It’s All in the Marketing: The Impact of a Virtual Reference Marketing Campaign at Texas A&M University

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Current information science literature says that library services need to be marketed to users. While the literature has a lot of advice on how to develop a marketing plan, there have been few reports on the actual implementation of a marketing campaign and the resulting impact on academic library services. This case study describes the design, implementation, and evaluation of a marketing campaign to promote the use of a new virtual reference service at Texas A&M University.

VIRTUAL REFERENCE AT TEXAS A&M UNIVERSITY

In 2003 the Texas A&M University System received a Telecommunications Infrastructure Fund (TIF) Grant from the state of Texas. Synchronous virtual reference (VR) software was purchased with the funds, and in February 2004 a joint VR system for nine Texas A&M University System schools was launched as a pilot project. Due to the uncertainty of user demand, it was agreed among the participating libraries that they would not market the new service. This would allow the libraries and librarians sufficient time to grow accustomed to the software and learn to be effective in this new medium.

In December 2004, the project was evaluated for viability and user demand. The project had experienced a number of technical complications attributed to the consortia arrangement, and overall use of the service was very low. At that time, Texas A&M University Libraries decided to completely revamp its approach to implementing a VR system. The consortium arrangement was discontinued. A new software application was purchased and the service was...
housed completely on site in College Station. The new service went live in mid-February 2005.

As part of the revamped approach to the Libraries’ VR services, a VR Marketing Committee was formed. This committee was charged with developing a plan to promote the use of the VR service by university students, faculty, and staff. The plan had to be ready for implementation on or before September 2005.

**LITERATURE REVIEW**

In the literature, virtual reference service is referred to by many names including virtual reference, digital reference, chat reference, online reference, and real time reference. As defined by Reitz, virtual reference refers to the “reference services requested and provided over the Internet, usually via e-mail, instant messaging (‘chat’), or Web-based submission forms, usually answered by librarians in the reference department of a library.” For the purpose of this paper, the term “virtual reference” will be used to refer to the reference services provided over the Internet via e-mail and real-time chat software.

The most frequently discussed issues regarding live chat services in the literature are software selection, training, staffing, policy development, and marketing. While most of these authors describe methods for collecting customer feedback and evaluation of the chat service itself, few suggest methods for evaluating a marketing program. Just as customer feedback and service evaluation can be used to improve the service itself, evaluation of the marketing can be used to refine the promotional strategies and optimize the cost benefits.

The literature provides descriptions of marketing campaigns that contain useful “how to” guides on commonly used marketing techniques such as the marketing blitz or ongoing marketing and promotion. Other aspects of marketing include Web presence, and brand and logo development. Target audiences were identified by some authors, but they tended to be more of a concern in state-wide systems that served diverse populations.

Library Web sites are frequently highlighted as an important resource for marketing virtual reference programs. Using post-chat surveys, Denson, Sanders, and Sims and Sims reported that most users learn about chat from a library’s Web site, with orientation sessions and teachers coming in second. Branding and logos are usually part of Web presence, and libraries go to various degrees of effort and expense to create them. But there are no reports of any attempt to evaluate the impact of the logo itself on the awareness and use of the chat service.

Additional types of promotional media used to promote live chat have been fairly consistent. Most libraries used local or campus radio, television, newspapers, flyers, posters, bookmarks, and give-aways. Sims reported running ten ads in the campus newspaper, but no evidence is given to support the effectiveness of this potentially expensive promotional medium. Some libraries implemented virtual reference before marketing and thus were able to compare levels of patron use both before and after implementing a marketing campaign, which gives some credence to their conclusions that marketing was effective. Most authors simply state that marketing worked because their goals were exceeded or the number of chats increased, but these reports are essentially descriptive or anecdotal. Little empirical evidence exists for the effectiveness of any particular marketing medium for promoting live chat service.

According to Sims, faculty is another important mechanism for promoting the service. Faculty can have a double impact: they function as potential users of chat themselves and as promoters of chat to their students. As users of chat they should be considered when identifying target audiences. Target audiences, with few exceptions, are more of a concern for the state-wide library systems who serve diverse populations. Bromberg, Hoag and Cichanowicz, and Thompson also described targeting diverse groups of users, but no author provided evidence that the efforts were particularly effective for a given target audience.

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**Table 1. Number of Live Chat Questions**

<table>
<thead>
<tr>
<th>Year</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
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<td></td>
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</tr>
<tr>
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</tr>
<tr>
<td>2006</td>
<td>164</td>
<td>291</td>
<td>174</td>
<td>201</td>
</tr>
</tbody>
</table>

Figures from 2004 reflect the nine-campus Texas A&M University System. College Station 2004 figures are estimated. Virtual reference service was not available in February 2005 because of an application software change. These figures do not include e-mail questions.
While this review reveals some evidence that marketing is beneficial, it demonstrates the need for a more systematic and quantitative analysis of marketing campaigns. Being able to compare pre- and post-marketing statistics over time would certainly add to the evaluation of the chat process. Unfortunately, little empirical evidence exists on the effectiveness of marketing campaigns or their individual components. The purpose of this study is to provide some empirical evidence to support the efficacy of marketing a virtual reference service.

### THE MARKETING PLAN

During the summer of 2005, the VR Marketing Committee gathered information and developed strategies using brainstorming, informal surveys of students, and interviews of staff at various Texas A&M University agencies and offices. The committee met weekly. Between meetings, individual members of the committee investigated various tactical options and prepared a short report for discussion at the following meeting.

The VR Marketing Committee focused on developing two strategies. The first strategy was to refine and promote the Virtual Reference brand image. The second strategy focused on promoting VR services to specific user groups, or target markets.

#### The Virtual Reference Brand

The first issue the VR Marketing Committee addressed was the logo and brand image of the ASK NOW service. A brand is the name or image that identifies an organization and its goods and services. Two important factors help establish a strong brand image. First, to capture a user's attention, repetition is essential. Second, the brand must be associated with its most important characteristic. The ASK NOW icon first used on the Libraries' Web site was considered eye-catching and colorful, but the committee felt it did not do enough to communicate the nature of the service. This point was reinforced by the results of a brief, informal survey of undergraduate students. The phrase “virtual reference” did not mean anything to these students, and they said they would not use the service because they did not know what it was. “Live chat” however, is a concept the students understood. The logo was modified to include the phrase “Live chat with a Librarian” and this tag line is now placed as a hyperlink beneath the logo. (See figure 1 for before-and-after illustrations.)

The next objective was to make this brand a familiar icon to students and faculty. Basic marketing theories such as the media multiplier effect and the three exposure hypothesis support the idea that for an advertisement to be effective, the consumer should be exposed to the message frequently and in more than one venue. The marketing committee followed these principles by planning and implementing several low-cost, high-impact tactics.

First, the committee tried to place the ASK NOW logo on several university Web pages. The committee contacted a number of university agencies including the Center for Academic Enhancement, the Department of Student Life, and the University Writing Center, and requested that the logo and hyperlink be added to their Web pages. Most of these agencies were quite supportive, but the actual implementation failed, primarily because the university does not have a central authority for managing the Web site. Time constraints prevented us from working with multiple webmasters in multiple departments to negotiate permissions, placements, and file transfers.

Another tactic involved a no-cost and widely visible communication mechanism: public workstation screensavers. There are 250 computers in the five library reference centers. In addition, there are 1,158 computers in computer information systems (CIS) laboratories across campus. The marketing committee developed a simple screensaver that contained the ASK NOW logo and the hours of operation for the service (see figure 2). The screensaver was displayed on library workstations beginning in September 2005 and has continued as part of a set of rotating images since that time. In addition, the screensaver was displayed in CIS labs in two-week intervals, three times during the fall semester 2005.

The marketing committee was very enthusiastic about the advertising potential of another widely visible communication mechanism that could be utilized at a very low cost: campus buses. Texas A&M University operates forty-six buses on campus and throughout the Bryan--
College Station community, and the university transportation services department estimates that 5.6 million riders use these buses annually. University–affiliated organizations and departments may place advertising on the buses at the rate of ten dollars per bus per month. To promote a consistent image, the same design used for the screensavers was used for the bus posters. By printing and laminating the posters in-house, the cost to print sixty posters was kept under one hundred dollars. Posters were displayed in all of the buses during September, October, and November 2005, bringing the total cost of this promotional tactic to $1,480.

The remaining posters were displayed in each of the five library lobbies, the Center for Academic Enhancement, the University Writing Center, and used as part of temporary displays in various student and faculty orientation events. ASK NOW brochures and bookmarks were also distributed at fall orientation programs. Throughout the semester, bookmarks were distributed at the circulation desks and brochures were prominently displayed at all reference desks. Finally, two advertisements in The Battalion, the student newspaper, were purchased. The first advertisement ran for one day during the first full week of classes, along with a press release about the ASK NOW service. The second advertisement ran for one day the week of November 22 to coincide with an anticipated increase in student research activity.

**Figure 2. Screen Saver and Bus Logo**

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**Target Market Strategies**

A market segment is a group of individual users with distinct characteristics. For a market segment to be considered a viable target for a promotional campaign it should meet the following criteria: the individuals within the market segment should be similar in nature; the market segment differs from the population as a whole; the market segment should be large enough to warrant separate promotional activities; and the market should be reachable through some type of media or advertising communications method.

Each target group then requires a separate promotional strategy—each with a distinct message and communication medium. In preliminary discussions, freshmen, distance education students, and commuters were identified as key target markets for the ASK NOW service.

**Freshmen**

The estimated 4,500 students in the incoming freshman class were identified as a target group because they are likely to be most familiar with the live chat technology. The committee believed it would be easier to establish the habit of using the live chat service within this group compared to other groups of users. Once a certain familiarity with the service was established, there would be an increased likelihood that this group of students would use live chat throughout their academic experience.

The marketing message to freshmen students focused on quick answers, getting started with research, help finding a book or journal, and referrals to subject specialist librarians. Work on getting the message out to freshmen and other new students started early. The Office of New Student Programs hosted sixteen orientation programs between May 23 and August 24, 2005. The Mays Business School hosted another six freshman orientation programs during the same time period. Texas A&M University Libraries set up information resource tables at every one of these programs, displaying posters, and distributing about three thousand ASK NOW brochures and bookmarks.

The annual Aggie Fish Camp presented another opportunity to promote the ASK NOW service. Fish Camp is a four day orientation
program held in Palestine, TX, where freshmen are given the opportunity to learn Aggie Traditions and to ease their way into college life. While the Libraries were not able to get a presentation on the agenda at Fish Camp, the Public Relations Office did distribute 4,500 note pads with the ASK NOW logo in the gift packages to the students.

Finally, the Libraries make a presentation in all English 104 Composition and Rhetoric classes each semester. Students are required to enroll in English 104 before they accumulate sixty academic credit hours. As part of the fall 2005 and spring 2006 presentations, librarians demonstrated the ASK NOW service and distributed promotional bookmarks and brochures. In the fall semester, librarians spoke in thirty-seven classes, reaching an estimated 828 students; in the spring semester, thirteen classes reaching 313 students.

Finally, the marketing committee recommended the distribution of a specialty advertising gift item as an effective method for reaching the freshman audience. The committee considered several items and chose a library approved water bottle customized with the ASK NOW logo and library URL. Originally, the committee planned on distributing these gifts to freshmen on dorm move-in day, but Texas A&M University has more than nine thousand rooms in twenty-six residence halls on campus. Implementing this strategy became problematic. As an alternative, the water bottles were stockpiled at the circulation desks of the five libraries. As a gesture of goodwill, when an inappropriate container was confiscated by library personnel, it was replaced with a free ASK NOW water bottle.

**Distance Education Students**

Distance education students were also identified as a primary target group for live chat reference services. Texas A&M University offers fifteen graduate degrees and three graduate-level certificates through distance education programs. In addition, a number of undergraduate classes are offered via distance learning technology. As of the fall semester 2005, approximately 1,500 students were enrolled in 190 distance education classes.

The marketing message for this market segment focused on highlighting special services for distance education students and promoting the idea that students could have access to librarians from their home or office.

In the case of distance education students, the main connection to the university is the course professor. The marketing committee decided to implement a two-step approach to promoting VR services by means of the distance education faculty. First, the Virtual Reference Administrator demonstrated the service to the distance education faculty. Four different orientation presentations were scheduled at various times and personal, formal invitations were sent to ninety-six distance education professors inviting them to attend a thirty minute presentation. A color brochure describing the virtual reference service, designed for the overall marketing campaign, was included in each invitation.

The faculty presentations started with a short PowerPoint show that defined virtual reference and identified the benefits of the service. This was followed by a step-by-step demonstration of a live VR interaction and a question and answer period. At the end of each session, participants were given a notepad printed with the ASK NOW logo, a promotional bookmark, and a gift of a Texas A&M University Libraries business card case.

Second, the VR Marketing Committee looked for ways to increase the frequency with which the distance education students would actually see the ASK NOW logo. Distance education faculty were asked to include the ASK NOW logo on the WebCT pages for each course so students would see the logo each time they login to class.

A concurrent strategy involved contacting distance education students directly. About the third week in September, after the enrollment Drop/Add period closed, the Distance Education Librarian sent each student an e-mail message highlighting the features and benefits of the ASK NOW live chat service. This message was intended to be a casual interaction to introduce the service and encourage further interaction with the Distance Education Librarian. Because this was a relatively easy and inexpensive tactic to implement, a similar e-mail message was sent again in early November—to coincide with the expected increase in course project research.

Because e-mail messages are easily overlooked and deleted, the VR Marketing Committee decided to follow-up the e-mail messages with a formal letter in the U.S. mail. This approach did incur the expenses of postage, stationary, and student labor to fold and stuff envelopes. But the committee believed that a formal letter, personalized with each student’s name, was more likely to be read. The letter, signed by the Dean of Texas A&M University Libraries, highlighted the features and benefits of the ASK NOW live chat service. It also emphasized the Libraries’ commitment to distance education students. A brochure describing ASK NOW services was included with each letter.17
Commuter Students

The marketing committee wanted to reach a third segment of users, commuter students, and defined members of this group as anyone who drove longer than one hour to get to campus. The marketing message for this segment was “no need to travel—the library can come to you.” But, after consulting the registrar’s office and several campus agencies, the marketing committee determined that there was no efficient way to identify members of this target group. The committee decided that the general marketing of the ASK NOW brand would reach many of these students.

MARKETING PLAN SUMMARY

The ASK NOW marketing plan is summarized in figure 3. A small printing of brochures and bookmarks had been authorized for distribution at new student orientations that started in May, but a detailed written plan, complete with a proposed budget and implementation timetable, was submitted to the Libraries administration in early June 2005. To expedite executive decision-making, the written plan also included pre-printed samples of brochures and bookmarks, illustrations of screensavers and posters, a sample contract from the Department of Transportation Services, a written cost estimate for the water bottles from the advertising specialty vendor, a draft press release, and a draft of the Dean’s letter to distance education students. The plan was approved in July, and full-scale implementation began immediately.

DATA COLLECTION

When the new virtual reference software was launched in February 2005, each virtual reference patron was asked to fill out a survey both before and after using the ASK NOW service. The optional, post-interaction survey focused on user satisfaction with the ASK NOW service. The results

Figure 4. Pre-survey of ASK NOW Patrons
It’s All in the Marketing

The initial survey is displayed in figure 4. This survey consisted of both required and optional questions. Required questions consisted of their name, e-mail address, and the question the patron wanted to ask. In the interests of patron confidentiality, identifying information was eliminated from the system database once a transcript of the live chat session was sent to the patron.

The first optional question was, how did you learn about this service? Patrons were provided with a drop-down menu of marketing media used in the ASK NOW marketing campaign including the options Orientation Packages, Fish Camp, Library Class, Library Correspondence, Library Web site, Reference Desk, Student Newspaper, TAMU Buses, Your Instructor (outside library), and Other.

The second optional question was, what is your status at the university? Patrons were asked to identify themselves as part of a specified list of university target markets: Distance Education (Undergraduate Student), Distance Education (Graduate Student), Undergraduate Student, Graduate Student, Faculty, Staff, and Other.

The Virtual Reference Administrator reviewed transcripts of every ASK NOW transaction and tabulated the data by hand. This process excluded test questions, lost messages, and the duplicate counts of dropped and repeated messages from the analysis. This data represents completed reference interactions only. For both optional questions, if a patron did not respond the question was counted as other. Responses to the two optional survey questions were correlated to determine the effectiveness of the various marketing media and target market strategies.

RESULTS OF ASK NOW MARKETING CAMPAIGN

This analysis is based on thirty-three months of data collected between January 2004 and September 2006. The VR software in use during 2004, Tutor.com from LSSI, did not accommodate e-mail questions. E-mail questions were managed through another process. New VR software installed in 2005, VRLplus from Docutek, does accommodate e-mail questions and the ASK NOW service automatically converts a question to an e-mail message when live chat is not in operation. Table 1 provides the monthly breakdown of live chat questions answered by the ASK NOW service. This table does not include e-mail reference questions.

In 2004, when there was no marketing activity at all, the Texas A&M University System,
representing nine campuses (see figure 5) and approximately 99,000 students, answered 1,337 live chat questions. That is less than four questions a day. This activity level is slightly less than what Janes found in his 2003 survey of 162 chat reference programs, the Global Census of Digital Reference, which showed that the “median number of questions answered per day was just a little less than six.” Of these 1,337 questions, LSSI (the virtual reference software provider in 2004) estimated that 896, or 67 percent of the questions, came from patrons at the College Station campus. In August 2004, an estimated thirty-four questions came from College Station; in September, eighty-seven. This 156 percent increase in activity is a reflection of the increase in student population at that time of year. Active enrollment on the College Station campus jumps from about 6,000 in August to about 46,000 in September.

When the VR consortium was discontinued in January 2005, virtual reference was only available to the 46,000 students at the College Station campus. Marketing of the ASK NOW service began over the summer, with a blitz during August and September of that year. The marketing campaign clearly had an impact. The number of virtual reference questions increased by 360 percent between August and September. This represents more than a 200 percent increase in the number of questions compared to the 156 percent increase from August to September 2004. From September to December 2005, the number of ASK NOW questions increased approximately 120 percent over 2004 activity.

The marketing campaign continued, at a lower intensity, during the spring semester of the academic year. The service was again highlighted in English 104 classes, screensavers were still displayed at library workstations and brochures were still available at all library service points. In February,
March, and April of 2006, use of the ASK NOW service increased by 475 percent over the same months in 2005. And a comparison of February to August 2006 to the same seven months in 2005 shows an increase of 308 percent (879 questions).

Overall use of the ASK NOW service on the College Station campus continues to increase. Even with a reduced summer school population, the ASK NOW service answered 498 questions during May through August—a 195 percent increase over the same time period in 2005. Since aggressive marketing tactics are no longer being implemented, we attribute this continued increase to satisfied repeat patrons and word-of-mouth advertising.

Tables 2, 3, and 4 focus on virtual reference activity from September 2005 to September 2006. The ASK NOW live chat service operated seventy-two hours a week and provided an automatic e-mail referral service to subject specialist librarians during off hours. Of the 4,404 ASK NOW interactions between September 2005 and September 2006, 61 percent were live chat transactions and 39 percent

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*These figures include e-mail questions.*
were e-mail questions. Questions that came in through the ASK NOW system when live chat was not in operation were referred to a subject specialist librarian via e-mail. In general, these questions were answered within twenty-four hours.

Target Markets
Table 2 shows a breakdown of ASK NOW use by various user groups. After the marketing plan was implemented, virtual reference activity increased among all users, including the two primary target groups: undergraduates and distance education students. On-campus undergraduate students, asking 33 percent of the reference questions, were the primary users of the ASK NOW service. On-campus graduate students, with 27 percent, were the next most active group. Faculty, a user market that was not targeted in the promotional campaign, asked 7 percent of the questions. Users that identified themselves as distance education students represented 7 percent of ASK NOW activity.

Although the overall marketing campaign was clearly successful, no marked result can be identified for efforts toward a particular target market. As table 2 shows, the rate of use for each target market was fairly comparable both before and after the marketing activity. Part of this could be attributed to the data collection mechanism. The pre-survey, which asked users to identify themselves as Undergraduate, Graduate, Distance Education, Faculty, or Other was set up with the Docutek software in February 2005. The marketing committee developed a strategy that focused on incoming freshman several months later. Data was already being collected. It was too late to change the survey and still have meaningful data to compare. The group with the most noticeable increase in the rate of use was Undergraduates. While this is probably due to large amount of marketing activity directed at incoming freshmen, there is no way to verify it with this data. Only 22 percent of the respondents did not respond to or identify themselves with this survey question.

Promotional Medium
Of the 2,901 respondents who answered the survey question, “How did you learn about this service?” 63 percent reported that they learned of the ASK NOW service through its Web presence. See table 3 for a breakdown of ASK NOW users by reported promotional medium. The importance of the Web presence is further supported in table 4. Faculty and graduate students (although not the focus of specific marketing activity) were most influenced by the ASK NOW brand on the Libraries’ Web site. Of those users that responded to the survey question, 79 percent of the faculty and 73 percent of the graduate students reported that they learned of the service from the library Web site. Clearly, the redesign of the ASK NOW logo to communicate its function was an effective marketing strategy.

It is also evident from this data that face-to-face contact with library users is still an essential form of communication. Of all respondents to the survey question, 27 percent said they learned about the ASK NOW service through some form of bibliographic instruction. Among the undergraduate users of the service, 438 or 36 percent of survey respondents reported that they learned of the service through a library class, an orientation, or their instructor. Promoting the ASK NOW service to freshman students through orientations and English 104 classroom instruction was an important component of the marketing plan. Various library orientations where ASK NOW was demonstrated to distance education professors, other faculty, and graduate students attracted another 298 users.

Only seventy-nine ASK NOW users pointed to library correspondence as the way they learned about the service. Of these, only nineteen identified themselves as distance education students. Distance education students were the only target market that received correspondence from the library as part of a coordinated plan; it is possible that another sixty users were enrolled in distance education classes, but did not identify themselves primarily as distance education students. Alternatively, individual librarians may have corresponded with faculty about the ASK NOW service as part of individual liaison initiatives.

Surprisingly, less than 1 percent of ASK NOW users reported being influenced by other promotional media. Only ten users reported that they learned about the service from the campus student newspaper. Another twenty-eight users identified bus advertisements as the place where they learned about the service. This is a disappointingly low number, given that forty thousand students ride the busses daily. But it is possible that these advertising media did contribute to some sort of cumulative effect on potential users.

CONCLUSION
The Texas A&M University Libraries experience provides evidence that the implementation of an organized, cohesive marketing strategy can have a positive effect on the promotion of library services. But it also demonstrates the need for more
systematic and quantitative analysis of the impact of marketing strategies. In particular, this study poses questions for further research: When should a marketing blitz take place? Should faculty, graduate students, and undergraduates be targeted at the same time or at staggered times throughout the academic year? Should a marketing campaign be repeated? How often? Long-term evaluation of user statistics is certain to offer more insight into the process of marketing library services.

References


15. Ibid.

16. Ibid.
