



Meeting the challenges: societies and scholarly communication

*Results of a survey to understand
the needs of scholarly societies in
the 21st century*

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1. Executive Summary

This report outlines the results of a survey undertaken by SAGE to gain insight and understanding of the professional challenges facing scholarly societies across the world in the 21st century.

The survey was supported by the Association for Learned Professional and Scholarly Publishers; the Professional/Scholarly Publishing Division of the Association of American Publishers; the International Association for Science, Technical and Medical Publishers, and the Federation of Behavioral, Psychological and Cognitive Sciences, and made available to the 600+ members of these organizations.

The online survey of 30 questions was available for response from 2 September, 2008 – 23 September, 2008.

118 responses were completed during this time – reflecting approximately 19% of the organizations contacted.

Societies cited the major challenges facing them as international presence for their organization; membership retention and growth; provision of online services; resources (funding and income); and Open Access.

International presence was the most highly-ranked attribute for societies (49%), with particular importance placed on sales representation on a global scale.

51% of societies in the survey have experienced growth over the last five years, and many respondents expect continued growth, as a result of more international memberships, increased accessibility through online publishing, and increasingly-diverse memberships including more students and non-practitioners.

However a concerning 13% have experienced decline, and this remains a major concern over the next five years, especially as a large proportion of membership heads towards retirement, and as younger members prove harder to recruit.

The quality of the published product (in print and online) remains of high importance to all societies, and is a major factor for a number of societies in their decision to self-publish rather than work with a commercial publishing partner. Of all services provided by publishers, editorial support was the most highly-ranked overall.

Providing online services remains a key challenge for societies, and increased online availability of journals is a service many societies aim to provide for members in the next five years. Also seen as important were online access to submission and tracking tools and citation data.

Newer technologies, including web 2.0 online collaboration tools were not highly ranked in this survey, although it is anticipated there is an increasing

awareness and desire to provide services for members using these communications channels.

With increasing pressures to provide greater services for members, financial return is more important than ever. 51% of respondents ranked transparency in financial reporting as the most important service a publishing partner can provide.

Changing journals sales models (44%) and Open Access (42%) are major challenges for societies. However there is as much support for OA as there is concern, across all disciplines.

It is unlikely that such a small number of results can be viewed as representative of the international scholarly publishing community, however some of the trends outlined in this report may indicate areas where publishers and membership organizations can look to boost support for society partners, while bearing in mind the nuances and individual needs of those partners in different regions and academic disciplines.

2. Background

The Scholarly Societies Project (2001) suggests there are as many as 25,000 scholarly societies across the world¹. These organizations share the common objectives to communicate scholarly endeavour, and to support the scholarly community that are their members.

While the aims of scholarly societies have changed very little over time, the challenges they face have continued to change rapidly, in line with a rapidly evolving publishing environment. Scholarly communications output is growing fast. According to the third Scholarly Publishing Practice report², 21,787 peer-reviewed scholarly and scientific journals were in publication in July 2008, 11% higher than in 2005.

Online and new technologies continue to develop at an extraordinary rate, opening up new possibilities, but also new risks, especially for small organizations with small resources. Business models, user expectations and their long-term requirements have also changed, and this trend looks set to continue, again offering new opportunities, but also new threats.

As the world's fifth largest journals publisher, SAGE publishes on behalf of more than 245 scholarly societies and associations. We are therefore committed to ensuring we understand how learned and professional society publishers are changing, and how publishers and membership associations can better support these groups.

To produce results that truly reflected the wider scholarly publishing community, across all major subject disciplines and major geographic regions, SAGE enlisted the support of the Association for Learned Professional and Scholarly Publishers; the Professional/Scholarly Publishing Division of the Association of American Publishers; the International Association for Science, Technical and Medical Publishers, and the Federation of Behavioral, Psychological and Cognitive Sciences. Combined (excluding duplications), these groups represent more than 600 organizations internationally across all areas of scholarly research.

¹ <http://www.lib.uwaterloo.ca/society/coverage.html>

² http://www.alpsp.org/ngen_public/article.asp?aid=24781

2.1. The approach

An online survey was created, and delivered using surveymonkey.com. Thirty questions were included in the survey, collecting both qualitative and quantitative data.

The survey was available from 2 September 2008 – 23 September 2008.

Members were contacted in a number of ways by the different partner organizations: Requests to complete the survey were sent out by email to SAGE society contacts, PSP heads of house, and members of FBPCS; with additional invitations posted to the ALPSP and PSP websites, the ALPSP email discussion list, and the ALPSP email newsletter (ALPSP Alert) on or after 2 September. Additional interest was generated through media coverage.

Some caveats to the data

It is anticipated that using an online survey, and the email and online invitation methods above, will have biased the results towards users with a preference for online communication as it will not have reached those without access to the internet.

In addition it is difficult to analyze how widely the survey was distributed as there is little data available on how many members access the website, newsletter or lists targeted, or how many non-members viewed the survey through media coverage.

It was also anticipated that the results may be biased towards members in the North American and European regions, as partners in the Asia/Asia Pacific regions were not established prior to launching the survey.

3. Results

118 responses were completed during the collection period – reflecting approximately 19% of the organizations contacted. Results by collector (chart a) show that the majority of responses came from ALPSP members (40%) and from media (42%).

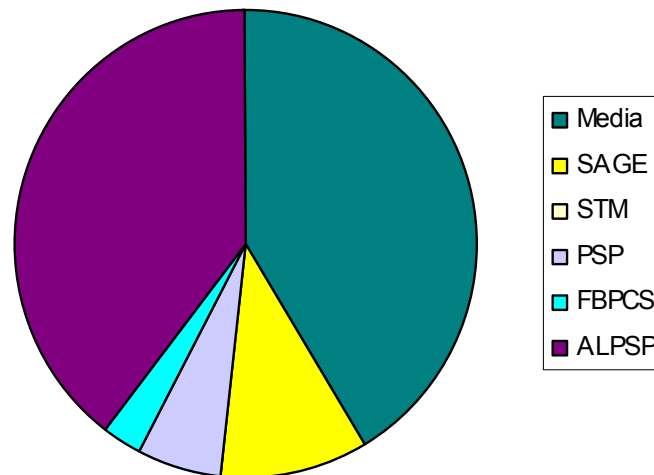


Chart a: collectors

Incomplete responses

44% of the surveys were fully completed: the rest only partially completed. This was expected since a number of the questions were optional, and these questions will be highlighted through the results section following.

The Media collection generated the highest drop out rate for complete responses (70%). This was anticipated since this will have reached a wider audience than the survey would be applicable to.

Collector	Incomplete
Media	34 (70%)
SAGE	4 (33%)
STM	0 (0%)
PSP	3(43%)
FBPCS	0(0%)
ALPSP	(53%)

Table a: collectors/incomplete responses

3.1 Demographics

3.1.1. Size³

The results reflect a fairly even spread of organizations, ranging from under 500 to more than 10,000 members, with the highest number of respondents (29%) from organizations with between 1000-9000 members (see table b).

Fewer than 500 members	24.2%
500-999 members	14.1%
1,000-9,999 members	29.3%
10,000+ members	21.2%
Don't know	11.1%
Other	0.10%

Table b: size

3.1.2. Ownership⁴

The results equally represent society-owned publishing (i.e. self-published) and commercial publishing partnered societies: 51:49 respectively.

3.1.3. Regions⁵

As anticipated (see chart b), the majority of respondents were based in Europe (48%) and North America (36%).

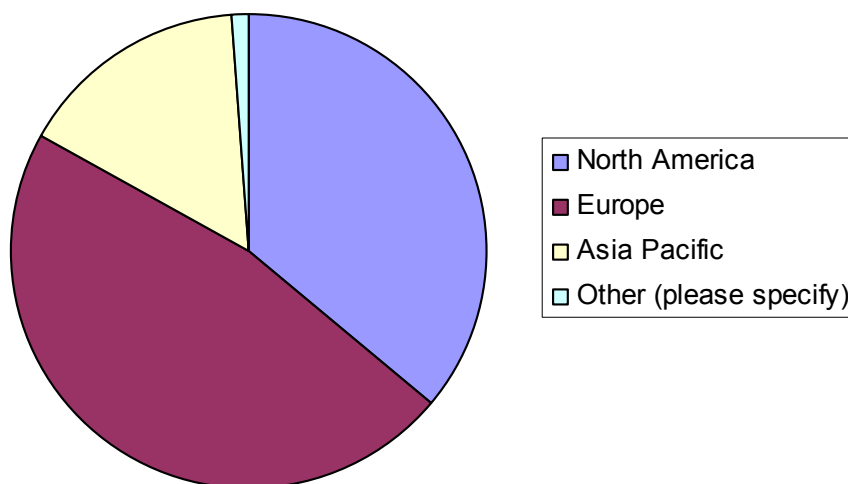


Chart b: regions

³ 99 people responded to this question

⁴ 99 people responded to this question

⁵ 99 people responded to this question

3.1.4. Disciplines

Of 99 responses (see chart c), although fairly evenly balanced, the majority of respondents were from a Science, Technical or Medical (STM) background (56%). Of these, the majority were societies in Life Sciences (19%) and Medicine (17%). 44% represented organizations in the Arts, Education, Humanities and Social Sciences (HSS).

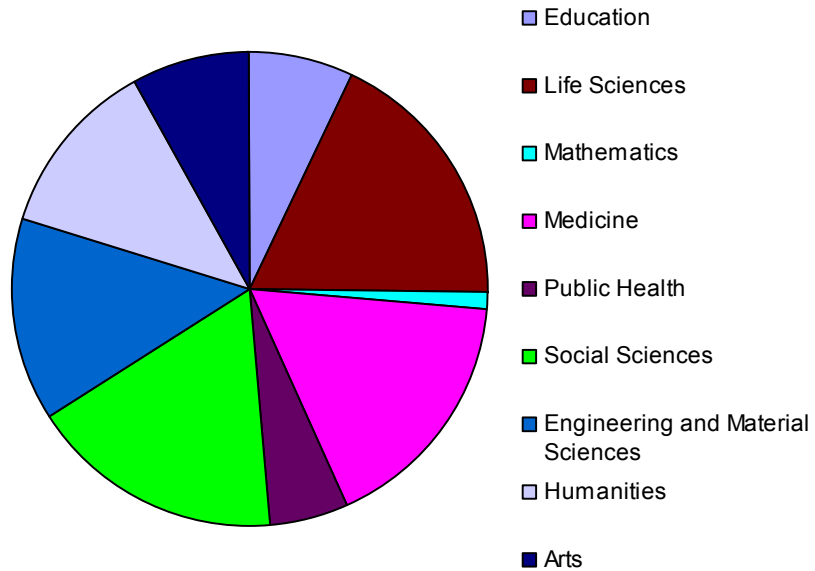


Chart c: disciplines

3.2. Key issues

Despite the broad range of organizations, in terms of disciplines, locations and size, there were some marked trends in responses.

Societies cited the major challenges facing their organizations as:

- **International presence for their organization**
- **Membership retention and growth**
- **Editorial quality**
- **Provision of online services**
- **Resources (funding and income)**
- **and Open Access**

3.2.1. International presence

49% of respondents placed international presence of highest importance to their organization. This finding was consistent across disciplines (42% of HSS; 46% of STM).

The geographic reach of society membership into new territories was highlighted by several of the respondents, with particular reference to new territories including Eastern Europe, Asia and South America:

“It is scheduled to grow, especially in Chile, Russia, Israel, Estonia, China, India, South Africa and [sic] India.”

“The Association covers Europe as a whole. Membership will expand especially to Eastern European Countries. Other countries as Turkey become involved.”

A small number of open responses also alluded to greater market penetration for their published product – highlighting the shift to online publishing as a key factor in this growth.

Publishing support

With expectations of greater market penetration, it was not surprising that global sales reach was ranked as very important (45%), especially sales representation in the United States and Canada (50%) and Europe (44%). However this support did not extend to other local (or regionally)-based services: neither regional editorial nor marketing support were highly ranked as key, with only 19% ranking editorial support as 1 (most important), and 20% for marketing support.

Beyond English language provisions

Despite the lower ranking of regional editorial support, non-English language services were highlighted by a small number of open responses, indicating that this may be an area that requires further exploration for certain disciplines:

“Multilingual issues: research publications in other languages than English”

“The Social Sciences and Humanities are published to a large extent not only in English, but in other languages of research”

production. Ways to make these internationally [visible] are [urgently] needed.”

3.2.2 Membership⁶

Positive membership trends

51% of respondents indicated their societies have experienced growth over the past five years.

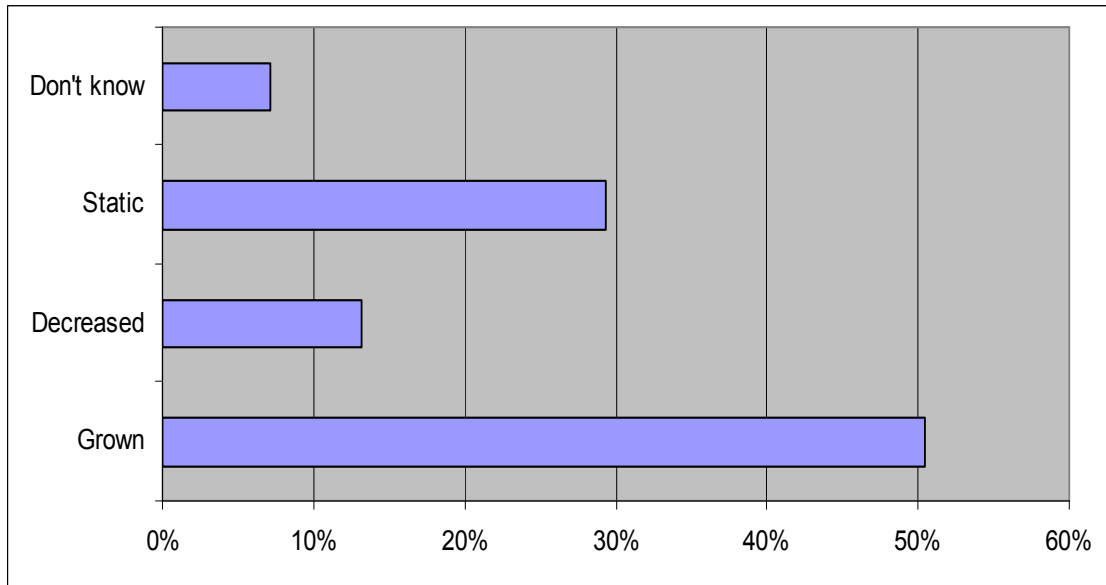


Chart d: Membership trends

Student membership⁷

Student membership for almost half of the organizations made up less than 25% of all members (table c). Variation was wide for other societies, from more than 22% with no student members, to 4% entirely comprised of student members.

None	22%
Under 25%	48%
25-49%	12%
50-99%	4%
100%	4%
Don't know	10%

Table c: student membership

23 open-ended responses suggested continued growth is expected over the next five years. For the majority, growth will come from increased internationality (see previous), and for a smaller number through wider diversity of membership, including increased student numbers and more junior researchers:

⁶ 99 people responded to this question

⁷ 99 people responded to this question

“It will broaden with more members who are not active research scientists being recruited and a major increase in student members.”

“Aging, ethnic diversity, increased number of women.”

“More younger scholars will join (PhD and post doc age).”

The implications of this increased diversity of membership are that societies will need to support these members through a wider provision of engagement and teaching.

This was reflected in the high ranking of *participation in professional development and education* (34%⁸), highlighted on chart e below, and a number of open-ended responses that called out training and professional development as a priority for the next five years:

“More web-based services, more international trainings etc. as a means of capacity building”

“Development of a professional specialization pathway. Additional subgroups to cater for interests.”

The results also highlighted the need to provide members with greater access to resources: *free access to society’s journal(s) in print and/or online* was ranked as *most important* by 40%* of respondents, highlighted on the following chart, and also as a key priority for member services over the next five years. Open-ended responses highlighted “more journals” and “more content” several times. Online access to materials, including the society’s journal but also other training resources, was seen as particularly important:

“Looking at ways of using electronic environment to add member value to publications.”

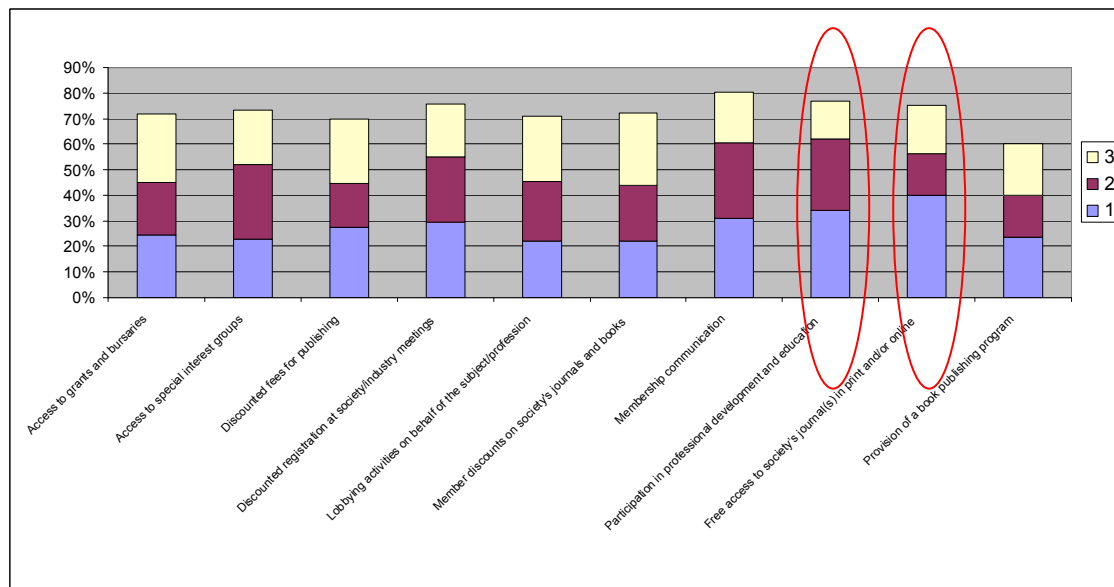


Chart e: Most important member services

⁸ 87 people responded to this question

Negative membership trends

Declining membership, as indicated by 13%⁹ of respondents as a trend over the past five years, is a major concern for societies. Many highlighted the changing make up of disciplines, and cited funding and resourcing as a key barrier to attracting new members.

Recruitment and retention of younger members is now a serious issue, with several open responses citing ageing membership and a growing number of retired members as a likely transformation over the next five years.

Younger scholars are themselves a concern for societies: scholars are no longer looking to a society for longer-term support, since they themselves are not in a long-term post:

“Demographics of the academy are changing as tenure is a more limited and finite possibility; younger faculty are more often adjuncts and unable to join a society.”

“We will probably experience more discontinuities in membership as people do not consider being a lifetime member any longer.”

All growth is good?

It should be noted that increased internationality and diversity may not be good for the health of all societies: a minority expressed concerns about the loss of localized memberships as a result of growing internationality, which should be explored further:

“Increase internationally and decrease in North America.”

“Expect membership will continue to grow internationally and decrease in North America.”

“Erosion of membership from local, focused societies to larger international societies.”

The implications

New ways to support the changing membership, and thereby improve retention, will be key to maintaining the health of these societies in the long term. This will involve looking at the needs of a more international audience, as well as a broader understanding of a discipline and different levels of experience. Additional access to training and content will be key, possibly through the provision of more journals, and certainly through the provision of more online resources.

⁹ 99 people responded to this question

3.2.3. Editorial quality

Although not at the top of the challenges facing organizations, societies responding to the survey continue to list editorial and production quality among the most important publishing services.

This becomes even more apparent when the decisions to self-publish (chart f) are analyzed.

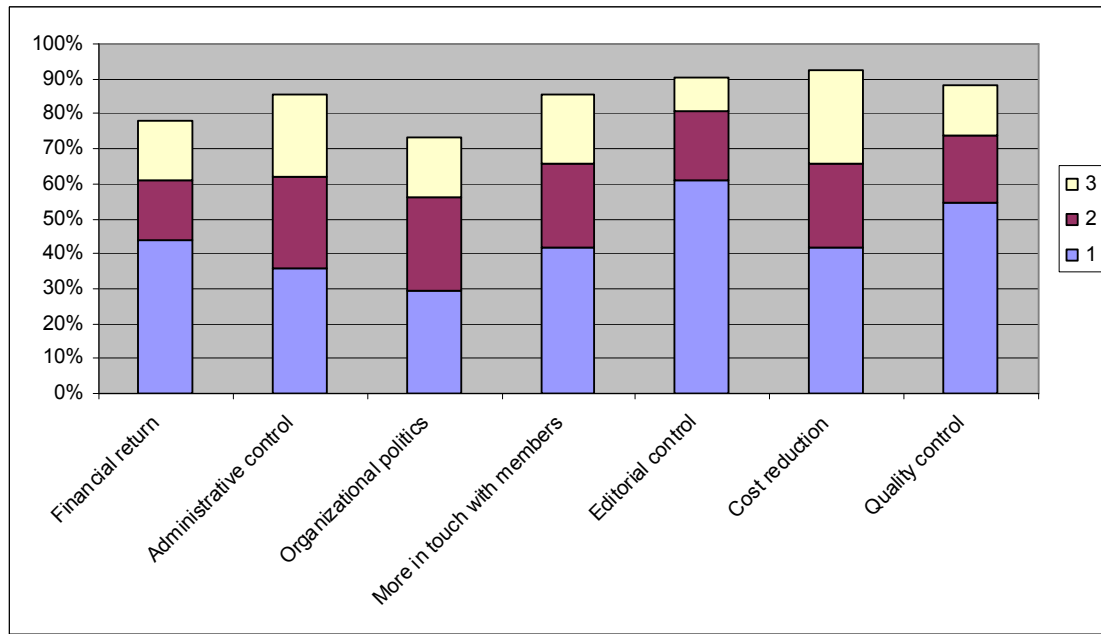


Chart f: reasons to self-publish

61% of self-published respondents ranked editorial control as the most important reason why they choose to self-publish. This was closely followed by quality control (55%).

Similarly, as shown below (chart g), when respondents were asked to rank the most important editorial services provided by a publisher, the quality of production is ranked first (49%).

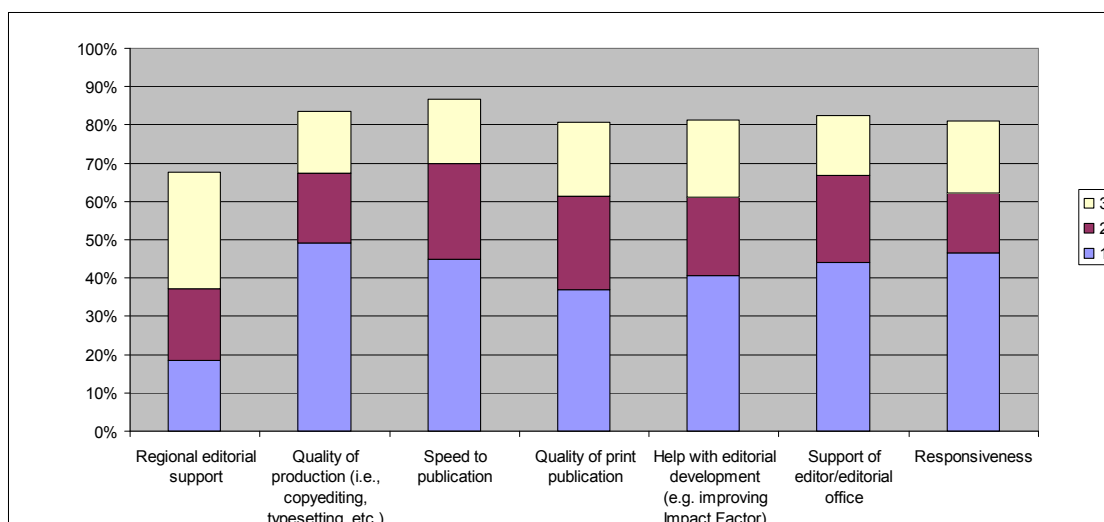


Chart g: Publishing services (editorial and production)

Editorial implications

Not surprisingly, speed to production and responsiveness were also highly ranked by societies. In fact, editorial services were, overall, the area where societies ranked publisher services as most important, with only regional editorial support ranked less than very important by the majority of respondents (see previous chart).

This finding strongly supports the unchanging commitment of scholarly societies to the dissemination of scholarly communication above all else.

This holds across results from both HSS and STM publishers: both ranked quality of production as most important (62.5% HSS; 40.5% STM).

A note to publishers

The implication from the results of the self-publishing societies is that editorial control and production quality drive the decision to self-publish. This finding should not be lost among publishers who must strive to offer improved editorial standards to potential partners, while agreeing to relinquish editorial control.

3.2.4. Online services

As previously highlighted, societies in the survey indicated that provision of more online services over the next five years is key to membership recruitment and retention.

Of the major challenges facing organizations, providing electronic access to a journal was the 4th most common issue, mentioned by 15% of 53 open responses. This finding is consistent with other more in-depth surveys on this topic.

Production

In addition to the provision of a journal for reading scholarly content, societies also highlighted the importance of online management tools for journals production: 43%¹⁰ ranked 'Online author services for submission and tracking' as most important.

Impact

Article citation data was equally highly ranked (43%) by respondents.

The changing communications landscape

While in the most part considered less important than other online services, there were indications that new technology tools, including online networking and collaboration tools, will grow in importance to societies over the next five years, in particular for education and training, already highlighted as key to membership support:

“Issues that concern us most are the evolving cyberinfrastructure and how it serves scholars; training information professionals for the 21st century; fostering communication across professional silos.”

3.2.5. Resources

As seen in the high ranking of editorial services, societies remain committed to providing high quality publishing, but this alone is not enough to maintain membership: other benefits, such as those training needs already highlighted, are a drain on society resources.

Societies are under enormous pressure to respond to the changes in the online publishing environment, and many respondents commented on the lack of resources available to them for this:

“Balancing the need to give more access to our content with the realities of funding the publishing operation's day-to-day costs as well as investments in new services.”

“Lack of resources vs. massive change.”

“Online licensing costs effectively doubled our outgoing expenses at the same time online costs decreased our print subscription base.”

Subscriptions

To be able to fund society activities, the potential decline in subscriptions from print is a major concern for many societies:

“As a small publisher, I would say that journal subscription sales (consortia, big deals), future of reprints sales, and decline of print advertising are major challenges.”

“Retaining and increasing subscriptions particularly in the light of difficult economic times and availability of info on the Web.”

¹⁰ Answered by 58 respondents

Relationships with publishers

Societies need funds to support their publishing and their membership. It was therefore unsurprising that ‘overall financial return’ was ranked as most important service from a publisher by 45% of respondents¹¹. In addition, the highest-ranked response for all publisher services (51%) was the provision of *transparency in financial and operational reporting*.

3.2.6. Open Access

As financial return from publishing services is critical to many of the societies in enabling them to deliver their objectives, it was again not surprising that “changing journals sales models” was ranked by 44% as a major challenge, and open access (OA) as a major challenge by 42%.

While it was expected that such a significant result would mean the majority of respondents would be negative towards OA, open responses show a fairly evenly split, but slightly more optimistic outlook, with replies highlighting the ability to broaden readership, despite the possible impact on revenue (chart h):

“Opportunity for knowledge translation is very significant. Big issue is sustainability and cost recovery/revenue generation.”

“It’s an opportunity to reach new readers. It’s a threat to a sustainable financial model.”

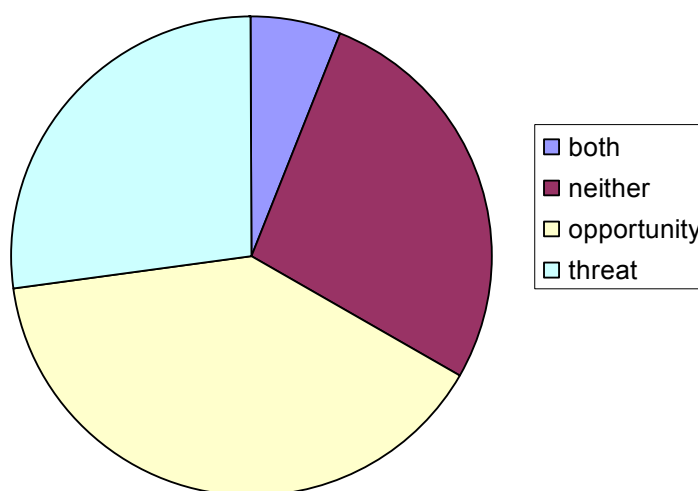


Chart h: Open Access: opportunity or threat

As shown on chart i, the primary concern for respondents was the impact of OA on subscriptions (42%). Also highly ranked was the impact on submissions (35%) which is an area currently unexplored in the literature.

¹¹ Answered by 57 respondents

Author copyright was also highly ranked (35%). A surprising result was the lower ranking of the depositing of information (ranked as most important by 21%).

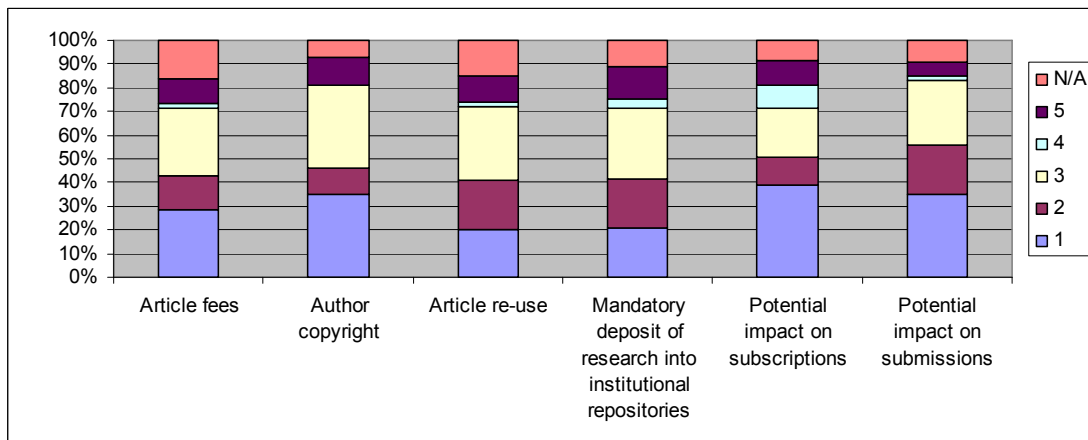


Chart i: Most important aspects of OA

Disciplines

The responses viewing OA as an opportunity were evenly split among disciplines, which was a surprising result. Given the small numbers of respondents involved, it may not be fully indicative of the different situations faced by societies in different research areas.

However, for respondents in this survey, it was particularly interesting to see both HSS and STM responses¹² fairly evenly split on OA as an opportunity or a threat.

Responses viewing OA as an opportunity highlighted the ability to broaden access. The negative responses related to revenue, copyright, and the lack of funds within certain disciplines to support the model:

*“Open Access is an opportunity as well as a threat: opportunities: availability, democratic participation in knowledge production
threat: copyright problems and quality assurance.”*
“In social sciences, OA is a threat, because in my field of social science there are few research dollars.”

Chart j indicates the close alignment in the main concerns that societies have regarding OA across HSS and STM disciplines. The findings suggest that societies may welcome further research on effects of OA on subscriptions and submissions. They also suggest that support on understanding author copyright is desirable.

¹² 34 STM responses, 44 HSS responses

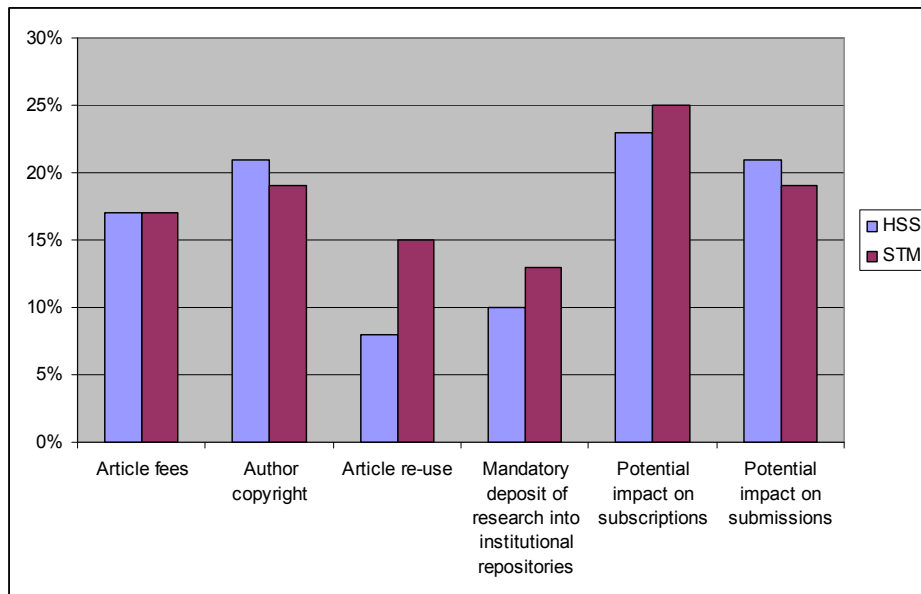


Chart j: Most important aspect of Open Access (ranked 1)

The evenly split results pro- and anti- OA across the disciplines in this study is surprising and suggests there may be a greater level in favour of free access to research than anticipated.

However, the data sample in this study is too small to provide a true picture of the global attitudes to OA across all disciplines.

3. Conclusions

Basing our findings on such a small sample warrants a great level of caution. While the results of this survey have shown some expected – and some unexpected – trends across regions and disciplines, these can be taken as only a very small indication of the wider views of the scholarly societies and the challenges they face both now and in the future.

Future application of this research may be to broaden the timeframe involved, and to further engage with partners in different regions and across more disciplines, to ensure that the responses fully capture the characteristics of these groups in greater detail. Additionally it is recognized that the high number of incomplete responses should be addressed in any future follow up research. One consideration would be to review the length of the survey.

What this report set out to achieve was a better understanding of the key priorities for societies, and the ways that publishing partners, and membership organizations like ALPSP; PSP; STM and FBPCS can support these societies more effectively.

The priorities of scholarly societies have not changed, and editorial quality, supporting the dissemination of scholarly research, and supporting members are the core focuses that any partner or membership body must look to support.

The future for these scholarly organizations is not clearly defined and likely to change. While many hope for greater internationality, there is a real risk of demise for organizations unable to recruit and maintain membership. Without a doubt supporting this task must be a priority.

Supporting societies with international presence must be a key priority, through strong online visibility, and sales support, particularly in the US and Europe.

Supporting societies with membership recruitment and retention will also be crucial to the long-term health of any partnership, as societies look to diversify and require new ways to train and develop members.

Managing the move to online publishing is a priority for many societies, and this is again an area where publishers and membership organizations can and do offer a significant level of support. The impact of new scholarly communities and communication online must be monitored, and advice and best practice offered to the scholarly societies that we work with.

The same applies for new business models, including, but not exclusively, open access. While more data on the viability of OA is now available, the concerns captured in this study are just a snapshot of issues to be addressed. Most importantly these models must be approached without damaging the financial stability of these organizations, without whom the future of scholarly communication would be futile.

To view the survey results visit:

http://www.surveymonkey.com/sr.aspx?sm=Xf1auGkK5eakVd2a4TS2_2fvzLEPvW4eZlj1RPcl6FqTY_3d (please note only summaries and open responses can be viewed. All individual data has been removed).

For further information contact:

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With thanks to:

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