

From COUNTER R5 to R5.1 for Ebooks:

*Cross-platform comparability of usage metrics and content delivery.
A COUNTER Registry-based analysis*

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Agenda

1. **COUNTER R5 to R5.1: Key changes**
2. **Ebook platforms in *COUNTER Registry***
3. **TR and IR: Two levels of granularity**
4. **Metadata at title level: Chapter-level identifiers**
5. **Chapter-level identifiers and content delivery**
6. **Key findings and discussions.**

COUNTER R5 to R5.1 · Key changes

1 Unit of analysis

The chapter (Book_Segment) is the unit of analysis for ebooks at item-level.

R5: 1 downloaded book = 1

Unique_Item_Request

R5.1: 1 book with 10 chapters = 10

Unique_Item_Requests

2 Reporting granularity

R5.1 allows us to measure the actual usage of chapters, not just the book as a whole.

The granularity depends on whether platforms can identify **Book_Segments in their metadata**.

When **Item Report (IR)** is provided, report items may be identified using accepted **identifiers such as DOI, ISBN, Proprietary_ID and URI**.

Without them, the book continues to be counted as a whole book.

3 Cross-Platform Comparability

At title level

The comparability across platforms remains strong at title level through

Unique_Title_Investigations and Unique_Title_Requests metrics.

At chapter level

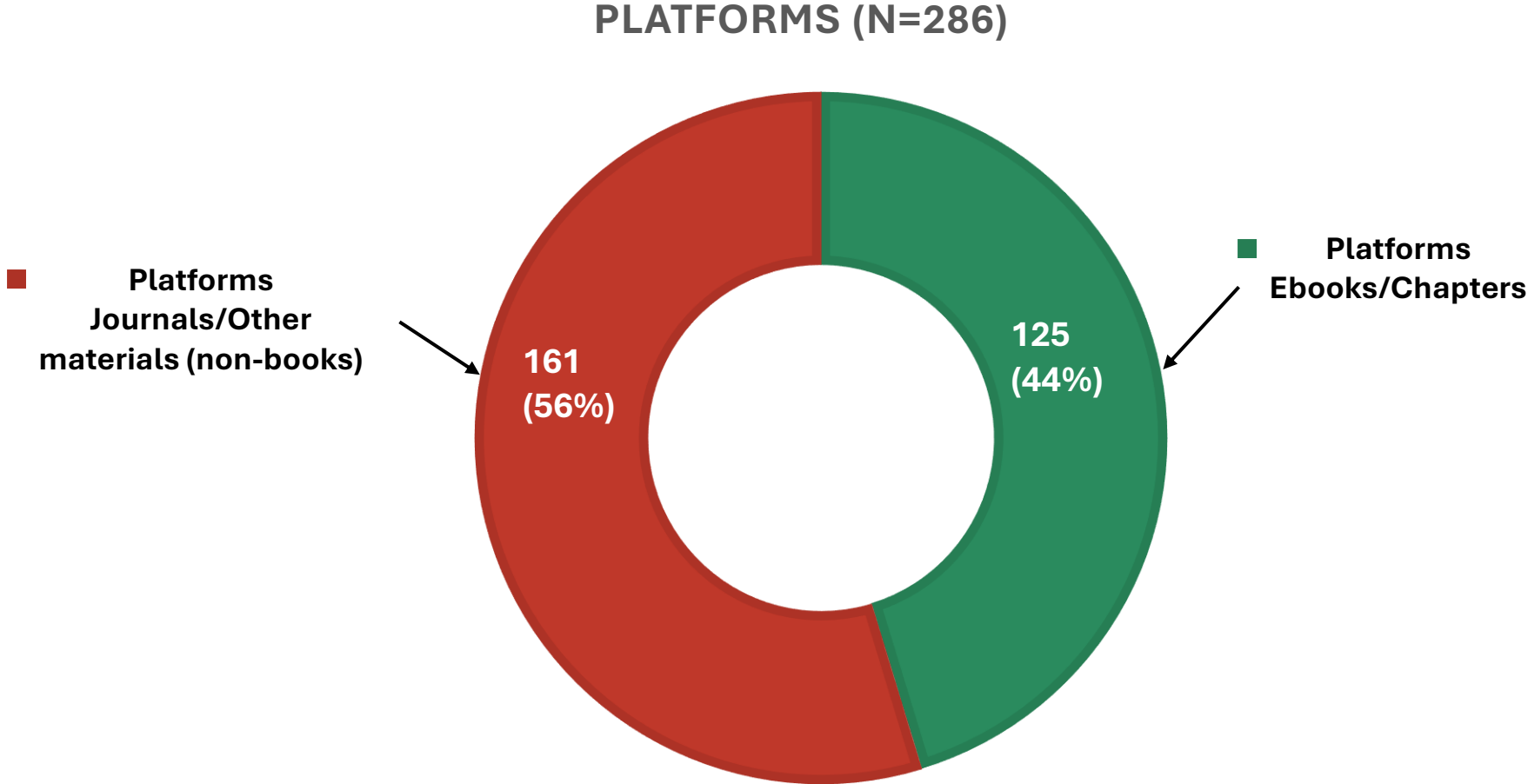
The comparability across platforms at chapter level remains limited because:

- **The IR is not a mandatory report.**
- Cross-platform comparability requires interoperable metadata, **such a DOI at chapter level.**
- **URI and Proprietary_ID** are IR-compliant but not interoperable.
- **ISBN** is interoperable but identifies the title, not the chapter,

COUNTER 5.1 *From Code to Registry*

From
CODE OF PRACTICE R 5.1
to
COUNTER REGISTRY

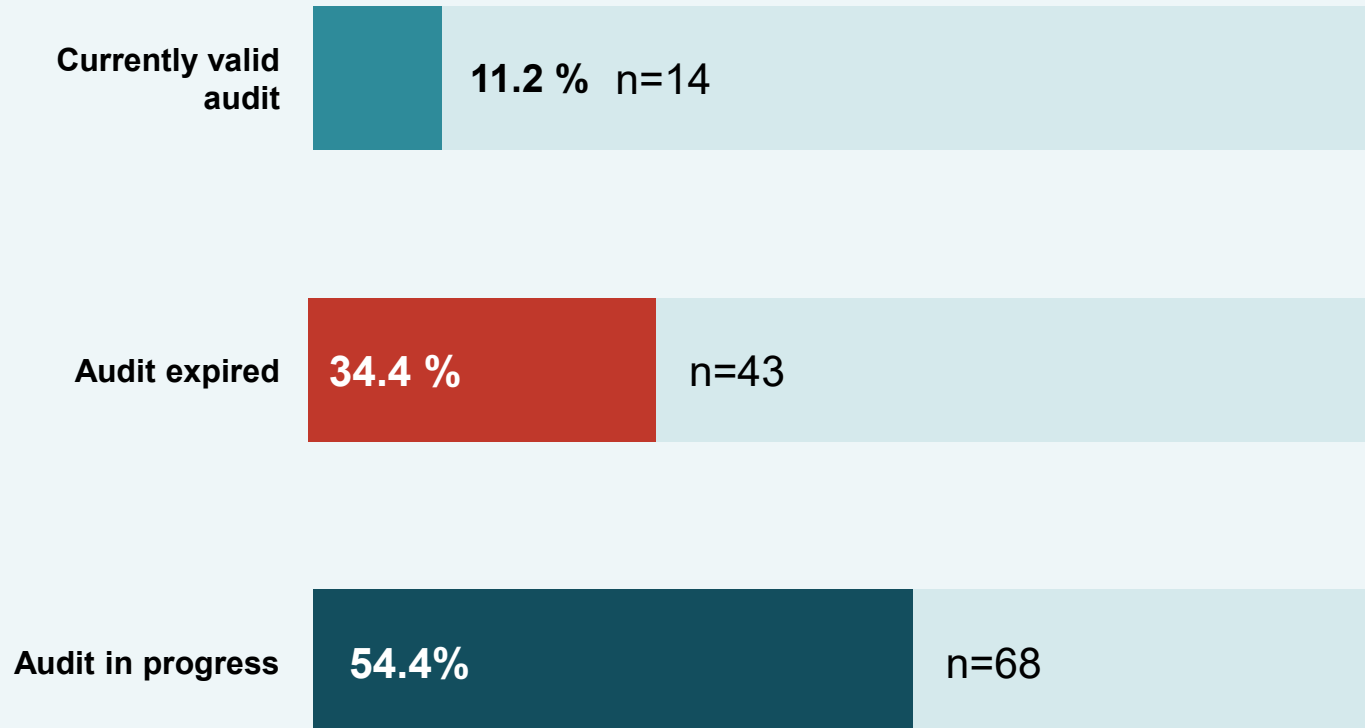
COUNTER 5.1 Registry. Platforms by Data Type



COUNTER Registry. Ebook platforms by audit status

AUDIT STATUS R5.1

Ebook Platforms (N=125)



ACTIVE / NON-ACTIVE AUDIT · R5.1

66%

Active audit in COUNTER 5.1

34%

Non-Active audit in COUNTER 5.1

Active audit : 82 (14 valid + 68 in progress)

Non-active audit: 43 expired (43%)

COUNTER Registry. Item Report (IR) by Host Types

IR × HOST TYPE

Active Audit Ebook Platforms (N=82)

Ebook platforms with IR (N=57, 70%)

Ebook platforms without IR (N=25, 30%)

Dominant host type:

eBook + eJournal (n=48)

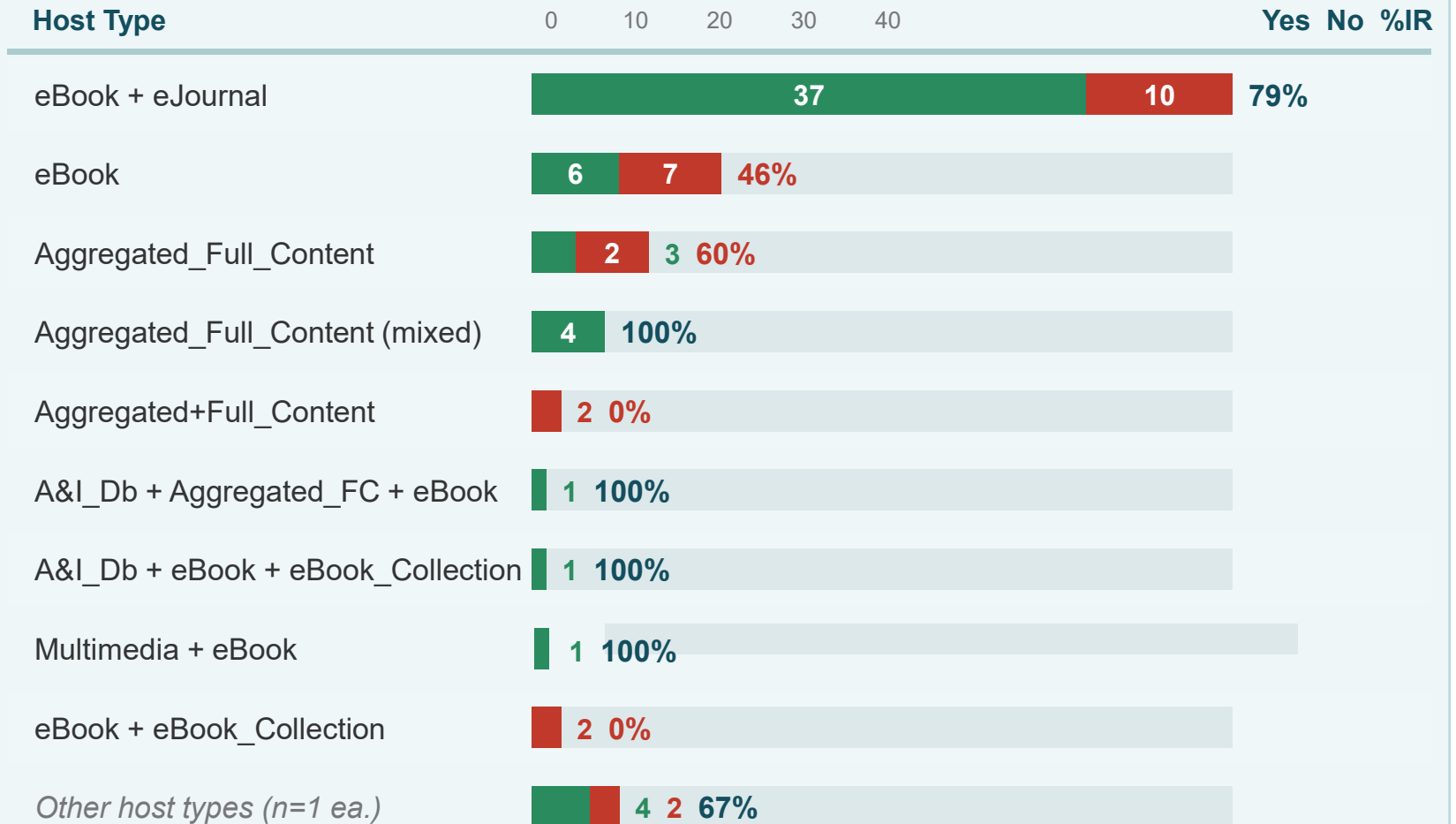
79% with IR in this group

Groups with 0% IR:

Aggregated+Full_Content · eBook+eBook_Collection ·
Full_Content_Database · eBook_Collection

IR in COUNTER 5.1 by Host Type

Stacked bars: green = With IR red = Without IR



Title Report and Item Report
TWO LEVELS OF GRANULARITY

COUNTER 5.1 *Title Report (TR)* · Measuring ebook usage at Title level

DEFINITION

Title Report *TR*

TR report details activity at the title level for ebooks and ejournals.

TR allows librarians to assess usage through two types of interaction:

- **Investigations:** includes any activity linked to a title or item, such as examining metadata or accessing content or downloading the full-text.
- **Requests:** The term request is linked to viewing or downloading the full-text of an entire book or a book chapter, both in PDF or HTML.
- Therefore, every Request is also an Investigation, but not every Investigation is a Request

KEY METRICS FOR EBOOKS

CROSS-PLATFORM

Unique_Title_Requests

Number of unique titles with full-text access per session. Increases by 1 per title regardless of how many chapters were accessed.

Comparable across platforms and across R5 / R5.1.

CHAPTER LEVEL

Unique_Item_Requests

It counts each unique chapters accessed per user session. In R5.1 items may be Book-Segments (book chapters).

The value is sensitive to delivery model and segmentation, so it is less comparable across platforms.

Unique_Title_Investigations

Number of unique titles investigated per user session — any interaction, including abstracts.

Total_Item_Requests

Total full-text accesses at item level (chapters).

Not comparable across platforms, varies by delivery model.

DEFINITION

Item Report IR

IR is a granular report showing activity at the item level for ebooks and ejournals.

- **IR is not mandatory for ebook platforms**
- For ebooks, the unit of analysis is **Book_Segment (chapter)**
- Each chapter accessed is counted as a separate **Unique_Item_Request**.
- **Requires chapter-level identifiers (DOI, Proprietary_ID or URI)**. Without them, the whole book counts as a single Book_Segment.
- Cross-platform comparability requires a DOI at chapter level.

KEY METRICS FOR EBOOKS

Unique_Item_Requests

CHAPTER LEVEL

It counts each unique chapters accessed per user session. The unit for books is Book-Segments (book chapters). This metric is sensitive to delivery model and segmentation, so it is less comparable across platforms.

Total_Item_Requests

Total number of chapter requests including multiple accesses of the same chapter. Numbers vary significantly across platforms based on content delivery method.

Unique_Item_Investigations

Unique chapters investigated (any interaction including abstracts) per session.

Total_Item_Investigations

Total chapter interactions including metadata views. Broadest usage measure.

Metadata at title level
and
CHAPTER-LEVEL IDENTIFIERS

Book Platforms. *Metadata at title level.* Chapter-level Identifiers

Platforms with DOI at title.
Distribution of chapter-level identifiers
N = 63 (82, 77% book platforms with IR)

DOI at chapter

58 platforms
95%

Host Type
Aggregated_Full_Content · 2

Host Type
Ebook · 7

Host Type
Ebook + Ejournal · 49

No identifier at chapter

2 platforms
3%

All (commercial publishers)

BSAVA
Sciendo

URI

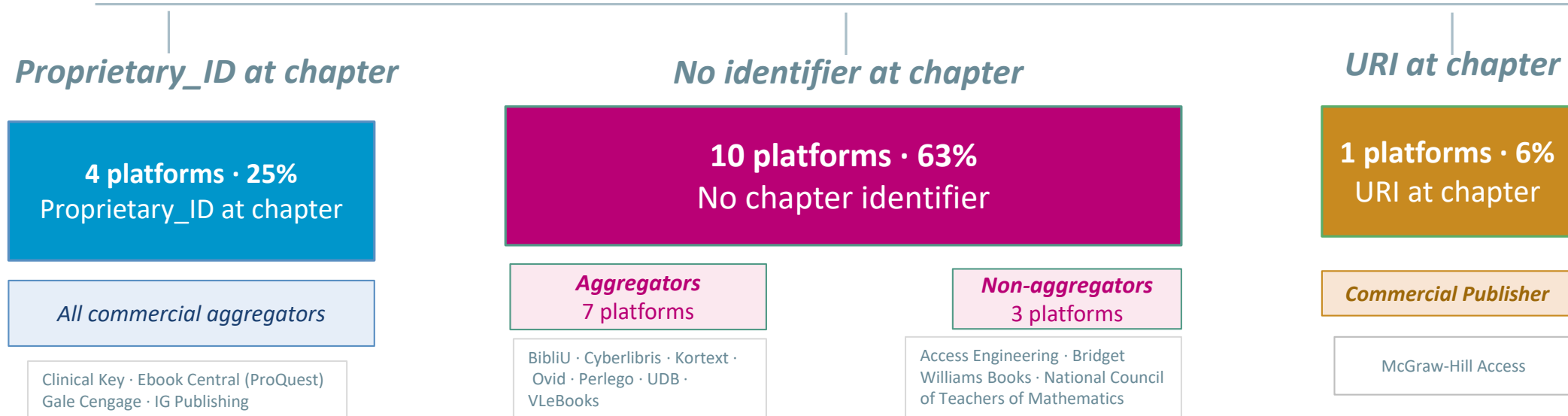
3 platforms
5%

University Press

Fulcrum · Oxford University Voltaire ·
Rotunda Digital

Ebook Platforms. *Metadata at title level.* Chapter-level Identifiers

Platforms with ISBN at title and no DOI at title-level
N = 15 (82, 20% of all book platforms) *



* 4 platforms excluded (no **information** available): ASTM Compass · Bloomsbury Digital Resources · Columbia International Affairs Online · Infobase

Relationship between
Chapter-level identifiers
and
Content Delivery

Ebook Platforms. *Metadata at Chapter-level and Content Delivery*

78 book platforms*

Platforms with a chapter identifiers and content delivery.



With chapter identifier

66

The chapter identifier platforms:

58 DOI at chapter level. | 4 Proprietary_ID at chapter level | 4 URI

DELIVERY PROFILE

**97% chapter-level + whole book
download**



Without chapter identifier

12

Neither DOI, Proprietary_ID nor URI

DELIVERY PROFILE

**92% whole-book
download**

DOI is a persistent and interoperable ID. It enables granular delivery and cross-platform comparability (IR).

Proprietary_ID. It is IR-compliant ID, but not interoperable.

URI (Uniform Resource ID). It is a web-based locator. It is interoperable and IR-compliant, but not necessarily persistent.

No identifier . Where it is not possible to identify Book_Segments, the whole book MUST be counted as a single Book_Segment (CoP R5.1, Sección 7.3).

Ebook Platforms · COUNTER Registry Analysis

Registry **KEY FINDINGS**

Book platforms in COUNTER Registry

Key Findings · *Book platforms in COUNTER Registry*

- **R5.1 shifts the unit of analysis to the chapter**
R5.1 makes the chapter (**Book_Segment**) the unit of item-level reporting for books.
- **Title-level comparability remains robust**
Title-level comparability remains robust through Unique_Title_Requests and Unique_Title_Investigations across platforms and releases.
- **COUNTER R5.1 is in a transitional phase of adoption**
From 125 ebook platforms in COUNTER Registry, **14 have a valid audit, 68 have an audit in progress** and 43 have an expired audit.
- **Item Report (IR) is provided by 70% of ebook platforms with active audit**
Of the 82 platforms with active audit, **57 (70%) provide an Item Report**. The IR provision is substantial to know the usage of items .
- **DOI at title level strongly predicts DOI at chapter level**
63 (77%) of book platforms have a DOI at title level. Of these, 95% also have a DOI at chapter level delivers the content as a chapter book.
- **Platforms without DOI at title rely on whole-book delivery**
15 (20%) of platforms carry ISBN only at title level, with no chapter-level identifier. These are predominantly aggregators.
92% of platforms without DOI at the title level deliver content as a whole book.
- **Aggregators are the weakest link in chapter-level identification**
Aggregators do not offer DOIs at chapter-level and granular IR reporting, regardless of COUNTER compliance status.

Should the IR and chapter-level DOI be mandatory for ebook platforms?

R5.1 improves ebook metrics, but the gap remain

R5.1 enables chapter-level granularity, but without mandatory IR and DOI at chapter level, the analytical potential remains unexploited in a significant share of platforms.

Title-level metrics ensure comparability; chapter-level metrics require infrastructure

Unique_Title_Requests and Unique_Title_Investigations remain the reliable cross-platform metrics. Chapter-level comparability depends on IR availability and is strongest when DOI is available at chapter level.

Mandatory IR without mandatory DOI would produce incomparable data

Requiring IR reporting without a chapter-level identifier would generate incomparable figures. The CoP's approach, making IR optional, leaves libraries without granular usage data.

THANK YOU FOR YOUR ATTENTION

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