

# Gaining Mindshare and Timeshare: Marketing Public Libraries

By Dr N Varaprasad, Johnson Paul and Lena Kua

## Abstract:

*This presentation is an examination of how the National Library Board had successfully gained market share by redefining its market space and remaking the image of libraries and librarians. Libraries were repositioned to gain mindshare and timeshare among Singaporeans, competing against the cinema, TV, video games and other leisure activities, becoming the Third Place after home and work for many.*

## **INTRODUCTION**

The National Library Board (NLB), Singapore, established on 1 September 1995, was entrusted with the role of spearheading the transformation of public libraries in Singapore. Library 2000 was the blueprint for translating this vision into reality. It articulated a new mission for public libraries: "to expand the learning capacity of the nation so as to enhance national competitiveness and a gracious society". Public libraries were to be repositioned as an integral part of the national learning infrastructure, actively supporting Singapore as a learning nation. Coupled with this, the NLB also set for itself an ambitious vision - the creation of a world-class library system that is affordable, convenient, accessible and useful.

## **Market Share**

The L2000 mission and vision statements set the basis of the NLB's marketing efforts in the last 9 years; the success of which is evident to all Singaporeans today. As in all public services, the NLB measures its market share by the percentage of its target users as against non-users. The NLB's marketing objectives has been to expand its mindshare and timeshare of the reading market.

*Mindshare* is evident in the active membership and usage of the library. In these terms the NLB today has an active library membership of 1.7m in FY2003 (0.63

members per capita) as compared to 0.97m in FY1994. Library visits in FY2003 totalled 34.7m (9.1 visits per capita) as compared to 5.5m in 1994. Book loans grew from 10.1m items in FY1994 to 34.8m items in FY2003 (9.5 loans per capita). The NLB's digital library services alone account for two million log-ons, nine million page views and one e-retrieval per capita.

Users are also happy with the NLB's quality service offerings as the overall compliments to complaints ratio improved from 0.3:1 in 1999 to 17:1 in 2002. The NLB scored a customer satisfaction index of 4.24 in 2003 as compared to 3.63 in 1999 (exceeding the public sector benchmark of excellence rating of 4.0) <sup>1</sup>

Inevitably, the National Library Board has become the *de-facto* market leader of "reading services" in Singapore. However we have yet to realize the full market potential. An October 2004 "Non-User Survey & Segmentation Study" concluded that non-users form 38% of the total Singapore population. The survey identified nine non-user segments - five Adult Non-users segments and four child Non-users segments.<sup>2</sup>

*Timeshare* broadly explains the NLB's ability to capture time value of its users as against alternative time uses like average time spent

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<sup>1</sup> Singapore Quality Award Winner, SQA Summary

<sup>2</sup> Refer to Annex A for a breakdown and analysis of the non-user segments.

for shopping, cinemas, etc. The average time spent at Raffles City Shopping Centre for example is 2 hours. 76% of the shoppers in this centre are between 20 to 40 years old, 49% are males and 51% are females.<sup>3</sup> Given the same user profile, the library however may not appear as sticky as the cinema or shopping centre given the convenience of our check-in/ check-out systems. The average duration of a visit amounts to no more than 30 minutes especially if it just involves a book loan. Programmes however attract a longer duration of stay (2 hours). In FY 2003, for example the NLB conducted 5,945 programmes attracting some 354,127 participants.<sup>4</sup> On the net, the average duration of each visit to elibraryhub (digital library) is about 6 minutes. Singaporeans spend an average of 21.8 minutes<sup>5</sup> online. In measuring timeshare, it is important to note that in FY 2000 cinema attendance totalled 13.5m as compared to 21m library visits in the same year. In fact, Compass Point (Sengkang) residents voted for a library in place of a cinema<sup>6</sup> when they were asked to opt for one or the other. The library had unquestionably become the third place – after home and work for a majority of Singaporeans.

### Marketing For Success

Traditionally marketing has been about physical goods and has been confined to institutions trying to sell their products. But in today's environment marketing is as much about getting a message across, ensuring consumers understand how to use a service or getting the public to buy into a government policy. In the context of the public sector every citizen is a "homogenous, equitable consumer" of services and therefore market development is constrained by policy rather than market

<sup>3</sup>

[http://www.rafflescity.com/service/leasing\\_enquiries.html](http://www.rafflescity.com/service/leasing_enquiries.html)

<sup>4</sup> With a minimum duration of 1 1/2 hours for each programme

<sup>5</sup> Netvalue (03072001),

[http://www.shop.org/learn/stats\\_intnet\\_asia.asp](http://www.shop.org/learn/stats_intnet_asia.asp)

<sup>6</sup> Straits Times, "The Library Won out" 26 July 2000

potential. Price, product, place and promotion (4 P's of marketing) are relevant considerations, but second only to policy. The mission centric public organisation is not driven by profits or potential and hence defies the logic of markets, as commercial entities perceive of it. Notwithstanding, the NLB's learning lessons would shed some relevant insights to commercial entities we hope, particularly those in the service sector.

### Key Challenges

The key challenges that confronted the management in 1995 helped to shape the NLB's marketing strategy. These are as follows:

1. How can the NLB **market the public mission** of "expanding the learning capacity" to Singaporeans?
2. How can the NLB **convince librarians** who by the very nature of their training are not predisposed or negatively conditioned to marketing?
3. How can **technology be effectively deployed** to gain market share instead of deploying technology for technology sake?
4. How can the NLB **leverage off the public media** to capture mindshare and timeshare? The common public perception of the library as promoted by the media has always been that of a storehouse, silent, inaccessible and unfriendly.

### NLB'S RESPONSE (CITE)

The NLB's response to the above can be summed in four initiatives: Customer Intelligence(C), Inside-out Strategy (I), Technology Strategy (T) and Engaging the Media (E)

### **CUSTOMER INTELLIGENCE (C)**

The challenge of marketing a public or social mission is not an easy one. This is primarily because the market positioning is too broad

to appeal to any single customer segment at any point in time. Additionally as a public institution, the library had to provide “something for everyone” and like all other public services is often “all things to all men.” The NLB’s response to this has been to define customer value segments instead of market segments. Particularly for the public sector, customer value segmentation helps the organisation to understand what value users are extracting and how they could be segmented and served. It then forms the basis of reaching out to others who are prospects in the value segment but are non-customers.

Value segmentation has enabled the NLB to design its services and policies in alignment with the needs and wants of its customers. A recent survey by Kau Ah Keng, Kwon Jung and Jochen Wirtz, in 2003, entitled “*Segmentation of library visitors in Singapore: learning and reading related lifestyles*” is a case in point. The socio-psychographic value segmentation identified seven segments within our membership with distinct learning and reading lifestyles as (1) Career Minded (2) Active Info-Seeker (3) Self Supplier (4) Casual Reader (5) Narrow-focused Learner (6) Low Motivator and (7) Facilitator. This is summarized in Table 1.

**Table 1: Profiled Market Segments & Reading Lifestyles**

Segment Characteristics	Library Membership	Reading Lifestyles
<b>Career minded</b> Middle age group, have secondary education, 73% married with children, considers library a first choice of information source, considers library for children a top priority, read work-related and recreational materials	79%	70% regular readers; read work-related and recreational materials
<b>Active Info-Seeker</b> 56% regular users; 25% visit once a week, high desire for information, read work related, non-work related and self improvement materials	66%	High desire for information; read work-related and non work-related and self improvement materials
<b>Self-supplier</b> Regular and active readers, 33% with University degrees, IT competent, PMEs, Book buyers, most are infrequent and non-users of library	77%	Regular and active reader; prefer to buy than borrow books; 54% read 1-3 books/month and 28% read 3-5 books/month
<b>Casual reader</b> 64% borrowers, 78% regular users, popular past-time is watching TV and listening to music	84%	78% regular readers; have most positive attitude towards reading
<b>Narrow-focused learner</b> Mainly students, 54% with tertiary education, 72% combines library visit with meeting up with friends.	88%	Read as part of educational curriculum
<b>Low motivator</b> 50% with at least polytechnic or higher education, 56% visit library once in 2-3 months, 17% never visit a library	63%	Not very positive attitude towards reading
<b>Facilitator</b> High proportion blue collar workers, housewives and retirees, 60% female, 18% no formal schooling, 37% primary education, 53 % never visited the library, place high value on library for children	33%	74% are non-readers; no interest in non-work related learning

**Source:** *Extracted from "Segmentation of library visitors in Singapore: learning and reading related lifestyles"*

Evidently, in the last 9 years, the NLB has had a convincing lead in two value segments, the casual reader and the narrow-focused learner with 84% and 88% of our total membership respectively. The career minded (79%) and the self-suppliers (77%) are predominantly adults who have a variety of choices for productive leisure of which reading features prominently. With value segmentation, the NLB builds on its customer intelligence with an annual customer satisfaction survey, supplemented with on-going customer feedback reports and pro-active polling of new service prototypes. These have enabled the NLB to feel the pulse of customers and their perceptions of new implementations. An

example of this is our Quality Services Management (QSM) feedback channel, which allows the public to lodge compliments, file complaints, or ask questions. Environmental scanning, civic group consultations, and focus groups discussions add to the string of customer intelligence gathering that enables the NLB to capture value segments, continually question and re-design its value proposition to Singaporeans. It must be noted that the NLB's report card shows a weaker attempt to reach out to low motivators (63%), active info-seekers (66%) with little success in marketing to facilitators (33%). These three latter segments are targets of our current

marketing efforts and therefore marketing is always Work-In-Progress.

## **INSIDE-OUT STRATEGY (I)**

### **1. Staff Makeover**

*"If we treat our employees correctly, they'll treat the customers right. And if the customers are treated right, they come back." J.W. Marriott, Jr. Chair, Marriott Corporation*

The traditional distinction between internal and external customers and the role of marketing in serving these distinct groups has been a management dilemma. The NLB believes that in order to convince external customers of the value proposition of your offerings, it is important that your internal stakeholders are first convinced and there is strong internal buy-in. This entails an inside-out strategy that does not distinguish the internal from the external customer. To establish the NLB in the minds of the general public as a premier information services provider, the "people" factor needed a makeover.

Internal marketing mechanisms were set in place to inculcate in staff a customer-centric mindset and to allow customer demand to drive staff competency. The NLB established several platforms for the organisation to become adaptive and responsive to customer demands. A set of core values were introduced to inculcate organization-wide desired cultural behaviour. They include four, namely Passion for learning, Commitment to customer service, Valuing the community and Working together (teamwork). The NLB has steadfastly adhered to its the commitment to these values. They were inculcated through induction and continuous training for all staff. This is supplemented by the Performance Management Programme (PMP), which has helped to accelerate the transformation of the mindset of the staff towards teamwork and customer service. With customer feedback, the organisation formulated a Librarian Development Programme that had a learning roadmap

and a process for staff career development. Starting with its Training Needs Analysis (TNA) exercise, the NLB then derives relevant information of its staff competencies/skills matrix to set in place its Total Training Plan (TTP) for the entire organization. It is a bottom-up approach, recognising that the front-line staff that interface with the customers are in the best position to identify competency gaps.

To facilitate common understanding of customer needs across different service channels, communication and suggestion platforms were necessary. These include the Express-So (CE communication sessions), Ask Stupid Questions, Staff Suggestion Schemes etc were organised to solicit feedback and encourage communication between staff on how the organization could respond to changing customer needs. A service standard for frontline staff was also derived collaboratively so that customer services are regularised across the NLB.

### **2. Re-inventing the Place**

#### *Place Making*

The NLB's inside-out marketing strategy not only transformed our librarians, but also our libraries and eventually our customers. Unlike hype marketing techniques of huge corporations, the NLB adopted a tipping point approach that generated waves of internal change through learning design initiatives. The government endorsed the Library 2000 recommendations with a budget of \$1b over 8 years. The NLB then set about to build a new image of public libraries and its librarians by first re-inventing itself.

Accessibility plays a big role not only in converting non-customers into customers but also in keeping them, and this is a strategy we used effectively. Bringing libraries to the people demonstrated our commitment to ensure greater visibility of libraries and connectedness to their day-to-day activities - hence the NLB's presence in shopping malls. With mall libraries, users

need not make an additional effort to get to libraries. It made the convenience of reading as frequent as shopping and at the same time leveraged the traffic density in such areas.

With its network of 73 libraries scattered throughout the country, libraries are practically at our doorsteps. The NLB's 3-tier library system strategically positioned the Regional Libraries in areas of large population centres, with some Community Libraries co-located in shopping malls (e.g. [Library@Esplanade](#) and [Library@Orchard](#)) and community centres/clubs or civic centres (e.g. Marine Parade Community Library), and Community Children's Libraries at void decks of HDB blocks. Visiting the library for people has become a part of their daily activities.

With good customer understanding and learning architecture competence, the NLB was able to totally transform itself from the traditional image of a cold, unattractive and unfriendly place, into a brand new creation, conjuring up pictures of the library as a fun and accessible place (the cool library), a hip and trendy community commons through upgrading, refurbishing and by establishing branches in strategic locations (malls) with heavy thoroughfare. More importantly it also had to demonstrate convenience of access, well stocked, with up-to-date useful and relevant collection in various formats, including best sellers and magazines. Libraries had to accommodate the lifestyle expectations of Singaporeans with the fusion of an up-market cafe and music culture with listening posts, and helpful and friendly librarians. Not all libraries were the same. Whilst most community libraries carried a theme and a wide range of collections, the NLB also built customised, studio libraries, which were tailored to specific needs of the customer segment. The teen-adult [Library@Orchard](#), performing arts [Library@Esplanade](#) and the Self-Help [library@CompassPoint](#) are good examples.

## *Play Making*

The NLB product had a new meaning. The NLB was not a mere distributor of books but also a partner in any individual's learning journey. Besides being a good enabler the library was actively promoting the national learning campaign. Promotional programmes, road shows and reading campaigns not only re-invented the image of public libraries as a place for the people but as a mass learning destination that is useful and relevant to the people of Singapore.

The NLB embarked on an event centric approach to play making. The Library Fest in 2002, the annual Asian Children's Festival, Biz@Library, [Health@Libraries](#), Profile of a Singapore Entrepreneur@Orchard, Chinese Creative Storytelling Competition, World Tamil Teachers' Conference and Exhibition are just few examples of active programming undertaken to share knowledge and encourage reading and learning at the libraries.

In addition, the library offers customised programmes like Aspiration Pathfinder (ASPI) and reference enquiry services that facilitate the life-long learning journey of Singaporeans through constructive methodology and consultation. These value-added services contribute to a high touch environment that the NLB provides to its customers.

## **TECHNOLOGY STRATEGY (T)**

The NLB believes that technology is a great enabler for efficient and effective delivery of services and does not necessary result in alienating or distancing people. Instead, technology can be leveraged for more effective interaction between people. Hence technology as a marketing strategy was adopted as early as 1997. This was born out of the practice of "process marketing" in Nordic countries. Dr. Hitendra Patel of the Monitor Group recently cited the NLB's

innovative use of technology as a key differentiator that created a market impact. He said “ The NLB must be doing something right to make people remember their brand name. Especially, in the way they have used technology for the convenience of its customers.” (Lee U-Wen, 18 April 2005)

Convenience and timeliness are two very real value propositions to customers who have time constraints. The NLB introduced a number of timesaving innovations and re-engineered many of its traditional processes to provide convenience and reduce waiting time. These include leveraging on IT to provide RFID (Radio-frequency identification)/ 24-hr automated book drops, self-check services, and BNQs (borrowers enquiry) terminals. This implementation managed demand variability in different branches and at the same time reduced anxiety of customers as the check-in; checkout system through RFID offered real-time data updates on book loans and returns to end-users. This was born out of the Business Process Re-engineering exercise that the NLB undertook to improve processes to reduce operational time for delivery of services. It resulted in performance measures being set for some processes including: Time to Market (TTM), Time to Shelf (TTS), Time to Checkout (TTC), and Time to Information (TTI). Loan processes (TTS) for example reduced from 6.5 hours to 60-165 minutes, and TTC reduced from 20 minutes to less than 10 minutes.

The NLB also leveraged technology, to provide remote 24-hour access to its Digital Library services (eLibraryHub), bringing the library into the living rooms of citizens, allowing access to the library’s catalogues and other e-Content via the Internet and enabling Singaporeans to access the library anytime and anywhere. In FY2003, the NLB’s corporate website registered 9.8m hits while its eLibraryHub recorded a total of 1.13m retrievals.

The NLB adopted a rapid technology prototyping methodology as a means to test and deliver value to customers. New ideas were tried out on a small scale in one branch, and if it proved successful with staff and customers, it could be quickly ramped up and rolled out in several branches. If not, it could be withdrawn without too much damage or lost. All products and services had to be re-positioned or re-engineered to ensure its relevance to existing customers and make them attractive to non-users. In short there were no sacred cows when it comes to the NLB’s suite of services.

## **ENGAGING THE MEDIA (E)**

The media, in the NLB’s viewpoint was not “paparazzi” but a major partner in the library’s re-branding effort as the NLB actively engaged them in many of our major outreach programmes. Instead of shying away from them, we have actively sought them out, giving them special places of honour in the official launches of our many reading and learning programmes and campaigns. Examples include our “Library Ambassadors Campaign”, where we engaged well-known personalities such as politicians and media celebrities for outreach to the teens and the GenX population; in our “Speak Mandarin Campaign” and “Speak Good English” campaign, where we included a mini series on local television using local media personalities and celebrities; and in our “kidsREAD” programme, at which we had our Prime Minister (then Deputy Prime Minister) officially launch the programme. Advertising also plays an important role in generating interest among the population for our programmes and activities. Huge month-long advertisement campaigns on buses and at various MRT stations helped draw in the crowd into the library. The NLB placed advertisements, press releases and media coverage of activities in a variety of media to create a constant presence in the minds of Singaporeans, so that we are not overlooked in people’s choice of leisure and learning pursuits. In 2003 alone, the NLB

had secured 414 positive media mentions with an approx. 600,900 audience reached per day, a testimony the NLB's continuing effort in promotion.

Today, the NLB is recognized by international media and has been featured on the headlines of the Asian Wall Street Journal, Nikkei Weekly and The Australian. The Harvard Business School has also done a case study on the transformation of the library system.

With a consistent and active branding initiative, the NLB's products and services were perceived as dynamic, forward-looking, innovative, fun and trendy. The NLB evolved into a lifestyle statement for Singaporeans, much to the surprise of librarians themselves.

## **CONCLUSION**

CITE has worked for the NLB and I believe it has shed some insights into the NLB's marketing initiatives that are commercially applicable. Finally, I'd like to conclude by emphasizing that "customers are our future" (both internal and external). They are our *raison d'être* for our existence. In order to achieve our mission to enhance the learning capacity of the nation, we need to acquire and retain our customers. To this end, at the NLB, we will continue to focus our resources and energy to ensure that no one is left behind in this fast pace, highly competitive environment of today, and to make us a nation of life-long learners. Going forward, the NLB is adopting a blue ocean strategy to reach out to our non-users and strengthen our value offerings to the existing group of users. The L2010 report, which will be released shortly, will outline the key shifts in the learning strategy and the NLB's new positioning.

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## Annex A

### Profile of Non-Users & Their Characteristics

Segment Characteristics	Top 3 Reasons for Non-Use
<b>Adults (Age 13 =&gt;) – self answered</b>	<b>Percentage</b>
<b>Avid Reader (11.8%)</b> Demographically varied, with 38% below 40 years, good appetite for reading and books, time available to read and learn, do not find library suitable for its needs, prefer to buy or rent books	Lack of interest (32%), Work commitment (16.5%), Other sources of books (11.6%)
<b>Self Supplier (32.5%)</b> Youngest group, 45% below 40 years, busy group, highest upper value added occupations (PMEs, self-employed, white-collared, skilled), reads occasionally, strong preference for buying/renting books, do not find the library suitable for their needs	Work commitment (43.3%), Lack of interest (23.4%), Family obligations (14.9%)
<b>Laidback Basic Reader (22.6%)</b> Second oldest segment, 53% 40 –60 years old, 57% male, lower value-added occupations (blue collar workers), light readers e.g. newspapers but not books, won't make effort to buy books or consume knowledge, lukewarm attitude towards reading, learning and library.	Lack of interest (39.5%), Work commitment (37.7%), Family obligations (22.1%)
<b>Daily Needs First (19.4%)</b> 50 % bet 40 – 60 years, highest proportion of lower-value added workers, little available time for learning or reading, focus on jobs, tasks, chores, reading not a strong trait or hobby	Lack of interest (35.3%), Work commitment (30.0%), Literacy issues (29.3%)
<b>Low Interest (13.8%)</b> Oldest group of adult non-users, >50% above 60 years old, majority economically inactive, lowest literacy rates, lowest current reading habits, very low interest in visiting library	Literacy issues (61.8%), Lack of interest (26.4%), Physical difficulties (12.9%)
<b>Child (Age below 12) – answered by parent/guardian</b>	<b>Scale of 0 (not important at all) - 10 (very important)</b>
<b>Reading Motivator (11.9%)</b> Play active role in child's reading activities, well read, male dominated (57%), may be look for non-NLB sources for materials, children generally well read.	Other commitments (5.56) Child too young to start reading (5.21) Physically difficult/tiring (4.67)
<b>Narrow-visioned (35.2%)</b> 35% of all child non library users group, female dominated (65%), highest % of non-working (e.g. housewives), less well read, children generally started pre-school, parents focus on basic curriculum, may not consider library good resource.	Lacks child friendly environment (3.99) Other Commitments (3.80) Not enough facilities to keep child occupied (3.52)
<b>Busy – Services Lacking (20.5%)</b> Busiest segment, lacks time to bring kids to library, perceive library offerings not suitable for child's needs, highest proportion of children age 0-2 years (70.6%), highest proportion of young parents/guardians, 70% working adults, lower value-added occupation, 74% secondary or tertiary education.	Other commitments (7.42) Child too young to start reading (6.09) Lacks child friendly environment (5.87)
<b>Kid Not Ready (32.4%)</b> Second most highly educated group, mostly parents/guardians of very young children, 73% female, fairly well read, feel children not old enough to be brought to library, >80% age 0-2 years,	Child too young to start reading (8.70) No books suitable for child (4.47) Other commitments (3.99)

*Source: Extracted from "Non-User Survey & Segmentation Study: September – October 2004"*