Digitized primary source collections have represented an investment of several million dollars over the last ten years by the University of Toronto Libraries. These commercially-sourced and rich collections have the potential to open up a world of scholarship to students and researchers who were previously prevented from visiting special collections in person by factors including geography and disability. While they offer exciting possibilities for research and teaching, disseminating information about these collections to students and researchers presents unique challenges and requires a concerted marketing effort different than required from most print and digital resources.

This article is about the strategy put in place at the University of Toronto Libraries to promote digital primary source collections. The goal of the strategy is to create the conditions needed for word-of-mouth knowledge sharing about digital primary source collections.

Challenges

While the Library has been licensing digital primary source collections for at least ten years, there has never been a concerted or coordinated effort to promote these resources to library users. If a particular faculty member had requested a resource or if a subject librarian learned of a
resource and became its champion, the resource would be well-used. However, in most other cases, a resource might be licensed and catalogued but show zero uses over periods of several years. Over time, the library identified several challenges to the successful promotion of digital primary source collections:

a) **Metadata:** Discovery of digital primary source collections by happenstance is nearly impossible. They do not sit on a shelf like physical books, and local library staff do not have and are unlikely to gain deep knowledge of the contents of licensed collections the way they do local special collections. Furthermore, in some cases the relative “newness” of many of these collections means in some cases the scholarly record related to these collections is insignificant or difficult to discover, and unable to provide staff with a sophisticated understanding of the collections’ value. Because of these deficiencies, rich and descriptive metadata is necessary to make these collections discoverable. In most cases, metadata is created by the vendors supplying the collections and records are turned on via the Library’s ERM. The vendor-supplied records are often sparse, containing titles and little else by way of description and vendors often fail to supply a collection-level record. That is, they will supply records pointing to each piece of a collection (i.e. a particular letter in a collection of correspondence) but not to the collection itself; meaning there is nothing to point to when trying to promote a digital primary source collection.

b) **Resources:** The nature of the content and the need for license agreements and technical access provisions means electronic resource acquisition staff are the ones purchasing digital primary source collections. This department does not have the capacity and skills for a marketing effort the communications staff has, or the faculty relationships for direct promotions that subject selectors or liaison librarians might have. In short, the staff members who hold the information about what is acquired are not the staff who are best equipped to share information. Furthermore,
the sometimes winding path of an e-resource acquisition makes planning for marketing imprecise as delays caused by the lack of adequate records, vendor-side access issues, or gaps between initial purchases and actual publication of a collection (or its distinct modules) can all wreak havoc on the best laid plans. The Library lacked adequate capacity for librarians in these three areas to share important information along the e-resource acquisition timeline.

c) Audience: The University of Toronto is large and decentralized. Spread over three campuses and forty-four libraries, the University is home to more than 14,000 faculty members and more than 80,000 students. There is no central conduit or central place for the sharing of information about library resources. While the most effective method for the adoption of a new resource is a personal recommendation, the scale of the University of Toronto can make such recommendations difficult.

The challenges identified to effectively promote digital primary source collections made it clear that the ultimate goal of any marketing effort could not be to reach every member of the University community directly with news about every licensed resource. Rather, the goal would be to put systems and tools in place that manufactured the conditions to enable word-of-mouth promotion to happen at scale.

Marketing plan

A marketing plan was established with student-facing and faculty-facing librarians as the target audience. That audience would then be equipped with all they needed to share information with potential resource users, as appropriate. A workflow process was put in place that would ensure each resource made its way through the queue for promotion.

Step 1. Resource is acquired and access is enabled by the vendor. If it is not already specified in the license agreement, permission is secured from the vendor for the use of limited portions of the resource for purposes of promotion.
Step 2. JIRA (workflows software) ticket is created by the acquisition librarian so the metadata department will enable catalogue records.

Step 3. Resource is listed as awaiting promotion on a spreadsheet shared between the collections and communications departments. A student employee populates the spreadsheet with text for Twitter and an accompanying image.

Step 4. Catalogue records are created, including a collection-level record that can be used to point to the full collection. The metadata librarian closes the JIRA ticket, which triggers an email notification.

Step 5. Weekly: A short description of the resource, noting types of material, dates covered, potential subject areas of study, and a link to the collection-level record is sent by the e-resources department in a weekly email to all Library staff accounts. Subject specialists are prompted to add resources to LibGuides or request their addition to the Subjects A-Z guide on the Library website.

Step 6. A link to the collection-level record is added to the shared collections-communication spreadsheet and a tweet is scheduled. Student employees source images for Twitter and schedule content using Tweetdeck.

Step 7. Weekly: The communications department rebroadcasts the weekly e-resources email through the staff newsletter, and archives the content on the staff newsletter website.

Step 8. Where appropriate, subject librarians share a short description of resource and the link with faculty contacts, in department newsletters, etc. Where appropriate, subject librarians update LibGuides or create JIRA ticket to request updates to Subjects A-Z with new resources.

Step 9. Monthly: e-resources staff attends meeting of reference librarians. Answers questions about electronic resources that have been promoted over the last month.
**Step 10.** Annually: Collect and review usage statistics for licensed products to determine which products are well-used, which methods of promotion appear successful, and which may require different strategies.

**Implementation**

The marketing plan was put into effect in January 2017 and almost immediately, lessons were learned that affected practice.

**Metadata**

The presence of a collection-level record is a catalyst, without which the rest of the marketing plan cannot move forward. Initially the practice was for the metadata librarian to “turn on” the vendor-supplied records in the ERM, and if no collection-level record was available, to wait until one was created by the vendor. Without a static link for the collection, it cannot be listed in newsletters, promoted on social media, or listed in LibGuides or on the Library website. This practice meant collections might wait months post-acquisition before being promoted to the library community. The metadata team adopted a new practice wherein if no vendor-supplied collection-level record is available, one is sourced from WorldCat and created. The new practice is significantly more onerous and is made possible by the hiring of graduate student library assistants. The availability of added labor now means a collection-level record is usually available within days of a resource’s acquisition.

**Staff Newsletter**

Notifications of new electronic resources were initially shared via the reference services listserv. Many subscribers to this listserv also fulfill liaison responsibilities so it was thought to be a sufficient distribution list. It was quickly determined some librarians for whom information about newly licensed electronic resources would be valuable were not on the reference services
distribution list. The owner of the liaison librarian distribution list suggested also sending the weekly message to this group but it was decided there was too much overlap between the two. Eventually it was decided the messages were of broad enough interest they should be sent via the All Library Account listserv – a list that reaches all library staff. This change was positively accepted and has meant that notice of newly licensed primary source collections reaches a broad and varied audience.

**Social Media**

The Library’s communication librarian suggested the use of social media, in particular Twitter, as a useful tool for the promotion of digital primary source collections. Initially this was done informally, with the communications librarian taking content that seemed interesting from the staff newsletter, and tweeting a notification of the new product from the library account. The communications librarian advised it was necessary to have an image accompanying any new product announcement to maximize potential for user engagement on Twitter. This requirement created a burden whenever there was a new resource to promote as someone was left scrambling to find a compelling image. The Library established a process whereby a shared Google Sheet, containing a queue of resources awaiting promotion, was shared between communications and collections staff, through which student library assistants were assigned the task of finding appropriate images to accompany each product, as well as scheduling tweets via Tweetdeck.

**Measurement and discussion**

At the end of the year, library staff reviewed COUNTER usage statistics for the digital primary sources that had been promoted to determine the efficacy of promotion strategies. Staff were looking to determine:
• Were current promotion strategies effective in inducing Library staff to investigate the new resources?

• Did current promotion strategies lead to sustained usage of digital primary sources, beyond an initial spike in usage?

For the sake of comparison, Library staff also pulled COUNTER statistics for comparable products that had been acquired in previous years but never promoted, to understand how digital primary sources perform in their first year after acquisition without marketing and promotion.

**Promotion via newsletters and Twitter is effective at highlighting new products**

An initial review of the data shows a definite spike in usage when a resource is promoted. Generally, a resource will go from zero or single digit usage and show dozens or hundreds of uses the month it is promoted. Both the newsletters and Twitter are effective in driving users to a new platform. The difference in patterns of usage between resources that receive promotion and those that do not is clear. Resources that were not promoted after they were acquired might go a year or longer with no usage. As for whether these methods of promotion translate into sustained usage – it is too early to tell. For some products, usage drops back down to zero the month they are promoted, while others look more promising with usage initially declining but then building every month. For example, the product “Disability in the Modern World” from Alexander Street Press saw only 4 results clicks in the first six months after it was acquired. The month it was promoted in the newsletter there were 10 results clicks, then 6 the following month, 22 the following month, 75 the month it was promoted via Twitter and 86 the last month for which there is data. This is a promising example, but another year of data will give a clearer picture.
Resources that are not promoted may never be discovered

The usage data revealed some resources might receive hundreds or thousands of uses per year without ever being promoted. It is likely these have found a faculty champion and have been adopted for a course. What is more likely though, is an electronic primary source that is not promoted might be scarcely or never used by the University community. For example, the Library acquired the Gale collection “Trade Literature and Merchandizing of Industry” in April 2015 and the ProQuest collection “Trade Catalogues” in May 2017. The content of the two collections is comparable. In the first 23 months after it was acquired, the Gale collection received a combined 7 Record Views, before showing a modest spike in usage in months 24 and 25 and then going back to zero usage in months 26-30. The ProQuest collection received 4 Record Views in the months after it was acquired and then a combined 583 Record Views in the months after it was promoted via the newsletter.

Some resources do not require a marketing effort

A look at the usage data revealed promotion efforts for historical newspapers have little impact. For the most part, historical newspaper collections are well-used without an effort promoting them, as long as they are listed in the catalogue. The Daily Mail Historical Archives had 732 Record Views in their first 24 months without any promotion. The New York Tribune had 499 Record Views in the ten months between when it was acquired and when it was promoted.

Keep lists short to avoid user fatigue

Digital primary sources are often acquired in bundles from vendors at the end of the fiscal year, meaning there is a long list of new content to promote all at once. The usage statistics showed messages promoting new products should be short, as users are unlikely to click through a long
list of resources. For example, when the Library acquired six collections from ProQuest’s Digital National Security Archive, the announcements were bundled together into one email. The first collection on the list received 11 Results Clicks. The second received 8, the third 2, the fourth 1, and the fifth and sixth collections listed were never clicked. The exact same problem was observed when collections from Gale’s Archives Unbound were bundled into a single message. Ideally, lists for the newsletter should contain four items or fewer.

**Well-crafted internal communication can successfully manufacture word-of-mouth**

The ultimate goal of the marketing plan is to reach faculty members who might use the licensed resources for their research, or suggest their use to their students. Over the last year there have been several examples that suggest the plan is working. A ProQuest collection of historical women’s magazines was acquired in December 2016, but a collection-level record was not created until November 2017. That same month, a lecturer in the University’s history department tweeted at the Library, asking if the collection was available. The communications librarian was able to respond to the faculty member with the static link for the collection-level record. She responded expressing her gratitude, and she would be sharing the resource with her students. In December 2017, the Library saw an email that was circulating in one of the University’s research units. A paragraph highlighting a new resource had been copied from the newsletter and pasted into a new email, and then forwarded along a couple of times until it reached a group of researchers for whom the resource may be of interest.

**Conclusion and next steps**

The digital primary source marketing plan represented an important first step in creating word-of-mouth knowledge sharing about these collections at the University of Toronto. The usage statistics show, at least in the short term, the plan is drawing attention to digital primary source
collections. In the coming months, collections plans to work more closely with communications to experiment with social media channels beyond Twitter posts, and the Library plans to continue to monitor usage statistics to better understand the efficacy of our promotion strategies and the impact of promotion on use over the long term.

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