

# Changes in the World of Publishing

#### **Today**

Key Competitive Forces; Key Competitors

#### **Tomorrow**

## New Tools Emerging Competitive Forces New Competitors



# Key Competitive Edges Today



- Focus on specific market segments.
- Content volume, quality and coverage.
- Digital usage is key to sell to customers and authors.
- Value based selling and refined pricing strategy.
- Content with analytics and technology.
- Increased operational efficiency.





# **Traditional Competitors**

















La Salud: Nuestro Proyecto Editorial.

OXFORD UNIVERSITY PRESS



University of Chicago Press





Analysis

Outreach

## Tools and Innovations in Scholarly Publishing (400+ tools identified) Organized by Workflow

# Pre Experiment understanding the field:

- Literature search tools
- Read/view articles
- Get alerts/recommendations of interest
- Summaries of recent science
- Social networking

#### Pre Experiment, getting ready:

- Finding experts
- Finding funds
- project management
- Share protocols

#### **Experiment:**

- Create/analyze survey data
- Collect/mine/extract data
- Archive/share data
- Data analysis tools
- Visualization tools

#### Writing/Publication:

- Collaborative writing environments
- Finding journal in which to publish
- Peer review
- Annotate and tag info

#### Post publication:

- Impact analysis
- Archive/share posters/articles
- Organize conferences

https://docs.google.com/spreadsheets/d/1KUMSeq\_Pzp4KveZ7pb5rddcssk1XBTiLHniD0 d3nDqo/edit?pref=2&pli=1#gid=0

# **Emerging Competitive Forces**



## Content

#### Reader content expectations expanding

- Give me relevant material faster, more easily.
- Provide me insights and learning.
- Deliver greater utility than standard narrative materials.
- Help me to make better decisions; add value to my work.
- Discoverability remains key but readers now expect
  - I need a specific problem solution.
  - Formulas, tables, figures, equations, applications are important.
  - I want information by use case or format, not just subject (context).
- New content types gain in importance: data; video; animations; real time feedback.
  - Scale of data, strength of networks, growing computational power, visualization tools all driving growing importance of data.
  - I want to view techniques, methods, processes, simulations.
  - I like adaptive learning tools expected to assist w training, certification, personalized learning.

<u>Emerging Competitive Forces</u> Delivery / Purchase Models

- Competitors increasingly offering updated and updatable content.
- Budgets continue to be squeezed-buyers interested in renting for right now rather than owning for the future.
- Patron driven acquisition vs our evidence based model. Libraries want to buy across publishers even at a premium for doing so, but they don't like a forced purchase w/o oversight.
- Ad sponsored websites offer free content (efunda, matweb).
- Social Networking Sites for scientists allow free sharing of content (Researchgate).





New Nontraditional Competitors:



# <u>Content</u>

Scientific Video Content – Publishers and Suppliers: Seeing a technique or method.

JoVE; IET TV; DNA Tube; Alexander Street Press; You Tube

- Free Content: Availability and quality of free reference content improving
  Kahn Academy, Google, Wikipedia
- Self Publishing: the publication of any book (or other media) by the author without the involvement of an established publisher.
  - Glass Tree Academic Publishing; Pub Pub; Peerwith; Amazon.



# <u>New Nontraditional Competitors:</u> <u>Delivery</u>



- MOOCS: Free, web-based classes designed to support a large number of participants. Often, though not always, free.
   EdX: Coursera: MOOC org: Udacity: Seeking Alpha
  - EdX; Coursera; MOOC.org; Udacity; Seeking Alpha
- Social Networks for Scientists: primarily to collaborate and manage their professional network, but now offering ability to freely share research.
  - Mendeley; Academia.edu; ResearcherID; ResearchGate, Google Scholar; Microsoft Academic Search; Semantic Scholar; Lib Gen; Sci-Hub; facebook; epernicus; twitter
- Rental Models: Offered either to institutions or end users
  Proquest; EBSCO; Barnes& Noble, Amazon





# Journal of Visual Experimentation

- **JoVE** is the leading creator of video solutions in scientific research and education.
- 9,000+ video articles demonstrating experiments from labs at top research universities globally.
- Delivered online to scientists, educators and students.
- 800 institutional subscribers.
- In 2013 JoVE Science Education launched: video lab methods & core techniques for undergraduate/grad student labs to complement courses.
- 13 thematic "packages" including Life Sciences, Engineering, Environment, and Behavioral Sciences.
- <u>http://www.jove.com/</u> (demo) TBD re: DEMO



## Jove – Sample Method Page



Accessed on 09/04/2018 Link: https://www.jove.com/video/58171/investigating-mammalian-axon-regeneration-vivoelectroporation-adult

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# <u>Free Content</u> Khan Academy

- Free short lectures via YouTube Videos with practice exercises and tools for educators.
- 5,000 courses and 9,000 videos.
- Broad range of subjects and levels including: Biology, Chemistry, Healthcare, Medicine, Economics, Finance
- Offered in English and 65 other languages.
- 10M unique users per month; 300M+ lessons delivered; 100K+ practice problems
- On staff faculty and network of content specialists provide content.
- Funded by donations including: the Gates Foundation, The Broad Foundation, Google.

🚺 Customer First [ 🚺 Customer Needs 🔠 Customer Choice

Customer Value Customer Satisfaction





## Khan Academy





Accessed on 09/04/2018

Link: https://www.khanacademy.org/economics-finance-domain/microeconomics/nashequilibrium-tutorial/modal/v/more-on-nash-equilibrium

**Customer Value** 

🚺 Customer First 🚺 Customer Needs 🔠 Customer Choice Customer Satisfaction

# <u>MOOCS</u> EdX



- EdX hosts 500+ online, university-level courses in a wide range of disciplines for a worldwide student body.
- Created in 2012 by MIT and Harvard, EdX has 65 university and college partnerships globally.
- Courses can be accessed by anyone anywhere as long as they have an internet connection. Open to everyone without entry qualifications.
- Each partner makes a commitment to develop a certain number of MOOCs per year, bringing quantity and variety to edX's catalog.
- EdX is a nonprofit organization and runs on open source software.
- EdX conducts research into learning based on how people use its platform.
- <u>https://www.edx.org/about-us</u> (see site)





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Accessed on 09/04/2018



## Self Publishing

## **Glass Tree Academic Publishing**



- **Glass Tree Academic Publishing**, launched in April 2016, provides tools for self-publishing academic books and manuals.
- Open or closed access, print and/or e-book, including peer review classification; subject matter taxonomy; promotional tools (in alliance with Kudos).
- GTAP is offering,"...a low cost publishing platform, transparency in pricing and a fair profit sharing model with a 70% of profits to authors" and "fairly priced publishing services such as formatting, illustration, editing, peer review, and marketing".
- Funded by and is a part of **Lulu Press, Inc.** the online, selfpublishing, POD and distribution platform founded in 2002.
- Phase two (Q4 16) focuses on conference proceedings.
- Phase three (Q2 17) focuses on journal article publishing.

**Glass Tree** 





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## **Glass Tree**



鱳 Þ Publish Shop Pricing Support Search **Glasstree Publishing Fees** Print Book Ebook (Open Access) Ebook \$5 \$40 \$80 One Time Includes first year hosting \* Includes first year hosting \*\* Distribution on traditional retail channels coming soon Distribution on ebook retail channels coming soon not applicable Free DOI Available Free DOI Available Free DOI Available Free access to Kudos in conjunction with DOI request Free access to Kudos in conjunction with DOI request Free access to Kudos in conjunction with DOI request Free ISBN included. Free ISBN included. Free ISBN included. -0r--0r--0r-Bring your previously unused ISBN Bring your previously unused ISBN Bring your previously unused ISBN Submission to Indexing (e.g. Web of Science, SCOPUS, Submission to Indexing (e.g. Web of Science, SCOPUS, Submission to Indexing (e.g. Web of Science, SCOPUS, according to their qualification requirements) and content according to their qualification requirements) and content according to their qualification requirements) and content discovery facilitators (e.g. Trend MD) as appropriate. discovery facilitators (e.g. Trend MD) as appropriate. discovery facilitators (e.g. Trend MD) as appropriate. "Gold" Open Access Submission to Open Access discovery channels (OpenAIRE, and others as they become available) \* The hosting fee will be waived for subsequent years if at least one copy of the book was sold in the previous year. PUBLISHING COSTS FAQ \*\* Hosting can be purchased for multiple years at a discounted rate:

#### Accessed on 09/04/2018

Customer First 😣 Customer Needs 🖴 Customer Choice

#### Social Network Services for Scientists Research Gate



- **ResearchGate:** a social networking site for scientists and researchers to share papers, access scientific output, knowledge and expertise and find collaborators.
- Described as a mashup of Facebook, Twitter and LinkedIn.
- Most users are involved in medicine or biology though with participants from engineering, CS, agriculture science and psychology.
- The company grew from 12 employees in 2011 to 120 in 2014 (currently reported 300 member team);.
- RG claims 15M members but only a small fraction (1.1M in 2016) have filled out a profile.
- RG has been criticized for using a crawler to find PDF versions of articles on the homepages of authors and publishers and presented as if they had been uploaded to the web site by the author.
- The PDF is displayed embedded in a frame, only the button "External Download" indicates that the file was in fact not uploaded to RG.
- In 2013, RG closed Series D financing for \$52.6M from investors including Bill Gates. Total raised is over \$100M.

## **ResearchGate**





Customer Satisfaction

**Customer Value** 



**Customer Value** 

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Beginning mid-2016, ProQuest will pilot Access-to-Own, whereby libraries have access to everything, and use budget dollars to purchase permanently what was most accessed in the "rental" period. Demand-driven Acquisition (DDA).

## Pros for Library

- Limited budget spent where patrons have proved need/use
- Gives library access to more than they'd otherwise be able to affordeven in short term standard rentals.
- Does away with need for interlibrary loan on popular FL titles.

### Pros for Publisher

- Allows library to see patron needs they didn't previously know about-to expand their buying interests
- Publishers stand to earn a larger total purchase in proving use/need.
- Builds and maintains a stronger positive relationship between library and publisher

<u>Elsevier's stance</u>: "We need to provide content to our customers in the way that they want to access it. We experiment with offering our content on multiple platforms to determine which methods best fit our customer's needs.".

Customer Satisfaction



# Meeting the Problem Solving Mindset

#### **Editorial**

- Think about purpose of material, not just breadth of coverage, in conceptualizing new product.
  - How does it fit into the end user's workflow?
  - What problem/pain point does it solve?
- Ask proposal reviewers about ease of utility for feedback on improving same.
- Encourage au/eds to increase use of tabular material, varied formats/pedagogy, and video/animated examples to improve content utility.

#### **Product/Operations**

- Consider future tagging taxonomy by use case or content type, not just subject. Authors could assist with this in the same way they provide key words.
- Tagging would be by smaller content components not just chapters as a whole.

#### Marketing

- Focus must be on discoverability for end users to find and demand
- Aggressively seek reviews that prove the content utility as well as quality.



## End



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