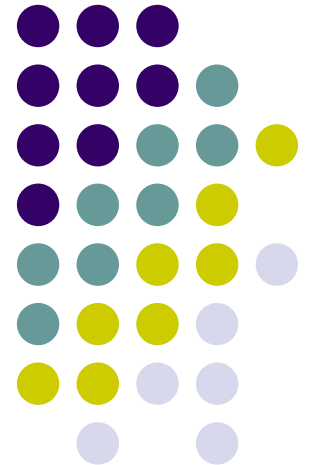


“What do society Members really want?”

Mary Waltham
Publishing Consultant
Princeton, NJ

mary@marywaltham.com

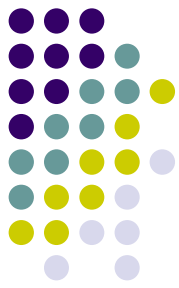
SSP Meeting in San Francisco June 6th 2007





Context: Journal industry overview- tracking the trends

(source: Spring 2007 report on
joint AAP/PSP/ ALPSP/STM/ PA initiative for 2005)



- The sample: 32 publishers of 4,123 journals
- 3,968 paid: 111 Open Access
- 500,000 articles
- Print ONLY – 54 journals; Online only 467

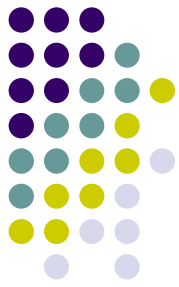
- Revenue **up** 13% (2005/2004)
- Single article downloads **up** 85% PPV revenue up 52%
- Hard copy reprint sales **down** 20%
- Advertising revenue **up** 25%: print, online and print & online all **up** although number of pages **down**
- Licensing channels **grow** -> 125,217 multi-, single and individual licenses

Context continued

(source: Spring 2007 report on joint AAP/PSP/ ALPSP/STM/ PA initiative for 2005)

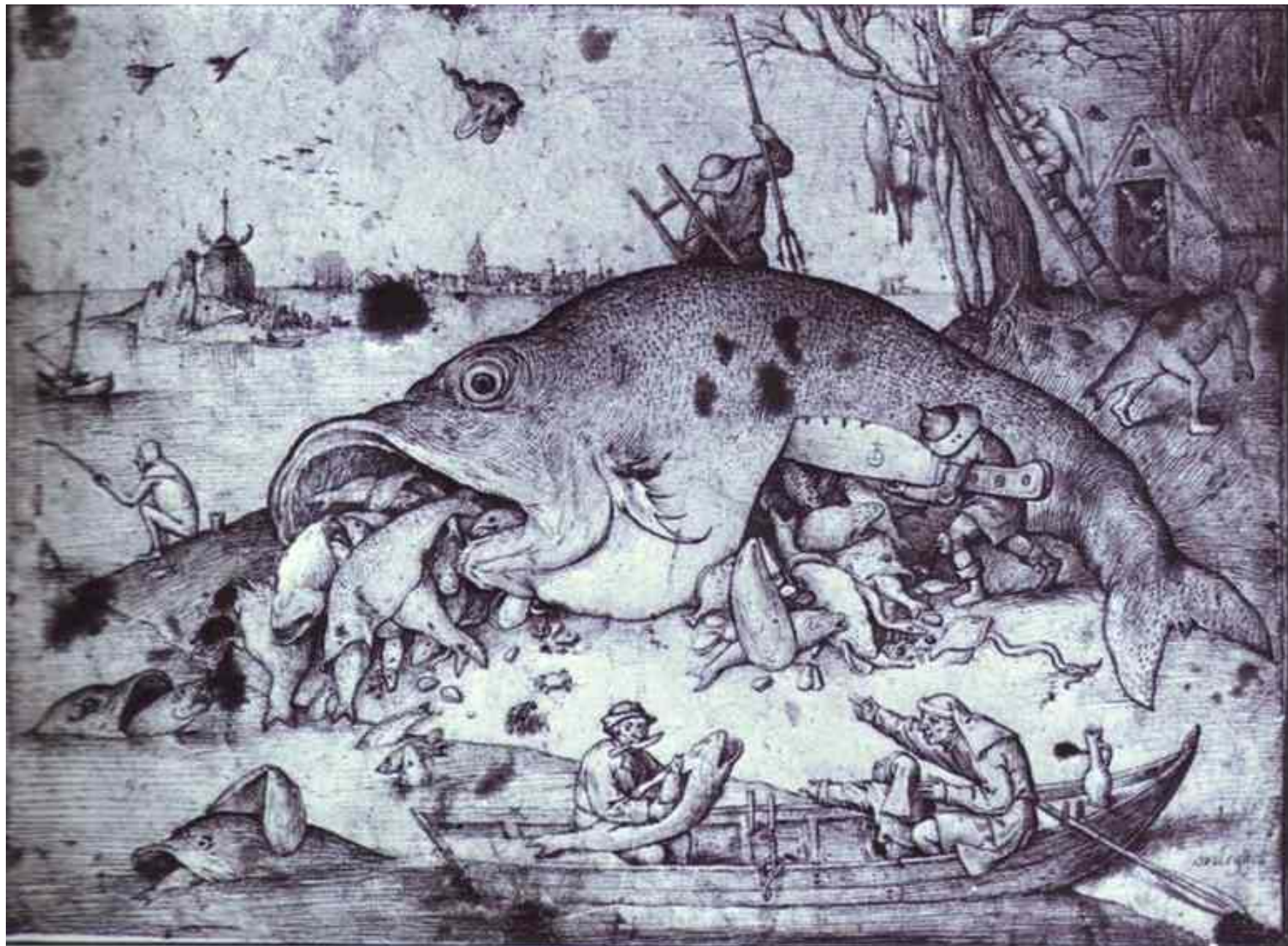


- Print only revenue **down 2.6%** (replaced by Online and Print and Online)
- Print circulation numbers **down 2.7%**
- Print only subscriber numbers **down 13%**



Context: Industry overview 2006

- Some commercial publishers results for 2006 (source: Annual reports)
- Informa “organic” Academic and Scientific business revenue **up** 6% and STM **up** 14%
- Elsevier revenue **up** 4% (online is 37%)
- Wolters Kluwer revenue **up** 9% (online is 43%)
- John Wiley revenue **up** 7%
- Springer revenue **up** 10%



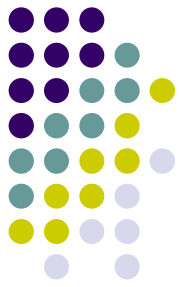


Why have societies?

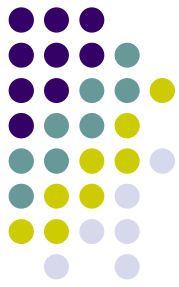
- To promote understanding
- To promote interaction
- To use the resulting knowledge of a field for the common good

- Only fulfilled if Membership is active

Why do people join societies?



- Distinguish professional organization and learned societies though the two often overlap
 - Professional — often perform certification
e.g. medicine, architecture, engineering
 - Learned — promote an academic discipline
e.g. biochemistry, carbon, modern languages
- Range of sources of evidence – public surveys-> mini-case studies
- Bottom line- the actual and perceived benefits of Membership match/exceed the cost



Why do researchers join societies?

- Taking the Pulse of Scientific Societies

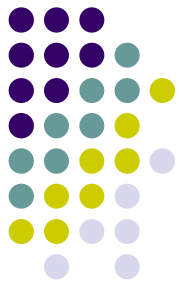
The Scientist 2003, 17(17):9

“With more researchers now accessing journals through institutional subscriptions, the economic incentive to join a society for a better subscription deal is lost”

Sample of 340 readers ~

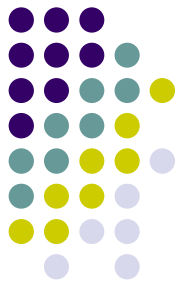
- 83% belong to a society
- 17% DO NOT belong to a society
- 21% belong to 4 or more
- Top 3 reasons for joining
 - Meetings and conferences
 - Association with fellow scientists
 - Subscriptions to research journals

Are researchers continuing to join/renew society membership?



- Mini-poll of workshop participants
- In the past two years (2005 and 2006) did your Membership numbers:-
 - Increase
 - Remain Flat
 - Fall
 - More than 7%
 - More than 3%
 - 3% or less

Are researchers continuing to join/renew society membership?

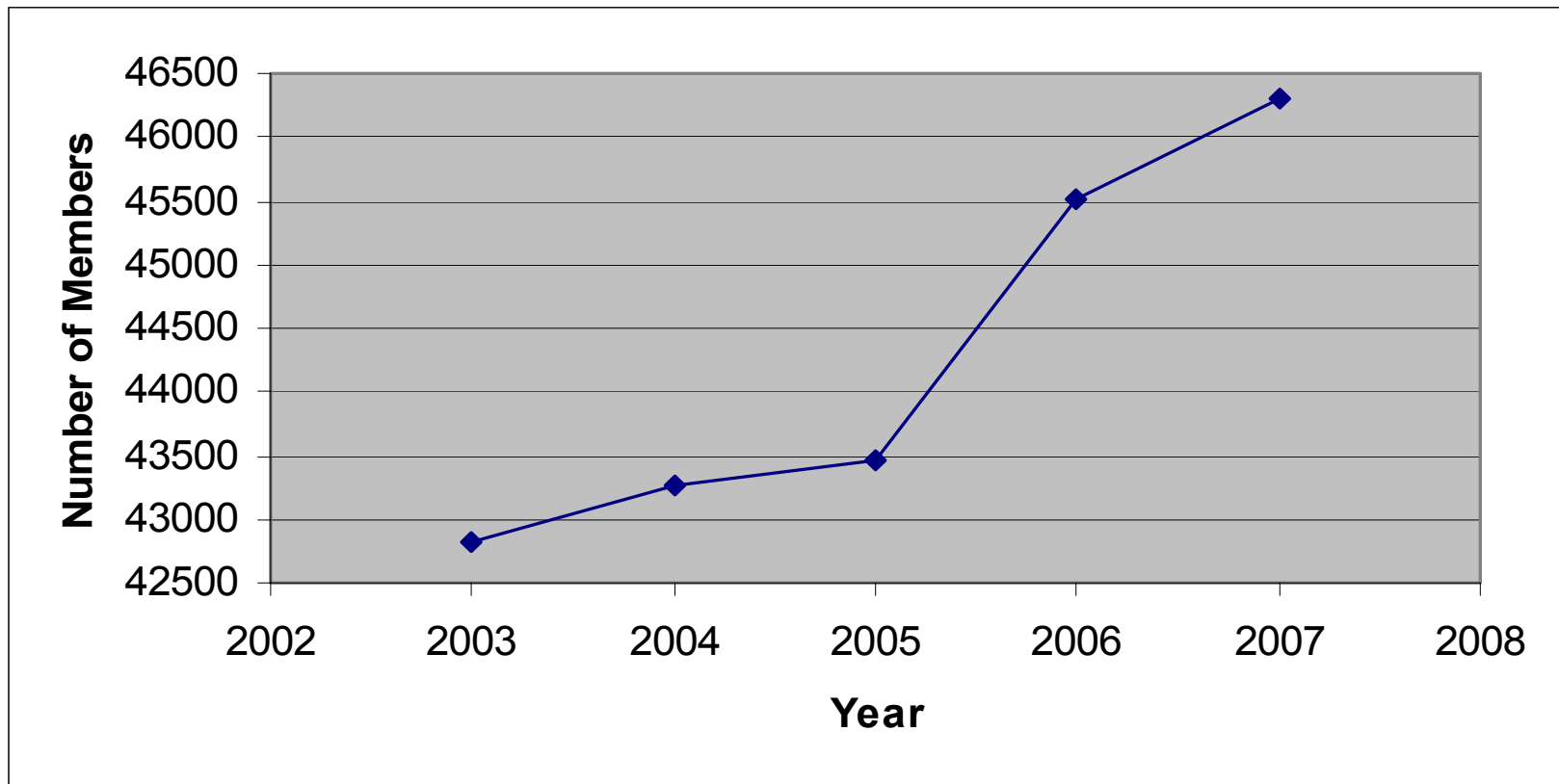


Sources:

- Data and observations from recent analysis of the circulation patterns of a large number of publishers
 - A number of smaller society publishers Member numbers falling at minus 3% (+/-) per year
- Mini-case studies
 - American Physical Society
 - New York Academy of Sciences
 - JISC: Learned Society Open Access Business Models:
Mary Waltham, June 2005

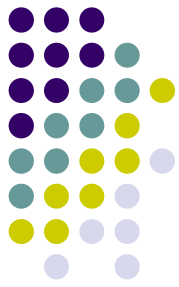
Mini-case study- American Physical Society (APS)

(Source: APS Executive Director)



Why do Members join?

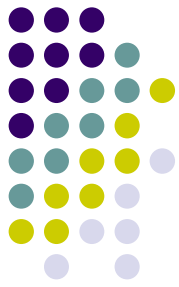
(Source: APS Executive Director)



- Keep in touch with community of physicists
- Keep in touch with developments in the field
- Support the physics community
- Receive *Physics Today* (magazine in print)
- Some 30% of all Members attend a meeting each year

How/do you connect with younger scientists?

(source: APS Executive Director)



- Forum on Graduate Student Affairs started 6 years ago = chance to participate in leadership and governance activities
- Student membership has grown markedly in the last 5 years
- This year we had almost 3,000 students at the APS March Meeting
- We hold special receptions and lunches for students at our meetings and of course much reduced rates for their membership

How/do you connect with scientists not based in the USA?

(Source: APS Executive Director)

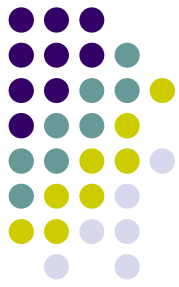


- We don't do anything special to attract international members.
- When we survey them we find that they don't want anything different from our US members.
- We make special efforts to include foreign physicists among our fellowship recipients
- Many of our prizes and awards go to foreign physicists (whether or not they are members), and this is also true of invited speakers at our meetings

What proportion of Members receive print copies of the journals as a Member benefit?

- “Total APS member print subscriptions 1,129 (14%) of an approximate total of 8,000 {out of over 46,000 Members} who subscribe over all media (print and online) types.”

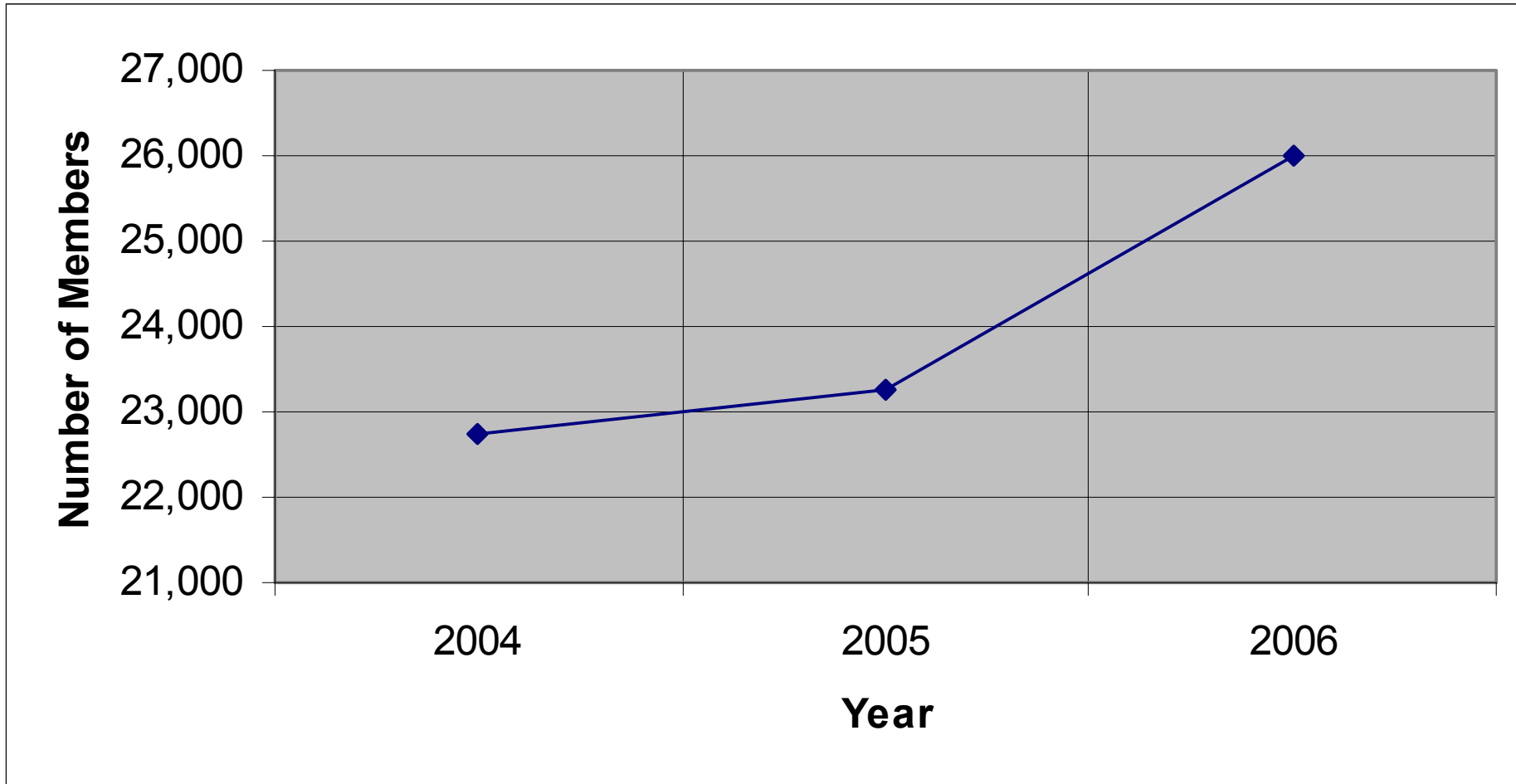
How have you managed the transition?



- “We started about 10 years ago to emphasize the need for membership in APS to support physics and the physics community, and it has gradually taken hold.
- Our lobbying activities as well as our educational programs are key for this.
- However, it means that we have a more tenuous relationship with our members than we did in previous times”

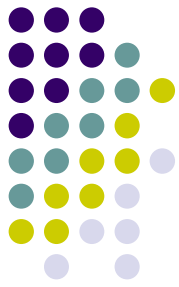
Mini-case study-New York Academy of Sciences

(source: VP, Publishing and Communications)



Mini-case study-New York Academy of Sciences

(source: NYAS VP, Publishing and Communications)



- Key added value for Members is scientific meetings with multiple speakers
 - Online for a larger member group as e-Briefings:-
Overview written for non-specialists
 - Drill-down meeting reports for specialists
 - Bulleted highlights of each talk (possible handheld product)
 - Full journalist report on each talk
 - Multimedia – p/point slides synched with audio, fully searchable
- Open questions – structured formulation of research agenda with annotated linked resources and speaker bios

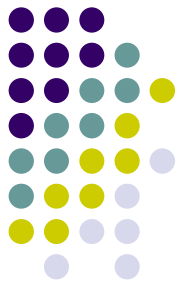
Why do Members join?



(source: NYAS VP, Publishing and Communications)

- Survey Members annually and online 'snapshots' more frequently
- Access to content #1 reason for joining
- NYAS as communicator highly valued
- Print and online almost equally valued
- Greatest participation -> live events in NY area
- Increasing participation internationally in online activities

How/do you connect with younger scientists?



(source: NYAS VP, Publishing and Communications)

- Live programming built around
 - Career building advice
 - How to get a grant
 - Run a lab
 - Mentoring

How/do you connect with scientists not based in the USA?

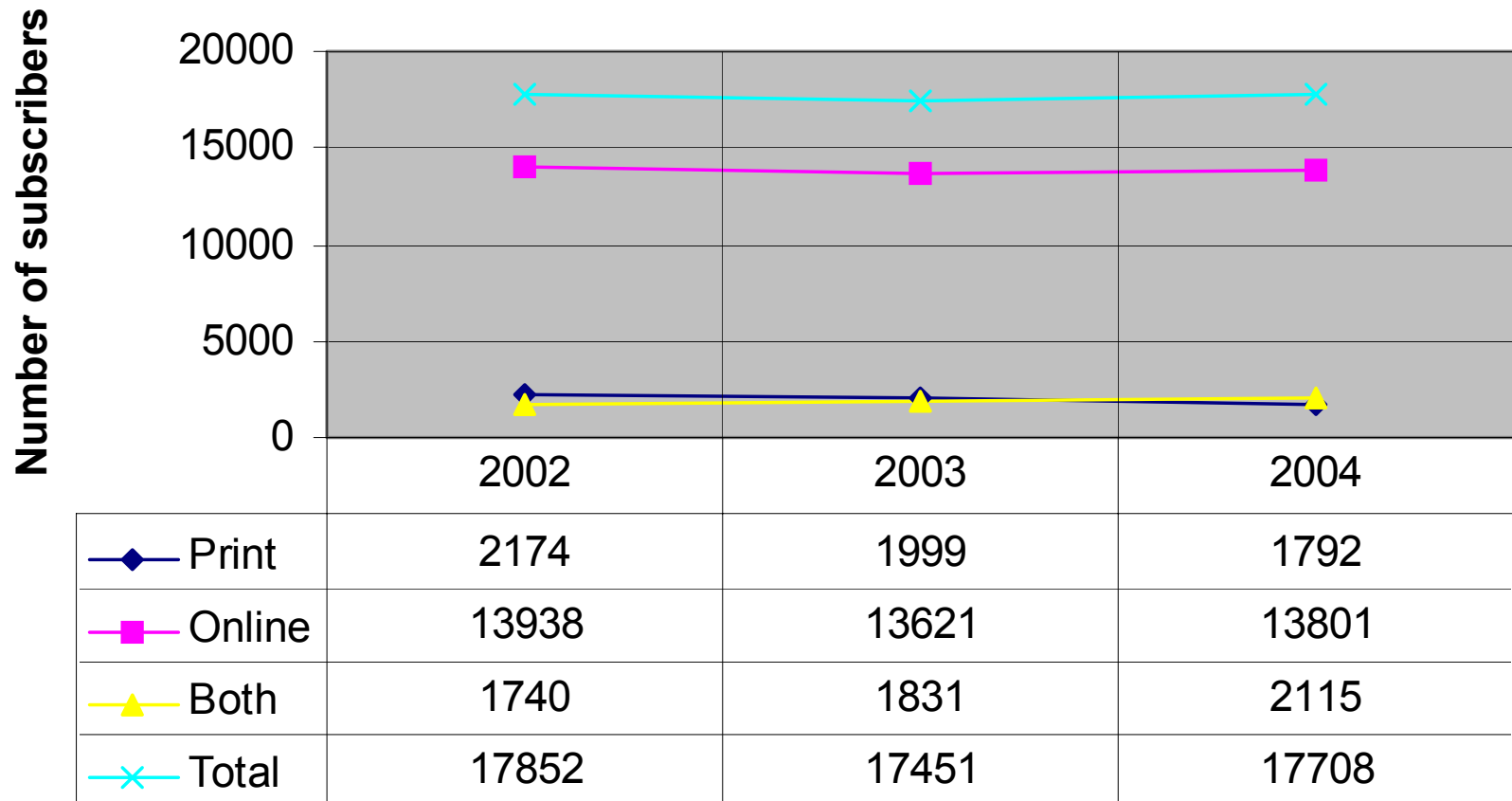


(source: NYAS VP, Publishing and Communications)

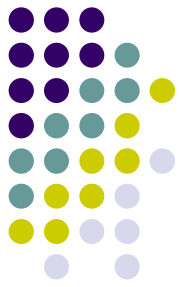
- Online activities to ‘capture’ our live US events
- Events outside USA working with local institutions, organizations and corporations

Geography: Total Member subscriptions by version

(Source: JISC 2005:Learned Society business models...M. Waltham)



Member subscriptions (print and online) by country- 12 journals



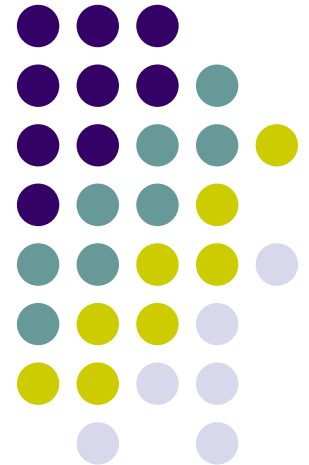
(Source: JISC 2005:Learned Society business models...M. Waltham)

Country of publisher	End 2002	End 2004	Change	% Change
US (2 journals)	14,250	13,616	-634	-4.4%
UK (10 journals)	3,602	3,673	+71	+2%

What are societies and associations offering to their Members?

Professional Associations Research Network

“Analyzing Member Services: A strategic perspective
for Professional Associations”

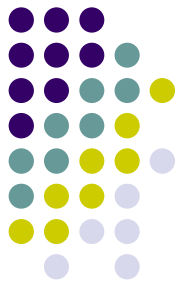


Range of services offered- based on analysis of 410 websites of professional associations

(Source: PARN Analyzing Member Services: simplified)

←-----Who benefits?-----→			
How?	Members	Members + specific external groups	Members + diffuse external groups
Professional status	Meetings/conferences Branches Magazine Training events Qualifications Journal Special interest groups Branded goods	Association/society news Guidance on ethical behavior	CPD programs Good practice guidelines Research Code of ethics Disciplinary and complaints procedures
Material and professional status	Awards Career guidance Lobbying Counseling	Insurance (professional indemnity) Annual report Members directory Network for employers	Industry news Government lobbying Media/PR office Campaigns
Material value	Business, legal and HR advice Marketing services Work related insurance Union representation Pensions Credit card	Recruitment Benevolent fund	

PARN analysis of range of services by size of association



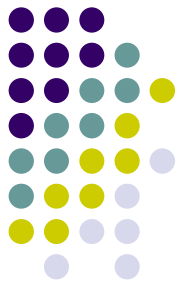
- Focus is on providing
 - Information
 - Education and training
 - Community and networks
- Large associations (over 30,000 Members) offer widest range of services
- Large associations seem to be pioneering new services and small associations may be 'left out'
- Observation: as services required change need to stop providing some of least supported ones

Consider who pays Membership dues?



- Are there options for corporations/employers to ‘buy’ Membership for their staff directly ~ Corporate Membership management?
- PARN example is the Chartered Insurance Institute (CII)
- Institute manages corporate accounts at company (rather than individual) level i.e. it is a B2B service
- **Why would corporations do this?**
- Competitive advantage is underpinned by knowledgeable professional staff = qualifications + tools to support on-going practice
- Corporations receive some discount for bulk purchase of CII services

Consider your global Membership

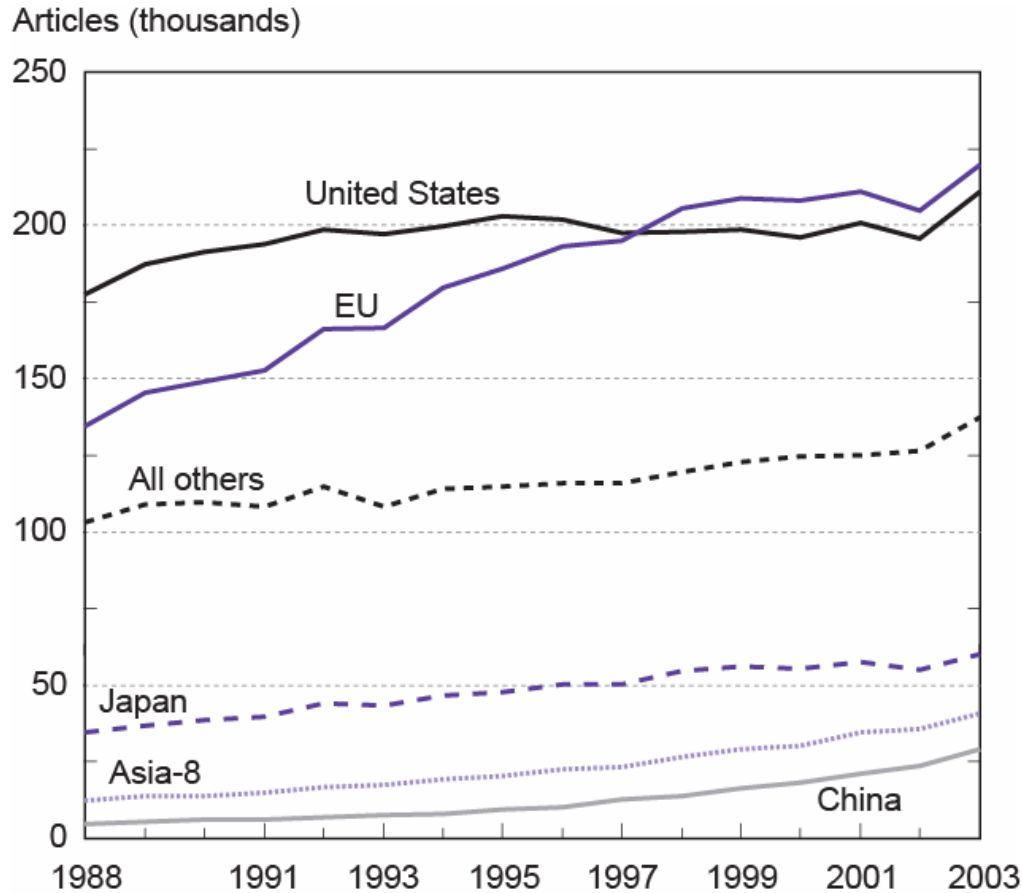
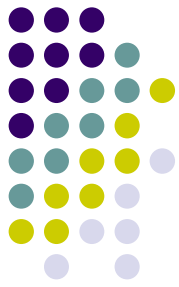


- For society publishers are you:
- A US organization with international Members?
- An international organization with HQ in the US?

Answer may be different for publications and for other Member services

Trends in productivity of science and engineering articles 1988-2003:

(Source NSF Science and Engineering indicators 2006)



EU = European Union

NOTE: Asia-8 includes South Korea, India, Indonesia, Malaysia, Philippines, Singapore, Taiwan, and Thailand.



Trends in productivity

“Asia” too broad to be useful as a market descriptor

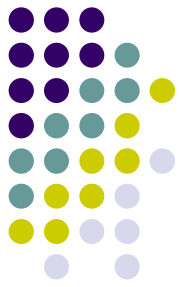
Consider:- China, S. Korea, Japan

Analysis of article publication rates over time shows **proportionately** more articles in Chemistry, Physics and Engineering from “Asia” than the world overall

Rapid recent growth in Biology and biochemistry, Plant and Animal sciences and Geosciences

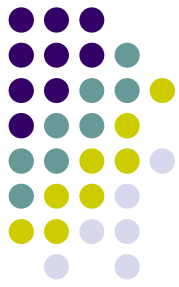
International journals will compete for the best Chinese research articles

Consider expansion of fields

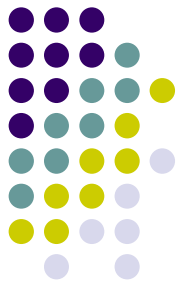


- Growth in knowledge -> number of practitioners increases -> instability -> split into multiple components
- Sub-compartments and specialties emerge and tend to become isolated
- Emergence of 'new' fields and shrinking of 'old'
- May form 'new society' OR require special division

Consider technological changes



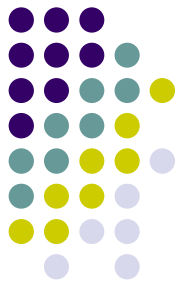
- “Web 2.0”- shorthand/buzzword for **easier communication and collaboration.**
- Online only - wireless and broadband (+44% year on year globally)
- Online advertising- ROI (at last!) and moving at a rapid clip but depends on site traffic
- Just in time and “what I want” (Seek Find Obtain)
- Search and data-mining
- Social networking: Communities, book-marking and tagging (User Generated Content)
- Business model: Innovation can make competitors’ product superiority (almost) irrelevant



Consider print as a Member perk

- Observation: The print journal is often supplied to members at a fraction of true cost to the society
- Print advertising revenues have encouraged retention of print (by publishers) in some disciplines but the shift to online advertising is well underway

.....how can a society respond to changes in:-



- Changing membership needs and drivers
- Funding of membership dues
- Geography
- Expansion of fields
- Technological change
- The transition from print

.....do for Members and potential Members what they are unable to do for themselves

Thank you!



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