

friendly guide to **COUNTER** journal reports

COUNTER

A guide for librarians

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contents

| | |
|--|----------|
| Introduction | 2 |
| Journal Report 1 (JR1) | 3 |
| Journal Report 1a (JR1a) and Journal Report 5 (JR5) | 4 |
| Journal Report 1 GOA (JR1GOA) | 4 |
| Journal Report 4 (JR4), Journal Report 3 (JR3) and Journal Report 3 Mobile (JR3M) | 5 |
| Journal Report 2 | 5 |
| Glossary of terms | 6 |

COUNTER stands for Counting Online Usage of NeTworked Electronic Resources. Our website is at <http://www.projectcounter.org/>

COUNTER was one of the first, if not the first, standards organization established for the modern information environment. It has succeeded in bringing together a collaboration of publishers and librarians to develop and maintain the standard for counting the use of electronic resources. It has also ensured that most major publishers and vendors are compliant by providing their library customers around the world with COUNTER usage statistics.

COUNTER publishes the Code of Practice, which is the standard for counting the use of electronic resources. It also maintains and publishes the register of COUNTER-compliant vendors and publishers. To qualify for inclusion in the register, publishers must pass an annual independent audit of their COUNTER usage report. This process ensures that vendors and publishers can provide their library customers with consistent, credible and compatible usage data.

This guide explains COUNTER usage reports for journals and how librarians can use the data to inform decision-making.

Libraries spend considerable amounts of money on purchasing different types of online content to support their users' needs. User activity, in relation to this content, needs to be continually assessed to ensure that this money is spent as productively as possible. The COUNTER Code of Practice Release 4 helps librarians to demonstrate the value of electronic resources by facilitating the recording and reporting of online resource usage statistics in a standardized, credible and compatible way.

COUNTER provides libraries with a set of journal usage reports that capture different aspects of user activity. This guide presents a brief overview of each type of COUNTER journal report, and demonstrates practical ways for librarians to use the information in ways that are relevant to their organization

Journal Report 1 (JR1)

Journal Report 1 (JR1) highlights the total number of successful full-text article requests by month and by journal. Librarians commonly use JR1 metrics to analyse user activity across online journals to which their institution provides access. The statistics may relate to individual journal subscriptions or to full-text databases that bundle together a large number of titles. As JR1 supplies data for the total number of article downloads from individual titles, across a selected time period, libraries can gain valuable insight into which online journals are popular/not so popular with their patrons. Librarians may find it helpful to group journals into basic categories of use (e.g. high, medium, low) to make their analysis easier to understand. The limits for these usage bands would be set by library staff, and may well differ between institutions.

For example, a library may choose to classify as 'high use' a title that has received more than 100 downloads in any given period; 'medium use' may mean total downloads between 51 and 100, and so on. The usage ranges can be reviewed regularly to check if the library's journal provision is providing adequate support

for teachers and students within the organization. Identifying 'low use' titles may prompt librarians to investigate how easy it is to access that particular content, a need for extra resource promotion or the possibility of cancellation.

| | | |
|---|-------------------------------|-------------------------|
| 1 | | |
| 2 | | |
| 3 | USAGE GROUPS | NUMBER OF TITLES |
| 4 | High-use > 101+ downloads | 15 |
| 5 | Medium-use > 51-100 downloads | 21 |
| 6 | Low-use > 1-50 downloads | 5 |
| 7 | | |
| 8 | | |

Producing usage groups to provide context to online journals analysis.

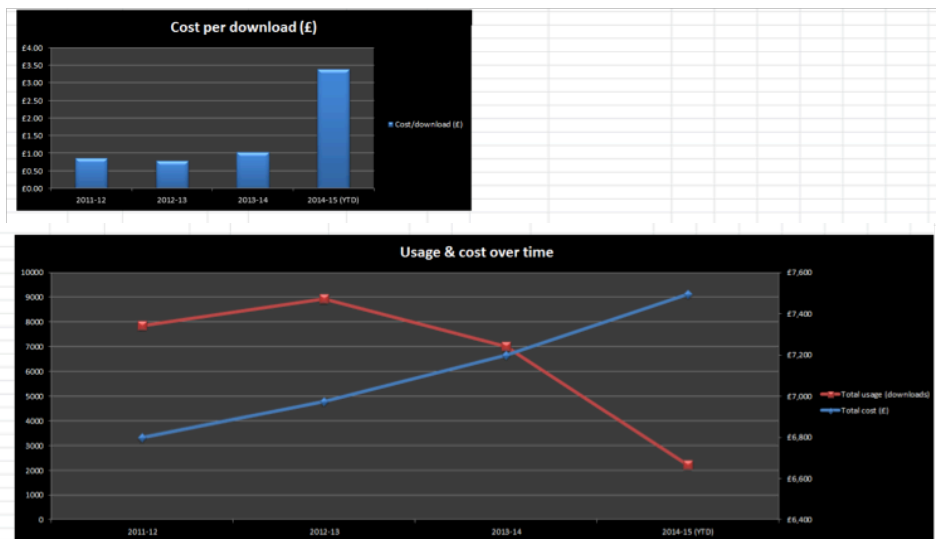
Adding resource costs to COUNTER metrics can help libraries to evaluate their online journal purchases more effectively. Cost per use can be determined by taking the total cost of a resource and dividing it by the total resource usage (i.e. number of downloads) for a selected time period. This cost can be a key component when librarians are assessing online journals usage, and can assist with discussions about the value of purchased online resources.

There may be times when it is useful for librarians to collate resource usage and costs from several years of subscription. In these circumstances it is important to include nil-use journal titles, because they will make a difference to the final cost-per-use calculation. For example:

| | 2013 | 2014 | 2015 |
|---------------------|------|-------|-------|
| Subscription cost | £100 | £103 | £106 |
| Title A use | 50 | 50 | 50 |
| Title B use | 20 | 0 | 0 |
| Title C use | 50 | 50 | 50 |
| Total use 1 | 120 | 100 | 100 |
| Cost per download . | 833 | £1.03 | £1.06 |

However, only primary journal publishers and vendors provide usage statistics for nil-use titles. Full-text aggregators (ProQuest and EBSCO, for example) do not, because the configuration of their platforms makes it impossible for them to run nil-use reports.

Representing COUNTER data outputs visually, in the form of a graph or a chart, can make it easier to spot and interpret resource usage and cost trends over time. Ultimately, this will mean that librarians are better informed when it comes to making purchase or renewal decisions.



An example of representing cost/usage data visually by using graphs and charts.

Journal Report 1a (JR1a) and Journal Report 5 (JR5)

Several COUNTER journal reports can provide more granular journal metrics, if organizations want to ask specific questions of user activity data from their purchased content. **Journal Report 1a (JR1a)** provides the **total number of successful full-text article requests from an archive by month and journal**. Publishers tend to sell journal coverage across different purchase models, providing separate subscriptions to 'current' and 'archive' content. Institutions that acquire access to an archive via a journal backfile, and are not interested in determining usage derived from more current content, can view the relevant archive usage by exporting JR1a data. Libraries that wish to examine usage data for a specific year, or years, of publication for a journal title can use the **Journal Report 5 (JR5)**, which details **total number of successful full-text article requests by year of publication (YOP) and journal**.

Journal Report 1 GOA (JR1GOA)

For libraries making financial investments in open access article processing charges (APCs), COUNTER's **Journal Report 1 GOA (JR1GOA)** may be of interest by calling attention to well-used open access publications. This report provides the **total number of successful Gold Open Access full-text article requests by month and journal**. For libraries that are attempting to calculate cost-per-use value for journals via COUNTER JR1, subtracting the JR1GOA metrics from standard JR1 stats may provide a more accurate cost per use. Open access titles would not be included in the final report, and would therefore not skew usage and cost outputs.

Journal Report 4 (JR4), Journal Report 3 (JR3) and Journal Report 3 Mobile (JR3M)

Some of the optional COUNTER journal reports highlight different ways in which users may engage with electronic content across publication formats hosted on publisher platforms. **Journal Report 4 (JR4)** outlines **total number of searches run by month and collection**, showing how many library users are searching for articles at a journal-collection or service level: this mirrors the COUNTER Database Report 1. **Journal Report 3 (JR3)** details the **total number of successful item requests by month, journal and page type**, while **Journal Report 3 Mobile (JR3M)** gives the same information, but for usage on a mobile device.

Libraries may be interested in exploring the sections of an online publication that are well used, especially non-textual aspects such as video, audio and images. As library users connect to online content via a multitude of different smartphones and tablets, librarians may choose to use JR3M statistics to investigate users' access habits and to create services and strategies that increase support for the use of new devices and technology.

Journal Report 2 (JR2)

All but one of the COUNTER journal reports provide details of usage for journal content that libraries either purchase perpetually, lease for a given subscription period or connect to via an open access pathway. Journal Report 2 concentrates on a different context – access denied to full-text articles by month, journal and category. The report reveals unsubscribed or inaccessible journals that users are trying to connect to through the library. These stats are often referred to as content 'turnaways' that are recorded on a vendor platform.

| Journal | Access Denied Category | Reporting Period Total | Jan-15 | Feb-15 | Mar-15 | Apr-15 | May-15 |
|-------------------------------|--|------------------------|-------------|-------------|-------------|-------------|-------------|
| Total for all journals | | 33740 | 2119 | 2352 | 3219 | 1810 | 1148 |
| Journal title V | Access denied: Content item not licensed | 997 | 66 | 120 | 125 | 67 | 28 |
| Journal title S | Access denied: Content item not licensed | 783 | 73 | 82 | 59 | 37 | 17 |
| Journal title A | Access denied: Content item not licensed | 688 | 30 | 45 | 62 | 40 | 24 |
| Journal title H | Access denied: Content item not licensed | 572 | 22 | 51 | 53 | 48 | 29 |
| Journal title F | Access denied: Content item not licensed | 438 | 16 | 59 | 59 | 42 | 32 |
| Journal title C | Access denied: Content item not licensed | 329 | 26 | 20 | 45 | 22 | 8 |
| Journal title W | Access denied: Content item not licensed | 310 | 44 | 41 | 5 | 5 | 2 |
| Journal title O | Access denied: Content item not licensed | 299 | 1 | 16 | 29 | 7 | 45 |
| Journal title K | Access denied: Content item not licensed | 298 | 15 | 11 | 12 | 5 | 18 |

Sorting journals with the highest turnaway figures using JR2 stats.

JR2 stats reveal an unmet demand for libraries to consider, as users are clicking on content that they cannot retrieve. This type of report may be helpful for librarians who are considering cancelling low-use journal titles, or making a budget case for new resources. JR2 provides proof of user activity across alternative, and potentially relevant, journal content, which may be a more appropriate financial investment for the organization.

Archive Non-current collections of journals, books, articles or other publications that are preserved because of their continuing value and are frequently made available by publishers as separate acquisitions.

Article processing charge (APC) A fee paid to the publisher to make an article free at point of access. While Open Access principles promote free availability of research and scholarly output, research papers are not free to produce. Under the APC system, the cost of publication is moved from the reader (via subscriptions and pay-walls) to the author. Note: if your funding body is paying the APC, it normally requires the article to have a CC-BY (Creative Commons Attribution licence).

Full-text article The complete text, including all references, figures and tables, of an article, plus links to any supplementary material published with it.

Gold Open Access Access to an article, immediately upon publication and at no charge to the user. To cover the costs of gold OA, publishers normally charge a fee to the author or their institution, known as the Article Processing Charge (APC).

Journal A serial that is a branded and continually growing collection of original articles within a particular discipline.

Search (regular) A user-driven intellectual query, typically equated to submitting the search form of the online service to the server.

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About the author



Mitchell Dunkley works as a Principal Information Assistant for De Montfort University (DMU) Library & Learning Services in Leicester. He is part of the library's Content Delivery Team, administering all things online, including the library's electronic resources portfolio.

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