Thank you very much for agreeing to give us your feedback on COUNTER Release 5. We have been asked to collect feedback on Release 5, and to find out how it has been to implement, whether it has achieved its aims, and what uses people are making of it. This will inform and guide COUNTER's future development.

We would be very grateful if you could coordinate a response on behalf of your organisation, or delegate it to somebody who will do that. Please note that you can save your responses part way through and continue later.

Please note that there are a couple of issues that we are not asking about here. We know that methods of dealing with consortia data have been requested, and in response an R5 harvester has recently been implemented, and COUNTER is collaborating with CC-Plus on a solution for larger consortia. Also, a separate project is currently under way looking at distributed usage logging.

1. In what country is your organisation's headquarters?

[   ]

* 2. Could you please let us know whether you are a provider or consumer of COUNTER reports?

○ Consumer: library or library consortium

○ Intermediary: a usage statistics service provider, either commercial or non-commercial

○ Producer of Release 5 reports: publisher, platform provider or other content provider

About you {continued)

3. Could you please tell us a little about your organisation?

○ Library consortium

○ Library

○ If you are a library, how would you describe your institution? (research or teaching focussed, ARL member, commercial, etc.)

[   ]

4. Where does your organisation access reports from?

○ Directly from publishers and vendors

○ Via an intermediary such as JUSP, Ex Libris, etc.

○ Both

Aims

5. One of the main aims of Release 5 was to simplify its use, with four Master Reports and Standard Views streamlined for the most common reporting needs. Do you agree that it succeeded in this?

○ Strongly disagree   ○ Agree

○ Disagree   ○ Strongly agree

○ Neither agree nor disagree

6. Another aim was to increase flexibility: with comprehensive reporting attributes enabling necessary drill-down. Do you agree that it succeeded in this?

○ Strongly disagree   ○ Agree

○ Disagree   ○ Strongly agree

○ Neither agree nor disagree

7. A third aim was to increase clarity, using clear and consistent terminology on all metric types and attributes. Do you agree that it succeeded in this?

○ Strongly disagree   ○ Agree

○ Disagree   ○ Strongly agree

○ Neither agree nor disagree

8. Do you think that Release 5 is an improvement on Release 4?

○ Yes

○ No

○ Don't know

We would really value your comments:

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Roll-out

9. With regard to the roll-out of Release 5:

	Strongly disagree	Disagree	Neither agree nor disagree	Agree	Strongly agree
The changes and the reasons for them were clear and well-explained	○	○	○	○	○
The Code of Practice itself was clear	○	○	○	○	○
The supporting documentation was presented clearly	○	○	○	○	○
The supporting documentation provided all the information we needed	○	○	○	○	○
The supporting documentation was made available in good time	○	○	○	○	○
It was made clear how the Release 5 reports related to and compared with the Release 4 reports	○	○	○	○	○

Which parts of Release 5 do you use?

10. Which of the Standard Views do you use?

	Regularly	Occasionally	Never
PR_P1 Platform Usage	○	○	○
DR_D1 Database Search and Item Usage	○	○	○
DR_D2 Database Access Denied	○	○	○
IR_A1 Journal Article Requests	○	○	○
IR_M1 Multimedia Item Requests	○	○	○
TR_B1 Book Requests (Excluding OA_Gold)	○	○	○
TR_B2 Book Access Denied	○	○	○
TR_B3 Book Usage by Access Type	○	○	○
TR_J1 Journal Requests (Excluding OA_Gold)	○	○	○
TR_J2 Journal Access Denied	○	○	○
TR_J3 Journal Usage by Access Type	○	○	○
TR_J4 Request by YOP (Excluding OA_Gold)	○	○	○

11. If there are Standard Views you don't use, could you please tell us why?

☐ Not relevant to us, and unlikely to become relevant

☐ The need hasn't arisen, but could in future

☐ We would use them, but there are problems with the way they are set up (please elaborate below)

Please comment

12. Do you use custom reports?

○ No, we use Standard Views only

○ We use custom reports that are specific to our needs only

○ We use custom reports that others might find helpful

13. If you have reports that others might find useful, would you be willing for us to contact you about them? (Please give your contact details at the end of the survey).

○ Yes (Thank you!)

○ No

○ Not applicable

14. Which metrics do you use?

	Regularly	Occasionally	Never
Limit_Exceeded	○	○	○
No_License	○	○	○
Searches_Automated	○	○	○
Searches_Federated	○	○	○
Searches_Federated	○	○	○
Searches_Platform	○	○	○
Searches_Regular	○	○	○
Total_Item_Investigations	○	○	○
Total_Item_Requests	○	○	○
Unique_Item_Investigations	○	○	○
Unique_Item_Requests	○	○	○
Unique_Title_Investigations	○	○	○
Unique_Title_Requests	○	○	○

15. If there are metrics you don't use, could you please let us know why?

☐ Not relevant to us, and unlikely to become relevant

☐ The need hasn't arisen, but could in future

☐ We would use them, but there are problems with the way they are set up (please elaborate below)

Please comment

Ease of use

16. How easy or difficult was the transition between Release 4 and Release 5?

○ Very difficult   ○ Easy

○ Difficult   ○ Very easy

○ Neither easy nor difficult

17. How time-consuming was the transition between Release 4 and Release 5?

○ Very time-consuming   ○ Quite quick

○ Quite time-consuming   ○ Very quick

○ Not notably quick or time-consuming

18. Once set up, how easy is getting the reports?

○ Very difficult   ○ Easy

○ Difficult   ○ Very easy

○ Neither easy nor difficult

19. How straightforward are the reports to understand and use?

○ Very complicated   ○ Quite straightforward

○ Quite complicated   ○ Very straightforward

○ Neither difficult nor easy

What do you do with the reports?

20. What are the primary outputs/outcomes from your use of the data?

☐ Acquisitions

☐ Collection development

☐ Deaccessions

☐ Stock management

☐ Other (please specify)

[text box]

21. Are COUNTER reports your primary source of usage data?

○ Yes, they are our main source of data

○ We also use other data

Please list any other data sources

[text box]

22. Do you combine the reports with any other data sources to derive further insights?

☐ KBART   ☐ Vendor dashboards

☐ Integrated library system   ☐ Other [please list below]

☐ Subscription/purchase agents   ☐ No, we don't combine the data

Please list any other data sources

[text box]

23. Do you provide data to Unpaywall/Unsub or other services to help you with collection management decisions?

○ No

○ Yes

If yes, please provide further details

[text box]

Support materials and tools

24. Which of the following support materials have you used?

	We are aware of this	We have used this	We found this particularly helpful
Friendly Guide to COUNTER Release 5	☐	☐	☐
The Friendly Guide to Release 5 for Librarians	☐	☐	☐
Manual for librarians (Module 1: books)	☐	☐	☐
Webinars (in real time)	☐	☐	☐
Webinars (recordings)	☐	☐	☐
Newsletters	☐	☐	☐
email lists	☐	☐	☐
Foundation classes (online tutorials on YouTube)	☐	☐	☐

25. Is there any training or documentation you feel is missing? Please tell us what else you would like to see.

[text box]

26. Would you say it was easy to find what you need in the support materials?

○ Strongly disagree
○ Disagree
○ Neither agree nor disagree
○ Agree
○ Strongly agree

27. Would you say that the support materials are clear and sufficiently comprehensive?

○ Strongly disagree   ○ Agree

○ Disagree   ○ Strongly agree

○ Neither agree nor disagree

28. Do you have any suggestions for improvement or development of the COUNTER support materials?

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29. Have you found COUNTER helpful in answering questions and resolving compliance issues directly?

○ We did not contact them.

○ No, direct contact was not very helpful

○ They were helpful but slow in responding

○ Yes, they were helpful and prompt

Problems

30. Providers have implemented Release 5 at different times, resulting in a mixture of Release 4 and Release 5 reports being available. How much of a problem does this present for you?

○ This makes the reports useless to us   ○ This is only a minor problem

○ This presents us with some serious problems   ○ This is not an issue for us at all

○ This is a nuisance, but one we can work around

Looking forward

31. Are there any amendments or improvements needed to the Code of Practice?

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32. How frequently should revisions be made to the Code of Practice?

○ As often as the need arises

○ They should be rolled up into batches and spaced evenly

○ They should be left until absolutely unavoidable

33. Do you trust the data from COUNTER reports?

○ Yes

○ No

○ Not sure

34. If not, which particular aspects do you distrust? How might this be remedied?

[ ]

35. Does Release 5 provide you with sufficient information for Open Access content from born-OA publishers?

○ Yes

○ No

If "no", how might this be remedied?

[ ]

36. Does Release 5 provide you with sufficient information for Open Access content from mixed-mode (hybrid) publishers?

○ Yes

○ No

If "no", how might this be remedied?

[ ]

Further discussion

Thanks! Do you want to talk to us some more? We would find this especially helpful to understand solutions you found to any implementation problems you encountered, and to learn about innovative uses of the COUNTER data.

37. If you are willing to discuss this further, either by email or as part of a planned focus group, please put your contact details here. (Contact details will be stored securely and used only for the purposes of this research. They will be held by the research team only, and will not be shared with COUNTER).

Name

Institution

Email Address

Phone Number