

Earnestly Seeking Greater Flexibility: The Pros and Cons of Pay-Per-View Journal Access

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Earnestly Seeking Greater Flexibility: The Pros and Cons of Pay-Per-View Journal Access

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Abstract

This presentation sheds light on a relatively new phenomenon that needs more earnest consideration from all kinds of libraries: the switch to a pay-per-view (PPV) access model for journals. The presenters, one from a corporate library background and one from an academic background, have extensive experience in utilizing PPV. They detail pros and cons of PPV and how it allows for greater access for users with more financial flexibility for acquisitions budgets. Discussions among acquisitions and collection development librarians in recent years have focused on demand-driven acquisitions (DDA) for e-books. The presenters believe that PPV for journals is in the same vein but even more far-reaching and beneficial.

The presenters started with an overview of PPV. Oberg reported that PPV access options were available across a versatile range of content types, from journal articles to e-book chapters or sections, to parts of content of reference works, and even streaming video. These PPV options are available via different pricing models. The most common is a prepaid token bundle purchase, in which the library prepays a set of (article) tokens. Typically, the higher the volume of the purchase, the lower is the price per (article) token. A less common model is a postpaid arrangement, in which the library sets up the PPV access, and is invoiced on a monthly or quarterly basis, whichever is preferred/negotiated. Other pricing models include access via an institutional credit card (on demand access), as well as a newer model of article rentals. Article rentals is an innovative concept where the library user can preview an article for a limited time before deciding whether to proceed with purchase.

Following different content and pricing models, libraries have a variety of implementation options. Oberg discussed available options and their variance both from the purely technical implementation and implementation directed by the library's budget model, i.e., whether the library absorbs all PPV costs or whether the library charges back users for any PPV transactions. The most optimal option, from the library user's perspective, is the one with the least access obstacles, when PPV is activated/open for all library users. A less user friendly option is one

where access to PPV content is mediated by selected super users, who can be internal staff (library staff), or external contacts (in the case where the library is utilizing an external document delivery vendor).

Markovic continued the PPV overview by addressing different challenges libraries should be ready to encounter when planning PPV implementation. Estimating potential usage is critical, especially with the initial PPV purchase. It is essential to review previous document delivery/ILL usage and user demand for nonsubscribed content, for overestimating will result in overspending on a PPV account, and underestimating will result in overpayment on the per-token/per-item level of purchase. To make matters more complex, there is a lack of standardization among vendors in not only pricing models but nomenclature itself. Some vendors call their PPV options tokens; others Article Select; and others use bundle, prepaid article, etc. Additionally, the lack of standardization extends itself through the terms of use for PPV content. While some vendors allow nonexpiry on purchases, others make their PPV options valid only for a limited time (a year or two) after purchase. Moreover, vendors define actual usage differently. Some may allow archiving, use of articles by more than one user, while others do not. Another critical challenge is the technical aspect of implementation which was mentioned earlier. In the user-friendly, open to all, implementation, there exists a potential for the

PPV account to be depleted more rapidly than in the mediated implementation. On the other hand, while the mediated option is more economically conservative, as the demand can be “controlled” by the super users, it is more complex from a technical standpoint. There are additional steps to set up access for super users, whether they are internal library staff or an external document delivery vendor.

Though the presenters agree that PPV access options have both pros and cons, they lean toward pros.

PPV access to nonsubscribed content is a perfect solution for shrinking budget trends, where libraries are not only less able to acquire new content, but often have to cancel subscriptions to content with moderate to high usage, all in an effort to accommodate budget limits. By offering PPV, library users’ needs are fulfilled in a quick, easy way, where implementation can be so seamless that the users will remain unaware that they are accessing PPV content (vs. subscribed content). In addition, the cost per article via PPV is by rule lower than cost per article via a document delivery vendor, ILL, or directly through the publisher’s web site (where no PPV has been established). Thus, in short, PPV fulfills users’ content needs and provides cost savings for the library’s budget.

Though PPV requires more ongoing oversight including troubleshooting, maintenance of access, and usage statistics review, it is a beneficial collection development tool. Collections can be assessed in a cost-per-use analysis to include cost per use for PPV access. Moreover, reviewing PPV access usage statistics over time provides great insights into usage trends and user behavior. Overall, PPV accounts are an excellent negotiation asset when negotiating annual contracts. Understanding and analysing PPV usage statistics is an excellent negotiation asset when negotiating renewal of PPV accounts.

One of the key cons that the presenters wanted to emphasize, especially for the vendors in attendance, was that although PPV is available across a range of content types, not all vendors support institutional PPV, and that needs to

change. As they stated in the session, the message they communicate to vendors is “something is better than nothing.” If vendors only offer inflexible, bundled, and expensive subscriptions across their content portfolio, libraries will not be able to sustain them. If vendors offer institutional PPV, on the other hand, libraries will be able to provide them with some revenue.

Oberg next turned to a discussion of examples from the academic sector that focused on what is the end-user experience with journal article PPV. He noted the components of access include an end user A&I database (could include Google), an OpenURL resolver, and the publisher’s website, and focused on the steps taken by end users to get to a PPV article in a nonmediated environment. Essentially, the principle at work is to make the end user barrier as invisible or seamless as possible. His first example showed PPV directly available to the end user, and his second example illustrated how PPV works for one publisher who doesn’t support direct availability of the article to end users. In this second example, Oberg’s library has modified a web form template to prepopulate with article metadata and include key end user contact detail. Once that form is submitted by the end user, a structured email is sent to a dedicated e-mail address, the article is purchased by the library’s credit card, and the article is then emailed back to the end user within a set amount of time.

Markovic discussed examples from her extensive work in corporate libraries that focused on various budget and access models. She talked about the importance of a cost threshold whereby a PPV transaction might then be triggered as a less expensive option. Another key consideration is from where the money is allocated in a library’s budget to pay for PPV versus subscriptions. This is particularly a problem when a library wants to shift money toward one type of access versus another, and it also has a significant impact on how PPV access might be implemented. In other words, if a library charges PPV costs back to users and the transactional portion of the budget is separate from subscriptions, it points toward a moderated PPV implementation. It also may mean ongoing difficulty if the PPV option increases in

popularity versus subscriptions due to problems in shifting the money from a different budget area over time.

In closing, both presenters highlighted the major takeaways from their PPV experience:

- Greater flexibility (for library budgets).

- Greater access (for end users).
- A bit more for libraries to manage.

Markovic and Oberg asserted that the subscription-only, bundled journal model is no longer sustainable for all types of libraries. To (mis)use a famous advertising slogan, “A subscription isn’t forever.”