



Open Access 2015: Market Size, Forecast, and Trends



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Agenda

Focusing on Open Access

- Market Definition and Methodology
- Market Size, Structure, Forecast
- Key Drivers and Trends
- Competitive Landscape
- Essential Actions

Market Definition and Methodology

Market Definition

An important segment of the STM market

- Peer-reviewed research articles
- Digital, online, free of charge
- Free of most traditional copyright/licensing restrictions
- Does not include books, datasets
- OA-only – no paywalls
- Hybrid – option to pay to publish OA

Methodology

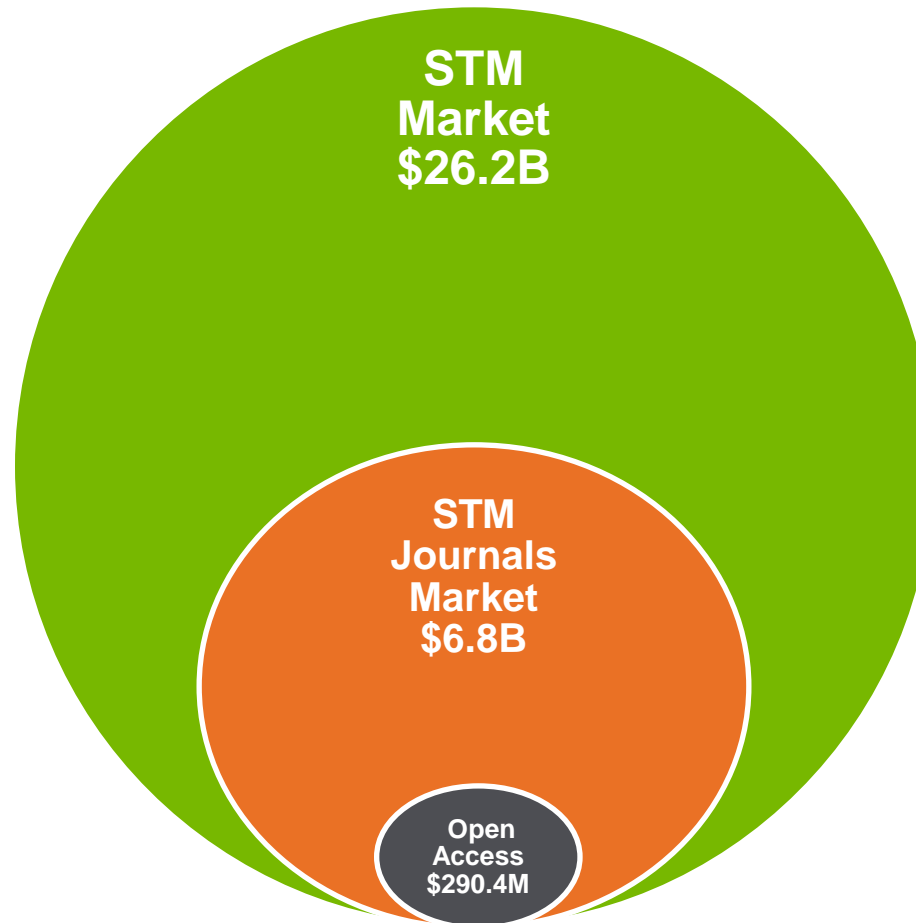
Interviews, desk research

- Databases (CAS, PMC, Scopus, Web of Science)
- Interviews with publishers and industry organizations
- Peer-reviewed journal articles, news stories, reports
- Publishers' websites – revenue models, article counts

Market Size, Structure, Forecast

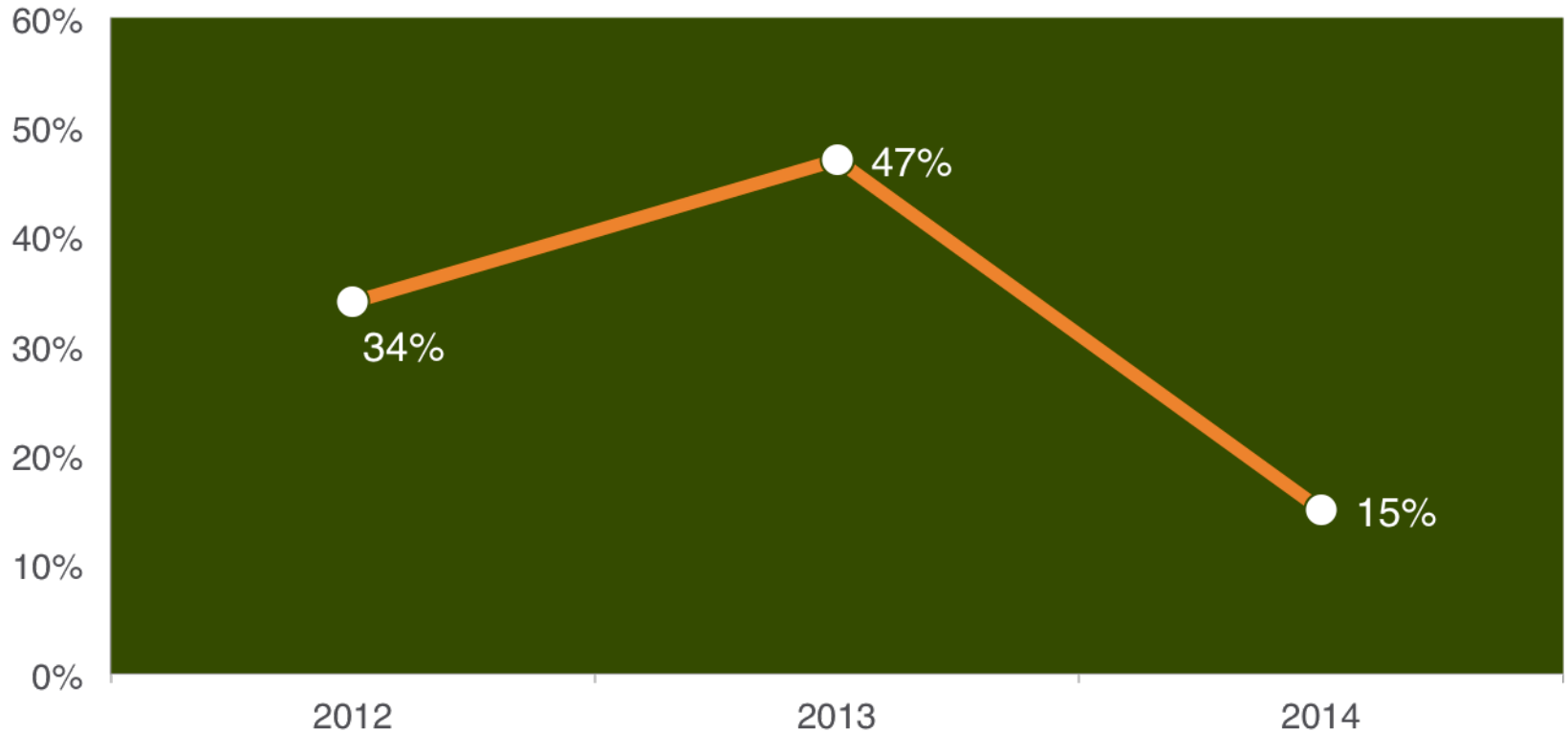
Market Size

Open Access: 1% of STM Market, 4% of Journals Market



Source: Outsell analysis

Open Access Market Growth



Source: Outsell analysis

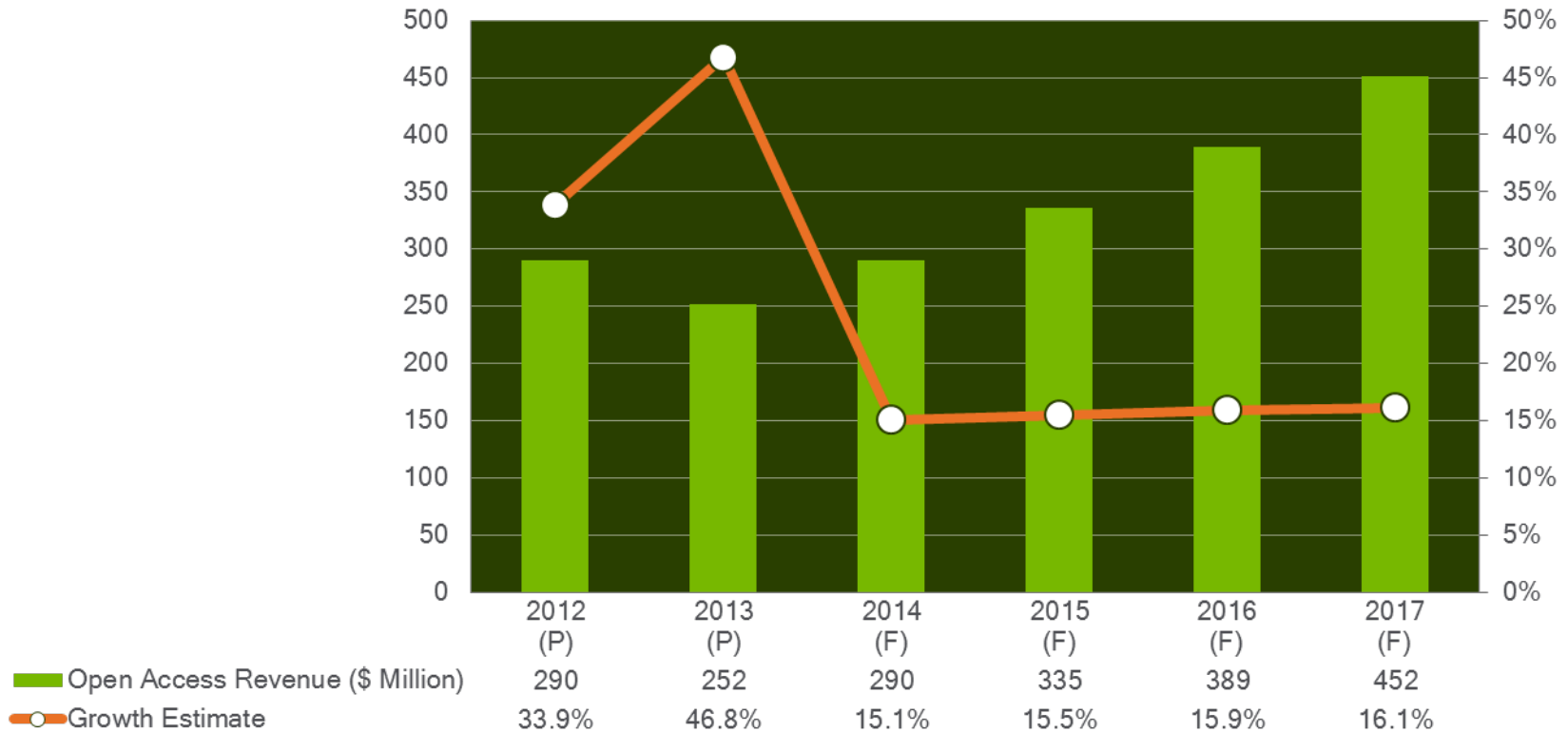
Market Forecast

Slower growth: assumptions

- Market awareness at saturation
- No funder support for APCs
- Minimal increases in APCs
- Continued resistance by societies
- Lack of robust infrastructure

Market Forecast

Revenue forecast and growth 2012-17



Source: Outsell Information Industry Database

Market Structure

Revenue models – Gold

Medknow

 Springer Open

**Wiley
Open
Access**

 Wolters Kluwer

 ROYAL SOCIETY
OF CHEMISTRY

PeerJ

BMJ

 JMIR
Publications
The leading eHealth Publisher



SCOAP³ – Sponsoring Consortium for
Open Access Publishing in Particle Physics
Sponsoring Consortium for Open Access Publishing in Particle Physics



Market Structure

Revenue models – Green



Key Drivers and Trends

Primary Motivators in OA

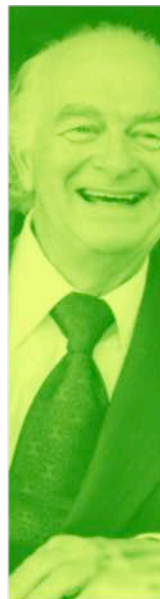
Publication of research

4



Funders

4



Researchers

4



Publishers

4

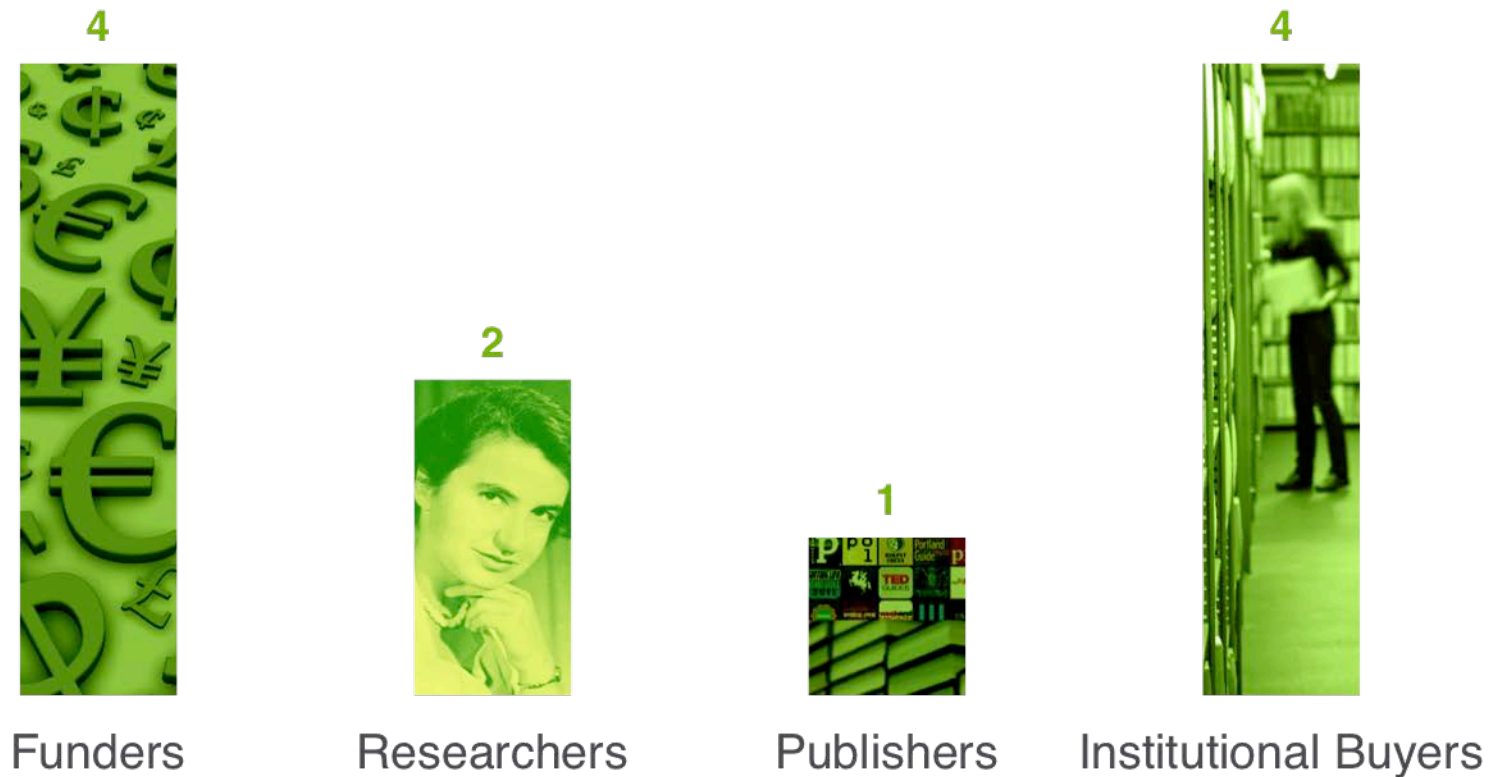


Institutional
Buyers

Source: Outsell analysis

Primary Motivators in OA

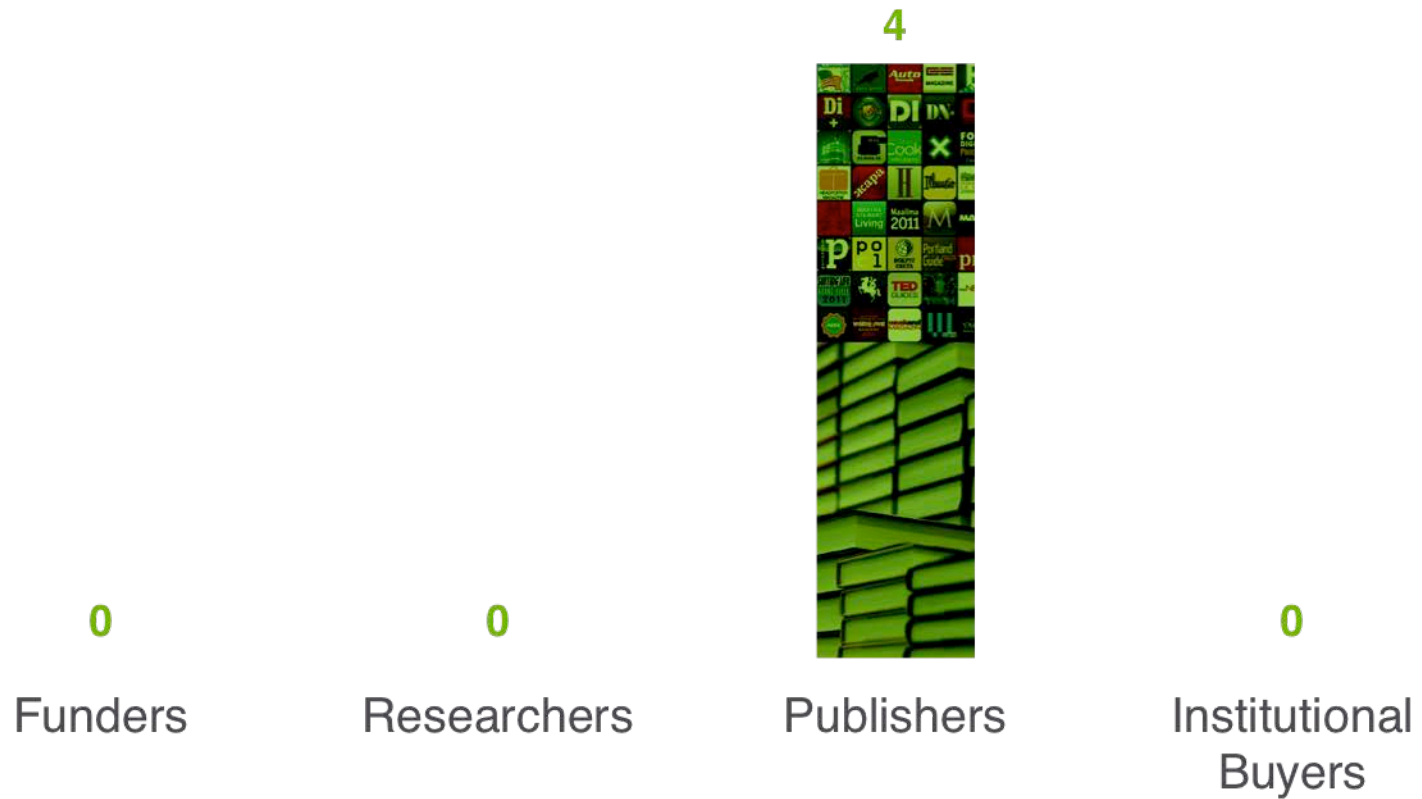
Open access to research



Source: Outsell analysis

Primary Motivators in OA

Margin preservation



Source: Outsell analysis

Primary Motivators in OA

High researcher profiles



Source: Outsell analysis

Primary Motivators in OA

High-Quality Peer-Reviewed Journals

4



Funders

4



Researchers

3



Publishers

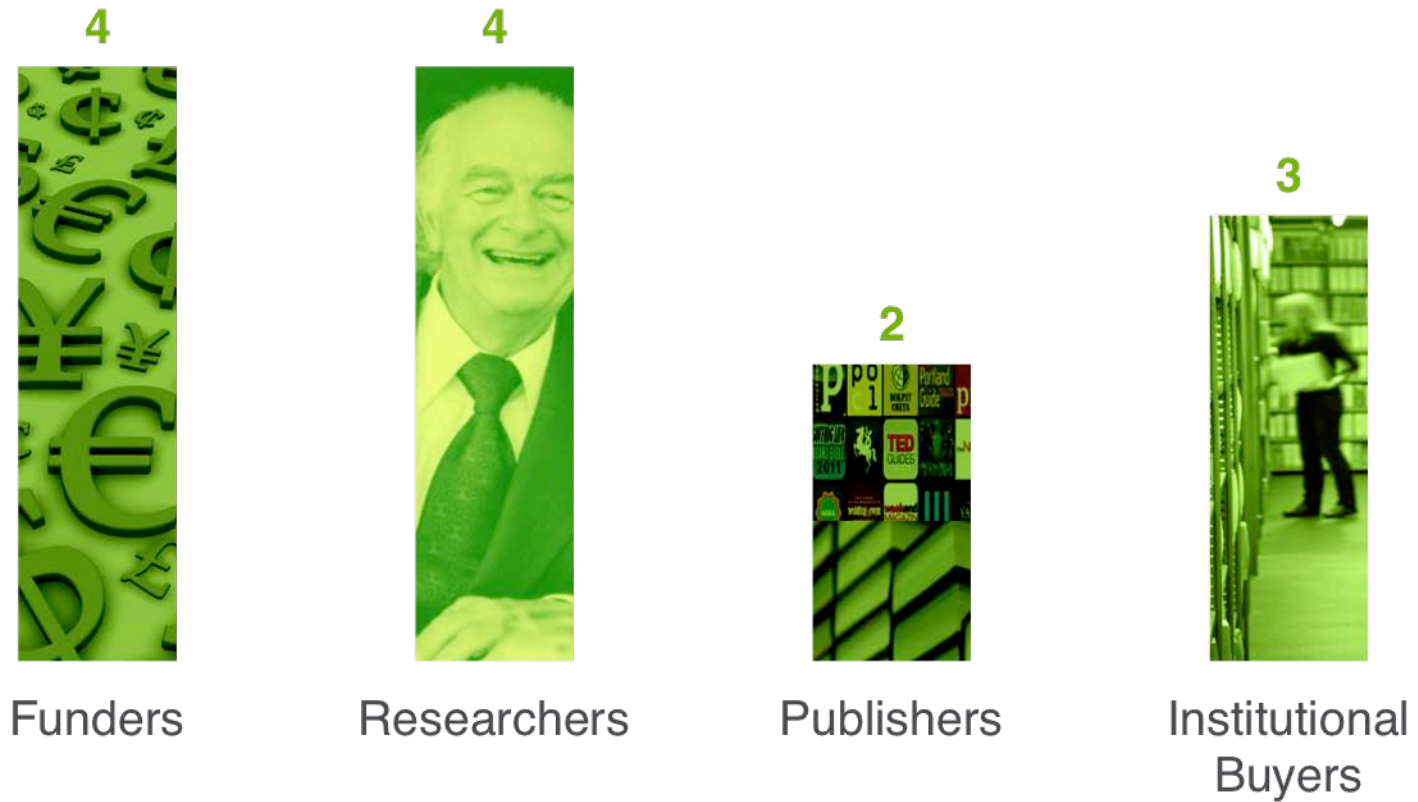
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Institutional
Buyers

Primary Motivators in OA

Speed to Publication



What is Impacting Open Access?

Funder mandates and compliance

N | H | M | R | C



wellcome trust



Impacting Open Access

Researcher behavior



Impacting Open Access

Startups and new services



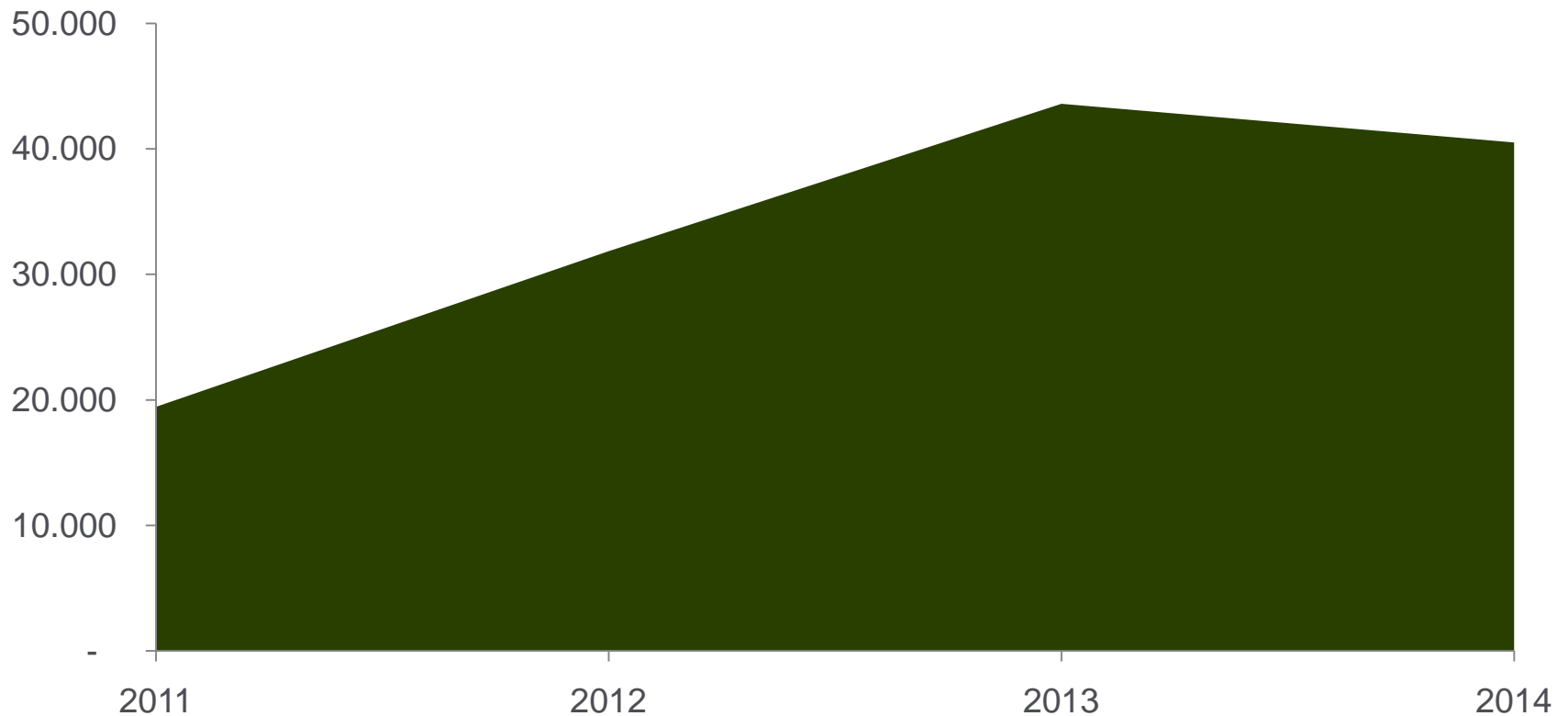
Impacting Open Access

Offsetting



Impacting Open Access

Megajournals



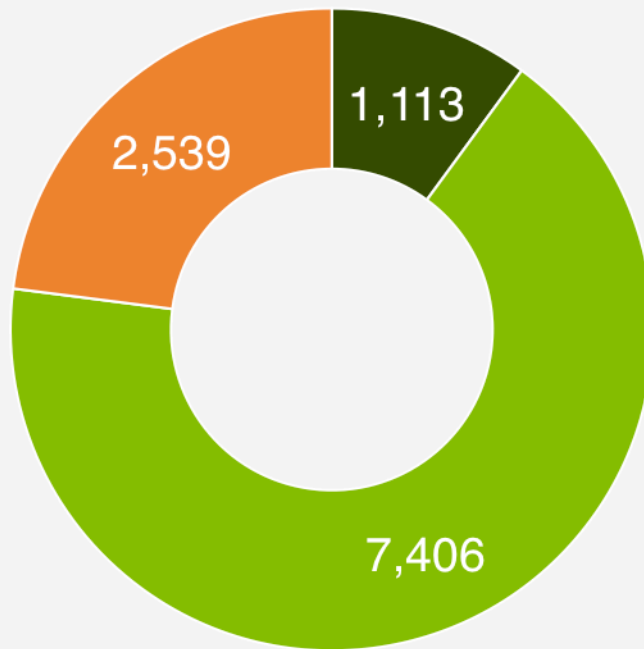
Source: Outsell analysis

Competitive Landscape

Competitive Landscape

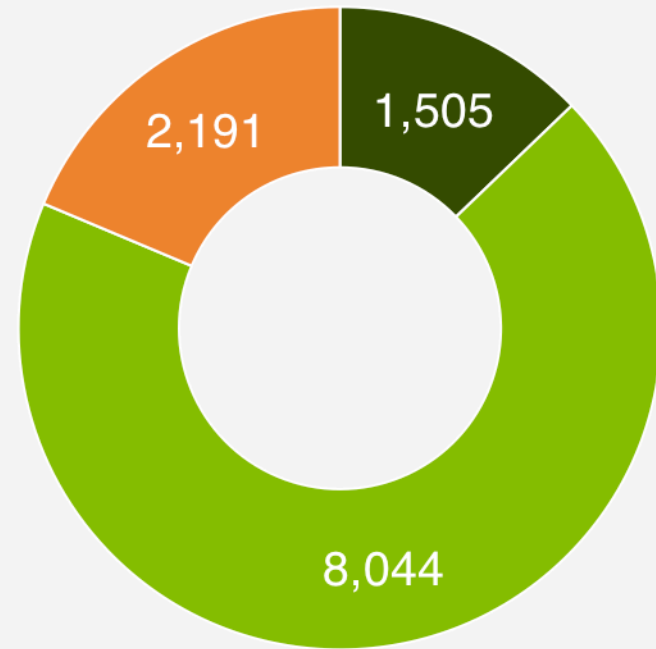
Sampling of journal numbers – 14 Publishers

2013 – 11,058 Journals



■ OA Only ■ Hybrid ■ Subscription Only

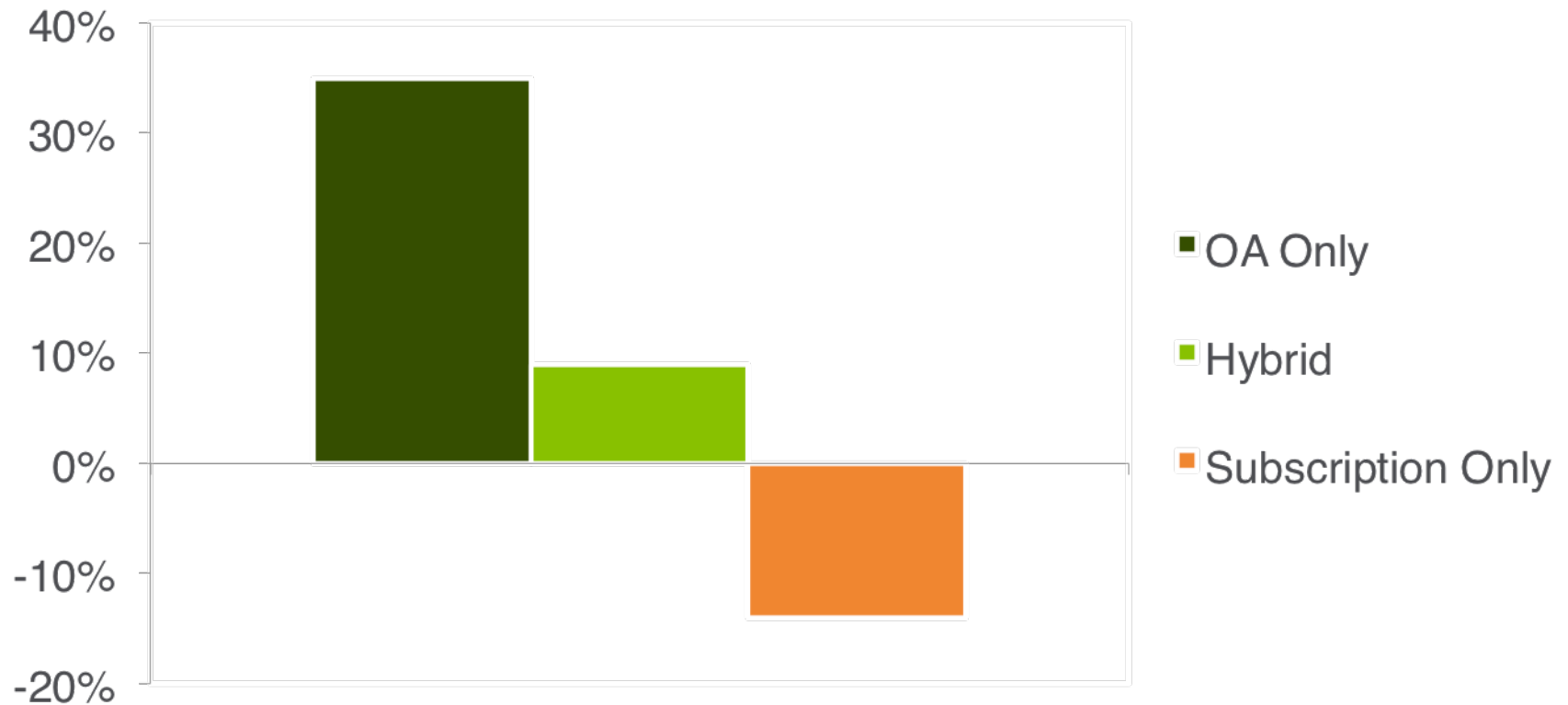
2014 - 11,740 Journals



■ OA Only ■ Hybrid ■ Subscription Only

Source: Outsell analysis

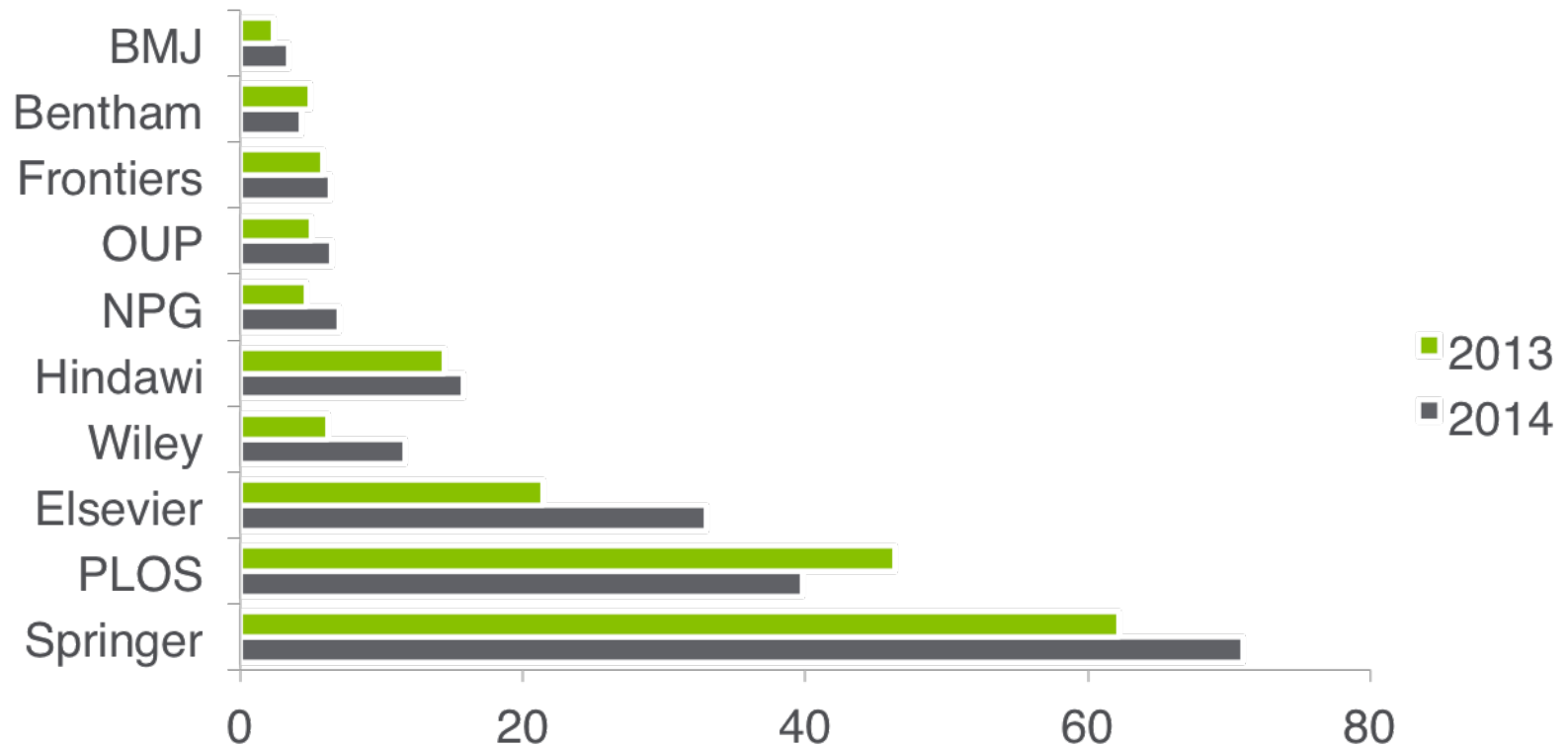
Competitive Landscape



Source: Outsell analysis

Competitive Landscape

Estimated open access revenues (in \$millions)



Source: Outsell analysis

Essential Actions

Essential Actions: Publishers

Keys to success

- Innovate and identify alternative revenue opportunities
- Support the use of standards
- Robust tools through improved information flow
- Remember the mission

Essential Actions: Information Managers

Keys to managing open access

- Be part of the conversation
- Educate the community
- Work with vendors

Wrap-up/Q&A

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