Usage Statistics in Times of Technological Disruption

Case Studies of Changes in Interface Design and Usage Patterns at Scholars Portal

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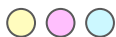Scholars Portal / OCUL
CLAW 2023

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Scholars Portal

- Technical infrastructure arm of the Ontario Council of University Libraries
- Large repositories of licensed ebook and ejournal content
- We're a content provider (aggregator?) **and** a library organization

Usage stats vs. user experience

We look to usage to tell us how useful an e-resource is to our community; but if usage changes over time, how much of that is a change in the usefulness of the content and how much is the usability of the site?

COUNTER: What are we counting?

The COUNTER code of practice ensures consistency for things like:
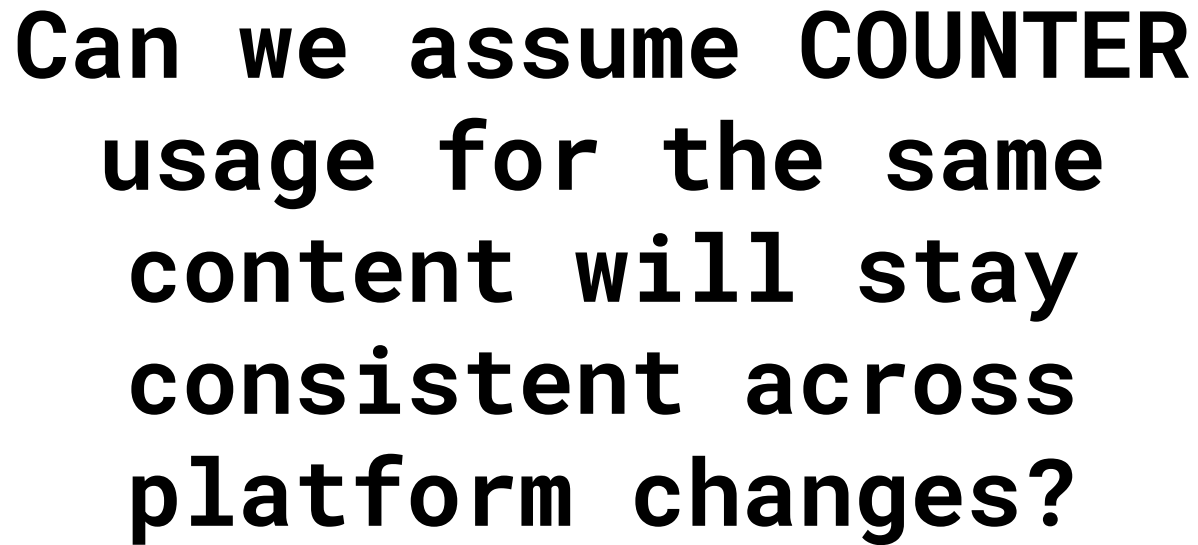
What "counts" as a user successfully accessing the full text

What "counts" as a unique user/unique access

Distinguishing between controlled content and open content

How do things like user experience & technical design interact with usage? How do we know if people aren't using some content because they aren't even getting to the point where they see the "download" button?

Can we assume COUNTER usage for the same content will stay consistent across platform changes?

The Convenience Factor

"If it's too inconvenient I'm not going after it" (Connaway, Dickey & Radford, 2011)

1. Users won't always go out of their way to access an e-resource – especially if an easier-to-access resource is "good enough".
2. Discoverability plays an important role. Changing from journal-level to article-level linking in your discovery layer can increase journal usage by over 90% (Swab, 2019).
3. What impact does it have on usage when e-resources become more or less convenient to access?

Platform order in link resolvers

Case Study with Scholars Portal Journals

01

Scholars Portal Journals

We locally host journal content licensed by OCUL, CRKN, and individual libraries

The platform is a Trustworthy Digital Repository/light archive dedicated to digital preservation
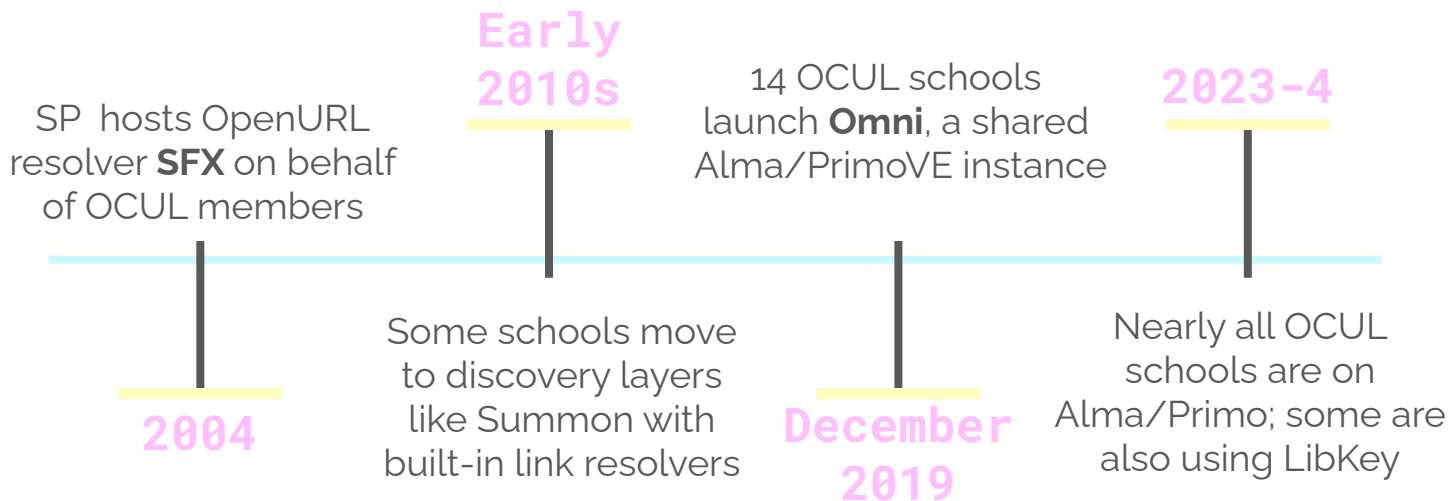
Almost all major academic publishers are represented, and almost all content is replicated on the publisher platform

Various other benefits over publisher platforms like bilingualism, data security, focus on accessibility, etc.

20 Years of Full-Text Linking

Early 2010s

SP hosts OpenURL resolver **SFX** on behalf of OCUL members

14 OCUL schools launch **Omni**, a shared Alma/PrimoVE instance

2023-4

2004

Some schools move to discovery layers like Summon with built-in link resolvers

December 2019

Nearly all OCUL schools are on Alma/Primo; some are also using LibKey

SFX Menu

Hosted & collections partly maintained by SP.

E-Journals - Scholars Portal is always on top of the menu; other sources are listed below.

UNIVERSITY OF WATERLOO

Title: Providing and Maintaining Access to Electronic Serials: Consortium and Member University Library's Perspectives
Source: Serials Librarian [0361-526X] Zhao, W yr:2017 vol:72 iss:1-4 pg:144 -151

Full Text

Full text available from **E-Journals** - Scholars Portal
Note: LEARN: Yes. E-Reserves: Yes. Course Packs: Yes. Link: Yes. ILL: Yes. ILL-e: Yes.

Full text available from Taylor & Francis Journals Complete
Note: LEARN: Yes. E-Reserves: Yes. Course Packs: Yes. Link: Yes. ILL: Yes. ILL-e: Yes.

Check our catalogue:

Holdings in Primo - Resource Discovery

Holdings in TRELLIS, our library catalogue

If we don't have it online or in print:

Request document via RACER: Article order from Scholars Portal
Note:You have to be a registered RACER user to use this system

More Options ▼

Primo Electronic Service Order

Pulling from the Alma knowledgebase.

Default is alphabetical order (and "S" comes late in the alphabet)

ARTICLE

Measuring use of licensed electronic resources. A second iteration of the MINES for Libraries registered survey on Scholars Portal and other resources for the Ontario Council of University Libraries

Thomas, Dana ; Davidson, Catherine ; Kyrillidou, Martha ; Plum, Terry

Library management, 2012, Vol.33 (6-7), p.374-388

❝ *Purpose - Entering into its 11th year, the Ontario Council of University Libraries' Scholars Portal (www.scholarsportal.info...* ❞

PEER-REVIEWED

🔗 **Available Online** ›

TOP

SEND TO

View Online

Full text availability

ABI/INFORM Global

Available from 1992-01-01.

Most recent 1 year(s) not available.

SHOW LICENSE ⧉

Emerald A-Z Current Journals

Available from 2003 volume: 24 issue: 1 until 2016 volume: 37 issue: 9.

SHOW LICENSE ⧉

Scholars Portal Journals: Emerald

Available from 1989-01-01 volume: 10 issue: 1 until 2023-08-31 volume: 44 issue: 5.

SHOW LICENSE ⧉

Change in use on SP by publisher and migration status, 2019 to 2020

	Elsevier	Wiley (CRKN Wiley)	Springer (CRKN Springer)	Taylor & Francis
Schools that migrated	-84%	-72%	-71%	-40%
Schools that didn't migrate	-23%	+2%	-11%	-20%

Primo Customizations

View Online

Full text availability

Scholars Portal Journals: Érudit
Available from 2006-01-01 volume: 1 issue: 1 until 2023-01-31 volume: 18 issue: 2.

Scholars Portal Journals: Open Access
Available from 2006-01-01 volume: 1 issue: 1 until 2023-01-31 volume: 18 issue: 2.

CRKN Open Access Journals List
Available from 2006-01-01 volume: 1 issue: 1.

LibKey integration: This lets your users go straight to the full text that LibKey has detected. They don't follow your service order.

Custom config: You can prioritize SP Journals and make it come first in the list.

ARTICLE

Today and in Perpetuity: A Canadian Consortial Strategy for Owning and Hosting Ebooks

Horava, Tony

The Journal of academic librarianship, 2013, Vol.39 (5), p.423-428

.... *A consortially-built platform called Scholars Portal is our digital library for archiving ebook content and making it available 24/7 to university students and faculty...*

📦 PEER-REVIEWED JOURNAL 🔓 OPEN ACCESS

TOP

SEND TO

VIEW ONLINE

📄 Read PDF ↗   📄 Read Online ↗
🔗 Available Online ›
📖 View Issue Contents ↗

After changing the order…

185% Increase in Elsevier usage on SP Journals

168% Increase in Wiley usage on SP Journals

11% Increase in T&F usage on SP Journals

In 2022, many OCUL schools manually configured Primo service order so SP would always come first.

Here's what happened to the stats at one school.

After implementing LibKey…

-54% Reduction in Elsevier usage on SP Journals

-80% Reduction in Wiley usage on SP Journals

-60% Reduction in T&F usage on SP Journals

LibKey doesn't use the same service order as Primo. Here's what one school's SP stats did after implementing LibKey (some SP collections prioritized in Primo).

Caveats:

- Not all SP collections were available in Alma's KB at the start of 2020
- We don't know who activated our collections or when
- Some schools that didn't migrate in December 2019 still experienced a link resolver change in early 2020

Takeaways:

- Expect some usage fluctuation when you change your discovery/access tools (especially something like LibKey!)
- For the most accurate measure of usage, combine usage for the same title across platforms

Ease of access of DRM-protected ebooks

Case Study with Scholars Portal Books

02

Canadian University Press Ebooks

Deal between Association of Canadian University Presses (ACUP), OCUL, and CRKN to provide access to ACUP titles on SP Books

Titles that were expected to be course adoption books could be assigned restrictive DRM by the publisher

We load (almost) all ACUP titles, including publishers/titles not available electronically on other platforms

DRM status could become less restrictive over time

ACUP DRM Timeline

SP uses Adobe
Content Server to
offer DRM'ed
content

2018

ACUP introduces a
"3-user" upgrade
for DRM-restricted
books

2022

~2013

New SP Books
platform launches
with built-in
handling of DRM

2020

New ACUP deal
distributed by De
Gruyter specifies no
restrictions on
simultaneous users

Legacy Books Platform

Single-user DRM is handled through Adobe Content Server.

In order to read a single-user title, users must download external software & link their Adobe accounts.

Default loan period: 3 days.

Borrow this E-Book
Click here ▼

An Ethical Reader in a Posthuman World
Animal Subjects

Download your book here...

Adobe® Digital Editions

Authorize Your Computer

Authorizing your computer enables you to:
- – Easily transfer Adobe DRM protected items between multiple computers and mobile devices.
- – Read Adobe DRM–protected items on computers or mobile devices (up to six).
- – Restore your content from backup should you ever need to re-install the OS.

Select eBook vendor, then enter your login ID and password below

eBook Vendor: [Adobe ID ▾]   Create an Adobe ID

Adobe ID: [   ]

Password: [   ]   I forgot my password

New Books Platform

Single-user DRM is handled natively in the platform. The experience is identical to opening a DRM-free title.

Title is "returned" after 10 minutes of inactivity.

Snacks: a Canadian food history
Thiessen, Janis
University of Manitoba Press, 2017

✚ Add to My Books

Usage Terms:
👤 Number of concurrent users allowed: 1
⬇ PDF downloading or exporting is not permitted for this title.
🗐 Text selection and copying is not permitted for this title.

Read this book offline in Adobe Digital Editions.

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Unique uses per title: old vs. new Books platform

	2016 (old platform)	2017 (old platform)	2019 (new platform)	2020 (new platform)
DRM-Free Titles	3.27	4.01	3.24	4.53
Single User Titles	2.29	2.28	10.36	7.02

Titles with NO use in a year: old vs. new Books platform

	2016 (old platform)	2017 (old platform)	2019 (new platform)	2020 (new platform)
DRM-Free Titles	54%	50%	57%	54%
Single User Titles	56%	56%	32%	43%

Titles with less than 5 uses in a year: old vs. new Books platform

	2016 (old platform)	2017 (old platform)	2019 (new platform)	2020 (new platform)
DRM-Free Titles	83%	81%	85%	83%
Single User Titles	84%	84%	65%	75%

Caveats:

- 2020 ¯_(ツ)_/¯
- What's the impact of ease of access vs. loan period?
- Changing DRM status/trends: 46% of ACUP titles were single-user in 2016, compares to only 38% in 2020
- Data comes from a sample–not the total

Takeaways:

- If an ebook is inconvenient to use, it probably won't be used very much
- Roadblocks that stop people from accessing the content won't necessarily show up in COUNTER stats
- If you see something funky in your stats… try exploring the user interface!

Usage stats vs. user experience

User experience does impact use. E-resources that are easier to use will see a higher volume of use. More investigation is needed – but take a critical eye to your stats!

References & Further Reading

- Bucknell, T. (2012). Garbage in, gospel out: Twelve reasons why librarians should not accept cost-per-download figures at face value. *The Serials Librarian*, 63(2), 192-212.
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- Swab, M. (2019). Connecting Users to Articles: An Analysis of the Impact of Article Level Linking on Journal Use Statistics. *Evidence Based Library and Information Practice*, 14(4), 38–51.
- Wood-Doughty, A., Bergstrom, T., & Steigerwald, D. G. (2019). Do download reports reliably measure journal usage? Trusting the fox to count your hens? *College & Research Libraries*, 80(5), 694.

Thanks!

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