



COUNTER

Release 5.1

The Friendly Guide

Introducing COUNTER Metrics

This is part of a suite of Friendly Guides demystifying Release 5.1 of the COUNTER Code of Practice

The complete series is:

- Introducing COUNTER Reports
- Introducing COUNTER Metrics
- COUNTER Attributes, Elements, and Other (Slightly) Techy Things
- COUNTER and Open Access
- Becoming COUNTER Compliant
- COUNTER for Consortia
- Changes in Release 5.1

Note: for ease of reading we have used plain English in all the Guides. For technical reasons, the Code of Practice itself uses underscores to link words – thus Data Type is actually Data_Type, and Total Item Investigations is Total_Item_Investigations.

What you'll find in this Guide

What are the COUNTER Metrics?	3
Usage metrics	3
A usage metrics scenario.....	4
Search metrics.....	5
A search metrics scenario	5
Access denials.....	6
Which metrics should I use?	6
Metrics for calculating cost per download.....	6
Understanding the value of databases.....	7
Acquisition decisions	7

What are the COUNTER Metrics?

There are three flavours of metrics in R5.1: usage metrics, search metrics, and access denials. We're often asked about the differences between metrics, and one analogy that can be helpful is this: a publisher platform (website) is like a popular club. Search metrics represent the door count, usage metrics are people buying drinks at the bar, and access denials are the people turned away by the door staff for not meeting dress code.

Usage metrics

Usage metrics, unsurprisingly, reflect usage of content. They have been designed to allow comparison of usage patterns across different publisher platforms no matter what type of content is delivered or what user experience designs have been put in place.

Investigations and Requests: distinguishing between use cases

Every interaction with a piece of content on a platform is an Investigation, but only some interactions are also Requests.

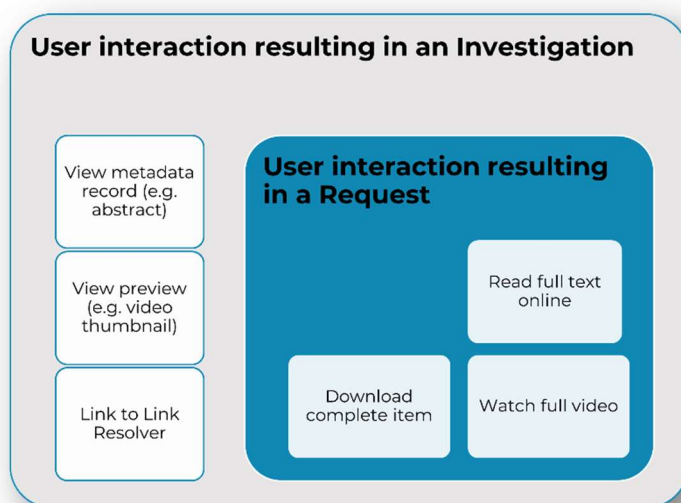


Figure 1. Requests are a subset of Investigations.

same examples as earlier, viewing or downloading a book chapter or watching a video would be Requests.

An Investigation might be an interaction with metadata (e.g. a book blurb or a video thumbnail), or use of a link such as one to inter-library loan.

An Investigation is also counted when a user interacts with the full record, but that full-record activity is *also* a Request.

This means Requests are a subset of Investigations that are tracked *only* when a user interacts with the full record for a piece of content. Using the

Total and Unique: deduplicating for accuracy

Investigations and Requests are reported in two ways: as Total counts and then as deduplicated Unique counts. Unique usage metrics mean that usage patterns are comparable across publisher platforms, no matter how the user interfaces are configured.

Item and Title: books are a special case

While our usage metrics are primarily associated with individual pieces of content (Items), books are treated as a special case: for books, unique Investigations and Requests can be rolled up to the level of the book.

That all means we have six usage metrics:

- Total Item Investigations and Total Item Requests apply at the level of the item and count every interaction.
- Unique Item Investigations and Unique Item Requests also apply at the level of the item, but roll up the total counts to only show one interaction per user session.
- Unique Title Investigations and Unique Title Requests condense the unique counts even further, to show just one interaction per user session per book.

A usage metrics scenario

Let's assume that a publisher platform offers journals, books (downloadable as both whole books and chapter-by-chapter) and multimedia. During a single visit, one user reads a journal article's abstract and then downloads the PDF; visits a book blurb and then downloads the whole 17-chapter book; and watches a video. That would result in the following usage counts:

	Journal	Book	Video
Total Item Investigations	2	18	1
Unique Item Investigations	1	18	1
Total Item Requests	1	17	1
Unique Item Requests	1	17	1
Unique Title Investigations		1	
Unique Title Requests		1	

Search metrics

There are four types of search metric in R5.1.

Searches Platform appears in the Platform Report, and it reports on user-initiated searches at the level of the platform (i.e. only one search is counted even if the platform includes multiple databases).

Searches Regular and Searches Automated are often confused. They both report on user-initiated searches on a per-database level and appear in the Database Report, but:

- **Searches Regular** applies where the user can select a specific database from a multi-database publisher platform, or where there's only one database on the platform.
- **Searches Automated** applies on multi-database platforms where users cannot choose which databases to search.

The fourth search metric is **Searches Federated**, which reports on searches conducted remotely by a search engine outside of the publisher platform. It only applies on a per-database level and appears in the Database Report.

A search metrics scenario

In this case, our publisher platform offers three databases. During a single visit, one user conducts three searches across the whole platform and then one search just on database 3, resulting in the following usage counts:

	Platform A	Database 1	Database 2	Database 3
Searches Platform*	4			
Searches Regular		3	3	4
Searches Automated				
Searches Federated				

**appears only in the Platform Report*

The same user then visits a different publisher platform with two other databases, and conducts five more searches. This platform does not permit the user to restrict their search, resulting in the following usage counts:

	Platform B	Database 4	Database 5
Searches Platform*	5		
Searches Regular			
Searches Automated		5	5
Searches Federated			

**appears only in the Platform Report*

Access denials

Access denials are sometimes known as turnaways, and we have two varieties in R5.1. **No License** access denials are counted where a user cannot access something because their institution does not have a license to the content, while **Limit Exceeded** access denials are tracked where a user cannot access something because their institution's cap on the number of simultaneous users has been exceeded.

One common pattern is for subscription journals, where users can read the freely available metadata (title, authors, abstract) but are then denied access to the full article. In those cases the usage would be counted as both a No License access denial and an Investigation.

Which metrics should I use?

Metrics for calculating cost per download

We always recommend using Unique Item Requests for calculating cost per download (CPD).

If you are calculating CPD for subscription content, divide your annual spend by the Unique Item Requests for that year.

If you are calculating CPD for a book you purchased, divide the purchase price by the Unique Item Requests since the purchase date.

If you are calculating CPD for open access materials, you'll want to make sure the report is a Global Item Report – there's more information about that in the *Friendly Guide to COUNTER and Open Access*.

Understanding the value of databases

Many librarians use a combination of metrics to gain a clearer understanding of the value of their database holdings. Searches Platform is great for highlighting the total traffic to a platform (remember that door count?), while Total Item Investigations offers an insight into how useful the search results might be.

Acquisition decisions

Access denials can be valuable in acquisition decisions. High No License counts might suggest that users from an institution need resources that aren't within their holdings. In contrast, being able to demonstrate an absence of denials could help librarians push back against acquisitions that might not be used frequently.

Find out more

There is a lot more information in the full Code of Practice (<https://cop5.projectcounter.org/en/5.1>) and of course in the COUNTER Media Library (medialibrary.projectcounter.org).

If you have questions that haven't been answered elsewhere, please don't hesitate to email our Project Director:
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