

## **Cycling Through: Paths Libraries Take to Marketing Electronic Resources**

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### **Abstract**

This study explores the marketing of electronic resources in libraries, investigating how libraries determine the effectiveness of their marketing campaigns, looking for evidence that they have a marketing plan in mind when they embark on a campaign, and finding out if libraries have sufficient measures in place to move successfully through a cycle of marketing.

This paper reports on the results of a content analysis of the published literature in the field of library and information science about the marketing of electronic resources. The author uses the components of a typical marketing plan to guide the analysis, giving special consideration to the evaluation of marketing efforts.

### **Introduction**

Connecting patrons to appropriate resources is a concern for libraries as more collections are removed from traditional shelves and placed in virtual spaces. The placement of a new-books shelf near the front door or the positioning of ready reference volumes in a study area of a library does not apply to the electronic resource world because there are no physical volumes to view. This research examines the marketing strategies in use by libraries to direct patrons to appropriate electronic resources.

This article reports on the results of an analysis of published literature by libraries about their marketing campaigns, using the model of a typical marketing plan to gain insight into how libraries perceive their own strategies. The author employs content analysis to identify the components of libraries' marketing plans, with special focus given to the assessment of marketing efforts, aiming to discover if evaluative steps taken by libraries in marketing electronic resources provide actionable knowledge for the next phases in their marketing plans.

### **The literature**

To understand how libraries are marketing electronic resources the author turned to the published literature in the field of information and library science. The review of the literature was focused specifically on marketing electronic resources, with no limitation on date, in anticipation of gathering a broad body of literature. The review of literature produced a corpus of twenty-three documents, the earliest published in 1999 and the most recent in 2009. See Appendix A for the institutions represented in this research.

The twenty-three documents were used in earlier research that identified thirty-eight marketing techniques in use at libraries, providing a summary of what kinds of libraries -- universities, colleges, medical, public -- were using which techniques.<sup>i</sup> In addition to identifying techniques the author did a cursory review of libraries' goals, targets, budgets, and assessments. Deeper analysis of the corpus is warranted, to determine how the

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components of a single marketing campaign for e-resources may fit into a larger marketing plan. This new analysis focuses specifically on the components of those plans. The earlier research on this corpus addressed four parts of a marketing plan. This analysis addresses a more complete set of components, as outlined in Dubicki: project description; current market; SWOT analysis; target market; marketing goals and objectives; marketing strategies; action plan; and evaluation.<sup>ii</sup> The components of a marketing plan are usually visualized as a circle, with *project description* as the first step, with the other steps following, with *evaluation* feeding back into *project description* as a new cycle of marketing begins. Dubicki describes the last step, evaluation, as a "means for measuring the success or failure of the marketing process." This analysis expands the last component, *evaluation*, into two parts: *measurement* and *assessment*. It is important to know if libraries are using an appropriate quantitative measurement of their chosen marketing technique(s). It is equally valuable to know if libraries are using those measurements to determine if their marketing campaigns were successes or failures, and if the measurements provide enough information for an appropriate assessment. See Figure 1 for a visual representation of the marketing cycle used for this research.

Figure 1: A marketing cycle



### **Organizing and analyzing the literature in ATLAS.ti**

To keep organized the notations about the components of a marketing plan, the qualitative data analysis software ATLAS.ti (v5.2) was employed. The text of each of the documents was imported into the software and was then used to identify each time a component of a marketing plan (as mentioned above) was stated. This software allows the creation of codes for the marketing components. After the author coded the documents, the data was then exported and summarized.

### Coding of the literature

As the documents were reviewed, the author highlighted the contextual descriptions of the marketing plan components, giving each component a name, or code, that she created. When a passage described a particular user group that a library identified as a target for the marketing campaign, for example, it was highlighted and then coded with *target market*. If there was no mention of a target market in a document then no code was entered. All of the documents were analyzed in this manner.

### Codes and definitions

Table 1 lists the codes that were created and defines their use in this research.

Table 1: Codes and their definitions

Project description	A description of the thinking behind why the library embarked on a marketing campaign
Current market	Notes if the resource currently being used, what other products are like it? Also states an understanding of the environment in which it is used
SWOT analysis	Identifies strengths, weaknesses, opportunities, and threats does the library have as a result of this resource
Target market	Identifies the user group(s) that will be the focus of the marketing
Marketing goals and objectives	What the library hopes to gain by marketing
Marketing strategies	Identifies an approach to achieve the goal as well as decides which marketing techniques are appropriate for the stated goals and how their use will be measured
Action plan	States how the strategies will be carried out (this code is not used itself but is rather comprised of timeline, staff, and budget)
Timeline	How long the marketing campaign will run or how long each component of the plan will take
Staff	Who will work on marketing campaign
Budget	How much money the marketing campaign will use
Measurement	Determines whether or not the measured effect of the technique reached the stated goal
Assessment	Determines if the measurement of the strategies provides enough evidence to take the next step in the marketing cycle

### Findings

#### Marketing plan components

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A goal of this research was to determine if libraries use the components of a typical marketing plan when embarking on a marketing campaign for electronic resources. Based on the coding it is clear that libraries do not consistently do this. Of the twenty-three documents only three report all eleven components of the marketing plan outlined here. Seven libraries report ten of the components of a marketing plan but do not mention a budget. Though the libraries represented in this research document many of the components of a marketing plan, only a few report that the components fit together as part of a cohesive effort.

Summarized here are the components of a marketing plan and the results of the coding.

*Project description:* Twenty-two libraries reported their reasoning behind wanting to pursue a marketing campaign for their electronic resources.

*Current market:* None of the libraries reported competing products for the resources they were marketing, or why their users may prefer one resource from another. The code is also defined for this research as an understanding of the environment in which they are marketing; libraries were successful at reporting this, with twenty-one summarizing the state of the library or describing their typical user groups.

The environment in which marketing takes place at this science and engineering library is described well in this quote, for example: "The S&E Library holds drop-in orientations for its users each fall. In the earlier years, the attendance at these orientations was considerable. However, in the last few years, the attendance has declined and recently dropped to one or two people at each session, due to changing behavior regarding how users access library resources in this networked environment. Clearly, traditional methods to conduct and market library services no longer worked well. Therefore, the S&E Library decided to bring events closer to users and try aggressive marketing techniques to reach out to its research community."<sup>iii</sup>

Lee asserts that understanding the current market is the essential step in a marketing plan, and describes a formal process for gathering information about the needs of the patrons in her article in 2003.<sup>iv</sup> She suggests that "laying the marketing foundation" by knowing what library patrons want will help to guide a library marketing plan in choosing an appropriate strategy. One of the libraries in this analysis documented doing this kind of knowledge gathering about their patrons before embarking on a marketing campaign.<sup>v</sup>

*SWOT analysis:* None of the libraries reported a full analysis of the strengths, weaknesses, opportunities, or threats for the library based on the electronic resources being marketed. Very loosely described, nineteen reported some thoughts on what consequences their marketing plans would have on their libraries. In an article reporting on the development of a 'Find A Journal' service, for example, the author identifies a possible strength and weakness for considering marketing the service via office visits for one-on-one training in faculty offices: "Our experience suggests that academic staff are more likely to respond to overtures in their own office, with services they can access from their desktop, rather than

coming to the library. However, we are aware that some academics may have very outdated equipment and this could be counterproductive."<sup>vi</sup>

*Target:* All libraries in this research report a target for their marketing of electronic resources. The targets are according to type of library: academic institutions report targeting students, faculty, other librarians, and library staff; public libraries target community members and the K-12 school population; and medical libraries target health professionals, senior citizens, adults, and high school students. The academic institutions are specific about the kinds of student they target, noting incoming students, freshmen, or graduate business students.

*Goals:* Twenty-two libraries report a goal or objective for their marketing campaigns. Seven of those noted that a goal was to increase "awareness" of electronic resources. Increasing "use" of electronic resources was mentioned in four documents. Two examples of clear goals are: "Develop and implement an extended partnership with community centers and public libraries to provide computer workshop classes on access to health information"; and "[to provide] an opportunity to focus attention on the intellectual content of the library rather than the building itself."<sup>vii</sup> Some examples of less developed goals are: "The library had been quiet for too long; it was time to make everyone aware of their existence"; "We did not develop a formal plan"; and "We all want to make the most of our investments and resources."<sup>viii</sup>

*Strategies:* The author defines the marketing component of *strategies* as having two pieces – the general approach as well as the specific techniques chosen – but in this analysis both were coded with the simple code of *strategies*; the two pieces are not distinguished in the final coding, therefore. This decision was made because many of the libraries easily described techniques in use but few stated a deliberate approach to accomplishing their goals. All twenty-three documents note a strategy (as defined for this research), listing thirty-eight specific techniques used. Whether the techniques are appropriate for the goals, and how they are measured, is addressed in a later section of this paper.

The specific techniques in use are: Academic staff as collection developers; Banners/posters; Blackboard; Bookmarks; Branding; Calendar; Collaboration; Collection policy; Email (external); Email (internal); Faculty/professionals as marketing tool; FAQ; Feedback form; Flyers/brochures; Giveaways; Home/off-campus access; Incentives; Mascot; Native language education; Newsletter; Newspaper alert; Online social networks; Patron training (group); Patron training (individual); Phone call/personal visit; Pins; Postcards/letters/direct mail; Screen savers; Slide show/demonstrations; Staff training (group); Staff training (individual); Students as marketing tool; Survey; Usage statistics; Use guide; Web page alert; Web page, customized; Word of mouth.

*Staff:* Eighteen of the twenty-three documents mention the people involved with working on the marketing campaign. The people were generally not named specifically to a role in the campaign, but rather were part of an "ad hoc committee," "each assistant librarian," or "a combination of librarians and support staff."<sup>ix</sup>

*Budget:* Of the twenty-three institutions represented in this research, twelve of them report having either no budget for marketing or do not mention budgeting in the article. Lindsay found in a survey that "the library's annual budget does not usually include funding specifically for marketing."<sup>x</sup> Of the five libraries that mention a specific dollar figure for their budget, the least is \$137 (a postcard campaign), the greatest \$3000 (laptops purchased for on-site marketing of electronic resources).

*Time:* Time is reported in seventeen of the twenty-three documents in a variety of ways. Of those, some are specific about a timeline for the entire marketing plan ("This team has prepared a three year strategy, for 2003-2006,") while others focus on the timeline for only the marketing campaign being described in the document ("a month-long promotional campaign to promote Ex Libris SFX").<sup>xi</sup> The documents describing activities in an academic setting tend to focus on the beginning of the school terms as the start of the marketing campaign.<sup>xii</sup> A few designed a time-sensitive themed campaign, such as "Awareness Week 2002," "Orientation Week," "Nursing Week," and "National Library Week."<sup>xiii</sup> One library reports an understanding of the cyclical nature of marketing, noting that, "Although the program is started with a timeline in mind, and a general goal of promoting the resources, the promotion never ends."<sup>xiv</sup>

*Measurement:* Twenty of the twenty-three documents report some kind of measurement as part of their marketing campaign. The measurements range from simple counts ("The SAmS instructed almost 500 people in forty-four classes across fourteen months") and comparisons ("Last year, for the first time a number of peer tutors had created RefWorks accounts for themselves prior to the start of the fall 2005 semester. In the previous year, there were no students in the room with existing accounts"), to noting trends based on measurements ("After double-checking the statistics on the library's fifty databases, and looking at three or four years' worth of data, I saw the overall trend was that the numbers were heading down, slowly and surely").<sup>xv</sup>

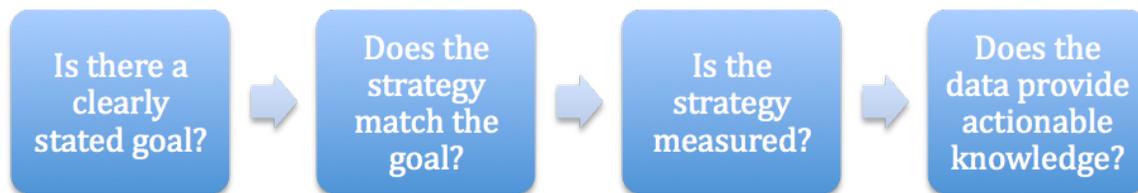
Broering remarks on the difficulties in knowing how and what to measure: "One of the most challenging parts of a service of this nature, involving multiple sites and diverse population, is to gather information and data to evaluate the program with some degree of uniformity. ... The measurement assessment is scientifically skewed by the very nature of the attendees and the multiplicity of topics being covered."<sup>xvi</sup> In sync with this thinking are two examples of the hurdle of measurement: "We don't know how many of our postcards have actually been mailed by our patrons"; "Since the launch of GET IT the feedback from users has been anecdotal, but positive."<sup>xvii</sup>

*Assessment:* When coding the texts for *assessment* the author focused on any mention of evaluation of the libraries' marketing plans. Nineteen of the twenty-three libraries provide some kind of consideration of the effect of their marketing strategies. Determining whether or not the stated assessments provide actionable knowledge for the next phase in the cycle of marketing is addressed in the next section.

Does the measurement and assessment match the goal?

Having a clearly stated goal for a marketing plan should lead to choosing a strategy to achieve that goal, and identifying how to measure the strategy will ultimately tell a library if the campaign has helped to reach the goal. This section uses the following model (see Figure 2), applied to each of the twenty-three documents, to see if the libraries in this analysis have efficiently designed their marketing plans in order to gain information about how to proceed in their next steps in a marketing plan.

Figure 2: A model to assess a library’s efficacy in marketing plan development



Libraries without a goal, a marketing strategy, measurement, or assessment were not considered in this portion of the analysis; five were removed, leaving eighteen libraries. The coded passages for these four marketing plan components were pulled together from each document to determine if the passage that was coded with *goal* was indeed clearly worded, if the passage that was coded with *marketing strategy* was appropriate for the stated goal, if the passage that was coded with *measurement* reported some kind of count of the strategy, and if the passage that was coded as *assessment* described an evaluation of the combination of their goal, strategy, and measurement.

Three of the eighteen were clear in describing the four components, as displayed in Table 2. The contents of the Table are quotes from the documents that were coded with *goal*, *strategy*, *measurement*, and *assessment*. They demonstrate an evidence-based assessment of the campaign, which can then be used in their next cycles of marketing. These three institutions have gained actionable knowledge. For example, in the first quote in the Assessment column one can see that the institution has learned that in order to get students to participate in instructional sessions, word-of-mouth advertising should be their focus.

Table 2: Goals, strategies, measurements, and assessments of successful marketing plans

	Goal	Strategy	Measurement	Assessment
1	"The goals of instructional sessions are to promote the library's resources as scholarly and reliable, highlight	"... Tours and introductory sessions called Smart Start Library to acquaint incoming students with the library's services and	"Students are asked to complete a short printed questionnaire following the session to help the library measure the	"Of the two hundred and eighty participants who completed questionnaires in September 2005, 87% of the

	special features of the resources, teach literacy skills, and present the library as a welcoming place." <sup>xviii</sup>	collections (including online databases and resources available via the Web site)"	effectiveness of instructional sessions."	respondents replied either 'agree' or 'strongly agree' in response to the comment 'Orientation leaders influenced my decision to attend.' These numbers demonstrate the value of word-of-mouth advertising."
2	"Provide information to senior administrators regarding student awareness, perceptions and satisfaction of WSU's efforts to create a virtual library system." <sup>xix</sup>	"The research team, in cooperation with library staff, created a questionnaire with 29 questions."	"The response rate was less than expected. Of the 2,965 surveys mailed out, 271 were returned by November 22, 2000, for a response rate of 9.41 %."	"From these figures, it is clear that the library's efforts to promote directly its electronic resources is not effective because only 18.5% of the students had learned about electronic resources from library publicity or librarians."
3	"The objectives of this research were to (1) assess the awareness and usage of current electronic resources and services by a segment of the Libraries' customer base, the faculty and teaching staff, (2) assess the obstacles to use of electronic information, and (3) determine how to increase the use of the available technologies and services." <sup>xx</sup>	"A random sample of 400 faculty (including teaching assistants) was generated by computer from a population of over 2,300."	"Thirty-nine percent of the recipients of the survey responded."	"... The most common cited obstacle to using information technology is lack of information; to increase use of electronic resources the Libraries need to provide more information and instruction on available resources. Obviously, current promotional efforts have not been sufficient."

### Part of a bigger plan?

We know that successful marketing campaigns are part of a larger marketing plan or institutional mission.<sup>xxi</sup> Woods notes that, "A good marketing plan should be based on the library's mission statement, strategic goals and initiatives."<sup>xxii</sup> It is surprising then, to

discover that only seven of the twenty-three documents in this corpus remark that their campaigns are a piece of a library-wide plan.

### **Discussion and future research**

Of the twenty-three documents in this analysis only three clearly demonstrate a commitment to using a marketing plan as a systematic process, based on data that can be viewed objectively. It is not clear from this analysis why libraries do a mostly poor job at identifying and employing the components of a marketing plan. Lindsay suggests, however, "Librarians do not understand the fundamental nature of marketing and public relations or its benefits."<sup>xxiii</sup> As a result, composing a marketing plan may not be a priority for libraries. It is clear that libraries understand the need to market but still fail to develop a plan to do so.

Both Marshall and Lindsay report on the attitudes of director librarians about marketing but there could be deeper research in this specific area, since their reports on director attitudes were only a part of a larger project.<sup>xxiv</sup> Probing more on the reasoning behind why a library director does not choose to make marketing (or marketing of electronic resources) a priority may provide researchers an opportunity to develop a solution to the problem.

### **Limitations of this research**

It is clear that libraries other than those represented in this research are developing and activating marketing plans for electronic resources in their libraries. This research is limited in scope to just what has been described in published literature, and therefore does not reflect the numerous ways in which marketing electronic resources may be being done in libraries today. There are many publications about how marketing electronic resources can be done, but for this research it is instructive to use the published data because it reflects the actual behaviors of libraries, related to marketing electronic resources.

### **Summary**

This paper reports on the results of a content analysis of the published literature in the field of library and information science about library marketing plans for electronic resources. The author uses the components of a typical marketing plan to guide the analysis, giving special consideration to the evaluation of marketing efforts. The author discovered that though libraries report many of the components of a marketing plan, only three of those libraries have composed a thorough plan. These findings parallel the conclusions of Ford, Lindsay, and Marshall, who found that libraries do not plan well for marketing in libraries; libraries do not do better in developing marketing plans specifically for electronic resources.<sup>xxv</sup> This research also discovered that less than one-third of libraries in this research report that their marketing campaigns are part of a larger marketing plan in the library.

### **Appendix A: Institutions referenced in this analysis**

Brock University<sup>xxvi</sup>

Denton Public Library<sup>xxvii</sup>

Edge Hill College of Higher Education<sup>xxviii</sup>

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Library System of Lancaster County<sup>xxix</sup>  
Lucy Scribner Library at Skidmore College<sup>xxx</sup>  
Morehouse School of Medicine Library<sup>xxxi</sup>  
Mount Sinai Hospital (Toronto)<sup>xxxii</sup>  
National Health Service (NHS) in England<sup>xxxiii</sup>  
Pacific College of Oriental Medicine (PCOM) in San Diego<sup>xxxiv</sup>  
Science & Engineering (S&E) Library at UCSC<sup>xxxv</sup>  
State and University Library, Bremen, Germany<sup>xxxvi</sup>  
Tanzanian academic and research institutions<sup>xxxvii</sup>  
Texas A&M University (TAMU) Libraries<sup>xxxviii</sup>  
Trinity University<sup>xxxix</sup>  
University of Arkansas<sup>xl</sup>  
University of Connecticut<sup>xli</sup>  
University of Illinois at Urbana-Champaign<sup>xlii</sup>  
University of New England, Armidale, New South Wales, Australia (UNE)<sup>xliii</sup>  
University of South Florida<sup>xliv</sup>  
University of Sunderland<sup>xliv</sup>  
Washington State University<sup>xlvi</sup>  
Wayne State University<sup>xlvii</sup>  
Weill Cornell Medical College<sup>xlviii</sup>

## Endnotes

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xvii. Cosgrove, 98; Delgado and Wood, 142.

xviii. Woods.

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xlvii. Holley and Powell.

xlviii. Delgado and Wood.