OPEN ACCESS MARKET OVERVIEW

NFAIS 2017 Open Access Conference

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Agenda

• Delta Think and our Open Access & Data Analytics Tool (OADAT)
• Market sizing
• Market growth drivers
• Market inhibitors
• Market dynamics and characteristics
About Delta Think

- Founded in 2005
- Focused on scholarly communications:
  - Strategic Marketing & Market Research
  - Digital Strategy & New Product Development
  - Technology & Organizational Transition
Open Access Data & Analytics Tool

- Analyzing a fluid market
- Centralized source of OA-specific data
- Visualizations and analysis
- Evergreen content
- Third-party market analysis
MARKET ANALYSIS
Estimated 2016 Market Size

STM Market
$27B

STM Journals Market
$7.5B

Open Access
$444M

Source: Delta Think analysis
Prepared by Delta Think, Inc. Proprietary and Confidential
Open Access Market

2016 $444M

Projected 2017 $511M

2016: 1.9% of STM

6% of Journals
OA Market Growth

Source: Delta Think analysis
Prepared by Delta Think, Inc. Proprietary and Confidential
OA Market Forecast: Growth Drivers

• Increased support by funders to fund APCs
• Tentative uptake by larger societies
• Increasing mandates, in number and strength
• Increased awareness by researchers
• Infrastructure in place in publishers, institutions, and funders
• Increased number of OA-related services
• Continued growth of megajournals and OA Books
• Increased hybrid uptake
OA Market Forecast: Growth Inhibitors

• Lack of a widely supported business model
• Minimal increases in APCs and inclusion in Big Deals
• Continued resistance by societies
• Lack of change in researcher publication motivations
• Focus on journals, less on books
OA Drivers: Funder Mandates
OA Drivers: Funders

Europe
- Centralized Vision (Horizon 2020)
- Strong mandates

UK
- Centralized negotiation & policy
- Funders support all OA

US
- Least centralized
- Public Access-focused

China/India
- Entrenched reward system
OA Drivers: Researcher Behavior
Market Dynamics: Repositories

Source: OpenDOAR. Data used with kind permission, under a CC BY-NC-SA license. Retrieved May 2017. © 2017 Delta Think, Inc. All rights reserved. May not be reused without permission.

https://deltathink.com/open_access_repositories/
Market Dynamics: OA Books

Source: Directory of Open Access Books (DOAB), JSTOR, Delta Think Analysis. Retrieved August 2017. © 2017 Delta Think, Inc. All rights reserved.
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Market Dynamics: Megajournals

Source: Scopus, Web of Science, PMC, Delta Think analysis
Prepared by Delta Think, Inc.
Proprietary and Confidential
Market Dynamics: Concentrated Output

Source: Scopus, Web of Science, PMC, Delta Think analysis

Prepared by Delta Think, Inc. Proprietary and Confidential
Market Dynamics: Concentrated Output

Source: Scopus, Web of Science, PMC, Delta Think analysis

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Market Dynamics: Articles per Journal

Source: Scopus, Web of Science, PMC, Delta Think analysis

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Market Dynamics: APC Pricing

Source: Publishers’ websites (Nov/Dec 2016), Delta Think 2016 survey data, STM Association 2012 and 2015 reports, Delta Think analysis. © 2017 Delta Think, Inc. All rights reserved.
Market Dynamics: APC Pricing

License

Content Type

Embargo length

Mission

Pricing

Competition

Introductory

Waivers

Discounts

Membership

Bundles

Offsetting
Market Dynamics: APC vs. “Impact”

Source: Publishers’ 2016 websites, Scopus public data downloaded November 2016, Delta Think 2016 survey data. © 2017 Delta Think, Inc. All rights reserved.
Market Dynamics: Hybrid Outlook

2013 - 11,058 Journals
- OA Only: 2,539 (23%)
- Hybrid: 7,406 (67%)
- Subscription Only: 1,113 (10%)

2017 - 12,947 Journals
- Fully OA: 9,301 (73%)
- Hybrid: 1,897 (15%)
- Subscription Only: 1,749 (14%)

Source: Delta Think analysis
Market Dynamics: Hybrid Outlook

Number of articles published

2012 2013 2014 2015

Hybrid Pure OA

Author Choice

Source: Delta Think analysis
Prepared by Delta Think, Inc. Proprietary and Confidential
Wrap up

- Strong growth, especially in hybrid
- The ebb and flow of market drivers
- OA is part of the strategy
- How to get there is the question
QUESTIONS AND DISCUSSION

To get Delta Think’s free monthly OA News & Views Newsletter contact us at

Investigations@DeltaThink.com

Or go to www.DeltaThink.com/Open-Access/