Humanities and Social Sciences Publishing: Market Size, Share, Forecast, and Trends

WHO'S INSIDE

Bloomsbury Publishing Plc

Cambridge University Press

De Gruyter

Emerald Group Publishing Limited

John Wiley & Sons Inc.

Knowledge Unlatched

Kudos

Liverpool University Press

Open Library of Humanities

Oxford University Press

Oxford University Press University
  Press Scholarship Online

Palgrave Macmillan (Verlagsgruppe
  Georg von Holtzbrinck Gmbh)

Project MUSE

Routledge (Informa plc)

SAGE Publications

Springer Science + Business Media

Ubiquity Press

**Market
Performance**

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Why This Topic

Humanities and Social Sciences (HSS) publishing often looks to be the poor relation of the more high profile, and more lucrative, scientific, technical, and medical (STM) publishing market. This is despite the fact that student numbers in the HSS disciplines far outweigh those studying STM subjects – there were almost three times as many HSS students as STM students in the UK in 2011-12, and more than twice as many HSS degrees as STM degrees were conferred by US universities in the same time period. Growth in student numbers has also been rapid – there were 31% more UK HSS students in 2011-12 than there were in 2001-2002, but the number of STM students grew by only 8% over this period. The situation in the US is slightly different, with growth of 39% for degrees conferred in the STM disciplines and 40% for HSS subjects.

Outsell has long tracked the growth of the academic books and journals markets, generally categorizing these into our market sizing work covering either STM or education. However, the HSS market differs from both of these markets in a number of important respects, and so it deserves a market sizing report and analysis of its own. This report sizes and segments the $4.7 billion market for humanities and social sciences content and solutions, examines the ways in which it differs from its STM cousin, and assesses where some of the lessons learnt in the STM market might be valuable. In addition, the report identifies and profiles the key players to watch in the market.

Methodology

To create our market sizing estimates, we took revenue data from Outsell's Information Industry Database for all of the major players in this space and built a bottom-up calculation of total revenues from the sale of material and solutions relating to the humanities and social sciences. We specified the revenues for such products using guidance available in publicly available financial filings, investor presentations, and annual reports, and for nonreporting companies, we used Outsell's own informed estimates. We corroborated our findings with information provided by trade bodies, such as the Association of American University Presses, and Outsell's portfolio of related primary research and market sizing work.

We also conducted analyst-led interviews with executives and other senior members of key players in this space. We supplemented this research with Outsell's daily conversations with information industry professionals and with targeted interviews with providers and stakeholders. Those activities, plus our daily dialogue with the market and key stakeholders, informed our opinions and views.

Definition of the HSS Market

The various subject areas of the humanities might appear to have little common ground. What they do share is a characteristic of primarily developing general knowledge and intellectual skills rather than occupational or professional skills. In this report, humanities will be taken to include the study, within higher education (HE) institutions, of:

- English
- History
- Archaeology
- Classics
- Information Science
- Languages
- Music
- Philosophy
- Theology

Meanwhile, social sciences disciplines apply scientific methods to the study of the human aspects of the world. Here this will be taken as the study, within HE institutions, of:

- Economics
- Political Science
- Psychology
- Linguistics
- Sociology
- Anthropology
- Communications
- Management

Outsell defines the HSS information market as the content, data, software, and solutions from for-profit and not-for-profit companies which advance some form of humanities or social sciences knowledge. The solutions comprise both primary and secondary data, as well as software and analytics services applied to such data. Examples of secondary data in the HSS market include such outputs as scholarly books and journals.

The main producers of scholarly books, journals, monographs, and datasets can be divided into three segments:

- Diversified (e.g., Informa, Wiley, de Gruyter);

- Traditional commercial and university presses (e.g., Harvard University Press);

- Society publishers which either publish independently (e.g., American Anthropological Association) or which outsource their publication activities to larger players such as Wiley. This is common practice in HSS, with Wiley alone publishing on behalf of around 300 learned societies.

Buyer Profile

The most important buyers of HSS content and solutions are:

- Libraries, which account for the lion's share of HSS content and solutions purchases. Although libraries at four-year universities are the single largest buyer category in the US market, libraries at two-year universities are also an important and growing source of HSS sales. Libraries often purchase HSS content from aggregators, a result of budget constraints that make discounts from bulk purchases important. Shrinking budgets have also led libraries to delay purchasing content until there is a need for it, using models such as Patron Driven Acquisition, which makes quantifiable usage rates more important. In addition, with new Open Access mandates in North America and Europe, there is an expectation that many libraries will wait out the embargo period before acquiring HSS content rather than paying for content within the embargo period. This is more likely to happen in the HSS space than in the STM market because HSS content on average has a longer shelf life than STM material, which is often needed urgently for ongoing research.

- Faculty departments at academic institutions, which are smaller institutional buyers than libraries but remain an important part of the HSS buyer landscape. These buyers purchase monographs and journals that their libraries do not provide.

- Practitioner organizations, which include governments, NGOs, and specialist organizations in areas such as art history, archeology, or the performing arts.

- Individual buyers of HSS content, which consist mainly of students, researchers, and faculty members at academic institutions. HSS content purchased by individuals as per Outsell's definition does not include textbooks (which is counted under our Education Content segment), but of high-end trade books and, to a lesser extent, monographs and journal subscriptions. Individuals in HSS are less data-focused than their STM counterparts, which drives lower demand for digital, data-related solutions; as a result, the demand for print is higher among HSS individuals.

The first two of those groups are the largest buyer segments of the HSS market, although libraries may account for as much as two-thirds of HSS content purchased. Library budgets struggle to keep pace with rising content prices, so finding new pricing models to help libraries acquire the content they need at a price they can afford is important to publishers. Aggregators' bulk discounts provide an attractive option for many libraries, and new, more-flexible digital pricing and content on-demand models also show promise.

## HSS Content Types: Monographs and Journals

Monographs, defined as specialist works of writing on a single subject or an aspect of a subject, are an essential output of HSS publishing, with these products used mainly by postgraduate academics and researchers. In many disciplines, the importance of monographs outweighs that of journals, because monographs are arguably better suited to the scale and tone of the research argument in HSS disciplines than journal articles. There are very low levels of subscriptions in the book and monographs business, and purchases of the formats are mainly transactional. The importance of monographs in the HSS market is one of the key factors which differentiates HSS from the STM space, where monograph publishing is much less common.

Library budgets have played a large role in funding HSS monographs, but they are increasingly being squeezed out of library budgets by high-profile STM journals, which are experiencing higher price rises than monographs. The extremely niche nature of monographs also puts them at a disadvantage here.

HSS journal sales are driven by institutional subscriptions, mainly from academic libraries, but also from individual departments and practicing professionals in certain disciplines, such as psychologists. Postgraduate students and researchers are the main users of this content. Revenue from top-tier HSS journals is growing at a relatively healthy rate, but second-tier journals are struggling to maintain positive growth. Though HSS content is predominantly print, journals are moving online at a faster rate than monographs.

As Figure 1 shows, Outsell estimates that more than half of the revenue (58.4%) generated in the HSS market is derived from the sale of books and monographs. A very small amount, less than 1%, comes from database solutions, and the remaining 41.4% comes from journal sales.

Figure 1. HSS Market by Format

0.3%

41.4%

58.4%
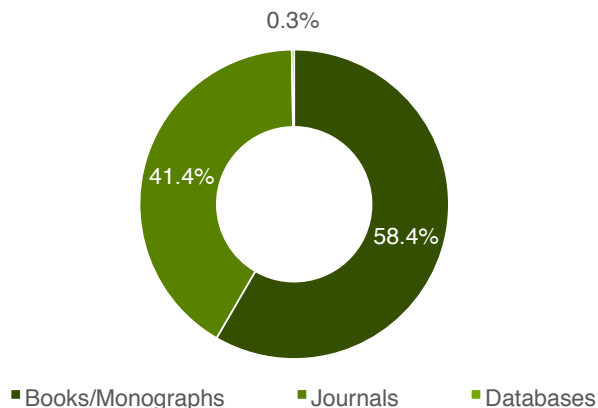
- Books/Monographs
- Journals
- Databases

HSS Formats: Print Versus Digital

As Figure 2 shows, Outsell estimates that almost 80% of revenues from HSS books, monographs, and journals still come from sales of print products, with HSS faculty and other users preferring print more strongly than their STM counterparts do. There are fewer drivers towards digital in the HSS monograph market than there are in the STM journals market, which features faster-moving research, often with a strong data element. Both of these aspects can benefit greatly from digital delivery, where text-rich, data-light monograph content remains well served by the print medium.

**Figure 2. HSS Content Market by Format**

22%

78%

- Print
- Digital
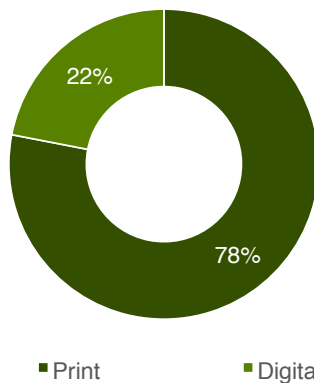
HSS Market by Geography

HSS content providers sell their solutions worldwide, often through library consortia deals, by working with an international player (such as Wiley, which publishes hundreds of journals on behalf of learned societies) or through aggregators. The market is oriented towards Europe and the US, as shown in Figure 3, but the proportion of the market accounted for by the Asia Pacific region has grown in recent years. It can be difficult for content providers to assess what is happening clearly in the books market globally because a percentage of print books bought by major US distributors such as Ingram and Baker & Taylor are sold overseas.

International markets appear to be growing more quickly than the US market, largely for funding reasons. For example, funding for materials budgets at Chinese universities has been growing at a faster rate than in the US, which is a key driver of this growth. As more content goes online, so growth of international markets will continue to outpace that of more established markets in the US and Europe.

Figure 3. HSS Content Market by Geography

12%

27%

60%

■ US   ■ EMEA   ■ Asia Pacific
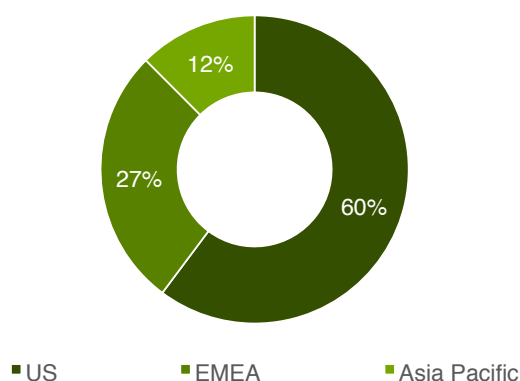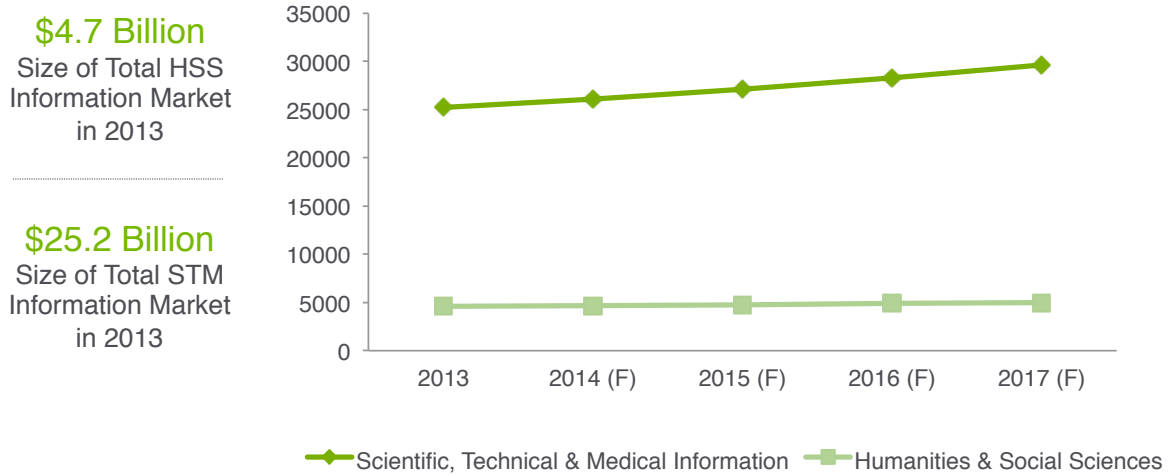
Source: Outsell analysis

Market Size and Growth

Outsell estimates that the global HSS information market was worth $4.7 billion in 2013, up 2.2% from $4.6 billion in 2012. As Figure 4 shows, the HSS market continues to lag behind the STM market in growth terms, which has a five-year compound annual growth rate (CAGR) of 4.1%, compared with 1.9% for HSS over the same five-year period.

Figure 4. Global HSS Market Size and Performance Relative to STM

$4.7 Billion
Size of Total HSS Information Market in 2013

$25.2 Billion
Size of Total STM Information Market in 2013

Chart axis values: 0, 5000, 10000, 15000, 20000, 25000, 30000, 35000

X-axis: 2013, 2014 (F), 2015 (F), 2016 (F), 2017 (F)

Legend: Scientific, Technical & Medical Information — Humanities & Social Sciences

Source: Outsell analysis

Figure 5 shows the revenue breakdown between the two segments of the HSS market. Although HSS content by volume is relatively evenly split between the Humanities and Social Sciences, Humanities represents a less lucrative set of disciplines that receives less funding compared with Social Sciences, and this is represented by the market split in which Social Sciences accounts for 60% of the total market.

Figure 5. Total 2013 HSS Information Market by Segment ($ millions)

1,876

2,814

■ Humanities   ■ Social Sciences
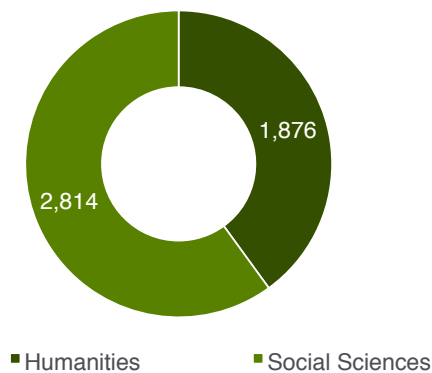
Source: Outsell analysis
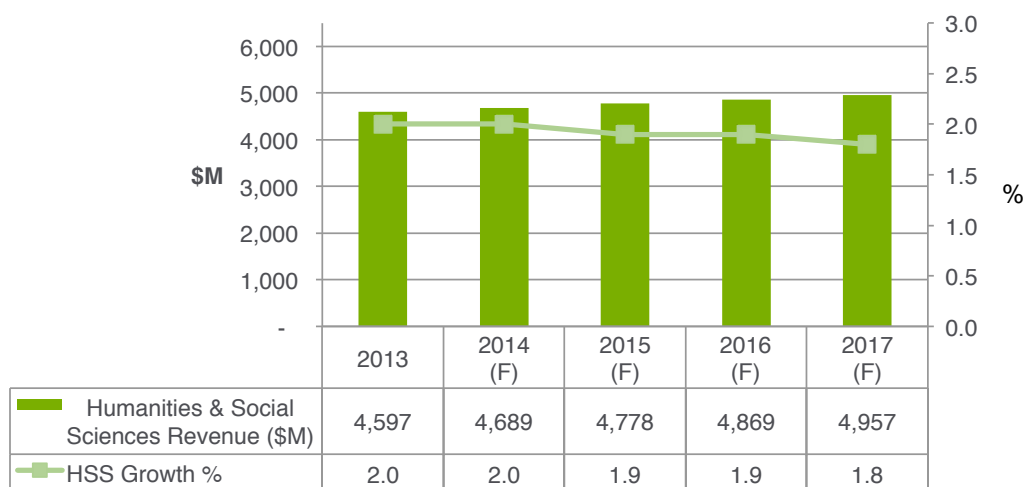
Market Dynamics and Forecast

Outsell forecasts steadily increasing but low-level industry growth rates for the HSS information space as new business models mature and new entrants develop. Outsell expects North America and emerging markets to be the main contributors to this growth.

Market Forecast

Outsell forecasts that the HSS market will grow by just 2.0% in 2014, as shown in Figure 6, reflecting small gains in North America as well as stronger growth in Asia and other emerging markets. Key disciplines where demand increases because of changes in the global political and economic climate are an important driver of growth in the HSS space.

In the coming years, Open Access policies in major markets will negatively impact HSS growth rates, which are already low. Additionally, for institutional buyers, budget cuts and rising content prices have caused many libraries to buy HSS content only when there is clear demand from users and to hold off updating titles for longer periods of time. Many developing economies emphasize investment in STM over HSS and, as a result, the HSS market does not benefit as much from the higher growth typically enjoyed by publishers in these regions.

Figure 6. HSS Information Market: Size and Growth Forecast, 2013-2017 ($ millions)

	2013	2014 (F)	2015 (F)	2016 (F)	2017 (F)
Humanities & Social Sciences Revenue ($M)	4,597	4,689	4,778	4,869	4,957
HSS Growth %	2.0	2.0	1.9	1.9	1.8

Source: Outsell analysis

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Key Trends and Market Drivers

The structure and format of the HSS publishing market is well established, and it has arguably been slower to change as a result of the impact of digital technologies than the related STM publishing market. However, the move to digital is a key change driver in this space, along with a number of related factors. These change drivers are summarized as follows:

- **The move from print to digital:** As in other information industry segments, the move from printed resources to a networked world of digital solutions offers content providers in this space the opportunity to deliver value-added features and functionalities. However, the HSS space has not moved as far in this direction as the STM market because there is a lower perceived benefit for researchers to these sorts of value-add activities. Another challenge to the HSS space in moving from print to digital is that revenues from print book sales are generally falling faster than revenues from e-book sales are rising: This should act as a driver to content providers to build value-added solutions as a way of boosting revenues.

- **The need for improved discoverability:** As content moves into the digital environment, providers can boost usage by making their content as widely discoverable as possible. Challenges in funding mean that libraries must make tough decisions about collection development, so publishers must ensure that patrons and users can find content as easily as possible. Solutions providers play a key role in improving discoverability, by making sure content is available through many channels, and by facilitating discovery through the expeditious use of metadata. This push towards improved discoverability has also led to the emergence of new startups such as Kudos, which helps authors tell the broader research story around their articles, as well as helps them use social networks such as Academia.edu, Facebook, and Twitter, and track the impact of this activity on their metrics. Open access HSS content also has an impact in this area, enabling content to be freely available to researchers worldwide.

- **The slow rise of open access:** Although open access still makes up a very small proportion of the HSS publishing and solutions market, and levels of awareness of open access and the understanding of mandates are very patchy, most players in the space have experimented with open access. The key issue for open access in HSS is the way in which funding models in HSS disciplines differ from funding models in STM. The STM side of the market drives open access development because STM researchers are able to divert some of their funding towards publication of the material resulting from their work. However, in HSS, lower levels of funding lead to lower article processing charges (APCs) and therefore lower revenue opportunities from OA publishing. In addition, there is less imperative in many HSS disciplines to publish quickly, which reduces the drive behind the use of open access models. The needs of STM, which is where the money lies, continue to drive the debate, which does HSS publishers few favours. However, although OA holds some challenges for the HSS community, it has encouraged creativity among formats (commentary, data sets, multimedia materials), and among business models, with startups such as Knowledge Unlatched and Open Library of

Humanities emerging to test OA models suitable for the space. It may be that in HSS alternate revenue models such as advertising will be required to support the low APCs. OA does not yet account for a large proportion of HSS revenues, but it is likely to increase in importance, not least because of funding mandates, where the UK market is currently leading the way.

Potential Disruptive Forces

The changes enabled by digital networks and the funding pressures in the market are impacting significantly on the HSS market, with key disruptive forces including:

- **Library budgets under pressure:** The HSS market, like many others, faces challenges from the budget pressures its core library clients experience, particularly in mature markets. Many library clients are experimenting with new models such as patron-driven acquisition (PDA). The movement of university libraries in mature markets considering a move from a "just in case" approach to acquisitions to a "just in time" approach, such as the PDA model, poses a challenge for content providers in HSS disciplines because measuring the impact of content, and thus justifying its value to library buyers, is less easy in HSS. Areas like history are not as fast moving as disciplines such as high-energy physics; content therefore has a longer shelf life and gets cited, reviewed, and onto reading lists much more slowly than in the sciences. HSS finds itself under greater pressure from diminishing library budgets than STM in a second sense as well, because of the high proportion of HSS book and monograph content in comparison with journals. Journal price rises have been higher than price rises for books and monographs, putting HSS publishers under particular pressure.

- **Open access embargo periods:** Open access is both an opportunity and a challenge for HSS publishers. For example, a librarian looking at a flat or declining budget may well be tempted to wait until the end of the OA embargo period to access HSS content for free, since the researchers' urgency to access the content is less great; whereas in STM, they may be more inclined to pay for the material given the need for researchers to have it quickly.

- **Technology challenges:** These come in multiple guises. One issue is that many people in dominant positions in the HSS research space are in their 50s and 60s, and while the world is changing around them they haven't always adapted. Unfortunately, these senior, tenured academics have many more options to experiment with new business models and new technologies, but less inclination than their younger counterparts, who have more at stake when it comes to their career path. A second issue: Ways for technology to deliver true, value-added products in the HSS world have not been as clear as in STM, where data-intensive research projects can, for example, open up their data as well as the journal article summarizing the research.

- **Staffing skills:** Part of the reason new value-added solutions are few and far between in HSS is that most staff do not have the necessary skills to develop these solutions. STM

publishers have employed data scientists and are re-skilling their workforce to enable the development of these new solutions, but this transformation of the skills base in the HSS publishing world has been much slower.

- **Dropping demand:** Government cutbacks around the world mean that universities are becoming more focused on delivering value to students to attract them than on research. This means less research in some HSS disciplines, and falling demand for content.

Competitive Landscape

The HSS market is highly fragmented, with no single publisher enjoying more than a 4% market share. This is attributable in part to the important role that hundreds of small and medium-size university presses and society publishers play in this market. In such a fragmented space, Outsell expects to see resource-rich top-tier companies and university presses continue to acquire smaller providers to increase their market share, expand into new disciplines, and reach into new markets.

Outsell's estimates for the revenues and growth of the top 10 players in the HSS market in 2013 are shown in Table 1. Many of these businesses do not report the revenue split between disciplines, so these figures represent a combination of publicly available data and Outsell's estimates based on our ongoing coverage of these companies.

Table 1. HSS, Revenue Performance of Top 10 Companies by Size, 2013

Company	2013 Revenue ($US)	2013 Market Share (%)
John Wiley & Sons Inc.	$187,092	4.0%
Routledge (Informa plc)	$148,412	3.2%
SAGE Publications	$144,500	3.1%
Oxford University Press	$116,000	2.5%
Cambridge University Press	$115,000	2.5%
Palgrave Macmillan (Verlagsgruppe Georg von Holtzbrinck Gmbh)	$76,100	1.6%
Emerald Group Publishing Limited	$60,000	1.3%
De Gruyter	$53,834	1.1%
Springer Science + Business Media	$50,750	1.1%
Bloomsbury Publishing Plc	$50,214	1.1%
Total Top 10	$1,001,902	21.4%
All others	3,687,058	78.6%
Total	4,688,960	100.0%

Source: Outsell analysis

10 to Watch

The following companies are highlighted as firms to watch in the HSS market as they pursue innovative and market-moving strategies. The list, presented in alphabetical order, includes leaders and startups. Their offerings are changing the face of the landscape and challenging established players, comprising new products, services, and business models in response to market shifts.

De Gruyter

At-A-Glance	De Gruyter is an international academic publishing house publishing in both English and German.
URL	http://www.degruyter.com/
Recent News	In January 2014, De Gruyter consolidated all OA publications across multiple disciplines under a new imprint, De Gruyter Open. In September 2014, the company built on this move by acquiring eight STM subscription journals from Springer and moving them to open access, complementing these titles with three new humanities journals titles.
In Outsell's Opinion	Open access has been a key strategic imperative driving De Gruyter's publishing activities in both HSS and STM subject areas, although progress in this area may slow with the recent departure of CEO Dr. Sven Fund. Although open access remains a small part of the business, accounting for around 4% of HSS book revenues and 2% to 3% of HSS journals revenues, De Gruyter under Dr. Fund saw the open access model as a key future driver for the business. De Gruyter's experimentation with business models has gone beyond open access with its "Smarter Big Deal" program, which provides institutional clients with access to all De Gruyter content for one year. At the end of that first year, the client is given detailed usage statistics and the choice to purchase whatever content it wants. So far, this has netted large and small academic libraries as well as customers who have heretofore been reluctant to digitize. The program also boasts transparent, upfront pricing, with institutions paying €2.50 per user per year. Based on our ongoing coverage of librarians and other institutional buyers, transparent pricing is exactly what they are looking for after years of staff and budget cuts have left little time or appetite for enduring multiple sales calls before a quote is given.

John Wiley & Sons

At-A-Glance	Wiley is a key player in HSS society journal publishing, with around 160 of its own journals and 300 society journals. Wiley is also very strong in the books space, publishing 250 new books in 2014, as well as e-learning content and websites (e.g., for the British Psychological Society).
URL	http://www.wiley.com

Recent News	In February 2014, Wiley announced the Anywhere Article, which integrates supporting information into the article environment, making for a less cluttered and richer content experience. The focus is on presentation: easier-to-read typography, figures that can be enlarged and viewed separately, and easier-to-find metadata. References are presented in a side panel so that the reference and the citation can be viewed simultaneously. And, as important, the article fits itself to any screen size, including "pinch and expand" displays. The intention is to deliver a pleasant reader experience without obstacles, which is expected to lead to wider adoption by users. Wiley has also partnered with ReadCube to help incentivize users to move online and, in turn, to accelerate their own transition to digital content. Apps are another area of strategic interest for Wiley, which is helping societies and associations develop their own apps that hold journal content and/or conference information. A broader strategy of society partnerships is helping societies improve their offerings and grow market share. For example, Wiley's partnership with the British Psychological Society helped the society increase usage by more than 500% in five years, and helped Wiley grow their presence in the e-learning market.
In Outsell's Opinion	Wiley is strongly focused on delivering additional value through the use of digital formats in the HSS space, such as the Anywhere Article. In addition, Wiley's strong connection with a wide range of societies places it in a very strong position to invest in and then deliver solutions to these society clients which they would be unable to do alone.

Knowledge Unlatched

At-A-Glance	Knowledge Unlatched (KU) is an initiative designed to help publishers, libraries, authors, and the wider scholarly community reduce costs, mitigate risks, and grow the market for scholarly books. It acts as an intermediary between a global consortium of academic libraries and relevant publishers, facilitating a market that will enable the creation of basic open access online versions alongside parallel print and added-value digital editions (and possibly other future added-value services).
URL	http://www.knowledgeunlatched.org/
Recent News	KU released its Pilot Collection of books, mainly available under a Creative Commons licence, in March 2014, and in October 2014 announced that the 27 titles included in the pilot were downloaded almost 13,000 times between March and August 2014. The books were downloaded an average of 473 times each, with a range of 59 to 1,219 downloads. Nearly 300 libraries from 24 countries are participating in the Pilot, exceeding KU's initial target by 50%.
In Outsell's Opinion	The success of KU's pilot project has put the business under pressure to demonstrate that it can deliver on three key questions: whether it can scale successfully, whether it can deliver a viable economic model to its publisher partners, and whether it can offer a compelling enough alternative to its library consortium members. What was an idea which came out of left field two years ago has become a service which is being taken increasingly seriously, and which may indicate whether an open access model will be the saviour of the declining monograph format as print sales continue to decline, and as changes to research mandates put pressure on monograph publishers to deliver an OA alternative.

Kudos

At-A-Glance	Launched in September 2013, Kudos offers a toolset that helps authors maximize the possible readership for their scholarly work by making it easier to find, read, and cite that work. Kudos empowers authors to add context to their articles by linking to any content with a digital object identifier (DOI) as well as information that complements their work (e.g. Wikipedia, video, blog posts). Kudos also helps authors use social and professional networks (e.g., Academia. edu, Facebook, Twitter) and track a variety of measurable altmetrics. Kudos is working with about 25 publishers including Cambridge University Press, Edinburgh University Press, Liverpool University Press, Maney, SAGE, and T&F. These publishers pay an annual fee which provides access to a dashboard to view the activities of participating authors.
URL	https://www.growkudos.com/
Recent News	Kudos has been growing registrations by 1,000 per week on average, with more than 190,000 publications claimed within the system, more than 1,700 resources linked to publications, and more than 5,000 short titles, lay summaries, and impact statements. Within Kudos, more than 5,000 shares of links to publications have been made, generating more than 12,000 click-throughs to publications and more than 284,000 views of Kudos publication pages. John Wiley & Sons formed a partnership with Kudos in February 2014 that made the Kudos platform available for a range of articles from Wiley's Global Research portfolio. In 2015, Kudos is planning to launch an institutional product and an annual subscription pricing model, and adding a wider variety of metrics to measure and track author impact.
In Outsell's Opinion	HSS been a vital area for Kudos because one of the early pilot partners was Taylor & Francis, which generated a lot of activity early on from the HSS community. Although there is not yet enough data to see differences between HSS and STM, Kudos has found HSS researchers to be very active in adding additional content. As a solution working across both HSS and STM disciplines, Kudos is an important tool in helping the HSS community as well as HSS publishers benefit from the activities taking place in STM, a market which has traditionally been more digitally advanced. The role Kudos plays is also important: if the HSS market is going to continue to grow, then discoverability is a vital attribute. As a tool which helps authors and publishers to boost discoverability, Kudos is well placed to serve a core market need.

Liverpool University Press

At-A-Glance	Founded in 1899, Liverpool University Press (LUP) is the UK's third-oldest university press. LUP publishes around 25 journals and 70 books each year, with book titles almost exclusively monographs in addition to some contract and local-interest publishing.
URL	http://www.liverpooluniversitypress.co.uk/

Recent News	In 2014, Liverpool University Press will launch Modern Languages Open (MLO), a peer-reviewed online platform for the open access publication of research from across the modern languages to a global audience.
	The platform will provide a number of features including:
	• Interdisciplinarity across the modern languages and engagement with other fields from a modern languages perspective;
	• Open Access under a CC-BY or CC-BY-NC licence;
	• Peer review prepublication and interactivity postpublication;
	• Flexibility on article length from 3,000 to 15,000 words.
In Outsell's Opinion	Liverpool University Press (LUP) provides valuable evidence that finding growth in the HSS market is not an impossible task. Having redefined itself in 2004 to concentrate on a more HSS-focused portfolio, LUP has grown strongly over the last five years, both through organic growth and with the acquisition of smaller publishers (e.g., Exeter University Press). Successfully focusing on a few niche areas in the humanities (e.g., history, Modern Languages, postcolonial studies, Irish studies) and the fringes of social sciences (i.e., theoretical social sciences) has also driven growth. LUP is also notable for engaging with OA in a number of different ways, which is unusual for a publisher of this size. They offer both green OA (self-archiving in institutional or subject-specific repositories) and gold OA (publishing using article processing charges in open access journals), have set up an Open Access portal, and are carefully monitoring the 1% to 2% of their journals available under OA to gauge the viability of the model.

Open Library of Humanities

At-A-Glance	The Open Library of Humanities (OLH) is a project exploring a Public Library of Science (PLOS)-style model for the humanities and social sciences. This would see the creation of a "megajournal", similar to the PLOS ONE model. OLH is funded by the Andrew W. Mellon Foundation, which provided a planning grant to the University of Lincoln to build the technological platform and to enable strategic development of the business model and of OLH's megajournal and monograph pilot schemes. OLH plans to use a funding system of Library Partnership Subsidy (LPS), which will see libraries ideally funding the publication of 250 articles and 12 books per year in partnership with reputable presses. To make this work, OLH needs an average of $700 from each of 500 libraries.
URL	https://www.openlibhums.org/
Recent News	In June 2014, OLH announced that it was launching the OLH Monograph Publishing Pilot with partners including Cambridge University Press, Harvard University Press, the born-OA press Open Book Publishers, and Oxford University Press. If the Library Partnership Subsidy (LPS) reaches its optimum level of participation from library supporters worldwide, it will be able to run the pilot.
In Outsell's Opinion	Although OLH is still at a very early stage, it shows the growth in interest around OA in the humanities area, and it also demonstrates how various OA players are coming together to support each other: OLH is working with Open Book Publishers as well as with the Public Knowledge Project, which is responsible for the Open Journals Systems software, and which has invested around $25,000 in OLH. The involvement of proprietary players such as Cambridge University Press and Oxford University Press is also notable, signalling that OA developments are having an increasing impact on a range of players in the market.

Project MUSE

At-A-Glance	Project MUSE, a nonprofit collaboration between libraries and publishers, is an aggregator solution specifically focused on digital humanities and social science content for the scholarly community. It is a source of full-text versions of scholarly journals from university presses and scholarly societies as well as book-length scholarship. In total, 120 publishers can be found on the Project MUSE platform.
URL	http://muse.jhu.edu/
Recent News	The University Press Content Consortium (UPCC) was launched by Project MUSE in September 2012, and it now includes 120 university press partners. Approximately 550 peer-reviewed academic journals and 30,000 scholarly titles are available on the MUSE platform. These titles are available for unlimited DRM-free usage by students and scholars at more than 150 institutions worldwide. In addition, an estimated 2,700 libraries currently subscribe to Project MUSE.
In Outsell's Opinion	Activities from players such as Project MUSE and UPSO can be challenging in some ways because they can be substitutive rather than additive to the market as a whole. However, they also bring benefits such as taking HSS content into new geographic markets which all but the largest HSS publishers have previously been unable to reach effectively.

SAGE Publications

At-A-Glance	Founded in 1965, SAGE is a leading independent academic and professional publisher with offices in Los Angeles, London, New Delhi, Singapore, and Washington, DC. SAGE's publishing programme includes more than 600 journals and more than 800 books, reference works, and databases each year.
URL	http://www.uk.sagepub.com/home.nav
Recent News	SAGE has made several important acquisitions in the HSS space, including law publisher Vathek Publishing in September 2014, which brought the company's law journal portfolio. In June 2014, SAGE launched SAGE Stats, an interactive statistical resource which draws from hundreds of sources across federal, nonprofit, and private systems for use by students and researchers. SAGE Stats covers social science topics such as healthcare, crime, education, employment, religion, and government finances. At the end of 2014, SAGE was planning its launch of SAGE Swifts, a new series of short digital publications designed to be part of a collection of brief, peer reviewed, social science books.
In Outsell's Opinion	SAGE is a leading player in the social sciences part of the HSS market, positioning itself as a champion of social science disciplines. It is taking an active part in discussions about the role of OA for social sciences journals, and it has reduced its article processing charges to ensure that social scientists can take part. This fits well with SAGE's mission not only to serve researchers, but also to meet authors' needs. SAGE plays a valuable innovative role in the market through the creation of services such as SAGE Swifts, which will enable authors to make a contribution to research outside of the traditional journal or monograph model. SAGE is also looking at non-text offerings and is developing a series of streaming video collections for instructional and research usage.

Ubiquity Press

At-A-Glance	Ubiquity Press is a UK-based OA publisher of peer-reviewed, academic journals with a focus on HSS content. It was founded by researchers at University College London in 2012 and uses an article processing charge model. In addition to book and journal content, Ubiquity Press has a strong focus on research data, offering "metajournals" which help authors to archive their data, software, sources, and reports.
URL	http://www.ubiquitypress.com
Recent News	Ubiquity Press launched in 2014, and in addition to its own OA publishing activities it has five publisher partners (Stockholm University Press, Open Communications Press, the Open Library of the Humanities, Modern Academic Publishing Partners, University of Westminster Press) for which it runs back-office publishing systems such as editorial support, and production and typesetting, as well as offering indexing, archiving, deposit in institutional repositories, and content promotion. It plans to allow new participants to join sometime in 2015.
In Outsell's Opinion	Although Ubiquity publishes some content itself, the company stands out from other OA publishers by partnering with university and society publishers to deliver back-office publishing services. This creates a revenue stream which enables Ubiquity to serve its own OA agenda at an extremely low cost to authors.

University Press Scholarship Online (UPSO)

At-A-Glance	In 2011, Oxford University Press (OUP) created University Press Scholarship Online (UPSO) as an online platform for university press scholarly texts. UPSO seeks to make disparate content easier to find through a single online platform. UPSO now offers more than 16,000 titles in 28 subject areas, from OUP and 17 other leading university presses.
URL	http://www.universitypressscholarship.com
Recent News	UPSO regularly adds new university press partners, with the University of North Carolina Press the latest to come on board.
In Outsell's Opinion	UPSO has been a boon for smaller university presses, particularly in terms of taking business into new territories, offering valuable collective muscle and skill in packaging the content. Its mission speaks directly to the core imperative to improve discoverability of HSS content.

Essential Actions

Although the HSS market is experiencing challenges, publishers and societies operating in this space must consider a range of actions if their businesses are to survive.

✔ Be Flexible

Flexibility is important. HSS publishers must experiment with new formats and ways of distributing data, particularly as the journal as a wrapper (although not as a brand) becomes increasingly outmoded. Content needs to be made available in the forms which are most convenient to the end-user, and in forms which are easily discoverable, for example via learning management systems and discovery services. Business model experimentation is also important, although patron-driven acquisition may be challenging for the HSS space, with the risk that investment in some content may not pay off because of the long time frames inherent to this space.

✔ Improve User Understanding

A key imperative for content and solutions providers across the academic and educational services and solutions market, an understanding of user practices is vital to the development of compelling resources which support researcher workflow in the digital age. This information is easier to access in a digital environment, but in the slow-moving HSS market it will be equally important to learn more about the way in which academics, students, and researchers use content resources in a variety of media, and how these solutions complement and support each other.

✔ Manage Costs

As library customers come under increasing pressure to save money, so HSS publishers come under pressure to reduce costs in an effort to maintain and ideally improve margins. This is not easy to achieve without sacrificing quality, but areas with cost reduction potential include use of new technologies and approaches to streamline the production process (particularly important when publishing to multiple formats), and investigating the use of new editorial and peer review systems to reduce time to market.

✔ Boost Skills

The speed of change in the STM market provides HSS players with good examples of areas where improvements in staff skills could translate directly into new products and revenue streams. Working with authors on data analysis solutions could be one option in disciplines such as economics; employing staff to deliver improvements in user interfaces could bring benefits across the board.

✔ Maintain Quality

While pressures on revenues and costs are significant, HSS publishers must take care to ensure that any cost reduction does not affect quality. People still care about copy editing in HSS, especially on the books side, so robust peer review and copy editing, in addition to access to many formats, is crucial.

Related Research

Outsell clients can click *here* for more information on the companies analyzed in this report.

Reports

Scientific, Technical & Medical Information: 2014 Market Size, Share, Forecast, and Trend Report	September 25, 2014
Education Content, EdTech & Human Capital Management: 2014 Market Size, Share, Forecast, and Trend Report	August 28, 2014
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Insights

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