Renew Publishing Consultants (formerly Simon Inger Consulting) and GVPi Video Streaming Market Research Report

November 2017
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INTRODUCTION

We know that many publishers, societies and institutions are in the process of exploring ways to incorporate video into their websites and publishing platforms, whether as new product lines, for teaching and learning purposes, or to offer more value to existing products and services. Many are unsure about how to go about developing a video strategy whilst others have a clear idea of what they need and are in the process of implementing video content.

The purpose of this research project was to survey the current state of and thinking about streaming video. With the support of GVPI, Renew Publishing Consultants aimed to find out from publishers, scholarly societies, professional associations and higher education institutions where they are in their video development plans, what they see as the main challenges and barriers to delivering video content online, and what opportunities they think streaming video offers.

METHODOLOGY

We designed a very short survey (less than 5 minutes) and incentivized participation by offering to share the results of our research with the community. We wanted to encourage responses from people working in:

- Publishing organisations
- Scholarly societies and professional associations
- Universities and academic institutions (classified as HE for the purposes of this report)

We disqualified anyone who said they were working for a technology company or platform provider.

The project was advertised via scholarly publishing industry listservs, with the help of membership organisations such as UKSG, ALPSP, STM and SSP, through the industry press and through personal invitations.

The survey asked questions about:

- Current video streaming initiatives already in place or in development
- Hurdles to realising video streaming ambitions
- Current delivery methods and platforms
- Extent of market demand for key video streaming features

Given that publishing organisations, scholarly societies and professional associations, and Higher Education institutions would likely have different plans for their videos, the options to the questions regarding current use and
development differed depending on the sector the respondent identified as theirs. We used survey logic to branch survey respondents down the correct route.

All survey respondents were asked the same questions about hurdles to delivery, current delivery methods and current demand.

DEMOGRAPHICS

The survey closed at the end of September 2017 with 213 responses. 19 respondents were disqualified because they selected “Platform provider” as their organisation type.

REGION

The majority of respondents were from North America. We separated out “UK” from the rest of Europe for analysis purposes. We didn’t have any respondents from Africa.

The results focus on North America, UK and the rest of Europe because we didn’t have enough responses from people in Asia to make the results meaningful.

Figure 1 - Respondents by Region, n=213
Nearly half of the respondents came from Higher Education institutions, around a third from publishing organisations and 14% from societies and professional associations.

People who selected “Platform provider” were disqualified from taking the survey.

**WHAT IS YOUR INVOLVEMENT WITH VIDEO STRATEGY AND DEVELOPMENT AT YOUR ORGANIZATION?**

**Figure 3 - respondents by responsibility, n=213**
Most respondents were involved on some level with video strategy and development at their organization. A small minority (around 15%) of respondents had no direct involvement so we can assume the people who answered the survey were close to their organization’s video strategy and development on some level.
There is quite a significant regional difference in the results here – publishers in the rest of Europe are further behind their counterparts in the UK and the US in the development of video in all the areas we asked about.

In particular, publishers in the UK and North America are further ahead in their development of video for promotion purposes and as supplementary material for journal articles than publishers in Europe.

There is little regional difference in the use of video for “Editor Opinion” pieces and video editorials. Around half of the respondent publishers have either developed videos for this purpose or are in the process of doing so.

It seems that publishers are generally further behind in developing video for commercial gain than they are in their plans for developing video for promotion.
or as a supplement to other products. This approach shores up existing products and gives publishers an opportunity to add value to their current offerings. It also gives them an opportunity to show they have a truly “multi-media” approach to their content strategies.

It could be because it is somewhat easier to develop an extension to a product than it is to create a new product which would need significant sales and marketing input. However, it is more difficult to prove the return on investment for products which are essentially used as marketing or as supplementary to existing products. This could be slowing the development of new video products for sale.

**Societies and Associations**

![Figure 5- Development of Video Strategy, Societies and Associations](image)

We didn’t have enough respondents from societies in the rest of Europe to make meaningful analysis, so we have only displayed results from North America and the UK here. It seems that all areas of video streaming are likely to form part of societies’ video strategy in the future, and many societies are already making good progress with implementation. None of the options listed appeared to be unimportant or totally off the development plan, indicating that societies are keeping a fairly open mind about how video could be incorporated into their strategy in the future.
There is not much variation by region apart from in the areas of “outreach” and “promoting best practice”. Like the responses from publishers, use of video for promotional purposes was high up the agenda for societies in North America and UK and, perhaps somewhat connected to this, society respondents indicated that video is a useful way to reach younger generations.

**Higher Education Institutions**

![Graph showing video strategy development in Higher Education Institutions](image)

**Figure 6 - Development of Video Strategy, Higher Education Institutions**

Once again, we only received enough responses from people working in Higher Education establishments in the UK and North America. However, there is little regional variation here. Video is clearly an important part of HE strategy for teaching and learning as well as for promotion (of their own university). Video is less key as part of a strategy for publicizing research output; however, the responses show that it is not unimportant, with nearly half of respondents indicating it was part of their development plans. It could be that this function is left to the individual or department in some institutions, so it is perhaps not organized at an institutional level.

Clearly, video is important for all sectors and across all regions. When we include the results for “all respondents” across regions and sectors we see very little difference, indicating that these results are true globally. Video clearly has a number of different purposes and respondents indicated they are already in the process of implementing a number of initiatives.
Hurdles: What are the primary hurdles to achieving your ambitions for video?

Listed above are the results by Publisher (all publisher respondents globally), Society (all society respondents globally) and Higher Education Institutions globally (there was not enough data to separate their results out regionally). There were significant variations in the answers to this question, both by sector and region.

UK publishers generally felt the hurdles we listed were slightly less significant than North American publishers. The most significant hurdle to UK publishers was the cost of the content platform and delivery. For US publishers, staff resources and cost of production were identified as the most significant hurdles.

Evolving complexity over standards and accessibility, alongside the lack of an end-to-end service provider were of greater concern for publishers in North America than the UK. However, overall these were not identified as significant hurdles by most publisher respondents.

Publishers generally did not seem overly concerned with copyright considerations.

Societies identified lack of staff resources as the most significant hurdle to achieving their video ambitions, although there was some regional variation in
the overall percentages – 77% of US society respondents compared with 67% of
UK society respondents.

The cost of content production was a concern to societies globally; around half
of societies indicated they felt the ROI was unclear and was therefore a hurdle.
UK societies seem to be more concerned than North American societies about
compliance with accessibility legislation. Half of UK societies noted that the lack
of an integrated technology system was a hurdle, significantly more than North
American societies. Lack of in-house expertise seemed to be more of a concern
for North American societies – going hand in hand with worrying about staff
resources. UK societies are more concerned about compliance with copyright
legislation than their counterparts in the rest of the world.

For people working in HE the cost of both content production and platform and
delivery were identified as significant hurdles, alongside staff resources. Over
half of respondents working in HE said they were concerned about compliance
with copyright legislation.

Perhaps because societies are hoping to use video to promote themselves and
reach younger members, the requirement for staff input is significant, which is
why they are finding staffing a greater hurdle than the publishers. Promotional
content is likely to be more time intensive as the actual content has to be
created by people working for the society, rather than editors and authors. It
could also be that societies have fewer people working in marketing and
promotions and so are spread more thinly. Given there is no direct way for HE to
monetize their investment in video we can assume that people working in
Higher Education sector have less money to invest than publishers and societies.

Overall people working in Higher Education see more hurdles than those
working in other sectors. It could be because they have experienced more
demand and are further on in their development so are therefore more familiar
with the challenges associated with streaming video. Or it could be because
other sectors have already solved the problems we asked about so do not see
them as hurdles any longer. We suspect people in higher education are more
familiar with the hurdles because they have been working in this area for longer.
CURRENT DELIVERY: IF YOU HAVE VIDEO CONTENT, HOW IS IT CURRENTLY DELIVERED?

**Figure 8 - Delivery Platforms, North America**

**Figure 9 - Delivery Platforms, UK**
The delivery platforms used to host video content differs both by sector and by region. For example, Vimeo is popular with societies in North America, but not so popular with North American publishers and HE. This does not appear to be caused by regional market penetration – UK Higher Education institutions use Vimeo just as much as North American Societies.

YouTube is the most popular route for all sectors and regions, but is slightly stronger in North America than the rest of the world.

The organization website is a popular route for all sectors and regions. In the UK it is just as popular as YouTube, and more so for UK HE.

Societies use free solutions more than they use professional platforms – the concern here is that they could encounter more accessibility hurdles as time goes on. Earlier results perhaps indicate societies are not yet aware of some of the accessibility hurdles associated with producing streaming video content.

Very few people stated they did not have any video content, or that they had unpublished video content; so all video content produced currently appears to be finding a home somewhere.

**IS YOUR ORGANIZATION PLANNING TO PRODUCE OR ACQUIRE VIDEO CONTENT IN THE NEXT TWO YEARS?**

![Figure 10 - Plans for Development or Acquisition of Content](image)

There was very little difference either by sector or region in the answers to this question. Over 90% of people who responded said they were planning on producing their own video content. This could explain why cost and staff resources are seen to be hurdles, as producing your own content takes
significant investment. Only around 20% of respondents said they are planning on acquiring or licensing content.

DEMAND: IS YOUR ORGANIZATION SEEING A DEMAND FOR ANY OF THE FOLLOWING?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Publisher</th>
<th>Society</th>
<th>HE</th>
</tr>
</thead>
<tbody>
<tr>
<td>More video content</td>
<td>50% 50% 67%</td>
<td>64% 50% 83%</td>
<td>50%</td>
</tr>
<tr>
<td>Better video discoverability</td>
<td>57% 67% 61%</td>
<td>57% 63% 50%</td>
<td>50%</td>
</tr>
<tr>
<td>Synchronised slide deck for lectures and talks</td>
<td>32% 33% 33%</td>
<td>64% 63% 67%</td>
<td>29%</td>
</tr>
<tr>
<td>Transcripts</td>
<td>45% 58% 44%</td>
<td>29% 25% 33%</td>
<td>69%</td>
</tr>
<tr>
<td>Ability to annotate</td>
<td>34% 58% 17%</td>
<td>43% 25% 67%</td>
<td>38%</td>
</tr>
<tr>
<td>Closed captions</td>
<td>34% 50% 28%</td>
<td>21% 25% 17%</td>
<td>75%</td>
</tr>
<tr>
<td>Ability to create clips</td>
<td>34% 58% 28%</td>
<td>29% 25% 33%</td>
<td>40%</td>
</tr>
<tr>
<td>Multilingual support</td>
<td>39% 67% 28%</td>
<td>21% 13% 33%</td>
<td>46%</td>
</tr>
<tr>
<td>Chapterisation</td>
<td>32% 50% 28%</td>
<td>29% 38% 17%</td>
<td>31%</td>
</tr>
<tr>
<td>In-video search</td>
<td>23% 50% 11%</td>
<td>29% 25% 33%</td>
<td>40%</td>
</tr>
<tr>
<td>Synchronised tests and quizzes</td>
<td>30% 42% 33%</td>
<td>21% 25% 17%</td>
<td>33%</td>
</tr>
<tr>
<td>Audio descriptions</td>
<td>34% 50% 28%</td>
<td>7% 13% 0%</td>
<td>48%</td>
</tr>
</tbody>
</table>

Figure 11 - Video Streaming Demand

The results above are showing all publisher and society responses globally alongside responses by North American and UK respondents. The table shows results for all respondents globally from the HE sector.

The responses to this question differed by region and sector. All respondents said they were experiencing demand for more video content and better discoverability of that content, although publishers and societies in the UK seemed to be experiencing a marginally greater demand for “more” than their counterparts in the US.

Better discoverability of video content is important to all publishers, societies and those in HE, and slightly more so for those in the US. The ability to annotate video content appears to be important to UK societies and NA publishers, but not particularly important to NA societies and UK publishers.

Societies are experiencing more demand for synchronised slide decks for lecture and talks than publishers and those in Higher Education. There seems to be a definite need from societies here, which would be interesting to investigate further.

Both publishers and HE appear to be seeing more demand than societies for transcripts for their video content. Closed captions are the most demanded feature for those working in HE, and half of North American publishers stated
they were seeing a demand in this area. Accessibility generally is a key area of concern for people working in HE and North American publishers.

Generally, North American publishers appear to be seeing a greater demand than any other group for all features listed, including multilingual support and chapterization. Answers to earlier questions do not indicate this is because North American publishers are further ahead than the rest of the world in implementing their video strategy. It could just be because they are further ahead in their market research.

We know that UK societies have done the least which is perhaps why they are seeing the greatest level of demand for more video content.

Most of the respondents from HE institutions are using video for teaching and learning which could explain the higher demand for transcripts and closed captions – users are using the videos as part of their learning so need a more rigorous level of accessibility. Institutional policies are likely to dictate that all course materials are accessible by all students. However, they are perhaps not passing this requirement on to publishers and societies.

**ADDITIONAL COMMENTS**

We asked respondents to leave any general comments they had about video streaming. Here is a list of comments lifted verbatim from the free text box.

- Although we do not have customers banging on the door asking for video, we are confident demand will grow, and authors will want us to be able to include video content in their publications.
- As a society we have a news site, and this has made it easier to transition to video content as we already had journalists and digital media experts on staff who were familiar with making recorded content. If this had not been the case the development would have been more of a challenge.
- I would say that my organisation is exploring ways to develop and sell video content supplementary to the primary product which are books and journals.
- Libraries are facing the increased costs of licensing streaming media and the current models render potentially astronomical costs without being checked or transformed into "self-serve" models where digital content is transferred to the library for preservation/access. Very interested in results of research, thank you.
- Monetisation and suitability to the package model of delivery for libraries are huge hiccups. You cannot deliver 2020 content on a 2006 business model!
- The fashion to offer video interviews instead of written content is - in my opinion - user-unfriendly. An experienced reader has his own velocity and therefore steers the information process himself. If videos, one should show something really useful, for example surgical procedures etc.
- We are seeing more demand from authors to include videos within articles not just as supplemental material. Difficulties with accommodating variety of file formats.
• We have the largest collection (around 5000) of self-generated oncology videos in the world, all open access, many of them multi-lingual.

• We want our video content to be published with cc-licensing, as the institution as a whole is underway to adopt an open access policy. We want content to be integrated into our new learning management system, as well as embedded on websites.
**SUMMARY**

It is clear that there is a demand for streaming video content from all sectors and regions.

Publishers are focussed on developing video content to support articles and publications rather than developing video content to sell. They perhaps see video as a means of differentiating the version of record (e.g. for journal articles) to make their sites more attractive than other resources such as ResearchGate and Sci-Hub.

Societies want to use video to reach out to the young and the layperson, but also to promote best practices but are finding it hard to resource the production and development of content.

Higher Education Institutions appear to be experiencing more direct demand for streaming video and are perhaps further along than societies and publishers in identifying needs. It could be that because they are experiencing more demand they are also more aware of the hurdles that need to be overcome in delivering streaming video content.