

## The Evolution of University Press Publishing

Martin Richardson, Managing Director  
Academic Books and Journals  
Oxford University Press

## What are University Presses for?

“It is one of the noble duties of a university to advance knowledge, and to diffuse it not merely among those who can attend the daily lectures – but far and wide”

Daniel Coit Gilman, 1878  
(founder of Johns Hopkins University, and  
Johns Hopkins University Press)

“Oxford University Press is a department of the University of Oxford. It furthers the University’s objective of excellence in research, scholarship, and education by publishing worldwide”

Wording that appears on the copyright page of OUP titles

## Early History of Oxford University Press

- First book published in Oxford in 1478.
- University granted right to print books in 1636.
- First meeting of the Delegates of the University Press in 1668.
- University Press’s first home in Oxford was the Sheldonian Theatre in 1669.

## Sheldonian Theatre – our first home



## Walton Street –our current home



## Governance/Relationship with the University

- OUP is a department (the largest department) of the University of Oxford.
- OUP is governed by the Delegates – 21 senior academics, chaired by the Vice Chancellor.
- The 'Board' of the Press is called Finance Committee – comprising a number of Delegates, external members, and senior managers.

## OUP's main objectives

- To publish the highest quality scholarly and educational materials
- To represent the Oxford name
- To ensure the University receives an appropriate financial return

## Global reach

- First overseas office was New York in 1896.
- OUP now has offices in more than 40 countries worldwide.
- Publish in over 30 languages.
- Over 80% of sales are made outside the UK.
- 4,500 staff worldwide

## OUP Offices



## Summary of OUP's Publishing

- 40% - Academic and Professional books, journals and online resources
- 40% - School and ELT books and supporting materials
- 20% - Higher Education textbooks and supporting materials

## OUP's Academic & Professional Publishing

- Scholarly Monographs (over 1,300 pa)
- Learned Journals (235 titles)
- Law/Medicine
- Dictionaries (including Oxford English Dictionary)
- Reference
- Trade books

## Size of University Press Market

- Approximately 110 University Presses in North America and the United Kingdom
- Sales:
  - Total North American University Presses
  - (excl. OUP + CUP) \$500m (estimate)
  - Total UK University Presses
  - (excl. OUP +CUP) \$10m (estimate)
  - CUP \$300m
  - OUP \$1000m
  - Total \$1,810m

## University Press Market Segmentation

1. 'Giants':
  - OUP, CUP
2. 'Large' players:
  - California, Chicago, Harvard, Johns Hopkins, MIT, Princeton, Yale
3. 'Medium' players:
  - North Carolina, Columbia, Indiana, Illinois, Cornell, Duke, Texas, NYU, Oklahoma, Rutgers, Minnesota, Stanford, Kansas, Michigan, Georgetown
4. 'Micro' players':
  - Everyone else

## Parent Institution Support

- 48/64 American University Presses reporting in 2004 received cash subsidies totalling \$22m
- For small presses subsidy as percentage of net sales is very significant source of revenue, almost 40%
- For most larger presses, subsidy is less than 1%

## Financial strength of OUP

- The University have never given OUP any money or subsidy of any kind.
- Bible profits in 1840's allowed OUP to transfer £33,000 to University for the building of the University Galleries (now the Ashmolean Museum).
- Today 30% of our surplus is transferred to the rest of the University, to be used for a variety of purposes including:
  - Capital projects.
  - Funds for Library development.
  - Clarendon Fund for international post-graduate students
  - John Fell OUP Fund for visiting researchers .

## Tough times ahead for small University Presses (1)

- 70%+ of typical research library budget currently spent on STM journal 'big deals' from commercial publishers
- Library budgets coming under further pressure, particularly in the US, due to impact of global recession
- Average print run for Monographs in 1970's was 2000-2500 copies; now it is around 500 copies.



## Tough times ahead for small University Presses (2)

- Pressure from parent institutions for University Presses to become financially self-supporting.
- University Presses need to change to respond to rapidly-changing market requirements
- Difficult for smaller University Presses to invest in new technology necessary to support digital publishing

## Changing nature of scholarly publishing

- Declining usage and sales of printed journals and books
- Researchers and libraries moving rapidly to 'online only' access
- Boundary between informal and formal publication becoming blurred
- Importance of discovery (Google generation)
- Increasing competition from free resources eg Institutional Repositories

## Which publishers will survive these changes ?

“ It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change”

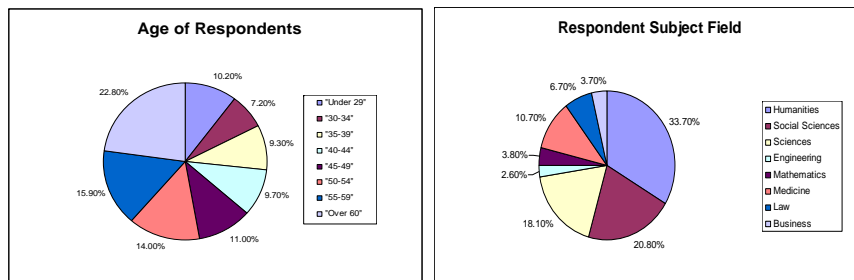
Charles Darwin

## Online Survey

- A survey of 36,000 OUP authors and readers in the US to determine
  - Current research habits
    - Trusted resources, methods of identifying key new research in the field
    - “Information Seeking” or “User Studies”
  - Use of new and emerging online resources
    - eBooks, podcasts, blogs

## Who responded?

2365 people responded to the survey  
They represented a wide range of ages and fields of study



## Top five research resources by field

Humanities	Social Sciences	Sciences	Medicine
Print books	Online Journals	Online Journals	Online Journals
Online Journals	Print books	Print books	Print books
Print Journals	Print Journals	Print Journals	Print Journals
Online databases	Online databases	Meetings & conference	Meetings & conference
Meetings & conference	Meetings & conference	Online databases	Online databases

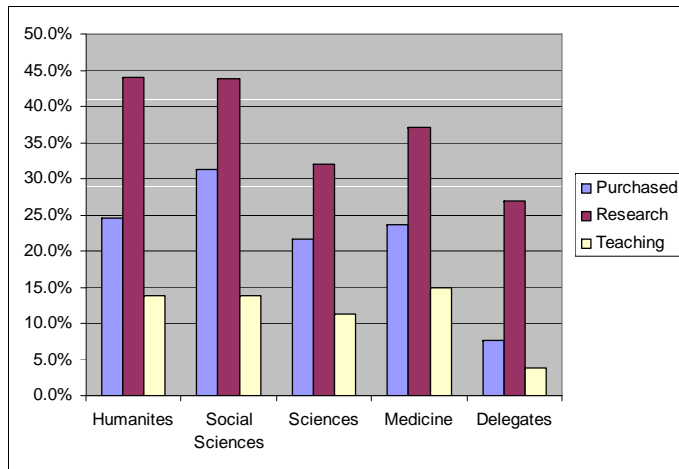
## Top five ways to find books

Humanities	Social Sciences	Sciences	Medicine
Citations in other books and journals	Citations in other books and journals	Citations in other books and journals	Citations in other books and journals
Book reviews in academic journals	Recommended by colleague	Recommended by colleague	Bibliographies
Bibliographies	Book reviews in academic journals	Book reviews in academic journals	Recommended by colleague
Recommended by colleague	Bibliographies	Displays at academic conference	Book reviews in academic journals
Library	Amazon.com (or other commercial online bookseller)	Amazon.com (or other commercial online bookseller)	Speakers at academic conference

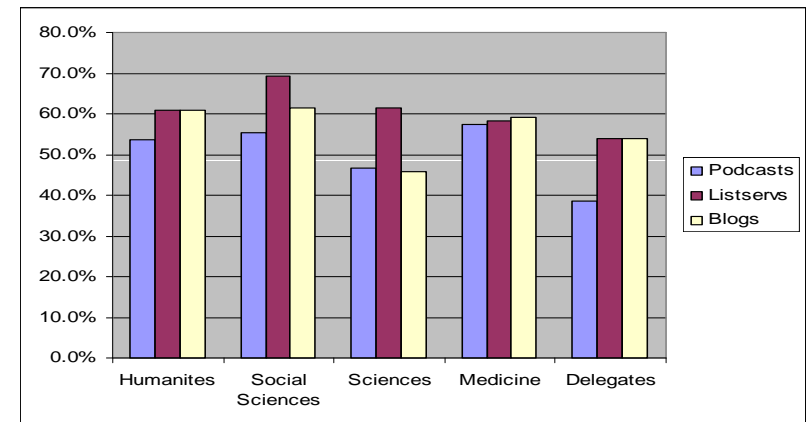
## Locating Journal articles

Humanities	Social Sciences	Sciences	Medicine
Citation in another publication	Citation in another publication	Citation in another publication	Open Access Repository (PubMed Central, arXiv)
Skimming print copy of journal regularly	Skimming print copy of journal regularly	Visiting journal online regularly	Citation in another publication
Visiting journal online regularly	Visiting journal online regularly	Recommendation by colleague	Skimming print copy of journal regularly
Recommendation by colleague	Online article databases (Web of Science, Lexus/Nexus, Ovid, Project Muse)	Receiving electronic alert (eg. E-mail table of contents alerts, RSS)	Receiving electronic alert (eg. E-mail table of contents alerts, RSS)
Online article databases (Web of Science, Lexus/Nexus, Ovid, Project Muse)	Receiving electronic alert (eg. E-mail table of contents alerts, RSS)	Skimming print copy of journal regularly	Visiting journal online regularly

## eBooks use by field

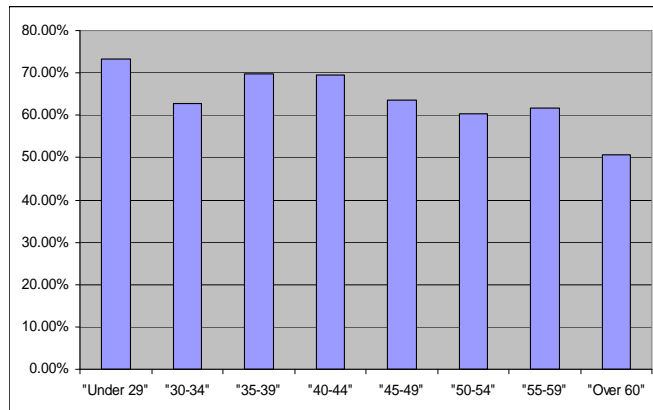


## Other online communication



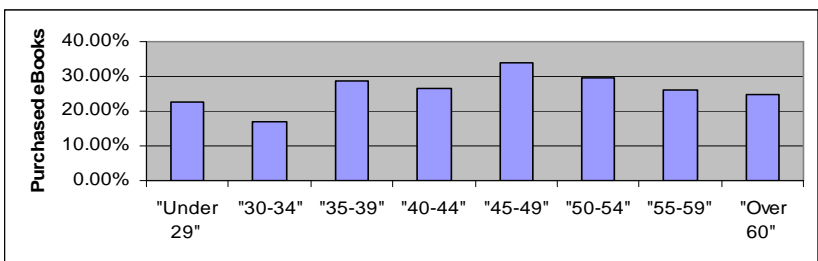
## Differences by age

*"Do you ever read blogs?"*



## Does age matter?

Interest in eBooks did not show a simple age trend.



## How is OUP Responding?

### Journals

- Current issues
- Back issue archive
- Supplementary data
- Blogs and wikis



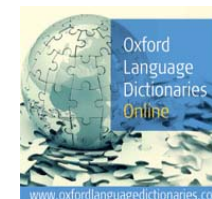
#### Product Range

OSO

OED

OLDO

ORO



For the complete range of Oxford Online products please visit:  
[www.oxfordonline.com](http://www.oxfordonline.com)

## How is OUP Responding?

### Choice of Access Models

	Books	Journals
Subscriptions	√	√
Consortia deals	√	√
Document Delivery	-	√
Purchase	√	√
Developing countries	√	√
Open Access	-	√

## No. of Optional Open Access articles published

	2007 Total	2008 Total	2009 Q1
Medicine	318	421	118
Life Sciences	396	454	127
Law	2	3	0
Humanities	5	5	4
Social Sciences	4	5	0
Mathematics	1	7	3
<b>Total</b>	<b>724</b>	<b>895</b>	<b>252</b>

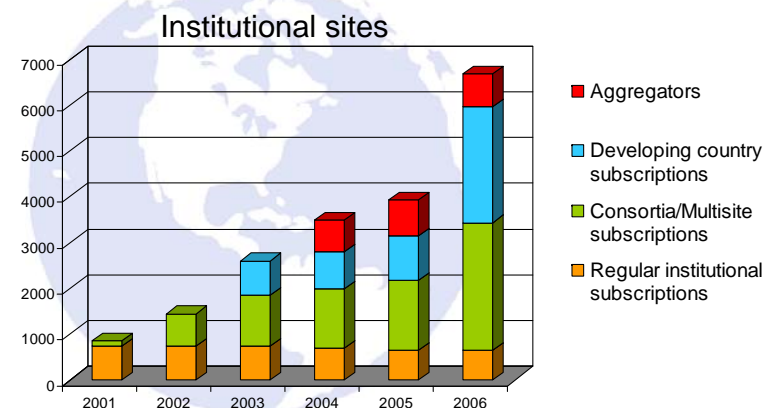


## Optional Open Access uptake

	<u>2007 Total</u>	<u>2008 Total</u>	<u>2009 Q1</u>
Medicine	4.8%	4.9%	4.5%
Life Sciences	11.2%	11.0%	10.4%
Law	2.9%	4.3%	0.0%
Humanities	1.9%	1.7%	4.7%
Social Sciences	2.3%	2.4%	0.0%
Mathematics	1.1%	6.0%	11.5%
<b>Total</b>	<b>6.8%</b>	<b>6.6%</b>	<b>6.3%</b>

## The growth of institutional access

### Maximizing dissemination and accessibility



## Universities and their Presses (1)

- University presses face a difficult future unless they have an explicit mandate from their parent institution about their reason for existence.
- Presses are integral parts of universities – they have to fight their corner for allocation of resources along with every other department.

## Universities and their Presses (2)

- Why should universities support their presses?
  - Presses can be powerful 'brand beacons' in local communities;
  - Presses can be flag-bearers for their parent institutions – eg Chicago Manual of Style; Oxford English Dictionary
  - Press connections should reach into the heart of the scholarly community – academics as authors, editors, referees, and readers of press titles;
  - Formal publication is a central part of the research funding, tenure and promotion processes;
  - In most disciplines formal publication is the core mechanism for evaluating and disseminating research and scholarship.

## The way forward for small University Presses & Academic Society Publishers (1)

- Focus on publishing the scholarship that academics are trained to write which is the basis of university level teaching and research
- Focus on areas of specialization:
  - Yale on art and art history
  - MIT on cognitive sciences/linguistics/philosophy

## The way forward for small University Presses & Academic Society Publishers (2)

- Take advantage of new Technology:
  - online publishing
  - new business models
  - digital printing
- Focus on value added activities

