.

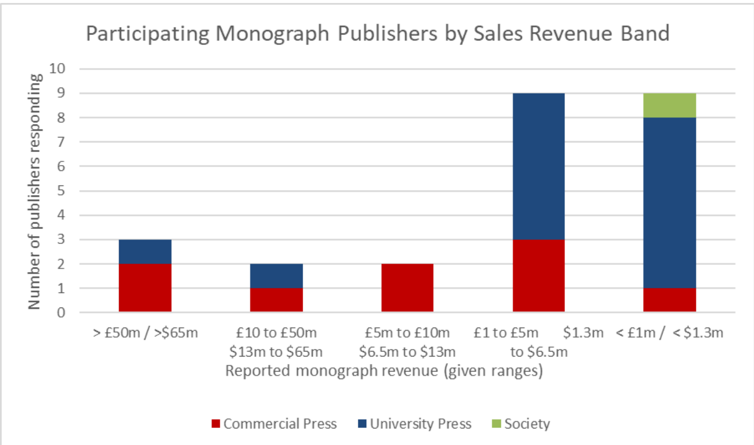

Figure 1: Participating monograph publishers by sales revenue band

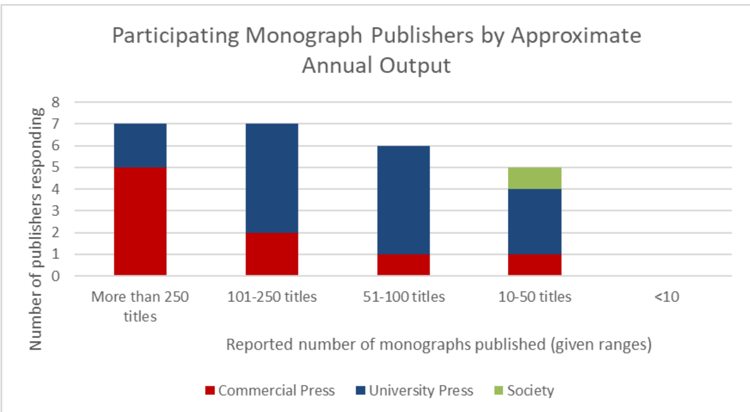

Figure 2: Participating monograph publishers by approximate annual output

Analysis: Five of the nine commercial publishers, including all commercial publishers larger than £5m, publish more than 250 new monograph titles a year. Two, sized between £1 and £5m, publish 101 -250 titles a year and one, with sales of less than £1m, publishes between 51 and 100 titles a year.

Of the university presses, the two reporting sales more than £10m both publish more than 250 titles. Of the seven university presses sized between £1 - £5m, four publish 101 -250 titles, and three publish 51-100. Of those under £1m one publishes between 101 and 250, two between 51 and 100 titles and three between 10 and 50 titles.

We asked respondents to indicate their publishing output in 2020 and to categorise their title output by type of publication. The responses for the year confirm the shape of the sizing data discussed above. The total output identified by the 25 respondents was 32,600 titles. Of these the nine commercial publishers released 28,409 titles and the university presses 4,191 titles. Figure 3 below presents our analysis of reported output in 2020. Although data were not collected from all known active publishers, with gaps among both commercial and university presses, we believe that the publisher mix represents approximately 75% of monograph output, including the majority of larger presses both commercial and university. From the data gathered it appears that commercial publishers are publishing up to seven times as many monograph titles as university presses.

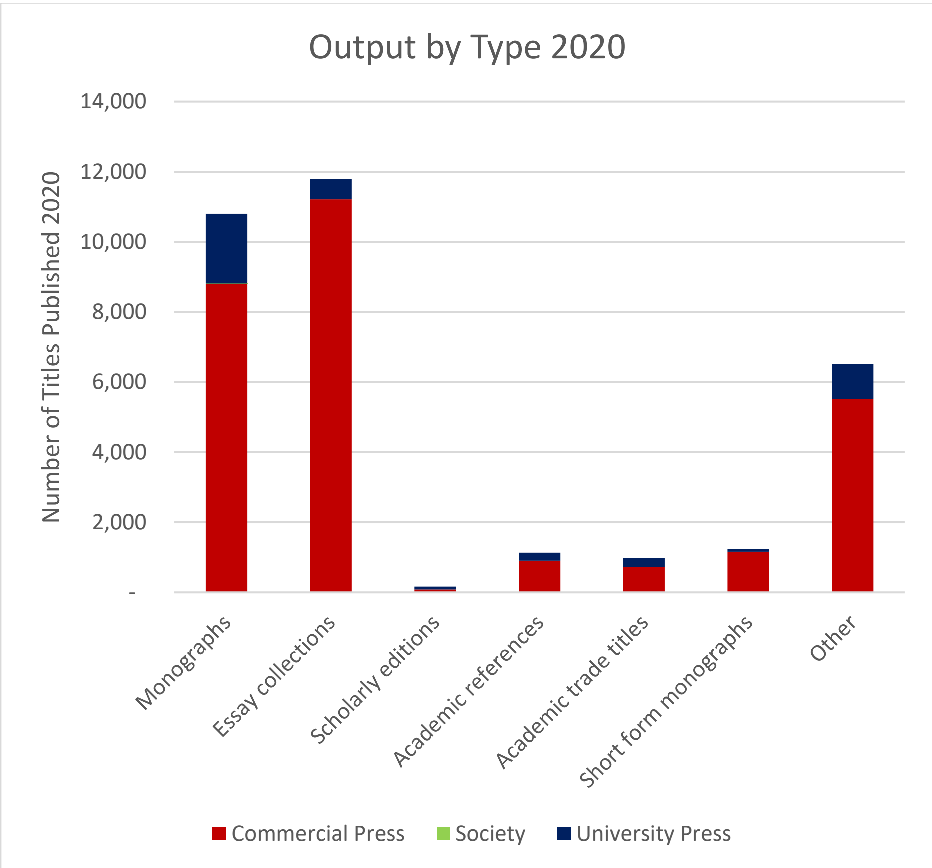

Figure 3: Output by publication type

The mix of 2020 output by publication type for commercial presses and university presses is presented in the pie charts in Figure 4 below.

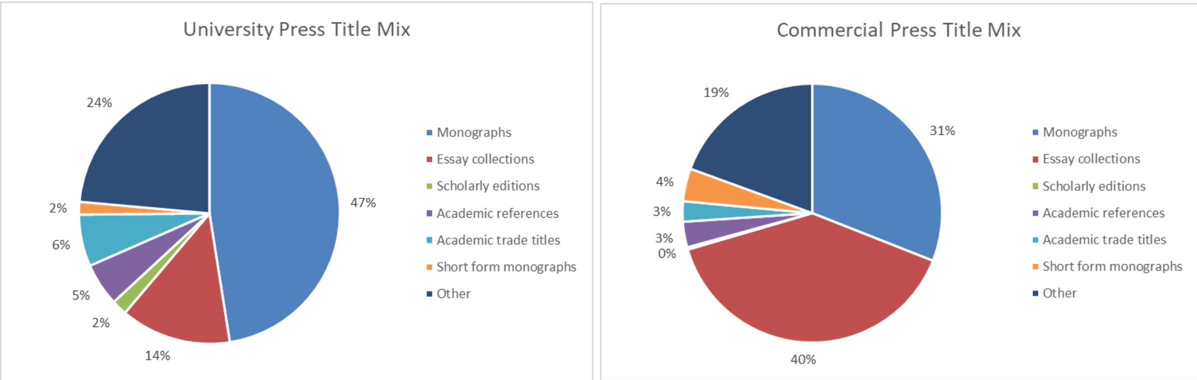

Figure 4: Mix of University Press and Commercial Press output by publication type 2020

5.1.2. The larger presses operate internationally, with multiple publishing locations. The smaller presses operate either from a single publishing location or from both a location in Europe and a location in North America.

80% of respondents have publishing operations in North America, 64% in the UK.

The larger commercial presses have multiple publishing locations around the world. Smaller commercial presses publish from centres in North America and either Europe or the UK. All but one of the commercial presses have operations in both North America and in Europe, with four of the nine also having operations in Asia and/or ANZ.

The larger university presses operate in several international publishing locations. Most of the other university presses operate single publishing locations, the majority being in North America. The majority of the university presses, being smaller, have more geographically limited operations, in six cases publishing only in North America, as shown in Table 1 below.

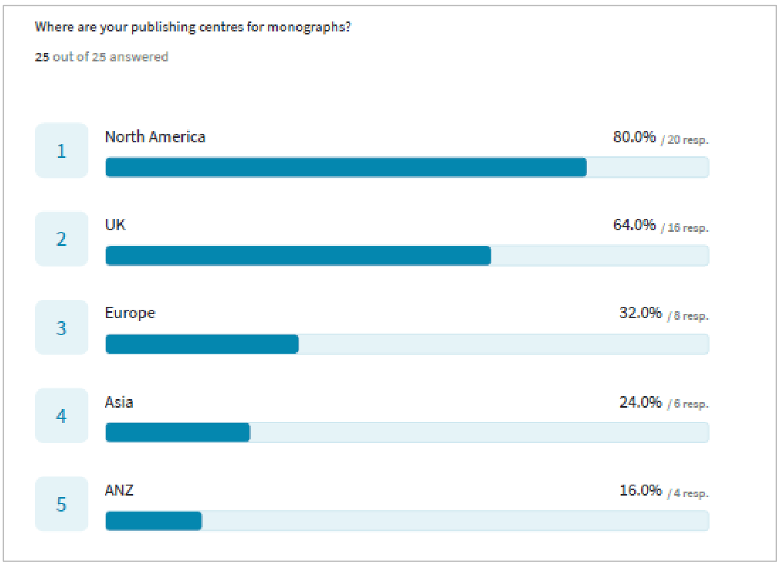

Figure 5: Geographical publishing centres for monographs

	UK only	North America only	Europe only	UK and North America	Europe and North America	UK, Europe, North America	UK, North America, Asia	UK, North America, Europe, Asia	UK, North America, Europe, ANZ	UK, North America, Europe, Asia, ANZ	Total
Commercial	1			3	1			1		3	9
Uni Press	3	6	1	1		1		2		1	15
Society		1									1
Total	**4**	**7**	**1**	**4**	**1**	**1**	**0**	**3**	**0**	**4**	**25**

Table 1: Geographical publishing centres for monographs

5.1.3. The respondents to the survey publish mainly in English. All but one indicated that either 100%, or between 75% and 99% of their monographs are published in English.

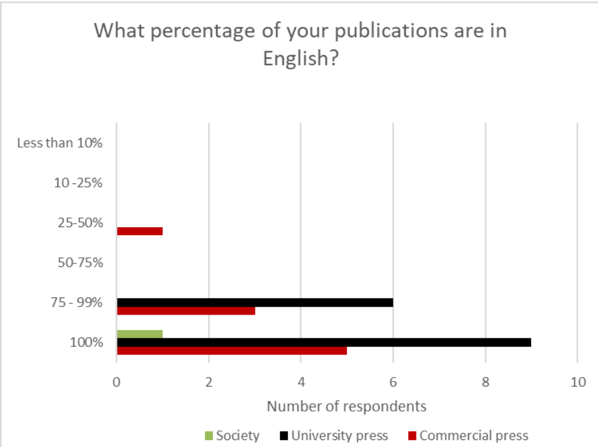

Figure 6: Percentage of publications in English

5.1.4. Publishers' sales revenue from monograph publishing appears stable, but revenues appear to have been sustained by the publication of an increased number of titles and by higher digital revenues, with declining print revenues per title published.

Giving broad revenue bands we asked respondents to indicate their revenue from monograph sales for each year from 2017 to 2020 and to add any comments.

All but two publishers remained in the same sales revenue value band throughout the period surveyed. The two exceptions were smaller university presses that moved between categories.

A medium sized commercial press commented, *'Monograph sales grew between 2017 and 2020, largely as a result of growth in the number of monographs we publish annually'.*

A second commercial press made a similar observation, *'We launched a new book programme in 2016 and greatly increased our output from 2018 onwards, hence the increase in sales figures from 2019. In addition, in 2020, due to the coronavirus pandemic, we saw a decline in print sales, as seen across the book industry'.*

Another large commercial press said, *'A greater proportion of the monograph revenue now comes from sales of ebooks'.*

A university press commented, *'Revenue from print sales has decreased; revenue from ebooks has increased, but not nearly enough to compensate'.*

Similarly, a small university press said, *'Within the bands of your study, our sales look stable, but there has been an overall slight downturn since 2018'.*

In contrast, one small university press noted strong sales growth*, 'Sales have increased 40% across this time period'.*

5.1.5. Monograph output has increased between 2015 and 2020, driven especially by commercial presses

The survey results show a general trend towards the publication of more monograph titles, this was especially noticeable among the commercial presses. In terms of the banding by output volume, most publishers remained in the same publishing output volume band throughout the period surveyed. There were two smaller university presses that moved from one band into the next one higher.

Respondents were asked, 'Compared to 2015 has your monograph publishing activity changed?'

Analysis: eight out of nine commercial presses indicated that they are publishing more monograph titles than they were in 2015, with the largest commercial presses all indicating 'many more'. Eleven out of 15 university presses indicated that they are publishing more titles. Whereas the picture across the commercial presses was consistent regardless of size, the larger university presses indicated 'About the same' or 'fewer' titles. It was the smaller university presses (smaller than £1m/$1.3m) that indicated they are now publishing many more titles than previously.

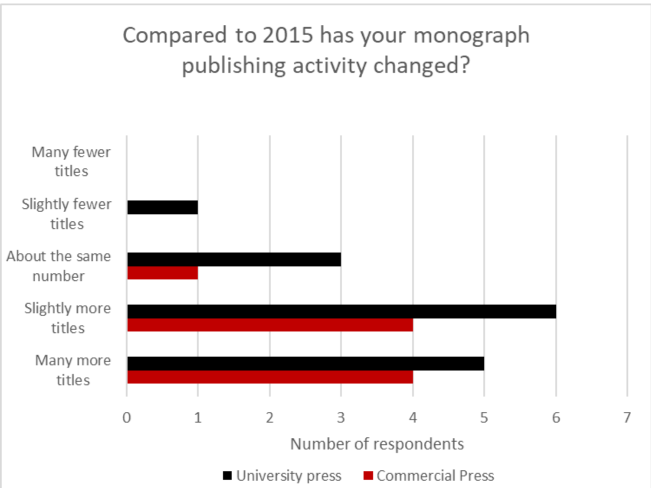

Figure 7: Change in monograph publishing activity since 2015

5.1.6. The typical page extent for monographs is between 200 and 400 pages.

Other than one small commercial press all respondents indicated that the average monograph page extent is between 200 and 400 pages. Commercial presses and university presses presented similar profiles.

5.1.7. History, politics/international studies and English language and literature are leading disciplines for monograph publishing.

Respondents were asked to identify the top five disciplines in their publishing of monographs in 2020. Figure 8 below presents the results for all respondents.

We were unable to identify specific growth trends by subject from the survey. But certain disciplines consistently emerged as leading areas among both university and commercial presses. Various 'applied' disciplines, including business, economics and education were identified more frequently by the commercial presses; these disciplines were identified much less frequently by the university presses.

Analysis: 17 of the 25 respondents (68%) placed history among their top five disciplines. This was followed by politics and international studies, identified by 11 respondents (44%), and English language and literature identified by 10 respondents (40%), and communication etc. studies identified by 9 respondents (36%). The frequency with which these disciplines occur suggests that they are perceived by publishers as strong areas for monograph publishing.

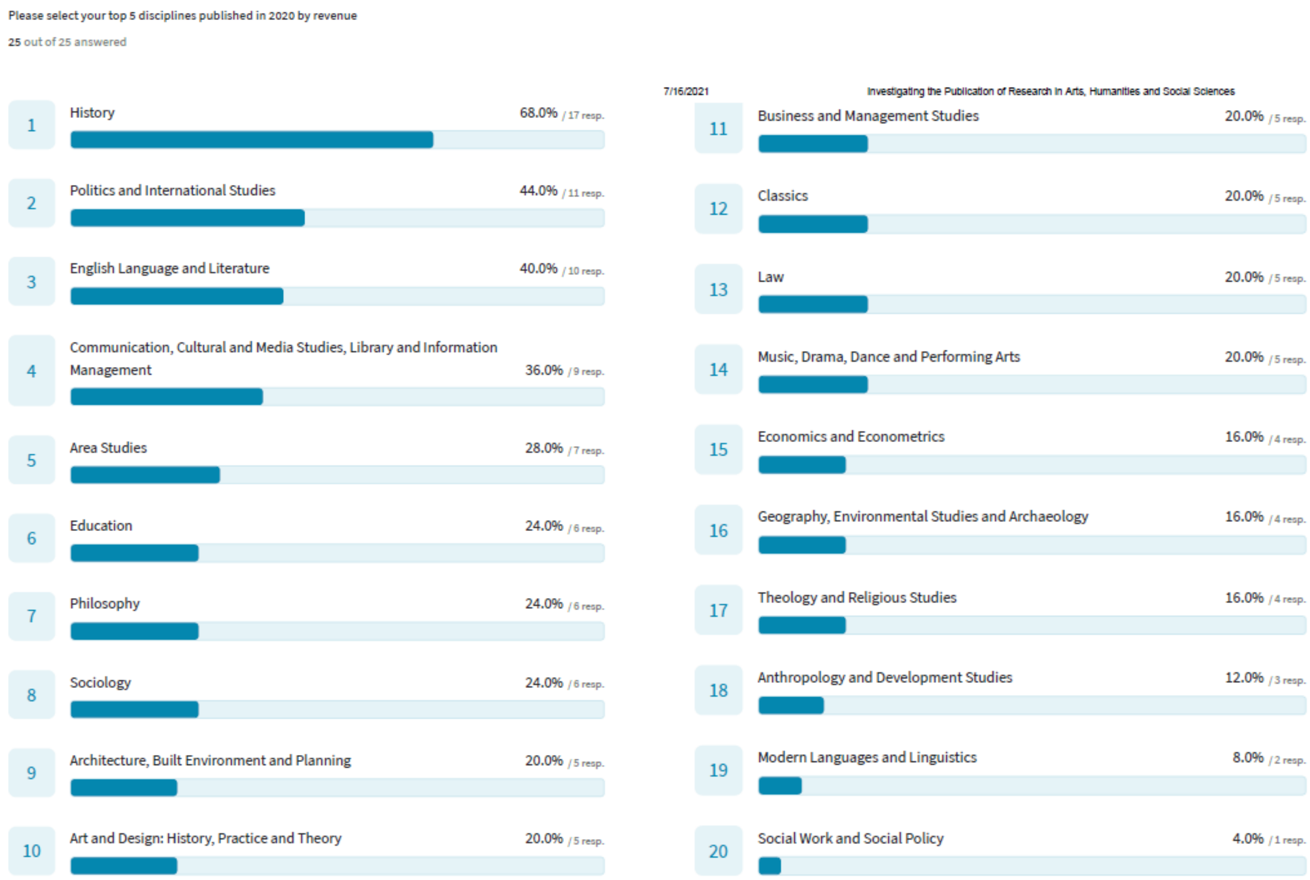

Figure 8: Publishers' top five disciplines by revenue 2020

We observed some interesting differences between the commercial and the university presses. History, politics/international studies, and English language/literature make consistent appearances as top five disciplines among the 15 university presses (appearing 14, 8 and 8 times respectively). Among the nine commercial presses these three disciplines are less conspicuous (appearing 3, 3 and 3 times respectively). The nine commercial presses identify business, economics, sociology, and education the most frequently (5, 4, 4 and 4 occurrences respectively). These same disciplines are mentioned less frequently by the 15 university presses (0, 0, 2 and 2 occurrences).

5.2. Editorial and Publishing Practices

5.2.1. The majority of publishing houses, both university press and commercial, initiate new monograph publications through a mix of active commissioning and the acceptance of unsolicited manuscripts. Among roughly half of the publishing houses that responded, including all the larger presses, commissioning editors have signing targets. Targets vary, but there is some evidence that commercial presses expect higher commissioning levels from their editors than do the university presses.

We asked respondents 'How is the publication of a monograph initiated?' giving options of 'commissioned', 'unsolicited submission' and 'both commissioned and unsolicited'. The results were similar across university press and commercial press respondents, with 21 indicating 'both commissioned and unsolicited submission'. Three respondents answered 'commissioned'.

	Commissioned	Unsolicited Submission	Both Commisioned and Unsolicited
Commercial Press	2		7
University Press	1		14
Socy		1	
Total	3	1	21

Table 2: Initiation of monograph publication - commissioned or unsolicited

A question asking, 'Do Commissioning Editors have annual commissioning revenue targets?' yielded a mixed picture, with 12 respondents answering 'yes', and 13 'no'. The larger presses, both commercial and university press, answered 'yes'.

A follow-up question asked respondents to indicate, using free text, the target level for commissioning editors. Eleven respondents gave answers, with several indicating a range in the number of titles to be commissioned by an editor. Factors influencing the range were subject, list, publication mix, and experience etc. The responses given by commercial presses were '20 – 50', '24 – 60', '30 – 70', '30 – 35', and '80' titles. The university press responses were '20', '22 – 28', '25, +/-' '40', '45'. Two university presses commented that it varies according to subject, but did not give a range. From these responses we observe that the upper ends of the ranges indicated by the commercial presses tend to be higher than those indicated by the university presses.

5.2.2. All the responding presses undertake peer review of academic monographs before publication. Among university presses this always includes peer review of the final manuscript. Commercial presses are more varied in their approach, with some relying on peer review of proposals, and using review of sample material and of the final manuscript as optional steps.

We asked for free text responses on the 'Peer review process – what peer review process takes place? How and when?' Responses showed that all the university presses undertake single blind peer review of the finished manuscript, with review of proposals mentioned in nine responses out of 15. The commercial presses showed a clearer pattern of peer review of the proposal, with peer review of sample chapters and of the finished manuscripts being options for some and standard practice for others.

Several respondents made more detailed comments, including a number of university presses that emphasised how much peer review is an essential element of their work.

This response from a large commercial press is representative of the practice followed by commercial presses, '*Depending on discipline & book series, typically before signing, peer review of either proposal or sample chapter'.*

A sizeable university press gave a similar answer, *'All titles are peer reviewed before approval and contract. Depending on the assessment at initial approval further reviews of draft material or the full manuscript on delivery may take place and with acceptance of the manuscript being conditional on meeting the quality, scope, and conditions attached'.*

Several US based university press respondents referred to the AUP guidelines. The following is representative of such responses, *'Peer review is standard for presses that are part of the Association of University Presses; two single-blind peer reviews per round of review; some manuscripts are subject to two rounds of peer review, some to just one. All are then vetted and approved by a faculty board that knows the identity of both author and all peer reviewers'.*

5.2.3. Payment of royalties is the most frequently mentioned method for compensating authors. Some publishers also use fixed fees.

We asked, 'Are author royalties or fees paid on print sales?' and then asked the same question with regard to digital sales. The responses were quite consistent as between print and digital, with the majority of respondents indicating that royalties remain the basis on which monograph authors are compensated for sales in both media. A minority indicated that they employ both royalties and fixed fee methods. It is noteworthy that no respondents indicated that they work only with the fixed fee method.

We did not explore the percentage level of royalties offered to authors of monographs.

PRINT	Royalties	Fixed Fees	Both royalties and fixed	Neither
Commercial Press	6		3	
University Press	12		2	1
Socy				1
Total	18	0	5	2

DIGITAL	Royalties	Fixed Fees	Both royalties and fixed fee methods	Neither
Commercial Press	7		2	
University Press	11		3	1
Socy				1
Total	18	0	5	2

Table 3: Methods of author compensation – print and digital

5.3. Costs of Production

5.3.1. Direct production costs for a monograph vary among presses, with £2,000 - £5,000 per title being most frequently cited, and £10,000 being the upper end for the majority.

We asked respondents to indicate, using free text, the direct cost to publish a new monograph, 'Please state (perhaps giving a range) your direct production cost of producing a typical monograph of 100,000 words (not including author royalties, nor acquisition, selling, marketing or distribution costs)'.

Responses were received from most respondents, although four commercial press respondents declined to answer, one citing commercial sensitivity. We converted all responses to UK pounds sterling (£) and grouped the answers received in ranges as shown in the table below.

The responses suggest that most presses identify a typical cost below £10,000 with the most frequently given response being in the range £2,000 - £5,000. That said, there were some notable exceptions among university presses that indicated production costs greater than £20,000.

Although the question was intended to exclude manufacturing costs, we recognise that the inclusion of manufacturing costs may distort some of the responses given. Whereas some publishers distribute primarily in digital form or print to demand, others have, we believe, included manufacturing costs in the direct production costs.

	University Press	Commercial Press	Society
£2,000 to £5,000	6	4	
£5,000 to £10,000	5	1	
£10,000 to £20,000	2		
More than £20,000	2		1
Did not respond		4	
Total	15	9	1

Table 4: Average monograph publication costs

Some more detailed verbatim comments were given; these are shown below:

'Direct production cost is on average £4,000 for a monograph of c.80-100,000 words, with few illustrations. This covers freelance copy-editing, proofreading, typesetting and project management. It doesn't include any in-house staff costs'.

'£2500 is the average direct production only cost for an average monograph of 100,000 words (increasing to £3000 if the work requires extensive editing). This does not include overhead, staff costs, royalties, marketing, storage and distribution, which is where the main costs to publish a monograph reside'.

'*This is commercially sensitive, so I'd rather not say, but I expect we have much higher costs than most since we do not off-shore this production work and project manage in-house. We see the quality of our book production as a key element of how we differentiate ourselves to readers and authors, alongside our editorial control of commissioning'.*

5.4. Pricing Practices

5.4.1. Commercial presses appear to use higher price points than university presses.

Although there are several variables affecting pricing that the survey did not explore (eg specific markets, trim size, page extent, illustrative content etc), the responses as to monograph pricing reveal some differences between commercial presses and university presses. Please refer to the charts in Figure 9 below that plot average £ and US$ prices reported by commercial and university presses. The size of the bubble is derived from the 2020 title output reported by each publisher. In general, it may be seen that commercial presses appear to attach higher price points to their titles than do university presses. This observation holds in respect of hardback volume prices and the price per page. Although there is a similar pattern in respect of both UK £ and US$ prices, it is more noticeable in respect of US$ prices.

Analysis: The indicative hardback volume prices given by the commercial presses yield averages of £87.43 and $120.50; the university press averages are £74.80 and $88.14. A further question explored the average price per page. For commercial presses the 'average price per page' is £0.35 and $0.47; and among the university presses £0.28 and $0.30. The data are summarised in the Table 5 below and the individual responses shown graphically in Figure 9.

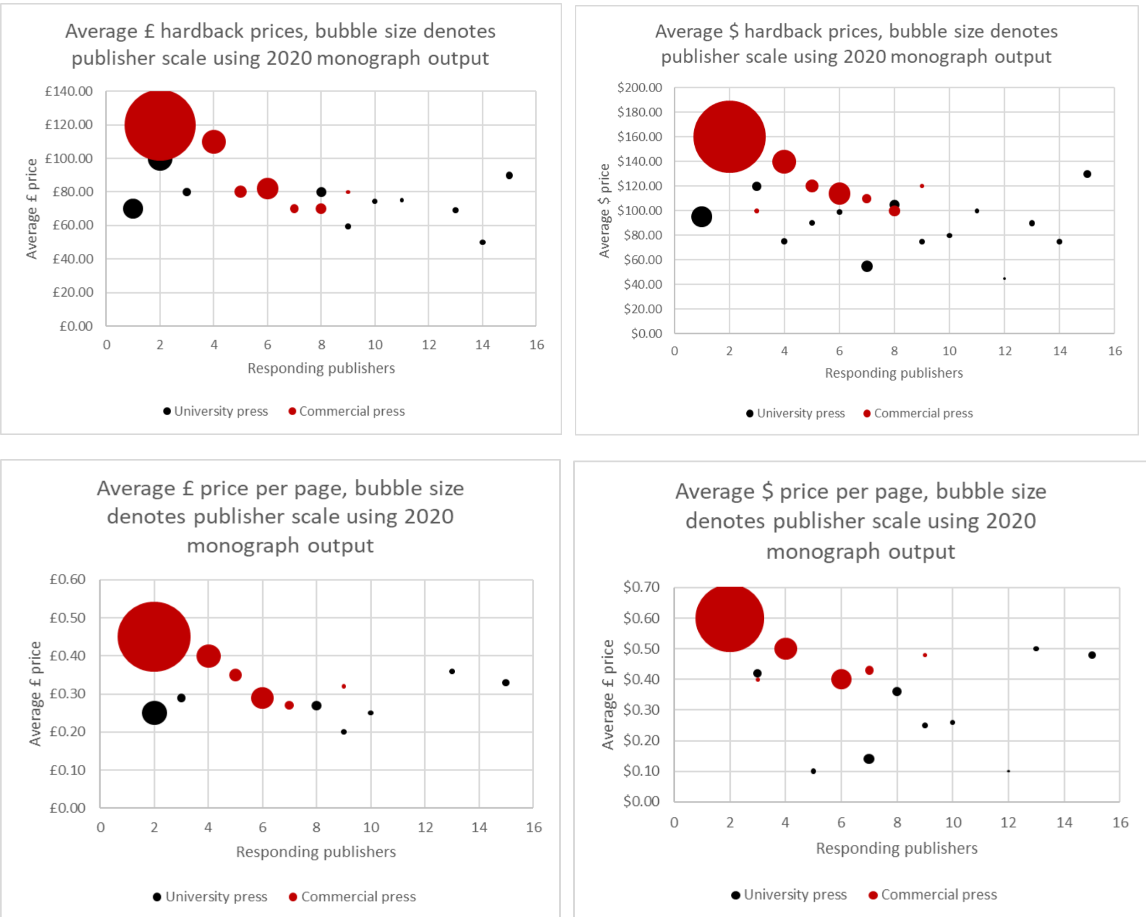

Figure 9: Average £ and $ monograph prices

Analysis of Monograph Pricing		
Commercial Presses	Range: £70 - £120. Average £87.43	Range: $100 - $160. Average $120.50
University Presses	Range: £50 - £100. Average £74.80	Range $45 - $130. Average $88.14

Analysis of Monograph Pricing per page		
Commercial Presses	Range: £0.27 - £0.45. Average £0.35	Range: $0.40 - $0.60. Average $0.47
University Presses	Range: £0.20 - £0.36. Average £0.28	Range $0.10 - $0.50. Average $0.30

Table 5: Average £ and $ monograph prices

5.4.2. There is considerable variation of practice in the pricing of ebooks in relation to the price of the print edition.

42% of respondents indicated that they apply the same price to digital books as to print.

Recognising that the pricing of monographs by publishers for institutional library customers is highly dependent on access models and on the composition of the collections that are offered to libraries, the survey asked about the pricing of individual ebooks. The majority of university presses indicated that they set ebook prices at the same level as the print edition price, using the paperback price (if there is one) as the base. Three of the commercial presses stated that they price at the same level as the print, two indicated 'less expensive than print', three indicated that they price at 80% of the print price and one at 90% of the print price.

	Same price as print (paperback)	90% of print	80% of print	60% of print	30% of print	less expensive	OA model	not answered
Commercial Presses	3	1	3			2		
University Presses	9		1		1		1	3
Society				1				

Table 6: ebook pricing practices

5.5. Sales of Print and Digital Versions

5.5.1. Publication of monographs in digital format is becoming universal.

21 of the 25 responding publishers indicated that 100% of new monograph titles are now made available in digital form. The remaining four (all University Presses) mention that 75% of new monograph titles are available in digital form.

5.5.2. Despite the ubiquity of digital monograph distribution, sales in print format continue and are sustained by print-on-demand and short run digital printing. Most publishers report that more than 75% of their monograph sales are made of books that are printed on demand.

Although several comments were made about declining print sales and, as noted previously, digital sales represent a growing proportion of revenues for both commercial presses and university presses, print persists as a format. All but one of the responding publishers indicated that they expect to make available in print form 100% of new monograph titles. One smaller university press indicated that 75% of titles would be available in print.

Print on demand (POD), or ultra-short run digital printing, is now used by most monograph publishers. The majority, of both commercial and university presses, report that more than 75% of print sales are made of copies that are printed on demand. That said, there are some clear exceptions – those presses where a much smaller proportion of sales are POD.

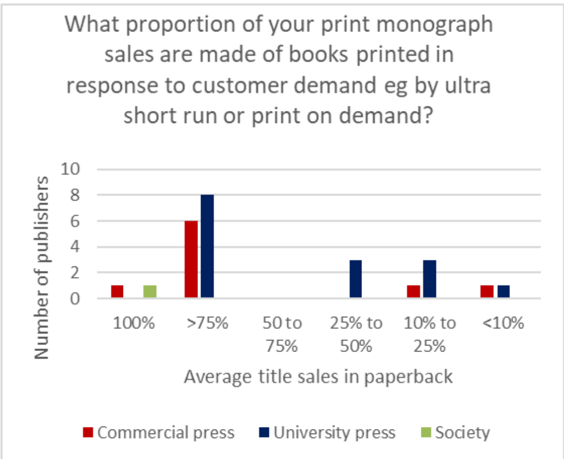

Figure 10: Percentage of print sales made of books printed on demand

Despite the clear support among publishers for print on demand, there is some continuing concern about the quality of POD production as shown by the following comment from a commercial publisher:

'Print on demand can be a useful way of managing costs during a period of transition from print to e, and is a particularly attractive option for open access monographs as print sales can be lower, and less predictable, than non-OA monographs. However, POD quality still lags behind traditional printing technologies, making it unsuitable for subjects with a strong visual component…, and generally unattractive to authors.'

5.5.3. There was a marked increase in the proportion of digital sales between 2015 and 2020.

The shift among monograph publishers towards a higher proportion of digital sales is marked. The survey asked respondents to indicate for 2015 and 2020 the proportion of digital sales in relation to total sales, giving ranges to make responding easier. The graphs below present the lower end of the ranges given and may thus under-represent the trend. In Figure 11 both commercial and university presses are ranked according to the number they gave as to their 2020 monograph title output. Figure 12 highlights the change from 2015 to 202 for all respondents and Table 7 presents the data.

Analysis: The university presses show a lower proportion of digital sales in both 2015 and 2020 than the commercial presses, but the survey results demonstrate very clearly the overall trend towards more digital sales, with the commercial presses transitioning faster than the university presses.

All of the larger commercial presses reported digital sales in 2020 at 50% or more of total monograph sales. Two smaller commercial presses were in the 25 - 50% band. The larger university presses indicated 25 – 50% of revenues from digital. One small university press reports more than 75% of sales as digital.

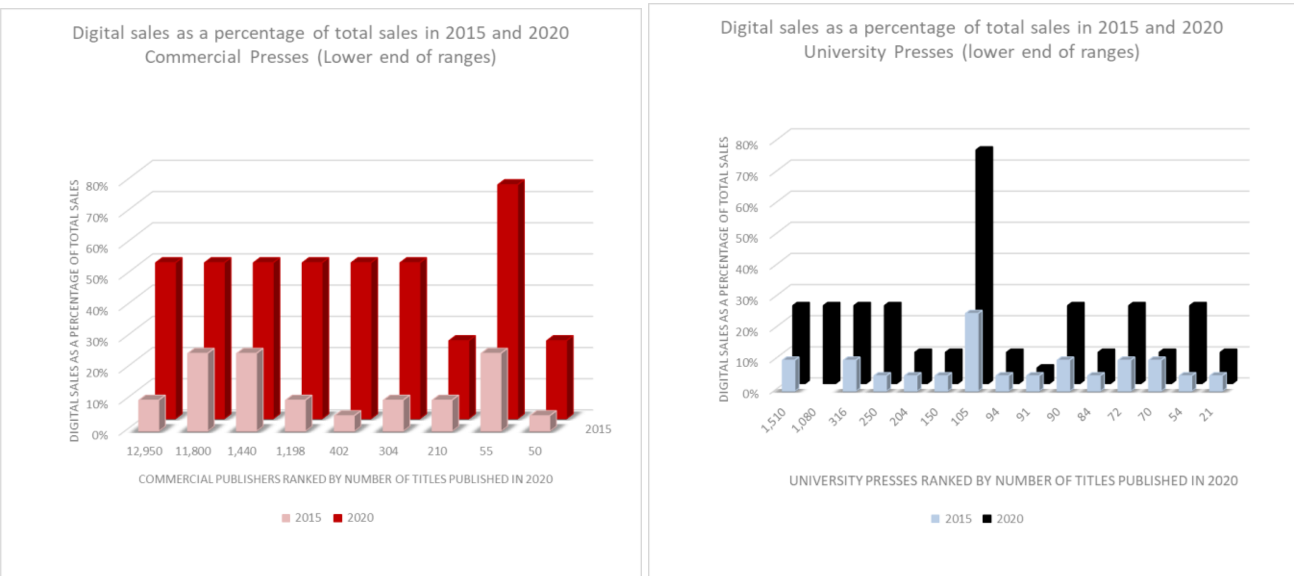

Figure 11: Digital sales as a % of total sales 2015 and 2020 - commercial and university presses ranked

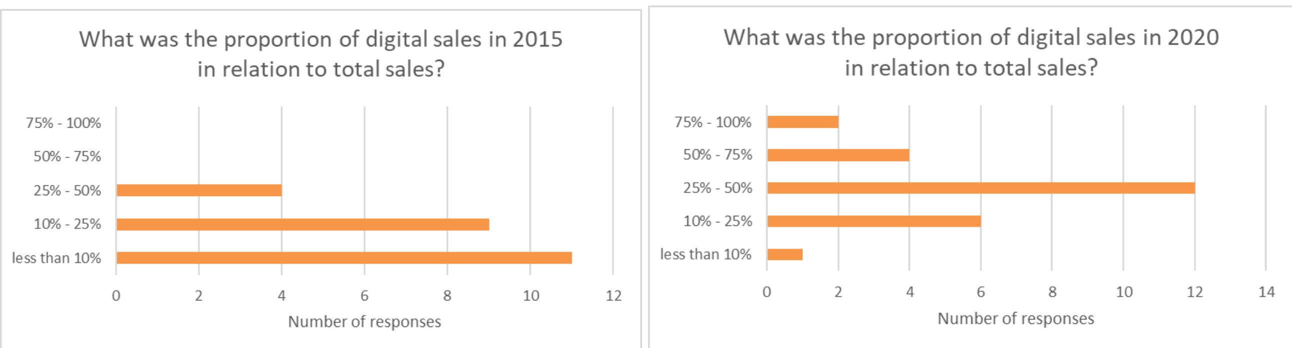

Figure 12: Changes in digital sales as a percentage of total sales 2015 and 2020 - all responses

What was the proportion of digital sales in *2015* in relation to total sales?

	less than 10%	10% - 25%	25% - 50%	50% - 75%	75% - 100%	Did not answer	Total
Commercial	2	4	3				9
Uni Press	8	5	1			1	15
Society	1						1
Total	11	9	4	0	0	1	25

What was the proportion of digital sales in *2020* in relation to total sales?

	less than 10%	10% - 25%	25% - 50%	50% - 75%	75% - 100%	Did not answer	Total
Commercial			4	4	1		9
Uni Press	1	6	7		1		15
Society			1				1
Total	1	6	12	4	2	0	25

Table 7: Changes in digital sales as a percentage of total sales 2015 and 2020

5.5.4. Average title print sales over three years are fewer than 400 copies, with most commercial presses indicating fewer than 200 copies as an average.

Most commercial presses and university presses indicate sales of print copies (whether hardback or paperback) to be below 400 copies per title over the first three years, with the majority of commercial presses identifying ‘less than 200’ as the most usual level.

Interestingly, the larger commercial presses give ‘less than 200 copies’ as their average volume sale, whereas the larger university presses give ‘200 to 400 copies’.

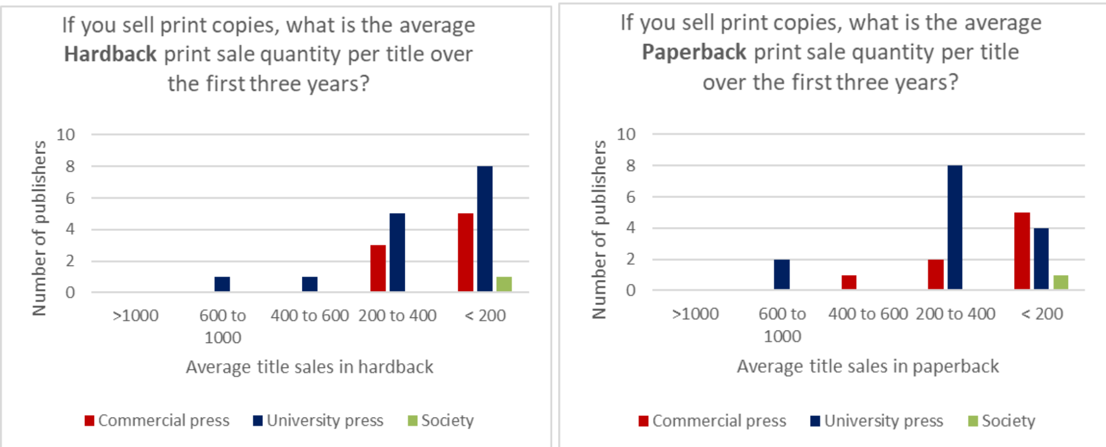

Figure 13: Average print sales volumes

5.5.5. Over 70% of print sales are made to institutional libraries.

There is some variation in the destination of print sales, as shown by responses to the question ‘If you sell print copies, what proportion do you estimate are sales to institutional libraries?’ Respondents were given ranges for their responses. The percentage of sales made by commercial presses to institutional libraries is noticeably higher than that made by the university presses. Taking into account the heavier monograph output from the larger commercial presses would suggest that between 50 and 75% of monograph print sales are made to institutional libraries. By contrast, some university presses identify a much lower proportion of sales being made to institutional libraries, perhaps reflecting a publishing programme or a market position that is more directed towards individual customers.

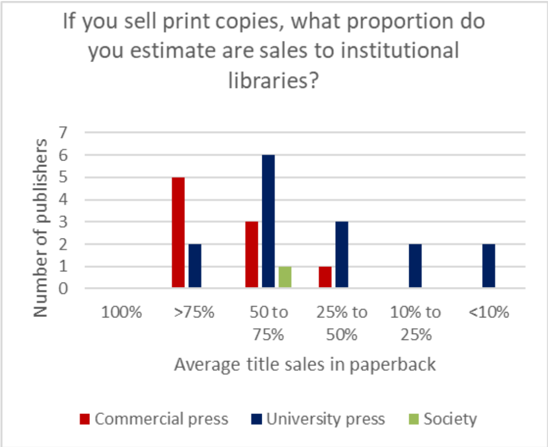

Figure 14: Estimated print sales to institutional libraries

5.5.6. Distribution of digital monographs is mainly through aggregators/library resellers, and, in 75% of cases, through inclusion in publishers' branded collections.

We explored whether respondents make available branded collections of their own monographs, asking, 'Does your organisation include monographs in your own branded digital collection(s)?' Eight out of the nine commercial presses gave a positive answer to this question, and one reported that it does not include monographs within its own branded digital collection(s). Of the university presses, ten replied 'yes' and five 'no', as shown in Figure 15.

All respondents distribute their monograph titles through aggregators and library reseller platforms. The most frequently mentioned platforms were EBSCO and Proquest, by both university presses and commercial presses. JSTOR, MUSE, UPSO and Cambridge Core were each mentioned by several. OAPEN was mentioned for the distribution of OA monographs.

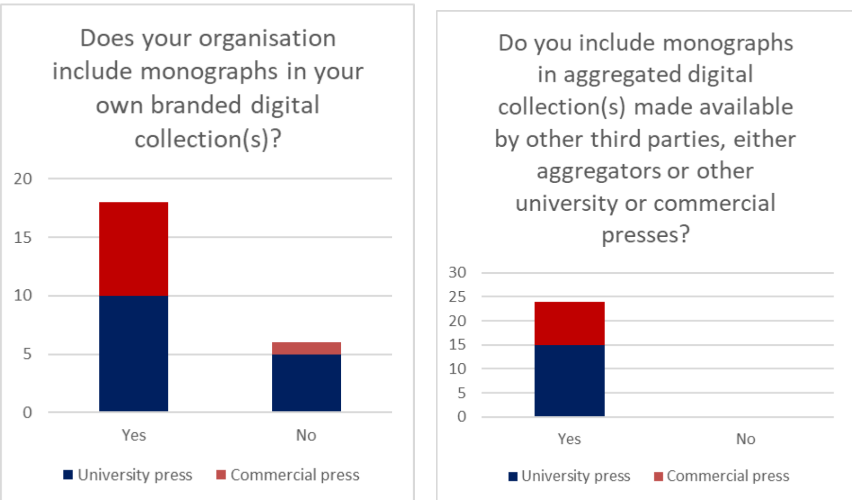

Figure 15: Inclusion of monographs in digital collections

5.5.7. North America represents the largest geographical market for almost all monograph publishers, balanced, for most presses, by Europe and the UK, and for several commercial presses, also by Asia and Australasia.

Respondents were asked to indicate, within ranges, their geographical mix of sales. Examining the responses by major geographical region reveals that for most presses the Americas, and we can infer North America predominantly, represent over 25% of total sales, and for most university presses over 35%. The UK, for over half the respondents, represents less than 15% of total sales. One interesting difference between commercial and university presses was the greater importance for the former of sales made in Asia and Australasia. Whereas more than half of the commercial presses replied that Asia & Australasia represent either 25% to 35% or 15% to 25% of total sales, none of the university presses offered a similar response.

Figure 16: Monograph sales by geographical market

5.5.8. Publication of video, audio and data sets alongside monographs is growing in importance.

We asked for open text responses to the question, ‘Do you publish data sets, audio or video files in conjunction with monographs?’

Five respondents answered ‘yes’, 10 answered ‘yes, but rarely’ or ‘in a few cases’, 10 respondents answered an unequivocal ‘no’. Noticeably there was a correlation between a positive answer and publisher scale among both university presses and commercial presses. We assume that this is linked to the internal capability of the larger publishers to make such ancillary materials available alongside the monograph. Several respondents mentioned that the demand among authors is limited.

Interestingly, there were two comments emphasising the growing importance of the publication of these materials, '*This is becoming an important feature of open research monographs', 'We regularly publish audio and video files as standalone content or in collections within our … digital resource products',* and *'This is an active focus of ours. We built our own publishing platform to support it. We publish in some fields that increasingly expect it'.*

5.6. Open Access Monograph Publishing

5.6.1. Fewer than 10% of new 2020 monographs published by most publishers are Open Access.

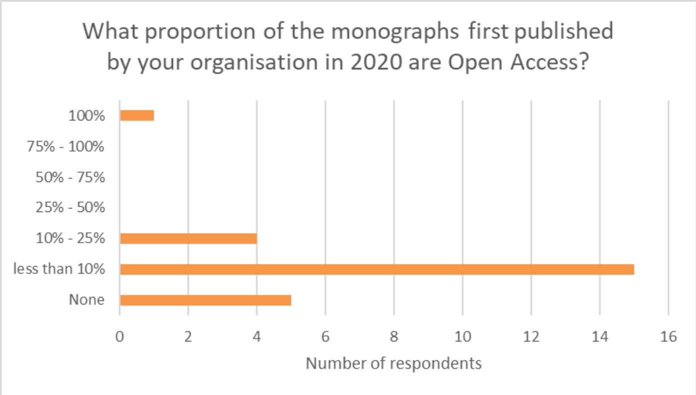

Figure 17: Proportion of 2020 monograph titles that are Open Access

Analysis: Eight out of nine of the commercial presses indicated that 'fewer than 10%' of the monographs they published in 2020 are OA. One commercial press indicated '10 -25%'. Of the university presses four indicated no OA titles, seven indicated 'fewer than 10%', three gave '10 and 25%'. One university press responded '100%' OA.

What proportion of the monographs first published by your organisation in 2020 are Open Access?								
	None	**less than 10%**	**10% - 25%**	**25% - 50%**	**50% - 75%**	**75% - 100%**	**100%**	**Total**
Commercial		8	1					9
Uni Press	4	7	3				1	15
Society	1							1
Total	**5**	**15**	**4**	**0**	**0**	**0**	**1**	25

Table 8: Proportion of 2020 monograph titles that are Open Access

5.6.2. Gold/author pays business model is the most prevalent model.

The survey asked respondents to describe, using free text, the business model used for the OA publishing of monographs.

Most of the responses that identified a model referred specifically either to the use of the Gold model (10 responses) or to Book Processing Charges/BPCs (7 responses). Three responses mentioned Knowledge Unlatched and three mentioned Green OA models, but in each case in conjunction with use of the Gold model. Six smaller university presses did not give a response to the question, of these four mentioned that they have no OA publishing model in place. One large commercial publisher referred to a discounted model available for authors of previously published titles who wish their work to be made OA.

5.6.3. The majority of publishers do not use a separate imprint to identify OA titles.

We asked 'Does your organisation use a distinct brand or imprint for OA publishing? If so what are the reasons for this?'

20 respondents answered 'No' to this question, with the following reasoning when given: '*No, it is core to who we are as a Publisher', 'No, our OA titles are, irrespective of funding model, treated the same as any other title in a discipline, series, or otherwise', 'No. In fact, we think it's important that they not be perceived differently', 'No - because we don't want to create a tiered system; OA books are treated in exactly the same way as all our books', 'We don't. We feel that if we did, OA would be devalued', 'No. We want to continue building the brand identity of our primary imprint'.*

One respondent answered *'Yes. Important for funding reasons'* and another answered *'We have a separate publishing platform for OA titles…'*

Three respondents answered 'not applicable' as they are not OA book publishers.

5.6.4. Publishers report limited interest in OA among monograph authors.

One publisher with an OA model attracts authors with an interest in OA. But the majority of authors do not enquire about making their monograph available as Open Access, as shown in Figure 18. This behaviour may be the consequence of the lack of funding for OA publication, as highlighted by the next question.

Analysis: The majority of publishers (17 out of 25) responded that 'fewer than 10%' of authors enquire about making their book available OA. Five other publishers (including the larger commercial and university presses) indicated that between '10% -25%' enquire about OA. One university press, with a pure OA approach to publishing, understandably responded '100%', and a second university press indicated '75% – 100%'.

Table 9 below splits the responses as between commercial and university presses and shows a generally similar pattern between the two.

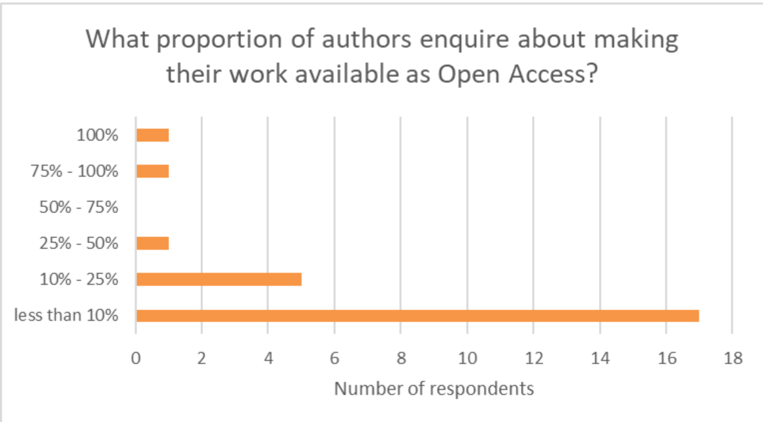

Figure 18: Proportion of authors that enquire about Open Access publication

What proportion of authors enquire about making their work available as Open Access?							
	less than 10%	**10% - 25%**	**25% - 50%**	**50% - 75%**	**75% - 100%**	**100%**	**Total**
Commercial	6	3					9
Uni Press	10	2	1		1	1	15
Society	1						1
Total	**17**	**5**	**1**	**0**	**1**	**1**	25

Table 9: Proportion of authors that enquire about Open Access publication

5.6.4. Fewer than 10% of authors of monographs have funding for OA publication.

Analysis: 20 out of the 25 presses responded that fewer than 10% of authors have funding for OA publication. Three gave the range of 10 – 25% of authors with funding. One press, with an OA publishing model, indicated that over 50% of authors have funding.

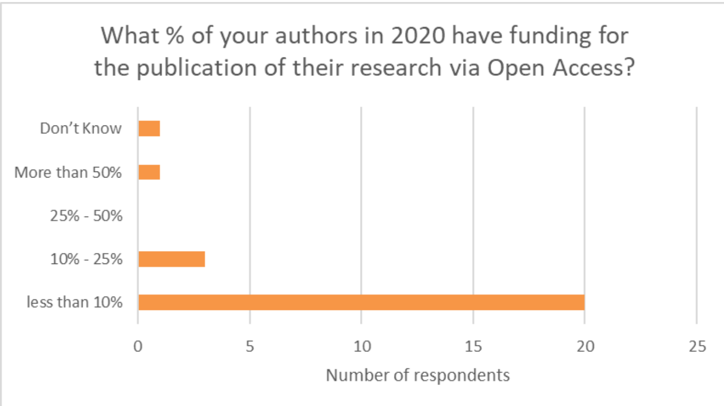

Figure 19: Proportion of authors with funding for Open Access in 2020

What % of your authors in 2020 have funding for the publication of their research via Open Access?						
	less than 10%	**10% - 25%**	**25% - 50%**	**More than 50%**	**Don't Know**	**Total**
Commercial	8	1				9
Uni Press	12	2		1		15
Society					1	1
Total	**20**	**3**	**0**	**1**	**1**	25

Table 10: Proportion of authors with funding for Open Access in 2020

5.6.5. OA publication fees (BPCs) are most commonly paid by the research funder or the author's institution.

Respondents were asked about the source of funding for OA publication. Respondents could choose more than one option. The most commonly reported funder of OA publication is the research funder, followed by the author's own institution.

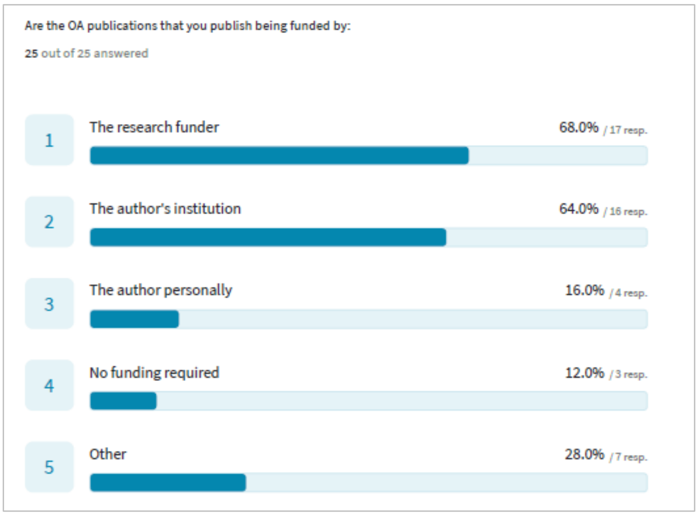

Figure 20: Sources of funding for Open Access publication

5.6.6. Over half of the publishers offer OA to chapter authors.

The survey asked whether publishers offer an OA model to the authors of individual chapters within edited works. The respondents gave 14 positive responses and 11 negative responses. All of the commercial presses gave a positive response. The University Presses were divided: five positive and 10 negative.

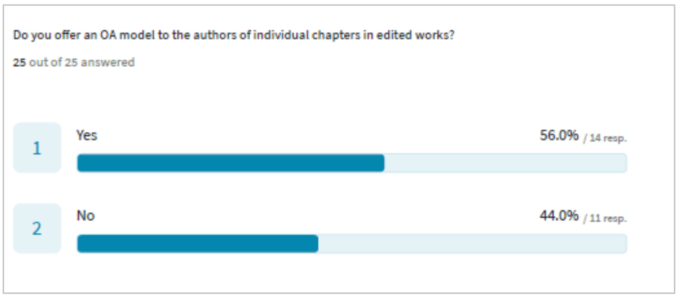

Figure 21: Open Access models for individual chapters

5.6.7. Publishers' policies as to the inclusion of authors' work in the authors' institutional repositories are varied and may be a source of confusion.

Respondents were asked, 'What is your policy regarding authors making the text of their research monograph available through their university repository? The response could be made using free text and drew a wide range of answers. The variation in responses appears to show that this is an area where many different policies are applied and in three cases no policy is in place. No discernible pattern emerged, as between commercial and university presses. In general, the larger presses were able to state their policy more clearly.

Analysis: Four responses stated that they do not allow authors to make their work available in institutional repositories and one commented '*we discourage*'. Seven responses (including the larger commercial presses) indicated that authors may make their submitted manuscript available in their institutional repository, but of these one applied a 24 month embargo. Four presses indicated that authors could post a single chapter of the published work. Two presses allow authors to post the entire published work subject to an embargo (variously of 12 and 36 months). Three university presses were vague about precise policy but indicated willingness or flexibility to allow authors to post their work. One OA press commented that '*we welcome this*'.

The present landscape is confusing for authors and readers. The industry may be better served in the future by establishing a code of best practice.

5.6.8. Authors appear to have a preference for more restrictive CC licences.

Publishers report that authors show a preference for the most restrictive Creative Commons licence when making their work available OA. In answer to the question 'What licensing model has your organisation found to be preferred by authors when making monographs available as OA', 67% of respondents identified CC-BY-NC-ND. Of the five who replied 'other' three undertake no OA publishing.

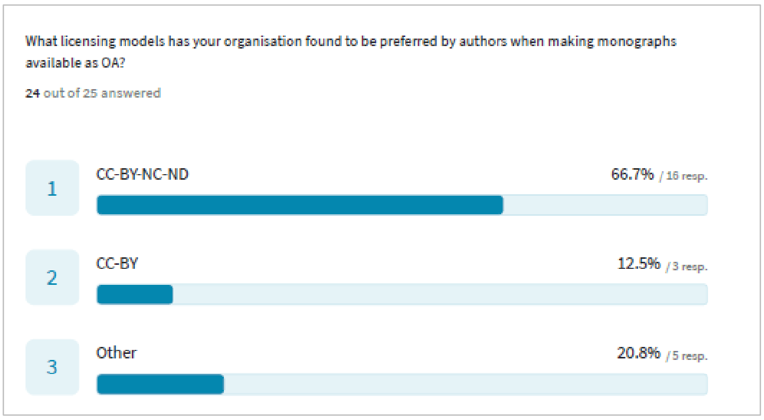

Figure 22: OA licensing models - author preferences

5.6.9. The clearing of rights for OA publication was identified as a problem area by 12 responding publishers, eight respondents said it was not a problem area.

We asked, 'Has your organisation found the clearing of third-party rights and permissions to be a problem area when making monographs available as OA? What approach does your organisation take to this?'

Among those who indicated that the area is not problematic, the following comment is representative, '*On the whole, no. Although we ask authors to clear these rights themselves. I do not think this issue is well understood*'.

Another commented *'It is just an extra consideration when considering an OA route for a monograph. As a smaller part of a programme right now, it's not a particular problem area, but could be trickier when scaled up'.*

A further comment, '*Not especially more problematic than clearing rights for commercial publications, although there are some challenges. Some rights owners still base their charges on print runs, which doesn't apply to OA books or books printed on demand. Some rights owners don't grant permission in perpetuity which presents an administrative burden to have to re-clear rights every few years for occasional images. Some lenders will not agree to lend images for a book published under a CC licence. Having said this, more and more lenders are making more of their collections freely available, and increasingly lenders have fee structures for digital publishing. We aim to work with lenders to secure the permissions we need, although in some cases our approach has been to recommend to the authors that they seek alternative images if the permissions prove problematic*'.

Among the 12 that indicated that the area is a problem, several emphasised that clearing rights in order to make backlist available OA is challenging. For example, *'It is not a problem with front list/new content. It is a huge issue for backlist content, requiring hours of research into the existing rights, trying to find an author's representative, etc*'.

'Absolutely. We communicate the issues around permissions to authors and editors early and often, for all formats of the book project (print, digital, or OA). This also limits the pool of titles we might consider for OA'.

Several respondents referred to the removal from OA versions of materials and images for which permissions were not cleared, *'For some books it has been tricky, but the majority of third-party rights holders are familiar with OA licensing. If permission has not be secured for the material, then the material is removed from the OA edition*'.

Another commented, '*It's a problem to clear image rights (in particular of museums). We sometimes publish the OA version with no image (provided it is not necessary for understanding the text)*'.

An interesting insight was offered by a commercial publisher*, 'In general we find it is somewhat harder to secure permissions for re-use of third-party material in open access books. Our preference is for authors to secure permission for third-party material in OA books to be released under the same Creative Commons licence as the rest of the book. As rights holders can sometimes be reluctant to agree to this, if the third-party material is integral to the work, we will permit it to be included 'all rights reserved' (i.e. excluded from the CC licence). This helps in many cases. However, in some areas it remains extremely difficult to secure permissions for inclusion in OA works, notably where the rights are held by commercial organisations (e.g. fashion marques, other brands, major film studios), and in some cases where they are held by GLAM organisations (Galleries, Libraries, Archives, Museums)'.*

5.6.10. Online usage of OA titles is greater than that of traditionally published monographs.

The survey results indicate clearly that most publishers are seeing greater online access and usage of OA titles as compared with traditionally published digital monographs. This is shown in Figure 23 and Table 11.

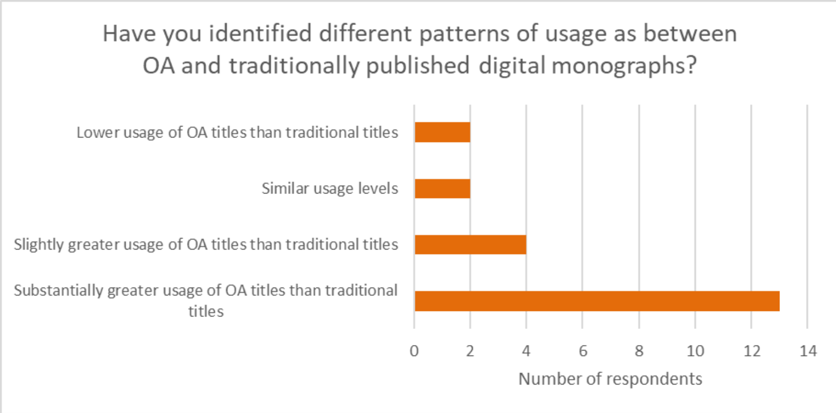

Figure 23: Usage patterns as between OA and traditionally published monographs

Have you identified different patterns of usage as between OA and traditionally published digital monographs?				
	University Press	**Commercial Press**	**Society**	**Total**
Substantially greater usage of OA titles than traditional titles	10	3		13
Slightly greater usage of OA titles than traditional titles	2	2		4
Similar usage levels	1	1		2
Lower usage of OA titles than traditional titles	1		1	2
Total	14	6	1	21

Table 11: Usage patterns as between OA and traditionally published monographs

Among the verbatim comments were several that confirm the greater usage of OA content:

'OA [is] used more widely by a significant amount. That may result in high-quality, non-OA material being overlooked by researchers and students'.

'More downloads, greater geographical spread, more social media mentions, more media coverage, more awards, more positive reader comments'.

'Usage of OA monographs ranges from the thousands to the hundreds of thousands, for individual books. There is no comparison with the print editions which typically sell in the low hundreds. OA usage is also much more widespread globally. Our books have reached over 240 countries and territories worldwide'.

One respondent commented on the wider global reach achieved through OA, *'For academic monographs, the market for OA titles remains the same as that for print monographs. However, there is a wider global usage, including usage in countries where we would have had no reach previously'.* In a similar vein, a university press commented on the advantages of OA in bringing an author's work to a wider readership, *'Our recommendation to authors of monographs is to publish in OA; it is the best way to reach a global reading audience, esp. for monographs that in a traditional publishing scenario have to be marketed very actively to reach only a portion of the possibly interested audience'.*

The question on OA usage also drew some comments on the relationship between making a monograph available Open Access and the resulting impact on print sales. A large press commented, '*Sometimes OA seems to stimulate print usage, sometime hinders it. OA significantly reduces the use of paid-for digital formats (such as Kindle)'.*

Another respondent raised the question as to how much can be inferred from basic measurement of views of the OA text*, 'Our data relate to views, which show a potentially significant positive to OA but it does not directly equate with engagement or value.'* This point was echoed in a comment from a large commercial press, *'This is actually very tricky to gauge given that such a large portion of web traffic is robots. Indeed, the more niche the content, the more the 'usage' is likely to be biased towards web crawlers. I hope our investments in usage analytics will help to understand this better'.*

It is clear that some publishers find it difficult to track or measure usage, either because they have only recently embarked on OA publishing, or because the information they receive from their platform or host imposes limitations, *'It is hard for us to track as we struggle to combine the data from all the aggregators for usage of traditionally published monographs'.*

Examination of the two responses that indicated lower usage of OA titles than traditional titles reveals that the first respondent has no OA programme, the second 'lower usage' respondent misunderstood the question, as they offer a contradictory verbatim comment '*…we get reports of downloads and page views. But the volume of these activities increases dramatically for OA as compared to gated content'.*

5.6.11. Dissemination of and creating awareness of OA monograph content are no longer considered by most publishers to be major problem areas.

In an open question we asked, 'Dissemination of OA research monographs has been identified as a particular challenge (Crossick, 2015). What measures does your organisation take to maximise the awareness of OA monographs?'

Respondents' replies split into three broad categories:

(a) Those for whom the question was not relevant as they are not actively publishing OA monograph titles (5 responses).

(b) Seven university presses and one commercial press who remarked that the problem raised in the question no longer exists, pointing to the various platforms and routes for dissemination (such as DOAB, OAPEN, Project Muse and JSTOR) and to the marketing efforts applied to OA titles which are equivalent to the marketing of other monographs.
One especially comprehensive response from a large university press summarised this perspective, '*The Crossick Report is now 6 years ago so it is worth noting that awareness and expectations of funders, institutions, and researchers as both authors and information users have changed. However, all our OA monographs are discoverable and can be found as an open category on our platform. We deposit in Google Books and DOAB and the DOI record indicates that the work is available with an open licence'.*
Another response similarly lists the actions taken to address the need, *'We have our own open access publishing platform, …We also distribute our OA titles via OAPEN, and via Knowledge Unlatched when funding [is]available. We ensure our titles are included in DOAB. We include OA metadata in the MARC records available for our titles from the publishing platforms'.*

(c) Commercial presses and some university presses who, in a range of responses, focused on the marketing efforts made to raise awareness (9 responses). Such marketing efforts ranged from: '*Same marketing as print books - newsletter, social media, conferences, flyers, launches',* to '*All of our Editors are trained to speak about this Topic… We publish White papers on OA publishing'*, and '*For awareness, authors are always the best promoters. We make sure they understand they can use* *the text itself to promote the book'*. One commercial press added the comment*'…we also make the Kindle versions available for free'.*

Although, as noted, several university presses did not recognise any challenges in dissemination or in raising awareness of OA books, one large university press commented that '*We expect this aspect of book publishing to develop considerably in the coming years'.*

There were two other responses which misunderstood the question.

5.7. Online Monograph Usage

5.7.1. The extent and the granularity of monograph usage analytics are varied; analytics is an area of investment for several publishers.

We asked respondents, 'Do you collect usage data for monographs at title and/or at chapter levels?'. The responses to this question showed a mixed picture: 17 respondents answered 'yes', and 6 answered 'no', or 'not yet'.

It was evident from the responses that experience and practice vary quite substantially. Some publishers track usage comprehensively: '*Yes. We are COUNTER-compliant and also have web analytics tools', 'yes, counter5 compatible usage data for all of our content'*. We infer that these publishers may be the operators of mature journal publishing platforms. Others are dependent on third party platforms which typically report on usage at title level only, *'we rely on our aggregation partners to assist us, but they are not able to provide chapter level data'*.

Several publishers emphasised that this is a priority development area for them as analytics are inadequate at present: '*Not currently. We are developing the capacity to do this'*, and *'Our publishing platform collects usage data, although this is fairly limited in scope at present. We are expecting a development to improve the range and type of the data available for reporting'.*

5.7.2. The majority of responding publishers are observing an increase in the online usage of monographs. Among respondents, the commercial presses appear to be seeing greater increases in usage, whereas half the university presses reported no change or a decline in usage.

Respondents were asked 'What patterns are you seeing as to the usage of monograph content?' and were given a range of options for their responses. Over half of those who answered the question indicated an increase in usage as shown in Figure 24 and Table 12 below. Increase in usage was more noticeable among the commercial presses. Four of the seven commercial publishers who answered the question indicated a 'large increase' in usage and two a 'small increase'. Of the 14 university presses that answered the question four indicated a 'large increase', and two a 'small increase'. Four indicated 'no change' and four either a 'large decline' or a 'small decline' in usage. We were surprised that nine respondents indicated either 'no change' or a decline in usage, expecting that all respondents would have observed an increase in usage.

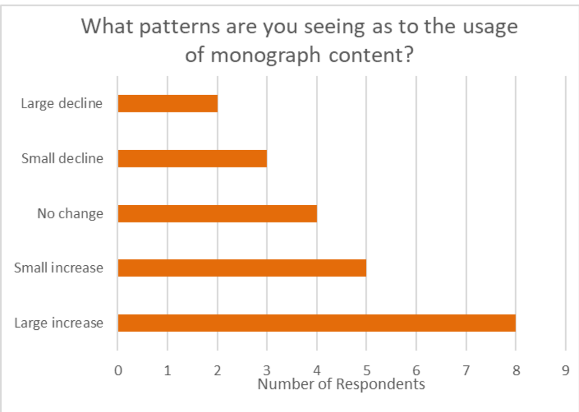

Figure 24: Changes in the pattern of usage of monograph content

What patterns are you seeing as to the usage of monograph content?				
	University Press	**Commercial Press**	**Society**	**Total**
Large increase	4	4		8
Small increase	2	2	1	5
No change	4			4
Small decline	2	1		3
Large decline	2			2
Did not answer	1	2		3
Total	15	9	1	25

Table 12: Changes in the pattern of usage of monograph content

In Section 5.6.10 above we previously presented some findings on the difference in usage patterns as between traditionally published monographs and Open Access monographs.

5.8. The Impact of Covid-19

5.8.1. Covid-19 has accelerated the shift from print to digital.

We asked the open question, 'What has been the impact of Covid-19 on your monograph publishing business?' Several themes emerged, the most significant being the negative impact of the pandemic upon print sales and its positive impact upon digital sales.

The responses from 19 out of 25 presses included a reference to the decline in print sales and to increased digital sales and/or usage. Six respondents used the term 'acceleration' when describing the impact of Covid upon an existing trend.

There were individual nuances in some of the responses:

A medium sized university press described the impact as*, 'More interest in digital content'.*

A medium sized commercial press commented*, 'Declining print sales but an increase in electronic requests from librarians'.*

A large commercial press remarked, *'In 2020 we saw a dramatic shift from print to digital. Digital sales were responsible for 23% of all monograph and minor reference revenue in 2019, but 47% in 2020. Prior to 2020 we had experienced many years of growth in monograph sales, but in 2020 overall revenues for monographs dropped year-on-year (that is, the increase in digital sales did not fully compensate for the loss of print sales)'.*

Another medium sized commercial press replied, '*Mixed. There has been downward pressure on print sales. Compensated by the better margin from eBooks'.*

Commenting on the longer-term implications, a large university press observed*, 'It has led to significant acceleration of migration from print to digital and we expect digital to be the dominant form of institutional access to monographs within 5 years'.*

This impression was supported by a second, medium sized university press's comment, *'A rapid, and likely permanent, increase in digital rather than print use by institutional partners'.*

A smaller university press remarked on the consequences for those titles which are not available in digital format, '*There has been a decline in print sales, with monographs unavailable in a digital format (due to third party material) hit the hardest'.*

One respondent commented on the underlying uncertainty about library budgets, *'There has been an increase in e-book sales, but not enough to cover losses from library spending being put on hold as the impact of the pandemic was monitored by universities. We are awaiting more data on this'.*

5.8.2. The impact of Covid-19 on publishers' operations has been varied, although the business of the smaller university presses appears to have experienced greater disruption.

Responses to the open question elicited a range of observations as to the effect of Covid-19 on publishers' operations. Two smaller commercial presses volunteered that the volume of proposals and manuscripts had increased, *'more manuscripts submitted than in years past', 'More proposals, more author demand'.* A large commercial press commented, *'So far, no big change in output, but of course we lost revenue in 2020'.* One university press observed, *'We have seen very little impact on publishing volume'.*

In contrast, several of the smaller university presses in their responses to this question drew attention to the disruptive effect of Covid upon publishing operations*: 'We have experienced difficulties in finding readers for peer review and difficulties in acquisitions due to the cancelation of conferences and travel', 'starting to see more delays in typescript deliveries, which may feed through to a smaller publishing programme in 2022',* and '*At pre-press stage we notice delays (authors unable to continue field work, work in the archives, library research, etc), standstill, and a decline in new submissions/acquisitions'.* One of the smaller university presses offered the one-word response to this open question*, 'crushing'.*

Only two respondents commented on the impact of Covid restrictions on staff and difficulties for the management of the business: *'Looking after staff/HR/IT has taken up time and money. In some ways it has brought colleagues and departments closer together'* and '*Slack and Zoom have been excellent apps for communication among our staff members, but we all agree that we'll be glad to get back into the office when it is safe again because our workflow has slowed, and many things would be quicker if we could just communicate in person'.*

5.9. The Future Outlook

5.9.1. Publishers expect that they will still be publishing long-form monographs in 2030, but several university presses express concern about funder requirements for Green OA access and wish to see direct funding for OA publication.

We asked, 'Given the current direction of travel, do you expect your organisation to be publishing monographs in ten years' time?'

In response, all 25 respondents confirmed that they expect to be publishing monographs in ten years' time, but several major presses qualified this expectation with observations about the need for direct funding for OA publication, and expressed concerns about research funder requirements for Green OA access.

Among the comments, a large university press remarked *'Hopefully. They are a core part of our publishing and offer a distinctive value in AHSS research. Whether monograph publishing is sustainable depends on whether OA policies insist on Green OA access. We do not believe that the current publisher investment in long form research is sustainable without a funded solution'.*

Another substantial university press remarked, '*We hope so. Green OA mandates from funders are of considerable concern to us though. We need scalable, sustainable approaches to Gold OA for research monographs'.* A third, smaller university press offered a similar observation, *'Yes, it will still be viable, but it will continue to be financially challenging. Current trends of scholars using digital for discovery and print for in-depth reading suggest the model will continue to be simultaneous. A shift to direct funding rather than [a] cost-recovery model would be ideal, and allow us to make the shift fully to OA, but those dollars seem not to be available in the amounts needed within the US scholarly ecosystem -- at least for HSS monographs published by university presses'.*

A large commercial press commented*, 'Yes, but it is likely to look dramatically different. We anticipate that in ten years' time a much larger proportion of the monograph list will be published open access, and that new models will be necessary to manage this transition in a sustainable way'.*

Several respondents commented that the format, or the 'container' may be different in ten years' time. A medium sized commercial press said, '*Unsure of the containers content will live in (i.e. whether they would still be labelled monographs, will there be a distinction between books or journals), but we intend to continue publishing impactful content for many years to come'.* And a university press indicated, *'We expect that monographs will still be published, but the main edition is likely to be the digital format. What that format will be is still open to question. Print editions will still be made available using the print on demand model'*.

Another university press expressed confidence in the persistence of long form monograph publishing*, 'Whilst monographs in ten years' time might not be in the form recognised today, I do believe we will be publishing long-form pieces of writing and research (i.e. the monograph) in whatever format (in print, e-book or other) as long as this is what is required by the academic community who we serve. If it is not required, then we will adapt to their needs to provide the quality publications they do require in the future'.*

5.10. Possible Future Directions – Technology Gaps

5.10.1. Standardisation in the use of metadata across the industry for content dissemination and usage reporting are identified as areas where reality falls short of expectations.

We asked for free text responses to the question, 'Are there areas of technology shortfall where, in your view, the available technology solutions lag behind the expectations of authors, readers or publishers for the publication or dissemination of research monographs?'

The responses ranged across a variety of different topics, but several recurrent themes were identified by three or more respondents including:

- **Standardisation of usage data**

'More information on usage and types of usage would be useful'

'tracking usage from different vendors'

'reporting analytics for digital sales is weak'

- **Metadata standards and dissemination**

'OA books in library catalogues'

'Metadata collection and dissemination (ongoing improvement, driven in part by Open Research). Content discovery and access'

'Creation and distribution of metadata is an ongoing challenge. Although there are established industry standards such as ONIX and MARC, virtually all third-party distributors, discovery tools and other intermediaries require their own versions of these standards (if not their own proprietary data standard). Creating these metadata feeds and delivering them is a challenge for small and medium-sized publishers'.

'Also, the process by which metadata is enhanced and distributed via the online channels is opaque, and the analysis work to identify where errors have occurred and resolve these issues absorbs a large amount of time'.

A large commercial press commented*, 'Bibliographic and metadata management systems: Such systems for books (which tend to be used by publishing staff rather than authors) are often cumbersome to use and difficult to update. Where such systems are used by trade and academic presses alike, they are not always well adapted to academic needs, and particularly to open access, and development queues can be long, meaning manual workarounds are needed'.*

'Open access policies increasingly require that action be taken at chapter level - that is, a funder may require that a chapter in an edited work that results from their grant funding be made open access. However, at most stages of the book supply chain, including in-house metadata management and dissemination via third parties, systems are not well adapted to manage or differentiate content at chapter level'.

'The above issues have a big impact on discoverability and availability of content'.

'deep linking'.

- **Integration of other content types – video, data, code**

'Ability to associate or integrate non-textual material with research books (data, code, etc)'.

'multimedia content always gives headaches :-) those projects are demanding because they are particular and need a made-to-measure approach; much time is spent in explorations (what might work, what not, esp. over the long term)'.

- **Authors are rarely sufficiently tech-savvy to make full use of available technologies**

'authors tend to be behind the curve so they lag'.

'for arts & humanities authors we often find a resistance to new technologies'.

'most authors have little or no idea of which technological tools are available'.

- **Collaboration tools in the arts and humanities lag behind those in STM**

'collaborative digital humanities book projects are not quite at the point where authors, readers, and publishers expect them to be, not to mention the matter of digital archiving'.

- **Some frustration with existing formats and tools**

'ebooks seem a not entirely satisfactory solution'.

'Capture of full-text XML is still expensive and requires additional technical resources which are often not available to small and medium-sized publishers. This is particularly the case for backlist conversion projects'.

'Making PDFs of our complex books'.

5.10.2. Whilst highlighting standardisation of metadata and of usage analytics, respondents also point to funding in HSS as a key future priority.

In a follow-up question we asked, 'What technology innovations would contribute to more effective development and dissemination of research monograph content?' Although several respondents declined to answer, or answered 'no' or 'none', there were two recurrent themes identified by three or more respondents:

- **Increased standardisation of metadata**

This theme emerged again in response to this question about future technology innovations
'More rigorous (regular and consistent) use of identifiers in metadata (ORCID, ROR, as well as DOI). More widespread use of EPUB3 format (natively W3C compliant)'.

'Better integration of metadata about OA versions into library catalogues'.

'Metadata and general publishing data standards agreed and accepted across the industry, with third party distributors and intermediaries agreeing to accept these standards, and where necessary taking responsibility for amending their own systems to accept the data received'.

'We disseminate title information using Onix feeds, which whilst industry standard are not accepted by all academic customers (or Amazon), makes dissemination more complicated. Also difference in platforms for librarians is inevitably a hindrance to discoverability'.

- **Funding for open access**

'Sustainable funding'.

'More funding in HSS for Open Access'.

'I am not convinced that any existing technology would help dramatically; solutions involving the goals and financial reward systems of higher education would be much more helpful than any technological fix'.

6. Conclusions

As was made clear in the introduction to this report, the survey responses analysed here offer publishers' perspectives on trends in monograph publishing. We recognise that there are other stakeholder perspectives in the debate on monograph futures. Indeed, a conclusion from our analysis is that further study of researcher behaviour and attitudes is needed.

From our analysis of the publisher responses the following conclusions may be drawn:

6.1. Long-form monograph publishing is a vibrant area of academic publishing in arts, humanities and social science disciplines. Title output continues to increase year-on-year. This is driven by the supply-side demand among academics to have their work published and is, we believe, linked to academic career development and professional status. This increase in supply-side demand is being met substantially by commercial publishers.

6.2. The academic monograph output of commercial publishers is significantly greater than that of the university presses. The key factors shaping this observation are: the scale of these publishers' programmes and of their operations, the range of subjects across which they publish, and the number of international centres from which they publish.

6.3. Online institutional sales and online access to monograph content have grown, so that online is now the dominant form of distribution. This trend has been accelerated by the impact of Covid-19 in 2020 and 2021 which has driven rapid growth in sales of digital monographs.

6.4. All the presses, both commercial and university, rely on digital distribution by aggregators, and the larger ones have their own online platforms.

6.5. Despite the growth in digital sales, there remains strong residual demand for print, notably among some university presses, possibly highlighting the importance of continued sales to individuals among the university presses. Print-on-demand technologies have ensured that print remains viable as it facilitates lower sales volumes while making possible ever-enlarging publishing programmes.

6.6. Volume print sales have continued their historic decline. Most publishers reported that monograph sales in the first three years after publication are fewer than 200 copies. Some university presses indicated that paperback sales of monographs were more usually in the 200 – 400 copy range.

6.7. Commercial presses appear to apply higher price points than university presses. This is apparent from responses as to average hardback volume price and average price per page. The mean of the responses from commercial publishers to the question about monograph hardback prices was £87.43 and US$120.50, and from the university presses it was £74.80 and US$88.14. We emphasise that this offers a qualitative view of pricing practice and deserves more investigation.

6.8. There is evidence that larger commercial academic publishers have been able to exploit economies of scale and to publish monographs with greater efficiency and at lower cost than their smaller counterparts, including some university presses. Such larger publishers have lower financial hurdles when making publishing decisions and require lower investment at a title level. They are, thus, able to apply a high volume 'factory model' to their academic publishing. We find evidence for this in our examination of title output, publishing costs, editorial processes, and the title sales that these presses identify, as compared with university presses.

6.9. Open Access models for publishing monographs have gained traction. This is evidenced by the established publishers now offering OA as well as conventional publishing options. Most publishers report online usage of OA monograph content to be higher than that of conventionally published monographs. The emergence of dedicated OA publishers is a further sign of the adoption of the OA model. But at the same time, most monograph publishers report that OA represents less than 10% of their output and report relatively low levels of author interest in being published under an OA model.

6.10. Policies regarding the inclusion of monograph content in authors' own institutional repositories vary widely across the industry. The resulting landscape is confusing both for authors and readers. A conclusion from this is that the industry might be well served by the development of best practice guidelines. The roll-out of funder policies, such as UKRI's Open Access policy August 2021 will, no doubt, galvanise this process.

6.11. Publishers expect long-form academic monographs to remain an essential means of scholarly communication over the next decade, with digital as the dominant form of dissemination.

6.12. There is some evidence from the verbatim comments of publishers that the potential for OA monographs will only be realised through the provision of dedicated funding for OA monograph publication in the arts, humanities and social sciences.

6.13. Greater standardisation in the use of metadata for monographs would contribute both to increased discovery of content and to improved consistency and transparency in online monograph usage analytics.

6.14. Further study is needed to explore further some of the areas highlighted in the survey. These areas include, but are not limited to, work into monograph sales cycles, monograph usage analytics, bibliometric information and metadata, researcher preferences, and OA funding models.

Acknowledgements

The authors of this report are grateful to all the participating publishers for responding to the survey. We also thank Richard Fisher and Mark Allin for their expert advice throughout the project and are grateful to other industry professionals who kindly provided feedback on early drafts of the survey.

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