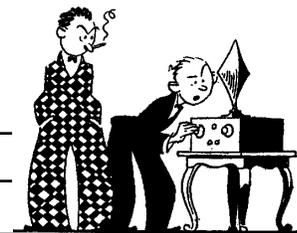


Academic Library Streaming Video: Key Findings from the National Survey

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Streaming video has been an option for academic libraries for nearly a decade. What is the state of streaming video in academic libraries today? How are these libraries acquiring streaming videos? Who makes acquisition decisions? How much staff time does supporting streaming video require?

The authors, both experienced media librarians in academic settings, faced these and other questions and realized that the information was not out there. Published results from some small surveys existed (Kaufman and Mohan 2009, Primary Research Group 2010). Data from these surveys was limited, and the sample sizes were small.

Thus in Spring 2013 the authors developed and distributed a survey designed to collect information on the status of streaming video in academic libraries. After testing the survey with other academic media librarians, and with numerous revisions, the authors distributed the *Survey of Academic Streaming Video (SASV)* in May 2013. Using Survey Monkey to collect responses, the authors distributed the survey via invitations sent to numerous discussion lists, including VideoLib, Coll-Lib, AcqLib, and Digital Copyright, among others. Individual responses were confidential. Respondents had the option to be included in random drawings for incentive awards, and to receive the results of the survey.

Since the survey asked for figures we encouraged respondents to read through the survey before completing it. The survey included a separate link to a PDF of the instrument for that purpose. Similarly, a separate document provided definitions of key terms that could be reviewed while taking the survey. The survey instrument and the definitions documents are available online: tinyurl.com/SurveyASV and tinyurl.com/ASVDefinitions.

Response was strong, resulting ultimately in 336 valid responses. These responses came from 48.9% of all Research/Doctoral universities, 21% of Masters institutions, 20% of Baccalaureate institutions, and 12% of Associate degree granting institutions in the United States. Forty three (43) ARL libraries responded. The survey received responses from 48 U.S. states and 6 Canadian provinces.

Analysis of the data provides a clear picture of the current (as of summer 2013) state of streaming video in U.S. academic libraries. The authors have organized findings from the data into ten key concepts. Percentage points are rounded.

1. Streaming video has reached the tipping point.

Data from the 2010 **Primary Research Group** survey indicated that across all Carnegie classifications approximately 33% of academic libraries provided streaming video (Primary Research Group 2010). *SASV* data shows that figure has flipped; 70% of all academic libraries now provide streaming video.

This percentage varies by Carnegie classification and ARL status:

Carnegie classification / ARL status	% streaming
Doctoral / Research University	78%
Masters institution	68%
Baccalaureate institution	56%
Associate institution	70%
ARL library	92%

Furthermore, when asked about plans to stream video, survey results show additional adoption. Of those respondents that did not currently stream, 17% indicated intent to do so within the next year (2014). An additional nearly 23% indicated intent to stream within 2-3 years.

2. Responsibility for streaming video may be distributed across the institution, but libraries have primary responsibility.

When asked who provides infrastructure for streaming video within the institution (a “check all that apply” question), 71% indicated the IT unit, while 59% indicated the library. But when asked who *primarily* is responsible for the infrastructure, these numbers change dramatically. The figure for libraries drops slightly to 54%. But the figure for the IT unit drops to 28%. Data from the *SASV* clearly demonstrated that libraries play a significant role in the infrastructure for providing streaming video within academic institutions.

3. There is no clear pattern of key responsibility for streaming video content within libraries.

Streaming video acquisition requires multiple responsibilities not necessarily associated with other digital resources in libraries. In addition to selection there are responsibilities for licensing, digitizing/encoding, ingestion, and metadata. These functions are widely dispersed in academic libraries. *SASV* data reveals that multiple staff positions have *primary* responsibility for selection.

Position	% with primary responsibility
Media librarian	24 %
Subject librarians	23 %
Acquisitions librarian	17 %
Other	31 %

Comments provided for “Other” demonstrate a wide variety of alternative areas of responsibility, including: director, electronic resources librarian, committee, and consortium roles.

The question of primary responsibility for licensing returned a similar array.

Position	% with primary responsibility for licensing
Dedicated licensing agent	3%
Media librarian	16%
Acquisitions/collection development librarian	34%
Other	39%

Again, comments provided for “Other” returned a wide variety of alternative personnel with this responsibility, including director, electronic resources librarian, and consortium.

While the survey provided “media librarian” as a response for these questions, it failed to establish whether or not responding institutions had a librarian who is primarily responsible for media. Thus we are unable from this survey to determine how these responses may vary if there is or is not a media librarian present.

4. Video formats in academic libraries are changing.

This should come as no surprise to anyone who works in libraries. The shift in video formats is not the first time libraries have dealt with content format changes. But the survey revealed key information on the degree to which video collections are shifting format as well as *how* they are shifting format.

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Survey results show that libraries are not just beginning to acquire video in streaming format, they are also converting hard copy collections to streaming format. Of libraries that are already providing streaming video, 63% have converted some of the hard copy collection to streaming format. Of those, 89% intend to shift more of their collection to streaming within the next three years. Additionally, of those that have not already shifted format of some or all of their collection, 35% intend to do so within three years.

Overwhelmingly this shift in format from hard copy (VHS and/or DVD) is happening with licensed digital copies. Of those who have converted video collection format, 81% have done so through digital files provided by the distributor.

5. Patterns of video acquisition and expenditure are changing.

SASV included questions to provide baseline data not only on streaming video but also on hard copy (primarily DVD and VHS). This allowed the survey analysis to compare differences in funding sources and spending. For hard copy video a general acquisitions fund is the primary funding source for 40% of the respondents. For 35% of the respondents, funding comes from a separate video acquisitions fund, while for 16% of the respondents, subject allotments within the acquisitions budget provides video funding. In contrast, streaming video acquisitions are more likely to come from a general acquisitions fund (49%), less likely to come from a separate video fund (14%), and even less likely to come from a separate streaming video fund (7%). The 14% of responses identifying “Other” as the primary funding for streaming video identified an electronic resources fund, grants, and distance education as the source of these funds.

Across all Carnegie classifications academic libraries’ spending on streaming video now exceeds spending on hard copy video. This figure is the total spend, and does not reflect the cost per title or number of titles acquired in these categories. Subscription video collections account for the largest portion of library spending on streaming video. In the aggregate, not divided by Carnegie classification, average academic library spending for the last fiscal year is:

Average spend	Video format
\$ 20,125	Physical copy video (DVD, Blu-Ray, etc.)
\$ 4,980	Individual streaming video titles
\$ 21,381	Subscription streaming video collections
\$ 2,093	Institutional funding for streaming video

While the amount spent for physical video in the last fiscal year is strong, survey results foretell significant changes in video expenditures to come. Of those who already stream, 32% anticipate spending less for physical copy video in the next fiscal year. For streaming videos, 42% anticipate spending more for individual titles and 47% anticipate spending more for streaming video collections.

6. There is no single acquisition model for streaming video.

As the figures in item #5 above already suggest, there are multiple approaches to acquiring streaming video content. Three approaches dominate: single title purchase with in-perpetuity rights (now often referred to as “life of file format”), term licensing, usually (but not always) for a period no longer than three years, and subscription to a collection. None of these approaches precludes the others. Respondents to the survey reported using all three of these approaches, in various combinations.

Of the respondents that currently stream video, 44% reported acquiring individual titles through in-perpetuity purchase. Similarly, 42% reported acquiring collections in perpetuity. An even larger number of respondents have term-licensed streaming videos: 66%. Ninety percent (90%) of those that stream subscribe to at least one subscription collection.

So while there is no single model for acquiring streaming video, it is apparent that subscription collections are emerging as a major approach for many libraries. These models are rapidly changing, however. At the time the survey launched only two companies offered subscription options, and only one offered collections for purchase in perpetuity. New companies and new models are emerging including evidence-based acquisition, demand-driven licensing, patron-driven acquisition, and pay-per-view options.

7. Most libraries do not digitize from their video collections on request.

At the time of the survey the *AIME vs. UCLA* lawsuit was still percolating its way through the courts. We felt it was important to collect information that addressed some of the issues presented in that lawsuit.

A majority of survey respondents (58%) indicated that they do *not* digitize from their hard copy collections on request, but this is a slight majority. Of those that *do* digitize on request, 40% do so only with licensed permission. Another 33% apply a Fair Use interpretation to justify the duplication of material. Significantly, libraries that digitize on request are more likely to have written policy statements about digitization than libraries that do not digitize (39% vs. 10%).

8. Libraries employ a wide array of discovery and access tools for streaming video.

Discovery and access points for streaming video in academic libraries include the online catalog, vendor portals, LibGuides, and various discovery tools such as Summon and Discovery. Overall, librarians report a preference for use of the online catalog, stressing the importance of title-level discovery. Seventy-five percent (75%) report providing catalog access. Only 41% of libraries responding to the survey, however, use the catalog as the *primary* access point. Availability of catalog access varies widely by type of license.

Type of License	% of libraries providing title level catalog access
Purchased/In-perpetuity	46 %
Term License	34.5 %
Subscription collections	57.5 %

Most surprisingly nearly 25% reported *not* cataloging streaming videos at all.

Libraries that employ catalog records for streaming videos rely heavily on MARC records (59 %) and/or meta data (20 %) provided by the video distributor.

9. Libraries employ multiple solutions for hosting streaming video.

Nearly three-quarters (72%) of libraries rely on vendor hosting for at least some of their streaming video. Overall, vendor hosting solutions manage between 81 and 100% of libraries’ streaming collections.

For content not hosted by vendors there is no dominant model or hosting solution. In-house solutions range from the institution’s tech infrastructure to a solution internal to the library. Academic institutions use both turn-key (e.g., Ensemble, UStream, V-Brick) and locally developed hosting systems. There is no dominant commercially available hosting system. Few institutions use third-party hosting.

Hosting Approaches	% of libraries employing
Vendor portal	72.5 %
In-house (Academic institution)	42.5 %
In-house (Library)	22 %
Third party	11 %

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10. Librarians are largely unaware of many factors related to streaming video.

Many librarians are unfamiliar with models, practices, systems, and other factors related to the acquisition and support of streaming videos in their collections.

Significantly, librarians overwhelmingly report a relatively low level of staff time to support streaming video. In the aggregate, for selection, licensing, encoding and uploading, and meta-data, respondents report a staff commitment of less than one full-time equivalent. More than a quarter of respondents, however, report not knowing what that commitment is.

Aggregated Staffing Commitment	% of libraries
Less than ½ FTE	42.7 %
½ to 1 FTE	14.6 %
1 – 2 FTE	10 %
Unknown	28 %

Other responses reveal confusion among librarians in understanding the differences between distribution and licensing models, especially the differences between collections vs. single title licensing and subscription vs. term-licensing.

While approximately thirteen percent (13%) of academic institutions fund streaming video outside of the library’s budget, most respondents reported not knowing who is responsible for selection of those videos, the level of funding, or the source of this external funding.

In terms of the hosting solutions used by the library or by the institution, respondents report a high degree of not knowing what system is used. (While this may not be a critical issue, contrast this degree of familiarity with librarians’ knowledge/awareness of the integrated library system or learning management systems used by their institutions.)

Postscript

Nearly eighteen months have passed since we conducted the *Survey of Academic Library Streaming Video*. That is a long time for a rapidly changing approach to library collections and service. A follow-up survey, using many of the same questions, to collect more recent data, while correcting some oversights and addressing other issues related to streaming video, is ongoing. We invite your contribution to the inquiry. Please contact the authors to complete the survey for your library.

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