



## **Society Journal Publishing**

Results of a Survey Conducted for the BMJ Journals Affinity Programme

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## 1.0 Executive Summary

Society publishers face enormous challenges as the journals market becomes ever more competitive. Not only do they need to compete harder for sales of their publications – often alongside much larger and better resourced commercial publishers – they also face challenges to their traditional role as the hub of a community. New technologies make it easier for academics and professionals to network and exchange information independently. Societies are increasingly required to expand their services to provide additional value to the communities that they serve, if they are to maintain and develop their role for the future.

With these issues in mind, BMJ Journals conducted an online survey in the summer of 2008 to help us understand the evolving needs of societies from their publishing partners. Publishers such as BMJ Journals have for many years provided services to societies to help them maximise the success of their journals publishing programme. These services have typically focused on activities such as production, online hosting, editorial development, sales and marketing and so on. BMJ Journals envisages that as the market is changing, so are the needs of societies, and as such publishers should respond to this with a more holistic approach to helping societies develop their role and effectiveness in meeting the needs of their communities. This survey was designed to uncover these evolving needs.

In summary, detailed responses were received from 24 societies covering a range of disciplines. 67% of respondents were medical societies, 20% life sciences, 6.5% social sciences and 6.5% other. No responses were received from societies in the humanities or physical sciences.

The key findings are as follows:

- Publications are seen as a key benefit of membership for societies (second only to events, and then by a small margin). Academic journals are particularly valued, with books notably less so.
- Of those societies who envisage developing new services for members in the next five years, the focus was anticipated to be on increased use of digital technology to support continuing professional development, enhanced publishing services and augmented communication with and between members.
- Societies anticipate the increasing importance of learning/professional development and see this as a key opportunity for maintaining and growing membership.

- The most commonly identified threats to society publishing are seen as declining revenues, changing expectations/behaviours of the next generation, authors self-archiving and the growth of institutional subject-based repositories.
- Open Access is more commonly thought of as a threat than an opportunity, although many societies remain neutral on its potential impact.
- Societies have three concurrent aims for their publishing programmes: meeting the needs of the discipline/global audience, supporting the interests of their members, and progressing knowledge.
- Societies see their publishing programmes developing in terms of online archives, web 2.0 initiatives and other technologically enabled advancements. Introducing book programmes is not seen by many societies as a future goal.
- Two-thirds of the societies surveyed currently have relationships with external publishing partners. Those who choose not to, do so for reasons of quality, control and economy.
- Two-thirds of those currently without a publishing partner indicated they would consider entering into such a relationship.
- The most important services offered to societies by publishing partners are: print and online production, customer service and subscription fulfilment, and sales and marketing.
- When describing the goals for their publishing programmes, for most societies profit/surplus is low down the agenda. However, this is not the case when it comes to working with external publishing partners. A high financial return is the number one criteria when looking to change publishing partners.
- Brand/reputation, technological innovation, and personal attention to individual title development are important attributes for a commercial publishing partner.

## 2.0 Profile of respondents

During October 2008 BMJ Journals surveyed professional and learned societies with a publishing programme, and received responses from 24 societies. Two-thirds of those organisations questioned were in the medical field, 20% life sciences, with the rest split evenly between social sciences and 'other'.

The largest proportion of respondents (57.1%) were based in North America, 33.3% in Europe (non-UK) and 9.5% from the United Kingdom. Two-thirds of respondents indicated they currently have a contract with an external publishing partner.

The size of the societies surveyed varied significantly: a third have over 10,001 members, while at the other end of the spectrum just under a quarter of respondents have between 501-2000. However, all of the societies surveyed have relatively small publishing programmes, producing between one and five journals each, with just under half (45%) only publishing one journal.

## 3.0 The importance of services to members

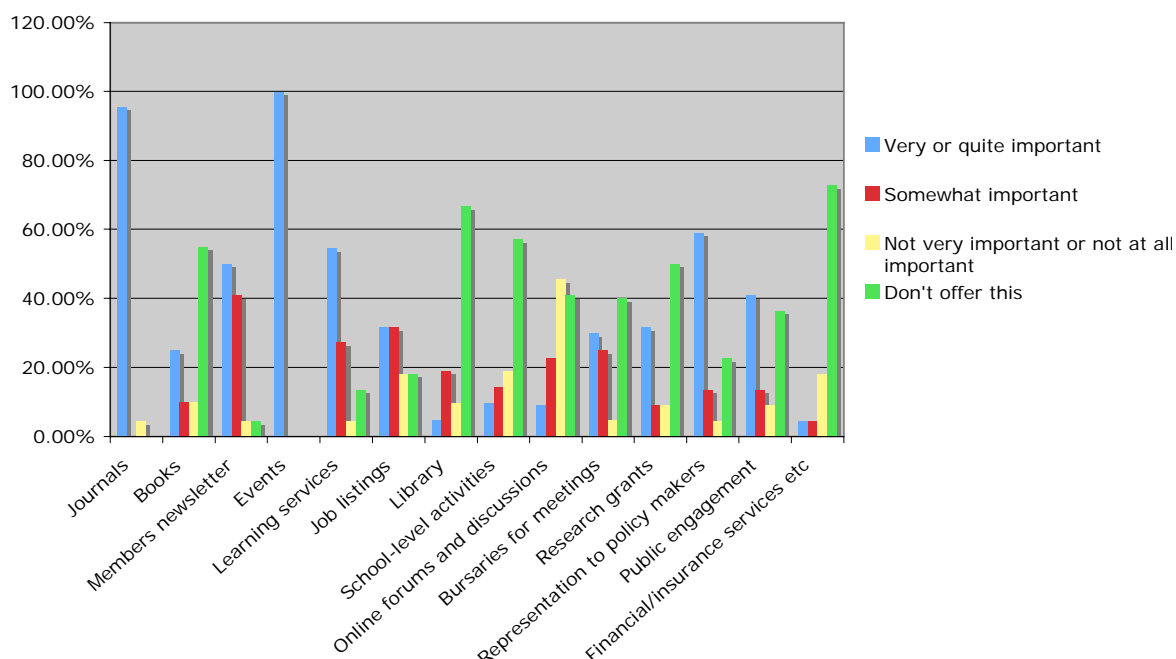
Societies believe that events and publications are the most highly valued services that they provide to members.

Events were the most valued service with all recipients considering them to be important; 81.8% of them 'very important'.

Within the category of publications, academic journals are the clear leader with 86.36% of respondents describing them as 'very important' and a further 9.09% as 'quite important.' Books were ranked much lower with 35% rating them as important and 10.0% not important, but this is due to that fact that over half of societies indicated they did not currently offer a books publishing programme (55%).

The least important services offered were school-level activities (19.1% 'not very important') and online forums (18.2% 'not very important', 9.1% 'not at all important').

Relative importance of society services



## 4.0 New services development

Of those societies who indicated they envisaged developing new services for their members in the next five years, key themes included:

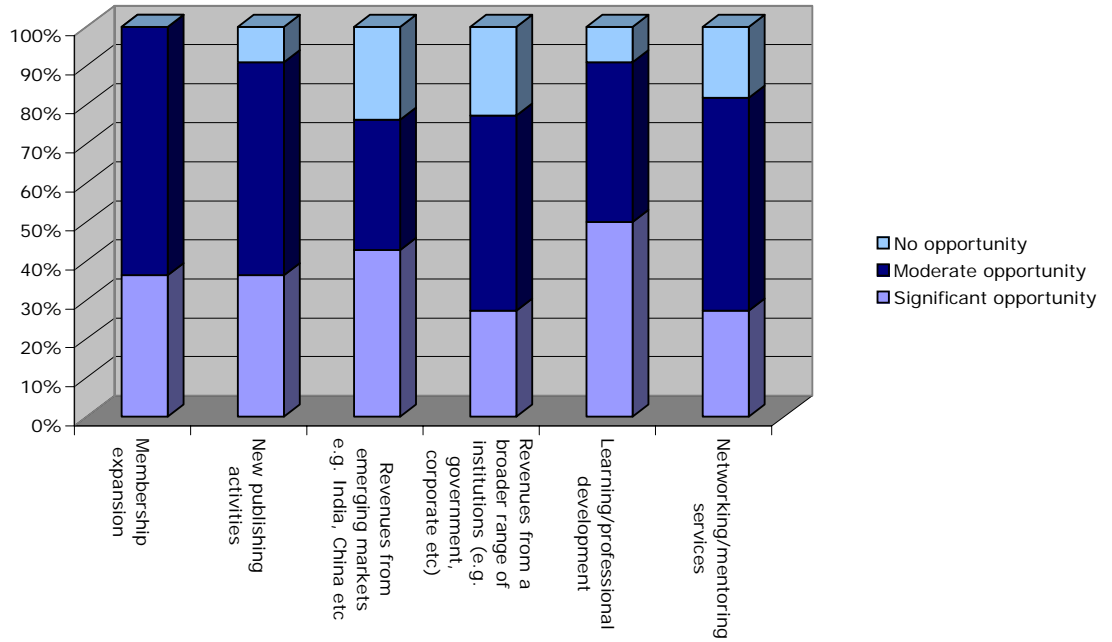
- investment in online presence
- more online extras (data sets, audit, visual etc) to supplement publications
- development of educational/professional development services
- online community building/networking
- specialised meetings
- student recruitment.

## 5.0 Threats and opportunities

The strongest opportunity recognised by society publishers is the increasing importance of learning/professional development. Half of respondents indicated it was a 'significant' opportunity, with over 40% of respondents viewing it as a 'moderate opportunity.' All societies saw membership expansion as an opportunity, although only a third describing it as 'significant'.

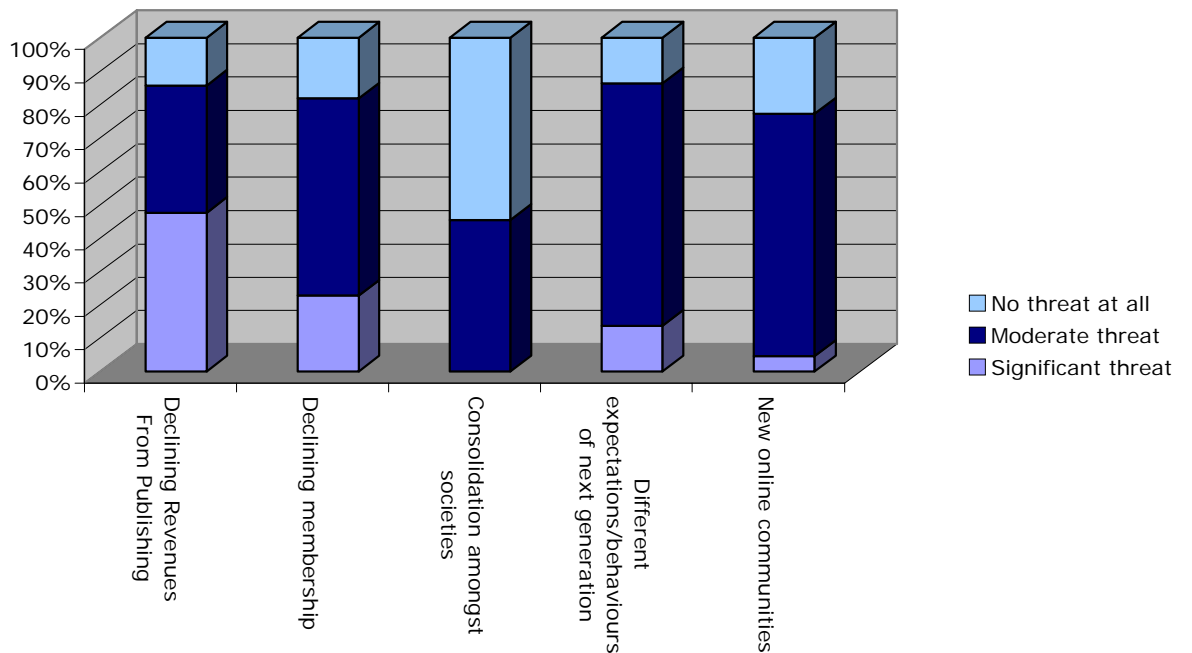
Revenues from emerging markets such as India and China were the least recognised (or societies felt they had already achieved all they could), with just under a quarter indicating they saw 'no opportunity' for expansion in this area.

**How much of a potential opportunity for your society in the future are each of the following activities**



Opinion was also split over the factors likely to be a threat in the publishing arena in the future:

**How much of a potential threat to the success of your society in the future do each of the following factors represent?**



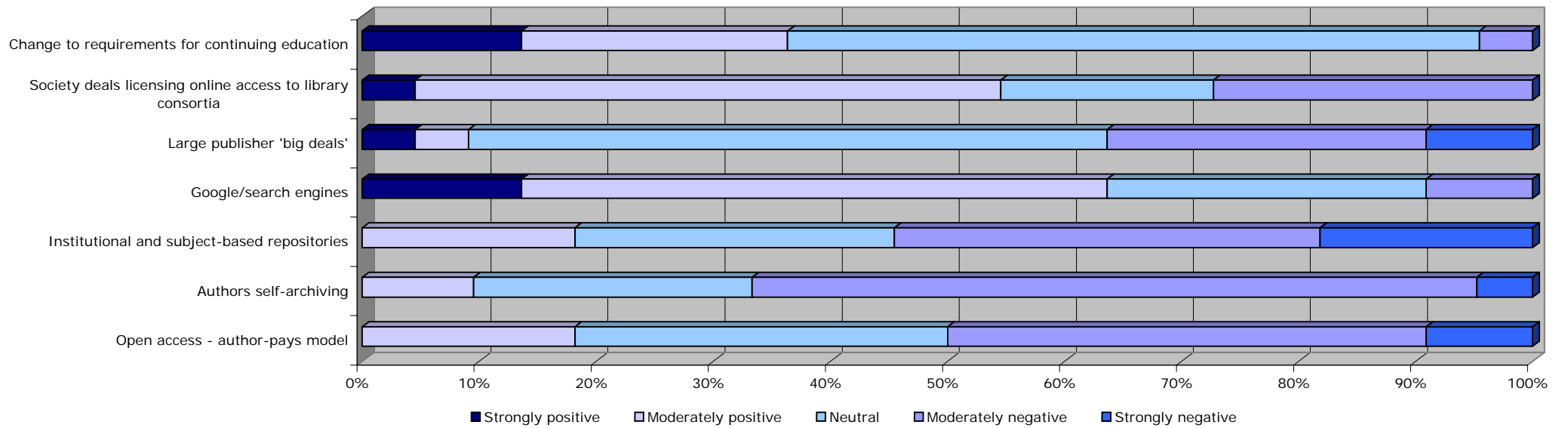
The most sizeable threat identified was declining revenues from publishing – just under half considering this to be ‘significant’ threat, and a further 38.1% a ‘moderate’ threat. Declining membership was also seen as a significant threat by 22.7% of societies. Over 72% of respondents thought different expectations/behaviours of the next generation was a ‘moderate’ threat.

Society publishers are generally fairly positive about the trends affecting the industry. Over 63% see Google/search engines as positive (13.6% strongly, 50% moderately positive.) They are also notably positive about licensing online access to library consortia, with half of all respondents seeing it as ‘moderately positive’ and a further 4.6% as ‘very positive’.

The most commonly identified threat was author self-archiving: with two-thirds of respondents seeing this as negative; 61.9% moderately so. Just under 10% of respondents however thought author self-archiving might be a ‘moderately positive’ thing for the industry. Institutional and subject-based repositories were seen as a threat: 18.2% as ‘strongly negative’, and 36.36% as ‘moderately negative’. Some society publishers however embraced the idea, with 18.2% seeing it as a ‘moderately positive’ trend.

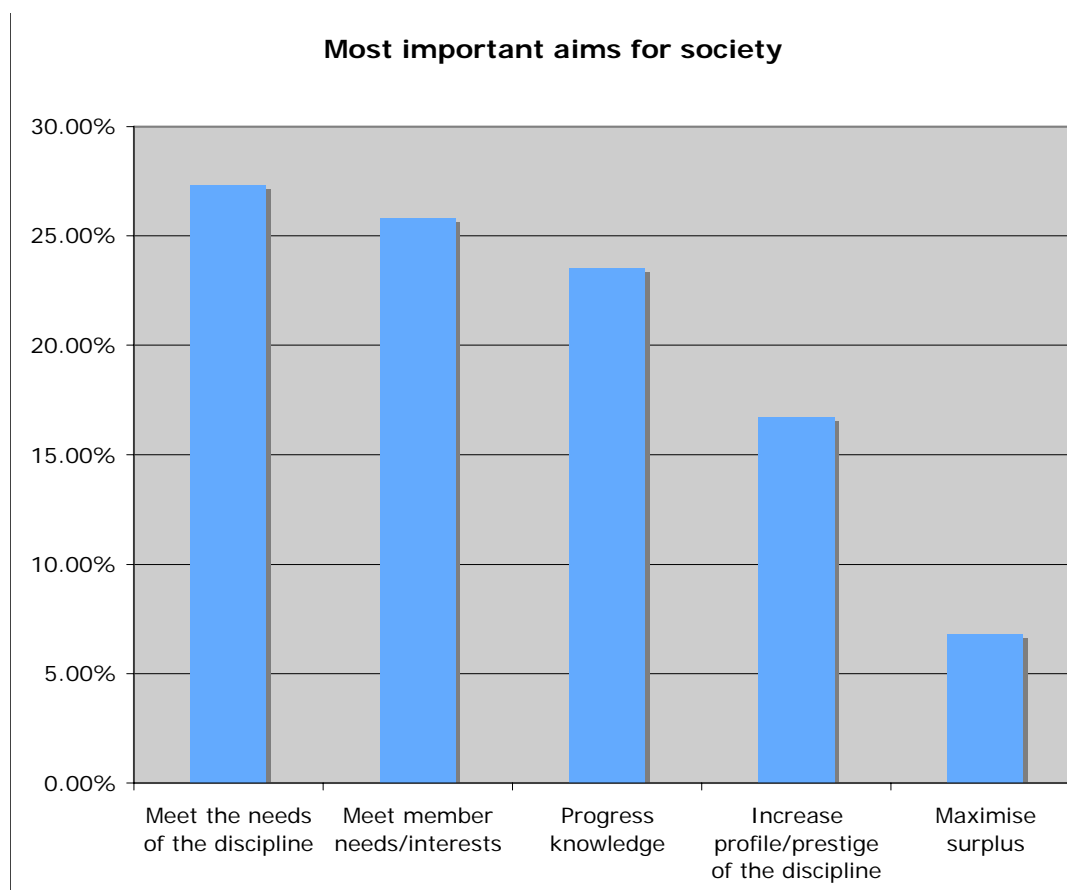
When it comes to Open Access the largest proportion of responses are negative (40.9% moderately so, 9.1% strongly). 31.9% of respondents remain neutral about its potential effects on their publishing programmes.

**Do you think each of the following trends will have a positive, neutral, or negative effect on your publishing programme?**



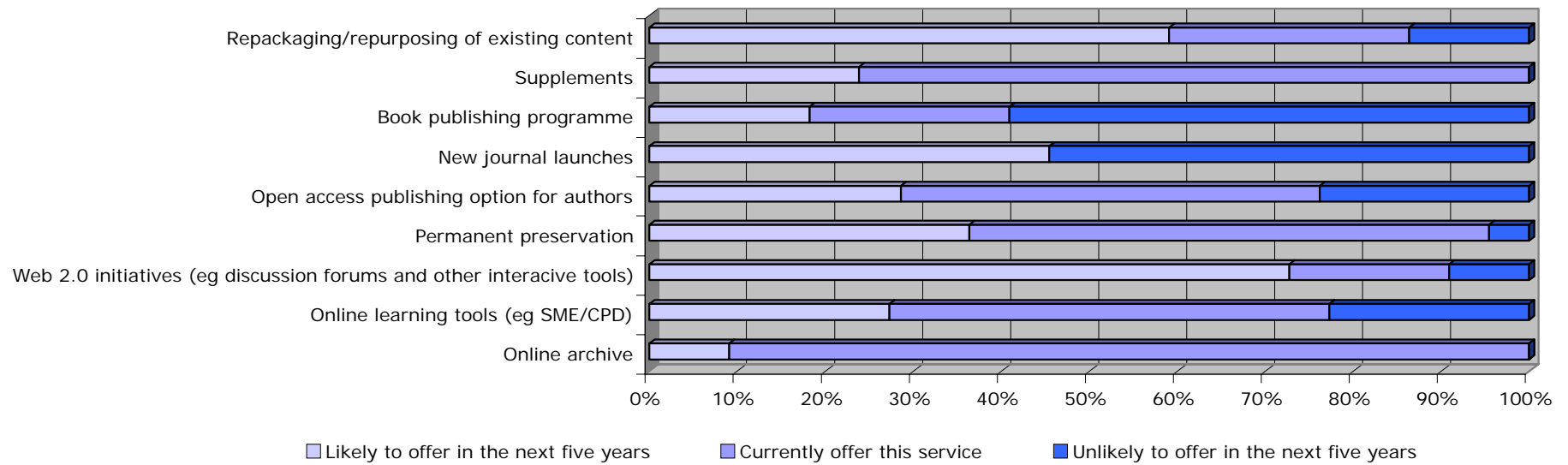
## 6.0 Society aims and publishing development

Societies consistently indicated three main aims: meeting the needs of the discipline/global audience (27.3%); meeting the needs/interests of their members (25.8%), and progressing knowledge (23.5%). Profit levels were lower down the priority list with 6.8% of respondents stating that maximising surplus was the most important aim of the society.



In terms of developing their publishing programmes, key areas of activity envisaged over the next five years centre on the repurposing and repackaging of content, web 2.0 initiatives and new journal launches. Although the vast majority of publishers currently offer online archiving, the remaining few publishers all stated this was an area they intended to develop in the next five years. Similarly, 88.9% of those not currently offering permanent preservation indicated they would be introducing this. The least common area for development was book publishing: 76.5% of respondents who didn't currently have a books programme (59.1% of all respondents) indicated they were unlikely to offer one in the next five years. Although only a minority (23.81% of all recipients) don't currently offer supplements, all of them indicated they would be developing this area.

**How likely is it that you will develop your publishing programme in each of the following ways over the next five years?**



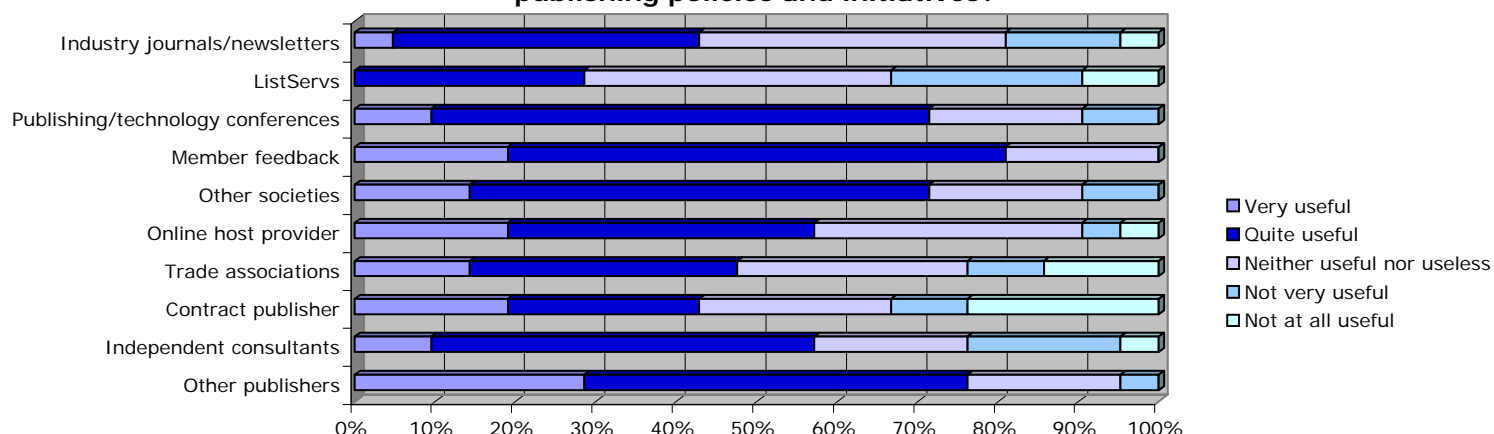
## 7.0 Valued information sources to inform publishing policies and initiatives

Member feedback is the most valued source of information to inform publishing policies and initiatives: 80.1% describing it as useful (61.9% 'quite' and 19.1% 'very'). This is followed by other publishers, other societies and publishing/technology conferences.

Listservs were found to be least useful with 23.8% describing them as 'not very useful' and a further 9.5% as 'not useful at all.' 47.6% saw trade associations as useful sources of information (23.8% saw them as 'not useful').

Contract publishers received mixed reviews: 23.8% each describing them as 'quite useful' and 'neither useful nor useless'. Whilst 19.1% thought they were 'very useful', 23.8% said 'not useful at all'. It should be remembered that a third of respondents are not in a contractual relationship (therefore would gain no value from this), which would explain this variation. If the responses from societies published under contract are isolated, about 60% find their publishing partner to be 'very useful' or 'useful' as an information source; 40% are either neutral or negative about this.

**How useful do you find each of the following sources of information to inform your publishing policies and initiatives?**



## 8.0 Publishing partner relationships

The majority, two-thirds of respondents, indicated they currently have a contract with an external publishing partner. Of those who didn't, control, cost and quality were three key themes behind why they choose to have their own

in-house publishing programmes at the moment. The societies' responses to reasons why they choose to self-publish are given in more detail below:

- “To maintain quality”
- “We have a good team and long experience of doing it ourselves”
- “Historical reasons. Prestige of own published output. Benefits of having in-house production staff working on a range of outputs (not restricted to journals)”
- “This gives us greater control over the quality and we can do so at a better cost than outsourcing it”
- “We maintain independence and can afford to do it”
- “Thus far it has been financially possible to do this; and it has allowed the society to manage all aspects of publication; to ensure quality and timeliness of publication”
- “On-staff expertise; control.”

Of those societies without current partnerships, 37.5% indicated that they would consider publishing with a contract publisher in the future.

## 9.0 Factors in choosing a publishing partner

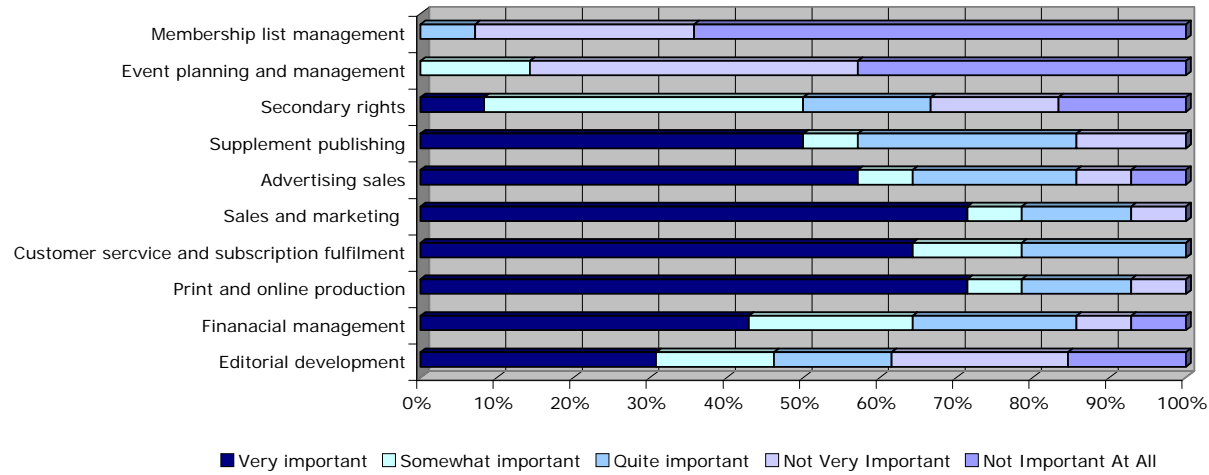
Customer service and subscription fulfilment were described as an important service offered by external publishers – 64.3% considering it ‘very important’, 14.3% ‘somewhat important’ and 21.4% ‘quite important’. Print and online production was also important to the majority of respondents (71.4% describing it as ‘very important’). Sales and marketing services were also highly valued (71.4% said ‘very important’).

Event planning and management was the least valued service. Membership list management was also described by the majority, 64.3%, as ‘not important at all’ probably because societies are already doing this in-house as a part of their core business activity.

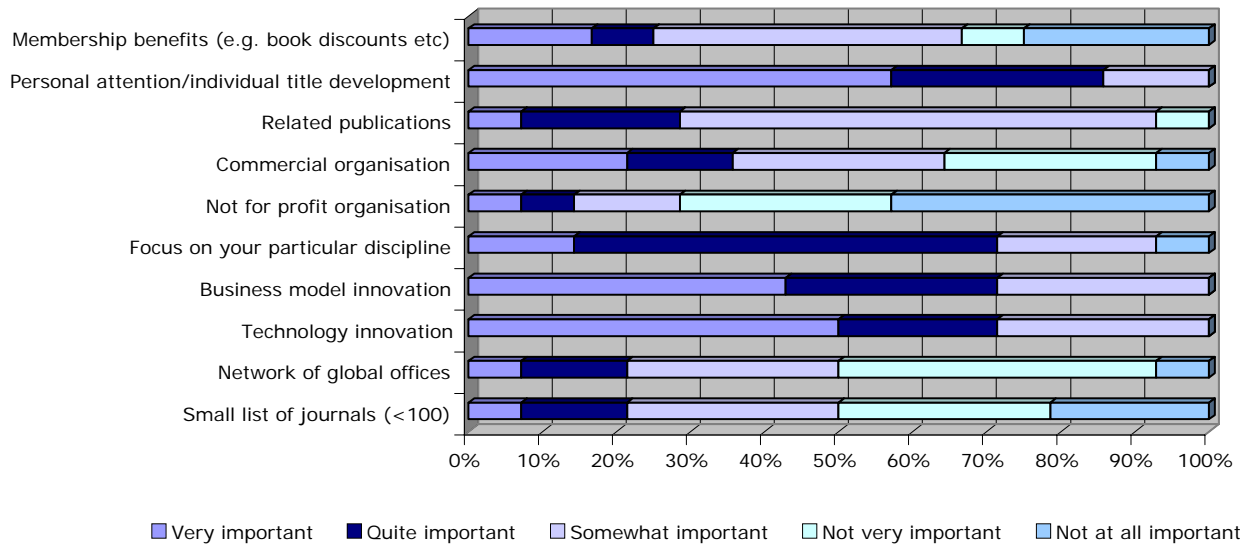
Despite maximising surplus being clearly low down the priority list when societies were asked to indicate their key aims for their publishing programmes, when it comes to working with external publishing partners the response is very different. 71.4% indicated that a financial return to the society was ‘very important’ with a further 14.3% indicating it was ‘quite’ or ‘somewhat’ important.

The only additional service that one publisher indicated they would like to see offered was publisher engagement in membership development and new market opportunities.

### How important are the following aspects of a publisher's service?



### How important are each of the following attributes to you in a publishing partner?



All of the societies questioned considered the following to be key attributes in a publishing partner: publisher brand/profile/reputation, technological innovation, personal attention/individual title development. Almost 60% of respondents indicated that publisher brand and personal attention/individual title development were ‘very important’.

Business model innovation was also a key factor with 42.9% classing it as ‘very important’, and two further groups of 28.6% seeing it as ‘quite important’ and ‘somewhat important’ respectively.

The publishing partner being a not-for-profit organisation was the least important attribute. Half of respondents indicated that a network of global offices and a small list of journals (i.e. less than 100) – no doubt relating to anticipated personal attention – were important.

Societies returned a variety of answers as their most important factors when looking to change publishers. The single most important (28.6%) was high financial return. Journal development opportunities were also considered fairly important (15.5% thought this was ‘most important’). The least important were collaborative publishing opportunities (3.6%) and more membership support (4.8%).

### What are the three most important factors when you look to change publishers

