The Evolving State of Open Access

A Delta Think Investigation

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AGENDA

• About Delta Think

• About Delta Think Investigations: Open Access

• Methodology

• Market Analysis

• Q&A
DELTA THINK

- Founded in 2005

- Focused on scholarly communications:
  — Strategic Marketing & Market Research
  — Digital Strategy & New Product Development
  — Technology & Organizational Transition

- Delta Think OA Investigation draws on all capabilities
DELTAT THINK INVESTIGATIONS

• Deep dives into key market topics

• First Investigation: Open Access
  • Analyzing a fluid market
  • An evergreen analytics tool
  • Third-party market analysis
No single industry data source
MEETING A MARKET NEED

Lots of information on Open Access...
...but often nebulous, speculative, and confusing.

A tool that meets the need for speed.

• Navigate complexity
• Actionable Decisions
• Flexible Format
METHODOLOGY
METHODOLOGY

• Qualitative Data:
  - 30+ interviews: publishers, funders, archive managers, institutions, thought leaders
  - 2017 Plan: 50-100 publishers, 20 funders, 10 repositories, 20 institutions, 10 thought leaders
  - Conferences, webinars, podcasts

• Quantitative data:
  - Includes data on 25K journals
  - Publisher data also from interviews and questionnaires
  - Public data sources
  - Websites
  - Reports/White papers
ANALYSIS

• **Cross reference** confidential data from interviews with public data sources
  - Bottom-up market sizing, rather than top-down
  - Analyze patterns

• **Confidential data remains confidential**
  - Goal: Benchmarks

• **Public Scopus data: a starting point**
  - Adjusted for inconsistencies with publisher info
YoY Growth of Total Published Articles

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Industry-wide problem!
MARKET ANALYSIS
Open Access Market
2015 $374M
2016 $419M

Growth
10%-15% pa → 2020
Key Driver: Funders – Dissemination

Europe
- Centralized Vision (Horizon 2020)
- Some mandate against Hybrid

UK
- Centralized negotiation & policy.
- Funders aspirational; mix allowed

US
- Least centralized
- Public Access

China
- Reward publication in Journals w/ IF ... esp. if > 5

Academic Independence

Fragmented Policy Landscape
Dynamics: Consolidation – Transition

Share of Global OA Article Output – Top 250 Publishers

0% 5% 10% 15%
Publisher

7,500+ n=250
Just a few will have a profound effect

Share of Global OA Article Output – Top 15 Publishers
APCs – Selected Publishers’ Spread of List Prices

- ACS
- Elsevier
- Frontiers Media
- Hindawi
- Public Library of Science
- Springer Nature
- Taylor & Francis
- Wiley
- Wolters Kluwer Health

APC (USD as stated in price list)
Pricing – Many Factors

License

Content Type

Embargo length

Mission

Pricing

Competition

Introductory

Waivers

Discounts

Membership

Bundles

Offsetting
APC Analysis: APCs vs. “Impact” by Fully OA or Hybrid

Graph showing the relationship between APCs (USD as stated in price list) and SNIP 2015 impact factor for hybrid and open access journals.
Hybrid Outlook

Number of articles published

Author Choice
Funder IF

Funder Cost base

Hybrid
Pure OA

2012 2013 2014 2015
Open Access Output
16-18% of total

Open Access Revenue
3% of total
Megajournals & “LMDJs”

Megajournals
• “sound science” threshold + large volume
• ~15% of OA article output
• ~3% of ALL article output!

LMDJs = Large Multi-Disciplinary Journals
• Megajournals’ more selective cousins
• ~1.5% of OA article output
Megajournals - Total Output

- Total Article Count
- YoY Change in Article Count

<table>
<thead>
<tr>
<th>Year</th>
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<th>YoY Change in Article Count</th>
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<td>2016</td>
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Global Analysis: Articles per Journal (Selected Territories)
Wrap up

• No single industry data source
• Now normalised
• Growth slowing but remains strong
• Funder mandates
• Journal reputation
• Incremental revenue model for established publishers
• OA becoming part of the Big Deal
What is the approximate compounded annual growth rate (CAGR) for total articles published in megajournals from 2013 to 2016?

a. 10%

b. 20%

c. 30%

d. 40%
Thank You! Questions?