

## Electronic Book Acquisition Strategies in Academic Libraries: A Review of the Literature

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# Electronic Book Acquisition Strategies in Academic Libraries: A Review of the Literature

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## Abstract

Electronic book (e-book) acquisition models have evolved over the decades they have been available to library customers. This review leverages findings from scholarly literature to document the proliferation and evolution of e-book acquisitions models, their strengths and weaknesses in various contexts, and their role in the collection development strategies of academic libraries. From firm orders and subscription packages to demand-driven and evidence-based acquisitions, engagement with e-book acquisitions models varies considerably based on factors such as library budget and staffing, institutional curriculum and programs, consortial affiliations, support for textbook affordability initiatives, and COVID-19 responses. The findings from this literature review suggest multiple acquisition models are frequently used in combination; librarians closely monitor e-book expenditures and use, regularly modifying acquisitions parameters; and e-book strategy is dependent on institutional goals, library budgets, consortial participation, and marketplace realities. Additionally, the increased availability of e-books and their acquisitions models have created opportunities for research that compares the efficiency and effectiveness of e-book purchasing models and draws on existing and evolving evaluative models to establish benchmarks for measuring success.

## Introduction

On February 18, 2025, Clarivate announced that it would eliminate perpetual licenses for electronic books (e-books) and no longer support demand driven acquisitions (DDA).<sup>1</sup> This abrupt and consequential change has left many librarians reevaluating their options within the e-book marketplace and returning to the question of how to strategically build collections and offer access to their respective communities. Clarivate's actions introduce operational uncertainty and reiterate concerns about their lack of price transparency, if not an explicit strategy of pricing discrimination.<sup>2</sup> Librarians have developed and refined their

e-book strategies over time; Clarivate’s new strategy—developed without consulting librarians and in contradiction to the needs librarians have repeatedly articulated—upends the iterative work many librarians have done on e-book acquisitions.

Library acquisition of e-books has grown and changed considerably over the past three decades; as the recent decision by Clarivate shows, it will necessarily continue to evolve. This review of the literature leverages findings from library and information sciences (LIS) research to document the proliferation and evolution of e-book acquisitions models. Articles highlight strengths and weaknesses of models in various contexts and articulate the role of e-books acquisition as academic libraries have shifted from traditional collection development based on anticipated need to strategies that emphasize point of need access. The authors discuss the implications of these findings for librarians continuing to evaluate and optimize e-book acquisitions in support of strategic collections.

## **Scope and Methods**

The goal of this review is to engage deeply with peer-reviewed LIS studies on e-book acquisitions models and strategies to understand how they have evolved over time, and the respective benefits and challenges in various disciplinary and consortial contexts as depicted in the literature. To do this work, the authors conducted a search in Library Literature & Information Science Full Text (LL&ISFT) via EBSCOhost for “Electronic books” (Subject) AND “Academic Libraries” (Subject) AND library acquisitions (keyword) on February 14, 2025. The results were then limited to peer-reviewed articles, which yielded 210 records. The authors separately reviewed all 210 articles and excluded those that were not peer-reviewed (e.g. editorials, interviews, or pieces in editor-reviewed columns and proceedings), those that were not published in English, and those that were deemed out of scope (i.e. did not engage substantively with library acquisitions of e-books). The next step was to reconcile the individual selections, discuss what factors each person used to include or eliminate the article, and finalize the list of articles included in this research.

The authors identified seventy-one articles that matched their parameters. Each of the selected titles was then categorized with one or more of the following topical themes which the authors derived from an initial evaluation of the content: Firm Orders, Subscription Packages, Purchased Collections, Approval Plans, DDA—which the authors use inclusively for patron driven acquisitions, or PDA programs, Evidence Based Acquisitions (EBA), Consortial Acquisitions, Disciplinary Considerations, Textbook Affordability Initiatives, and COVID-19 Responses. After conducting this thematic analysis, the authors then supplemented the articles returned in the LL&ISFT search by reviewing reference lists within those articles and conducting additional searches in Google Scholar

and Web of Science. This process yielded additional sources that the authors wove into the review to provide context and address gaps.

The articles analyzed present studies conducted in academic libraries of all sizes across multiple countries and cover all major e-book purchasing models. This broad coverage of the research provides ample evidence of the ways in which academic libraries are blending purchasing models and consider cost, usage, subject coverage, availability, and other criteria to develop collections strategies to meet their needs. The articles evaluated were published between 2003 and 2025, and several authors were represented on multiple articles.

The authors acknowledge limitations to their approach. Other researchers may not have access to LL&ISFT, which the authors used to replicate the results at their respective institutions and increase the pace of review, and they may have made different determinations about articles the authors included or excluded. Research of this type is beholden to variances from vendor platforms, subject and keyword indexing, and database architecture. Indexing processes may rely on different definitions than those used by authors or readers. For example, the authors found several *Against the Grain* and *NASIG Proceedings* articles returned among peer-reviewed articles; in the authors' personal experience, these are editor-reviewed. Additionally, indexing often takes several months, and the authors found that recent publications were not returned in their LL&ISFT search. The decision to supplement the LL&ISFT search was informed by the intention to more comprehensively synthesize scholarly LIS literature on e-book acquisitions in academic libraries.

## Literature Review

Several studies outline and provide some analysis of the manifold considerations that librarian customers leverage to evaluate when acquiring e-books, including doing so by firm order. Magdalini Vasileiou, Richard Hartley, and Jennifer Rowley conducted interviews with academic librarians about e-books acquisitions to investigate their business models, variety of licenses, prices, platforms, interfaces, subject coverage, digital rights management, and alignment with reading lists.<sup>3</sup> The authors surfaced concerns about the complexity of business models, variety of licenses, high prices, and digital rights management restrictions.<sup>4</sup> Millie L. Jackson and Beth Holley considered the complimentary nature of print and e-books at the University of Alabama Libraries, noting that e-book acquisitions will evolve as options and models change.<sup>5</sup> Zsolt Silberer and David Bass reviewed major e-book vendors for their acquisitions considerations: ordering (proprietary system, integrated with book services company, print and electronic available, agent for publisher, database vendor); purchasing model (subscription—FTE, subscription—concurrent users, subscription—swapping, perpetual purchase single user, perpetual purchase multiple users); distribution (direct from publisher, vendor for publisher, e-book database vendor); and utility (added search features, added e-book features, added services—MARC etc., integration features, courseware features, personalization).<sup>6</sup> The authors' prediction about improvements in e-books time-to-market has been borne out, their suggestion that “we may even see the evolution of the pre-print databases [of e-books] much like in the e-journal world” has not.<sup>7</sup>

Some articles review e-book acquisitions for regional or specialized audiences. Grace L. Veach discusses e-book acquisitions models and their various considerations from the perspective of a librarian working in a smaller academic library.<sup>8</sup> Librarians at two Swedish university libraries reviewed the literature on e-book acquisitions and compared those findings to their own experiences. They found that “the problems [e.g., barriers to access and use, budget and pricing, business models, licensing] of e-book acquisition in academic libraries seem to be common to the economically strong Western countries.”<sup>9</sup> One of those authors then teamed up for a survey of academic librarians in Sweden and Lithuania. Across the two nations, they found that perpetual ownership was the preferred acquisition model, but they also found differences—drivers behind e-book acquisition in Sweden relate to providing access and keeping up with technology, where economics were a bigger consideration in Lithuania.<sup>10</sup>

### ***Firm Order***

Firm order—a one-time purchase of a particular item—is a long-standing, widely adopted acquisitions model within libraries. The appeal of firm order is that the library acquires exactly what is desired and is not committed beyond that particular item. Purchasing titles individually, however, is more expensive than purchasing or subscribing in bulk and is more time-consuming to process and manage. Because firm orders are a standard acquisition model, there are few scholarly articles that investigate e-book firm orders specifically. Nevertheless, given librarians' long experience acquiring print monographs via firm order, a variety of studies outlines considerations of purchasing e-books relative to print monographs. K. N. Rao, Sunil Kumar, and Manorama Tripathi conducted a statistical analysis of the price of electronic and print versions of books finding that e-books are typically more expensive than their print counterparts.<sup>11</sup>

In 2012 and 2013 respectively, Barbara Blummer and Jeffrey Kenton and William H. Walters published literature reviews on the topic of e-books acquisitions challenges and considerations for academic librarians.<sup>12</sup> Walters synthesized scholarly and trade literature, reporting challenges including limited e-book availability and delays in publication (relative to print), difficulty integrating e-book acquisition and cataloging into existing technical services workflows, preservation concerns, high or unsustainable costs, access fees, unsatisfactory pricing models, lack of transparency in pricing and licensing models, restrictive license terms, digital rights management (DRM) restrictions, interlibrary loan (ILL) limitations, lack of standardized e-book formats, a variety of access mechanisms, lack of patron awareness, user format preferences, usability concerns, unintuitive interfaces, annotation difficulties, poor presentation of text, and difficulty identifying relevant e-book titles.<sup>13</sup> Walters notes that “Although librarians have expressed a strong preference for title-by-title selection, roughly half of all academic library e-book titles are acquired through package deals.”<sup>14</sup> Despite these and other limitations from the perspective of librarians, aggregators have been successful in selling subscription packages.

### ***Subscription Packages***

Relative to other e-book acquisitions models, subscription packages—which provide access to content for a specified amount of time at an agreed upon cost—offer the advantages of less manual processing, fewer decision points, and a larger amount of content than could be acquired using title by title purchasing. On the other hand, as Rick Anderson notes, aggregator packages can be seen as speculative collection building<sup>15</sup>—in that some of the content may never be used—and they frequently do not perform as well in their usage as locally selected, DDA, or EBA models. Amy Fry reports the percentage of e-

book content used by acquisition model across nineteen studies, finding “On the whole, aggregator packages appeared to get the lowest rate of use per available titles, with no published studies showing use rates of more than 19 percent.”<sup>16</sup> Walters notes other disadvantages: “Most licenses for e-book packages (collections) give librarians no control over the titles included in the package. Vendors are free to add or remove titles during the term of the agreement, often without notifying the subscribing institution.”<sup>17</sup> The ongoing costs, a lack of control over the content included—which may change midway through the agreement—and a lack of perpetual access are seemingly disadvantages Clarivate did not contend with in their recent announcement.

Terry Bucknell discusses the implications of e-book collections on acquisitions budgets when they form part of library acquisitions strategy, highlighting relative advantages and disadvantages of subscription and purchased packages, firm orders, PDA, and EBA.<sup>18</sup> Bucknell notes how a subscription to ebrary’s Academic Complete in 2006 set expectations and created user interest in e-books: “Usage was immediately impressive and it quickly became established as one of the library’s best value subscriptions. It also seemed to precipitate a sea-change in user expectations. Previously, users had not demanded e-books, but as soon as a critical mass of e-books became available [...], e-books were regularly appearing in catalogue search results, and ‘we need more e-books’ became a regular demand.”<sup>19</sup> The size and newness of such collections likely had an impact on their initial reception and success.

A quantitative and systematic investigation of nine years of e-book usage at Laurentian University reiterates this sea-change. Alain R. Lamothe found that the size of the e-book collection had a strong relationship to the level of usage: “Of all factors examined during the course of this study, it was the size of the collection that exhibited the strongest association to usage levels and would suggest just how important the size and content of a collection can be to patron acceptance and utilization.”<sup>20</sup> Lamothe also conducted a study that compared individually purchased titles with bundled packages and found that individual selections receive greater levels of usage than the bundled titles negotiated consortially.<sup>21</sup> This study confirmed that not all bundles were alike, however: “for the most part, SpringerLink bundled e-books have recorded a greater level of usage when compared to bundled titles on NetLibrary and MyiLibrary.”<sup>22</sup> This echoes Fry’s finding that aggregator packages are not as well-used as publisher packages.

Some authors come to a different conclusion with local data. Michael LaMagna, Erica Swenson Danowitz, and Andrea Rodgers compare PDA, one-time purchases, focused-collection subscriptions, and large-scale subscriptions to consider which best serves users at their large, suburban community college.<sup>23</sup> They find that the large-scale subscription offers the lowest cost-per-use and serves the largest portion of their

students, but note “that focused eBook collections best support specialized disciplines such as Computer Science and Allied Health, Emergency Services, and Nursing.”<sup>24</sup> Karen Kohn conducts logistic regression to tease apart the various factors related to e-book use and finds that the Ebrary subscription collection outperforms e-books purchased via DDA and firm order on MyiLibrary.<sup>25</sup> Kohn acknowledges: “Librarians at this institution indicated a strong preference for Ebrary’s interface over MyiLibrary, lending support to the interpretation that usability affects the likelihood of an e-book being used.”<sup>26</sup>

Some studies compared e-book subscription packages to their print holdings. Rickey D. Best and Jessica B. Hayes compared local usage of American Council of Learned Societies Humanities e-Books to the print equivalents in their collection and found high usage and strong cost-effectiveness of the e-books.<sup>27</sup> In their study comparing usage of ebrary Academic Complete subscription and print holdings in two subject areas, Aiping Chen-Gaffey and Heather Getsay found that e-books usage was markedly higher than print.<sup>28</sup> The authors acknowledge limitations to their subscription-based approach, however, and indicated that they planned to expand e-books acquisition programs to DDA and firm orders, noting: “However, as a supplement to print, the library’s current e-books collections are primarily subscription-based, which are not specifically tailored to the university curriculum and students’ needs.”<sup>29</sup>

### ***Purchased Collections***

Publishers began selling digital archives and backlists to libraries in addition to or in some instances rather than offering these as a subscription service. The obvious benefit of purchased collections is that they offer perpetual access to a group of titles; however, annual maintenance fees are typically assessed. These collections were dismissed by librarians such as Julia Proctor as a mechanism for publishers to force unwanted titles on librarians who already owned much of the content in print.<sup>30</sup> Proctor advocated instead for firm orders, DDA, or customized collections saying, “Libraries are facing serious dilemmas where older content is concerned: our shelves are running out of space, and our buildings (including remote storage) are running out of shelves. However, the ‘clear your shelves’ ebook backlist offers are essentially giving libraries the ‘opportunity’ to buy content twice with much less certainty about the actual ownership the second time around.”<sup>31</sup>

Erin E. Kerby and Kelli Trei investigate e-book purchasing options for six publishers, noting which offered subscription access, package purchases, and title-by-title purchases.<sup>32</sup> The authors reiterate the potential time and cost saving of e-book packages, but urge caution: “This study is the first to look at overlap within related subject collections. This is an important factor for collection managers to be aware of, to either work together to acquire collections with overlap or to discuss the possibility of customization with the publisher.”<sup>33</sup>

Philip Gregory Kent documents the impact of the acquisition of the Springer Book Archives (SBA) at the University of Melbourne.<sup>34</sup> Kent indicates that the purchase “sought to achieve a step change in access to full-text historical monographs in science and technology disciplines” and although low costs per download suggest good value, “Times have changed and other purchasing options have emerged, suggesting that a large single purchase like SBA would most likely not be pursued at this time.”<sup>35</sup>

### ***Approval Plans and e-book Acquisitions***

Librarians have long used approval plans to partially automate selection and acquisition. Working with a vendor, the librarian creates a profile that specifies the title characteristics (e.g. publishers, publication year, and format) and purchasing parameters (e.g. costs, timelines, and shipment or notification) for the materials they are interested in acquiring. Approval plans have come to be seen as “just in case” collection building and have lost support as librarians increasingly embrace “just in time” approaches. Librarians began shifting approval plans to electronic, or e-preferred in the early 2000s. In 2006, Beth E. Jacoby surveyed eighty-eight academic librarians on use of approval plans to acquire monographs and reported the “impending use of approval plans for e-books.”<sup>36</sup> Jacoby asked survey respondents whether they would consider using approval plans to acquire e-books and the findings were not conclusive: “Of the 85 respondents, 7 percent said yes, 44 percent said no, and 49 percent said maybe. It is unclear whether the large number of ‘no’ responses was in reaction to acquiring e-books via an approval plan, the use of approval plans regardless of print or electronic format, or the acquiring of e-books in general.”<sup>37</sup>

Carmelita Pickett, Simona Tabacaru, and Jeanne Harrell outlined the considerations and evaluation process undertaken at Texas A&M University (TAMU) Libraries when they implemented an e-preferred approval plan in 2010.<sup>38</sup> The authors urged careful examination of approval plan parameters and current e-book agreements with both aggregators and publishers to avoid duplication. Nonetheless, they found several advantages to implementing an e-preferred approval plan: “weekly print approval shipments declined, mitigating ongoing space limitations; duplication was minimized, and oversight of e-books by subject selectors and collections personnel has improved.”<sup>39</sup> Simona Tabacaru later examined seven years of data from this e-preferred approval plan at TAMU and found that most subject areas had higher e-book use compared to print but 78 percent of monographs had nonetheless been acquired in print.<sup>40</sup> Tabacaru investigated usage in this study, finding “While only 22% of approval plan purchases are e-books, their overall rate of use is notably higher (49%) than print book use (39%). By acquisition method, approval plan e-books tend to receive less use compared to firm order e-books (59%).”<sup>41</sup>

Rather than relying on usage to compare approval plan performance to other acquisition models, librarians at the University of Nebraska-Lincoln (UNL) investigated citation counts of e-books acquired via an approval plan, firm order, and PDA.<sup>42</sup> Their findings were grim for advocates of approval plans; namely, librarian and patron selection outperformed approval plans in the social sciences, sciences, and humanities. More pithily: “Approval plans and e-book packages may well deliver the efficiencies and savings promised, but at UNL the approval plans appear to have been doing so with books that comparatively few researchers want.”<sup>43</sup>

### ***Demand Driven Acquisitions***

Demand driven acquisitions is related to approval plans in that it frequently relies on the existence of an approval profile, though approval plans increasingly incorporate collection development lists, e.g. most purchased titles, diversity, equity, and inclusion titles, and titles most popular in academia. In most DDA models, a pool of content is made available to users at no cost and the library is only charged for those items accessed by library users. Rick Anderson wrote and presented extensively on DDA; in “The Future of the Library Collection is not a Collection,” Anderson accurately forecast that “patron-driven acquisition (PDA) will be the new assumption,” among other things.<sup>44</sup> The benefits of DDA include providing an information-rich environment for users, delivering a large amount of content, including desired content at the point of need, with little mediation, and building the library collection with perpetual access to materials for which there is an established need. In addition to the planning and oversight of these models, the biggest challenge is productively dealing with feelings about handing book selection over to patrons. Candice Dahl urged librarians to recognize “long-held understandings surrounding libraries and librarianship are being challenged. What a library is, what a collection is, what determines the value of a collection, and the notion of expert selection are all being reexamined.”<sup>45</sup>

Dracine Hodges, Cyndi Preston, and Marsha J. Hamilton traced the availability of PDA models for libraries to NetLibrary in 1998.<sup>46</sup> Swinburne University of Technology claims to have been the first library to launch an e-book DDA; Tony Davies reported on the evolution of that institution’s e-book acquisitions, including changes to short-term loans (STL) and access to own (ATO).<sup>47</sup> Michael Levine-Clark was a relatively early adopter of DDA, leading implementations of print and e-book DDA programs at the University of Denver and documenting how DDA provided access to a broader range of materials, promoted usage of available titles, and allowed the library to center users with its collection budget.<sup>48</sup>

Several case studies detail planning, implementation, or modification of e-book DDA. Forrest Link, Yuji Tosaka, and Cathy Weng compared print book circulation

transactions, ILL requests, and in-house usage to offerings from e-book aggregators to plan for the implementation of an e-book DDA. They found the highest percentage of e-book equivalents in ILL requests and accordingly planned to implement an ILL-based e-book DDA.<sup>49</sup> Kay Downey and Wendolyn C. Vermeer separately wrote about technical services workflow considerations for the e-book DDA.<sup>50</sup> Downey described a 2012 pilot project in which Yankee Book Peddler (YBP) mediated the DDA and provided the library with discovery records matching the library's print approval plan and found that despite the significant investment of time in set-up the DDA acquisition fit well into existing workflows.<sup>51</sup> Vermeer similarly described a YBP DDA pilot project and reiterated the importance of flexible workflows to "adapt to pre-existing and unforeseen challenges" with an increasingly small staff.<sup>52</sup> Steven Carrico, Trey Shelton, and Roy Ziegler published a case study on implementing a shared PDA at Florida State University and the University of Florida, and documented their plans to expand it to the entire state of Florida.<sup>53</sup> A study out of Kent State University investigated the role of the library catalog in PDA, finding "full catalog interaction matters in PDA, with more than 70 percent of the purchased e-books being purchased after a trigger action linked with a catalog search and a click-through to the e-book from a full bibliographic record. In addition, the use of e-books was always slightly higher when catalog use was involved."<sup>54</sup> Marc Jaffy outlines how the Franklin University Library weeded its DDA pool as part of an e-book weeding project.<sup>55</sup>

Several case studies report early findings from a local DDA implementation.<sup>56</sup> Dana H. Longley reported on the Empire State College Online Library DDA as a means to provide e-books to distance learners and presents costs and usage data, as well as impacts on course development, budget, and ILL.<sup>57</sup> Mary Gilbertson, Elizabeth Chadbourn McKee, and Lutishoor Salisbury shared outcomes of a fifteen-month e-books PDA program at the University of Arkansas Libraries, comparing PDA titles to those selected at other institutions to assess quality, and evaluating the value of purchasing at first, second, or third use: "It may be more advantageous to purchase the books at third use, even though it may be a bit more costly."<sup>58</sup>

Kate-Riin Kont conducted several studies that investigated various aspects of DDA e-books. For example, Kont applied the time-driven activity-based costing (TDABC) methodology to analyze the cost of library activities related to e-books.<sup>59</sup> Kont later used TDABC to investigate the time and costs of acquiring and cataloging e-books relative to print books and found that activities related to e-book acquisition, cataloging, and processing use less staff time and finances.<sup>60</sup> Kont also reported findings from the first two years of an EBL DDA at the Tallinn University of Technology Library and discusses the importance of STL.<sup>61</sup> Kont returned to this theme to explore the financial and time costs of DDA purchases or STL, finding short-term loans to be the most cost-effective way to

provide access to e-books given the costs of staff time involved in acquisition activities and the purchase costs of e-books.<sup>62</sup> Kont noted, however, that “When the usage reaches a certain point, it becomes an indicator of continuing future usage and so it makes sense to purchase the eBook, as the library pays no further charges once an eBook is owned.”<sup>63</sup>

Some studies compared DDA programs to librarian selection. Kristin Rogers reviewed usage statistics for 3,716 patron-selected titles and 2,076 librarian-selected titles at the University of Mississippi Libraries, finding an average of .86 times more use for patron-selected titles.<sup>64</sup> A team from Sam Houston State University (SHSU) investigated how the selections of patrons and librarians differ in cost, subject areas, content level, and YBP select recommendation.<sup>65</sup> Edward A. Goedeken and Karen Lawson leveraged data from Iowa State University’s ebrary PDA, Academic Complete e-book subscription, and subject librarian selections to investigate patron versus librarian e-book selection.<sup>66</sup>

Other studies investigated DDA e-book programs relative to print collections. A team from Kent State University used data from a pilot YBP e-book DDA to consider that model relative to their print approval plan in terms of circulation, budget, costs, workflow, subjects, publishers, and publication dates.<sup>67</sup> The authors concluded that “DDA leads to much more active use of ebooks despite the shorter timeframe for ebooks to incur the uses for comparison.”<sup>68</sup> Rebecca Schroeder and Tom Wright cited declining circulation of print materials and low usage of large e-book packages at Brigham Young University as their rationale for pursuing e-book DDA.<sup>69</sup> Librarians at TAMU reported on a purchase-on-demand program, a subset of DDA, that covered both print and e-books. The authors used findings from the pilot program to update their approval plans and better align acquisitions with patron needs.<sup>70</sup> Kevin W. Walker and Michael A. Arthur leveraged Trueswell’s 80/20 Rule to consider the comparative value of e-book DDA against traditionally acquired print titles by subject matter and usage. They found that DDA e-books experience much higher levels of use and were aligned with subject coverage expected in the University of Alabama Libraries collections.<sup>71</sup>

As DDA has matured, studies have drawn on larger data sets. For example, Kay Downey and Yin Zhang compared DDA e-book programs across eight academic libraries finding that early removal of e-books from the DDA pool may adversely impact library users and better return on investment is achieved without STL.<sup>72</sup> Lindsey Lowry, Michael A. Arthur, and Donald L. Gilstrap leverage seven years of data from The University of Alabama’s e-book DDA program to convey the long-term effectiveness of the DDA-centered collection strategy as delivering efficiency and high return on investment.<sup>73</sup>

Other research presents best practices or tools that are intended for application in library settings. Scholars at Kent State University introduced a scenario analysis approach that is intended to help librarians address questions about their DDA e-book programs and facilitate their evaluation and selection of a DDA plan that will work best given their

needs.”<sup>74</sup> Zhehan Jiang, Sarah Rose Fitzgerald, and Kevin W. Walker conducted a statistical analysis called survival analysis to predict the time-to-trigger for DDA e-book purchases. The authors argue that this method provides insight into factors influencing DDA purchase patterns and “will help libraries optimize their DDA profile management and DDA budgets.”<sup>75</sup>

### ***Evidence-Based Acquisitions***

Like subscription packages, evidence-based acquisitions programs provide access to a large collection of e-books for a set period of time. The twist comes at the end of the period, when librarians select specific titles to perpetually license based on usage, cost, and other data. The benefits include access to a large body of e-books and data on engagement with the e-books. The challenges may include prohibitive pricing—both for the upfront costs of the program itself and for perpetual licenses for individual titles at the program’s conclusion—and a limit of desired titles, or saturation, especially when an EBA is continued multiple years. Relative to DDA, evidence-based e-book acquisitions models are newer and less robustly documented in the literature. The growth of LIS literature on EBA since 2017 suggests that many other librarians and publishers/vendors have come to better terms than those presented in the early 2010s.

Several authors provide case studies on EBA in academic libraries. Damla Yılmaz and Yurdagül Ünal detailed a Cambridge University Press EBA at Hacettepe University Libraries, reporting a cost-per-use of \$0.82 and an average book cost of \$180.<sup>76</sup> Clara Y. Tran and Jin Xiu Guo reported on Stony Brook University Libraries’ implementation of an EBA model in engineering and science and compared it to an existing science, technology, engineering, and math (STEM) subscription collection.<sup>77</sup> They found the EBA to be more cost-effective than individual title purchases, but rather than comparing the value of EBA and subscription collections, the author indicated the EBA was “a good supplement to the general STEM ebook collection.”<sup>78</sup> Mariella Pilgrim and Arlene Dolabaille discussed the implementation of a Wiley Usage Based Collection Management program at The University of the West Indies, St. Augustine Campus and highlighted the implications of continuing EBA for multiple years.<sup>79</sup>

Orbis Cascade Alliance was among the first consortia to publish on their experience entering into a consortium wide EBA.<sup>80</sup> The authors shared their experience managing records, enhancing discoverability, dealing with duplication, evaluating usage, and predicting costs for Wiley’s Usage Based Collection Management Model. They concluded that the pilot was a success because it “allowed us to devote 100% of funds to purchasing titles, and focus on a publisher whose content is consistently well used across member institutions, providing front- and back-list title access with no DRM.”<sup>81</sup>

Molly Strothmann and Karen Rupp-Serrano compared titles in an Elsevier evidence-based selection (EBS) package to existing approval plan parameters and hypothetical selections from relevant subject librarians.<sup>82</sup> Using usage data from the EBS, they determined how closely each selection matched patron’s selections and found that the simulated librarian selections more closely aligned with usage than the approval plan.<sup>83</sup> Although their study focuses on the alignment of subject librarian and approvals selection with the actual use by patrons, the authors compare the appeal of evidence-based acquisitions models relative to DDA by saying, “In exchange for that reduction in spending flexibility, they receive data to inform their purchases. Simultaneously, they are better able to incorporate professional judgment into their selections than a purely demand-driven acquisition model would allow.”<sup>84</sup>

Rebecca Schroeder and Rebecca Boughan document the role of EBA—alongside DDA, STL, subscription packages, purchased packages, and title-by-title purchases—in Brigham Young University’s comprehensive e-book strategy.<sup>85</sup> Their approach to shift expenditures away from approval plans provides access to a larger amount of content while maintaining the same annual expenditure, thus lowering cost-per-use. Specifically, their EBA with Wiley and Elsevier provide access to these publishers’ e-books for a single, negotiated cost and has an average cost-per-use of \$2.59 per title compared to \$1.23 for subscription e-books, \$6.52 for DDA e-books, and \$93.08 for approval e-books.<sup>86</sup>

Christopher Palazzolo, William Jacobs, and Matthew Jabaily recently reported preliminary findings from a study of EBA in academic libraries.<sup>87</sup> Noting that most of the published research is institution-specific, the presenters performed a review of the literature and surveyed librarians about their motivation, adoption, title selection criteria, renewal or cancellation decisions, and general comments with respect to EBA. They found that title selection at the end of the EBA period was driven by current year uses, followed by course adoption, access elsewhere, use over time, collection alignment, use distribution in the year, cost-per-use, subject librarian [input], format, and print duplication, whereas decisions to renew or cancel EBA were driven primarily by overall cost-per-use, deposit increase, proportion of titles used, difficulty in management, and changes in available content.<sup>88</sup> The presenters intend to share more detailed findings in a peer-reviewed article; a publication outlining the state of the art for library-based EBA across the United States would make a useful contribution to the literature.

### ***Consortial Acquisitions***

As with library resources in a variety of formats, e-books may be acquired consortially, introducing a host of additional considerations in their negotiation, management, and evaluation. The consortial acquisition of e-books—which spans a variety of acquisitions

models—has been much studied in the literature. Elements studied include consortial negotiation of e-book packages, consortial management and access of e-books acquired under different acquisitions models, and usage of consortially-acquired versus locally acquired e-books. Robert Slater, for example, compared locally versus consortially-purchased e-books and found that locally selected collections received greater usage: “92.39% of the locally selected Safari e-books were accessed at least once and 52.17% were accessed five or more times with an estimated average of 3.15 uses per book. Alternately, only 15.62% of the consortially selected NetLibrary e-books were accessed.”<sup>89</sup>

Matthew J. Jabaily and Rhonda Glazier investigated the quality of titles purchased via the Colorado Alliance of Research Libraries (CARL) DDA program and found that most available and selected titles were appropriate for academic libraries, with popular and lower-level academic titles selected at a proportionally higher rate than other titles.<sup>90</sup> They discuss the implications of member libraries using the CARL DDA program to supplement their collections, noting that their evaluative methods would differ if the consortial DDA demanded a larger share of the acquisition budget or became a primary method of acquisition, “it would be necessary to be more critical of the DDA program’s performance and a study focused on title-by-title assessment, not broad categorization, would be necessary.”<sup>91</sup>

Jeanne Richardson reports on an Ingram PDA program that made a core collection of e-books available via the Arizona Universities Library Consortium.<sup>92</sup> The program was deemed a success in that users: “select content that meets their interests and needs, and these resources are available immediately. They have access to the same core content regardless of their university affiliation or whether they are enrolled in, or instruct for, campus-based or online programs. [...] Annual library expenditures are lower for patron-driven materials allowing libraries to redirect funds to other resources, and to repurpose library spaces.”<sup>93</sup>

Two studies from the California State University Library Consortium detail e-book acquisition and strategy. The first reported on a year-long pilot of NetLibrary by leveraging usage statistics and user surveys: “Based on the findings of the E-book Pilot Project, the EAR Committee has recommended that the CSU continue to build a shared collection of e-books. Included with this recommendation is a draft cooperative collection development plan, that suggests the establishment of a system-wide e-book selection team, and limiting e-book collection development to support of specific academic programs that are offered by at least two-thirds of the 23 CSU campuses.”<sup>94</sup> The second study reported on Coutts and EBL PDA programs funded by the CSU Chancellor’s Office.<sup>95</sup> When the pilots came to an end, the e-book committee recommended putting consortial e-book PDA on hold until subscription e-book packages were evaluated; with several CSU campuses

already subscribing to e-book packages, the committee believed that CSU could not adequately assess e-book models without this data.<sup>96</sup>

Amy Fry has conducted research that explores e-book acquisition method and consortial versus local usage. Among other findings, Fry documented rates of usage between 8 percent (consortially purchased publisher package) and 32 percent (consortially purchased DDA).<sup>97</sup> In a study of ten years of OhioLINK e-book usage data, Fry concluded that, “while rate of use of ebook collections (especially large publisher packages) can be disappointingly low at individual institutions, in the OhioLINK consortium almost 100 percent of titles are used by the time they have been available for only a few years, suggesting that consortial ebook agreements can provide the best return on investment in terms of use.”<sup>98</sup>

### ***Disciplinary Considerations***

The availability, pricing, and acquisition models of content have varied across academic domains. Several studies have explored the disciplinary implications alongside e-book acquisition models to highlight challenges in providing robust digital collections to specific campus populations.

Librarians at the University of Florida assessed cost and usage of e-books acquired via firm order, PDA, and publisher packages to consider how they vary among disciplines.<sup>99</sup> In the humanities and social sciences, e-books purchased via firm order or publisher packages had high levels of nonuse while PDA titles had strong cost-per-use; STEM e-books saw strong usage and low average cost-per-title and cost-per-use, recommending the purchase of large e-book packages; medical e-books were well used but relied on windfall budgets, recommending large packages over firm orders.<sup>100</sup>

Jeffrey T. Husted and Leslie J. Czechowski reported on their experience attempting to build a digital reference collection for a dispersed user population of health sciences students.<sup>101</sup> Using standard collection development lists, they determined the availability of e-books for library licensing and found a low availability, rendering their goal of creating an e-reference collection moot.<sup>102</sup> Sarah Pomerancz similarly found that less than one-third of print books acquired in nursing and business collections had e-book equivalents available for library licensing from aggregators.<sup>103</sup> Unlike the Husted and Czechowski study, Pomerancz did not investigate reference sources, but looked more broadly at the alignment of the library’s collecting profile with the availability of e-book licenses in aggregators’ holdings.

Janet Sinder and Hillary Veeder considered DDA as a supplemental acquisitions model in their respective areas of law and architecture.<sup>104</sup> Sinder considered the effects of DDA on law library collections and collection development practices, finding benefits in

increased user choice, decreased reliance on ILL, and increased usage, but noting concerns about the availability of some titles as e-books, a likely decrease in the number of titles held by libraries, and the permanence of e-book “ownership.”<sup>105</sup> Veeder noted that monitoring architecture e-books in the DDA pool helps “inform decisions for firm ordering in print and electronic formats and provides insight into the breadth of topical coverage.”<sup>106</sup>

Chris Armstrong and Ray Lonsdale conducted focus groups and interviews to investigate the types of e-books required across disciplines, collection management issues, and licensing and pricing of e-books.<sup>107</sup> They reported, “all disciplines indicate that undergraduate textbooks together with reference books would constitute the primary purchasing areas.”<sup>108</sup> Library licensing of e-books that serve as textbooks is indeed a growing area of library collection strategy.

### ***Textbook Affordability***

Library acquisition of e-books to support campus textbook affordability initiatives has accelerated in recent years.<sup>109</sup> Early studies explored how librarians could leverage e-book acquisitions to re-envision the work of course reserves and provide access to assigned materials. Writing of a pilot conducted at the University of Minnesota in 2015, Emily C. Riha and Danika LeMay described a cross-departmental collaboration that made use of PDA e-book acquisitions.<sup>110</sup> The authors tracked usage and potential cost savings and distributed a survey to students who had benefited from the library provided texts; they established the need to purchase licenses that support multiple users and to promote the availability of these texts.<sup>111</sup>

Studies on e-book based textbook affordability initiatives commonly calculate the potential savings to students as in the case of Riha and LeMay. Librarians at Illinois State University considered other methods by which to assess the value of course-assigned e-books.<sup>112</sup> In addition to calculating potential student savings, the authors evaluated the value of these materials by considering usage of assigned materials compared to those that are not assigned, a quality analysis using Resources for College Libraries’ Outstanding Academic Titles designation, and the frequency with which the same editions of a text are assigned over multiple semesters. E-books purchased for the textbook affordability initiative showed high usage, quality, and value, even when pitted, for example, against e-books purchased via DDA. Mitchell Scott found that the high return on investment of library e-book based textbook affordability programs, even compared to DDA and EBA, suggests that these be retained over other acquisitions methods when budgets tighten.<sup>113</sup>

Given the complexities of workflows surrounding acquiring and providing access to library-licensed e-books in textbook affordability initiatives, librarians have documented their work to automate elements of these processes and enhance their delivery. For

example, Mitchell Scott documented the use of Python, the Pymarc library in Python, and MARC records to create an automated identification process to accurately match bookstore lists to library e-book holdings.<sup>114</sup> Some librarians have created delivery platforms and databases for library-licensed e-books. Xiyang Mi and Bonita M. Pollock discussed *Ebooks for the Classroom+* a database of library-provided e-books in support of textbook affordability at the University of South Florida (USF).<sup>115</sup> USF Libraries include content from a variety of publishers and providers and content relying on various acquisitions models, including a ProQuest Ebook Central PDA and six EBA programs in this database.<sup>116</sup>

Aware of librarians leveraging e-book acquisitions processes in support of textbook affordability at their various institutions, Mitchell Scott and Rachel E. Scott conducted a survey and interviews with academic librarians involved in textbook affordability initiatives throughout the United States. In this cross-institutional study, Scott and Scott documented the e-book acquisitions models, publishers and providers, licenses, budgets, personnel time, timelines, and other considerations that go into library provided e-book textbook affordability initiatives, identifying license options, subscription status, item cost, item adoption history, item status (required, supplemental, or recommended), course enrollment, course type, faculty interest, subject librarian input, and platform, discovery, and access as key when acquiring e-books assigned in courses.<sup>117</sup>

### **COVID-19 Responses**

The global COVID-19 pandemic led to unprecedented levels of remote learning and work. Although e-book acquisitions models were not necessarily front of mind as individuals and institutions scrambled to stay healthy, distanced, and, quite frequently, at home, e-books were among the few library-provided resources and services that consistently saw stable or increased use during this period.<sup>118</sup>

LIS researchers could not cleanly study the impact of the pandemic on library acquisition of e-books or their various models because of its unplanned nature and the highly variable and frequently changing impacts. Nonetheless, several studies were timed in a way that allowed the authors to consider the impact of COVID-19 on e-book acquisitions, usage, and format preferences. Librarians at SHSU, for example, conducted a ten-year follow up on their study of e-books.<sup>119</sup> They reported an increase—from 38 percent in 2011 to 64.4 percent in 2021—of respondents who reported previous use of a library-provided e-book for class or self-directed study in their discipline.<sup>120</sup> The authors were surprised to find that 71.4 percent of survey respondents indicated their use of e-books stayed about the same during the pandemic, but few reported using e-books less

and some populations—32 percent of graduate students—indicated their use of e-books somewhat or greatly increased during the pandemic.<sup>121</sup>

Alan Brine and Andrew Knight reported on the accelerated shift to digital library acquisitions in response to the global pandemic.<sup>122</sup> They documented the temporary provision of gratis access to licensed content in spring and summer 2020, which created a dependency that librarians had to quickly source after the content was again paywalled.<sup>123</sup> The authors explain the approaches of De Montfort University and Imperial College libraries, documenting increased use of e-books to support remote teaching and learning, and the importance of perpetual licenses relative to subscription content in this arena.<sup>124</sup> Julie A. Murphy and Anne Shelley similarly surveyed the textbook landscape in light of the pandemic to consider the impact on library support for textbook affordability and urge a more proactive approach: “Sometimes major upheavals provide an opportunity for change that would otherwise have been impossible.”<sup>125</sup>

Some studies have considered management of specific e-book acquisitions programs in response to COVID-19. Andrei Mihailovic, for example, surveyed technical services librarians about changes to their approval plans in the wake of COVID-19 and reported an increase in the use of e-preferred plans.<sup>126</sup> Kelly A. McCusker and Molly W. Rainard reported halting print approval plan shipments in April 2020 and moving several subjects to e-preferred.<sup>127</sup> Keri Prelitz considered the long-standing Ebook Central DDA program at Pollak Library at CSU, Fullerton in the wake of a seventeen-month campus closure and increased expenditures.<sup>128</sup> The author reviewed changes in e-book costs and eligibility, preferred access model, automatic upgrades, and STL, concluding: “in order for DDA to be most beneficial, it cannot be the hands-off, time-saving acquisition method as it was initially introduced, and that analysis is needed routinely not ‘just in time.’”

## **Discussion**

Studies of DDA are overrepresented in the literature; this e-book acquisition model is used across academic libraries of all sizes and both within and outside the United States. There was a pattern of libraries exploring the advantages and disadvantages of DDA to one or more acquisitions models. Familiarity with these studies not only provides librarians with useful information on implementing and managing DDA programs but also highlights areas that require further study. The literature presented herein also confirms that librarians frequently use a variety of e-book acquisitions models simultaneously. That they do so facilitates comparison of various models, for example, in the work of Strothmann and Rupp-Serrano and Tran and Guo.<sup>129</sup> The literature suggests that authors find the use of various models complimentary and strategic, as noted in Schroeder and Boughan’s work

to provide access to more content with the same overall expenditure by leveraging multiple e-book acquisitions models simultaneously.<sup>130</sup>

The need to employ a variety of e-book acquisitions models not only relates to strategy but is also due to the lack of availability of some content in specific acquisition models. Accordingly, librarians may be compelled to adopt an acquisitions model to provide desired content to their campus. As publishers have made e-books more frequently and more quickly available, concerns about the limited availability of titles in e-book format now refer more specifically to limited options for library licensing of content. Textbook publishers, for example, prefer to sell direct to users.<sup>131</sup> The employment of various e-book acquisitions models is also reflective of consortial e-book programs that may or may not allow for local acquisitions input. A large number of publications reported consortial purchasing of e-books, demonstrating that librarians continue to explore ways to collaborate with peer institutions to reduce costs and take advantage of shared resources.

Given the variety of acquisitions models and prevalence of aggregators, it is possible to pay for the same title twice. Several studies raised the concern of duplication—this phenomenon is most evident when a consortium provides e-book content. It may also occur when an institution has multiple acquisition models active and does not monitor them closely or needs to purchase a duplicate to realize benefits not available via the other. It is not uncommon, for example, that an institution acquires a perpetual license of an e-book available via subscription to ensure its long-term availability. Nevertheless, the cost-per-use and overall value are compromised when the library pays for content more than once.

Monographic acquisitions have become more centralized, with more content acquired via packages, DDA, EBA, by consortia, or otherwise than by liaison selected firm order. As Dahl indicated, acquisitions models that question “the notion of expert selection” have been somewhat fraught.<sup>132</sup> It is worth reiterating the importance of personnel resources—both among bibliographers and technical services staff—alongside collections budgets. The literature suggests that institutions with more personnel and larger budgets have more opportunities to experiment with acquisitions models and optimize processes to reduce cost-per-use. Complicated agreements and models require significant personnel time, a resource that some academic libraries do not have.

Several studies underlined the tension between access and ownership, with findings indicating that perpetually licensed e-books were preferred.<sup>133</sup> This preference relates to several factors. Perpetually licensed e-books are more often locally selected or triggered than subscription collections, which are most often curated by vendors or publishers. Perpetually licensed e-books are more commonly, but not exclusively, DRM-free, where titles in subscription collections are subject to a variety of access and use

limitations. A preference for perpetual access is apparent in librarians' approach to demand driven models; EBA was publishers' response to librarians' desire for both broad and perpetual access, and the move away from STL and ATO in DDA models is also driven, at least in part, by the desire to retain perpetual access. There are also, however, valid concerns about what ownership means in the context of e-books; e-books may be licensed perpetually, but "perpetual" may be defined in ways that limit librarians' ability to build stable collections with the assurance of ownership.

Another major tension in the literature is balancing risk and reward. Some e-book acquisition models provide much needed stability, some allow libraries to quickly expend one-time funds, some provide access to large amounts of content to support new curriculum or areas of institutional growth. Understanding not only the content, costs, and usage terms, but the opportunities inherent in a model is imperative to assessing an e-book acquisitions model. Access to a large pool of titles can be both a risk—in the case of an approval plan or DDA—and a reward—in the case of an EBA or subscription or purchased collection. The literature does not provide a clear consensus on STL, suggesting ongoing and local assessment of risk versus reward. The lack of consensus may also suggest that DDA has transitioned away from STL or ATO and become an avenue for perpetual purchases.

Many of the articles present case studies. In the LIS literature such work has sometimes been dismissed as "how I done it good."<sup>134</sup> Studies on the local implementation, use, costs, and various considerations of e-book acquisition models, however, can "draw rigor from process, invention, relevance, and extensibility rather than replicability, generalizability, and predictability."<sup>135</sup> In other words, by systematically approaching their processes, clearly documenting their methods, and rethinking the limits of traditional e-book acquisitions, these librarians are conducting research through design.

## **Conclusion**

By presenting LIS scholarship on e-book acquisitions and synthesizing key models, strategies, limitations, and findings, the authors document the ever-evolving landscape at this moment in time and provide inspiration from the literature to encourage librarians to continue to evaluate their practices, explore new models, and optimize their collections to best serve their communities. The authors have noted the challenges and limitations of their approach but nonetheless they provide an overview of major e-book acquisitions models and strategies librarians are using to meet the needs of their institutions' evolving research and learning enterprises with rich context from the literature.

Although e-book acquisition strategy is highly dynamic and local, the authors noted trends in the e-book acquisition landscape that have implications for the future. The move

away from speculative collection development towards point of need acquisitions has advanced significantly over the past two decades, and the embrace of DDA and EBA aligns with movements throughout higher education to leverage data for decision making. Basing collections decisions primarily on (cost-per) usage data, a diminished role for expertise in building collections, and opportunities for corporations such as Clarivate to curate well-used materials into subscription collections on behalf of librarians are not entirely unrelated. Library users have provided a considerable amount of usage and engagement data to Clarivate and this evidence-based curation—rather than librarians’ explicit requests for perpetual access, title-level selection, and DRM-free e-books—is the service Clarivate is now offering libraries, alongside artificial intelligence tools for which there is also debatable interest.<sup>136</sup> Further, given increased awareness of restrictions on ownership, usage, and access, the degree to which e-books can be understood as part of a library’s permanent collections has been diminished. A review of the literature suggests that e-book acquisition has been reactive rather than proactive for many academic libraries: with significant pressure to serve distance students, support textbook affordability, and promote accessibility, among other initiatives, librarians have had to source e-books for their communities while also developing other new and traditional areas of their collections, often on a flat or decreased budget. With continued disruption in the e-books marketplace and fewer personnel in libraries both likely, many librarians will continue to approach this work less proactively and strategically—taking what vendors offer rather than operating with experience and expertise—than is optimal.

Future research might explore the outcomes of the studies considered in this review, for example, by conducting a citation analysis to consider the relationship between acquisition model and citation rate. This kind of bibliometric analysis may provide additional insight into whether librarians see one or more purchasing models as more successful than others. Given the prevalence of articles on DDA, another idea for additional research might be a study of subject liaisons’ perceptions of DDA and its relationship to title-by-title selection, or collection development responsibilities more broadly, as it relates to their subject expertise. Finally, the literature would benefit from further study of e-book acquisitions in large consortial environments to investigate how terms and pricing at scale impact their viability.

This paper provides rich context for understanding the current practices, models, and challenges of e-book acquisition in academic libraries. The literature cannot prescribe a course of action for any particular library or consortia with respect to their e-book strategy; the needs of each are too particular, offerings are ever changing, each consortial context and role is unique, and acquisitions histories are fixed. By exploring and contributing to the literature, however, library and information science professionals equip

the profession to understand the various considerations in a complex and evolving e-book landscape and prioritize e-book strategies based on the needs of their communities.

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