The challenges and opportunities of marketing academic libraries in the USA

Experiences of US academic libraries with global application

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Abstract

Purpose – The purpose of this paper is to explore the value of marketing in academic libraries and how the marketing concept is applied in practice to marketing academic library services through the experiences of academic libraries across the USA.

Design/methodology/approach – The paper focuses on using marketing as a managerial tool to accomplish strategic organizational goals and objectives, discusses challenges and opportunities in academic library marketing, presents examples demonstrating innovative methods that academic libraries have used to market their images and services, and offers suggestions for developing marketing plans and strategies.

Findings – The paper finds that market research allows libraries to understand better the points of view of their student and faculty library users, as well as the perspectives of campus administrations and the community external to the college. The result is that the library is more successful in gaining visibility and support for its efforts, and library users are more successful in making the best use of the services available to them to meet their academic and research goals.

Originality/value – The paper offers practical solutions for academic libraries in the global community.

Keywords Marketing strategy, Academic libraries, Strategic planning, Information services, Cost accounting, United States of America

Paper type Research paper

Libraries around the world are facing rising costs and dwindling budgets due to technological advances and today's dynamic economic climate. As a result, marketing concepts are increasingly adapted within the library environment. Libraries are discovering that by using marketing principles and techniques, they can understand better their users' needs, justify funding, communicate more effectively with a variety of external audiences, and achieve greater efficiency and optimal results in delivering products and services that meet the identified needs of their clients. This paper explores how the marketing concept is applied in practice to marketing academic library services through the experiences of academic libraries across the USA. It focuses on using marketing as a managerial tool to accomplish strategic organizational goals and objectives. Challenges and opportunities in academic library marketing are discussed. Examples demonstrating innovative methods which academic libraries have used to market their images and services are presented, and suggestions for developing marketing plans and strategies are provided as well.

Increasing costs and competition for resources

In the last few decades, academic libraries in the USA have increasingly turned to the business world and its literature for more effective organizational, fiscal, and service delivery models. The value of a library to the university's mission and its priority in the university's allocation of funds can no longer be assumed. In the past, librarians have concentrated on providing quality services and collections, and not so much time on explaining the importance of library services to the ability of students and faculty to achieve their goals. As institutions make difficult decisions about where to allocate precious resources, libraries are faced with effectively defending their worth to campus administrators (Kassel, 2002). Many libraries have found that by applying marketing principles and techniques they are better able to articulate their value to the achievement of their universities' goals, and are better able to communicate with and meet their users' needs.

As all of us have experienced, the costs of staffing a library and of purchasing material to support learning and research increase constantly. At the same time the costs of higher education are rising. Historically, public universities in the USA received a majority of their funding from tax revenue that was allocated to them by their state legislatures. However, in the last decade, the percentage of a public university's budget that is from the state government has dropped dramatically, forcing them to behave more like private schools that do not receive government support. At the publicly assisted university where the authors of this paper work, less than 15 percent of Portland State University's total budget now is from the State of Oregon, although that percentage was 39 percent in 1992. The rest of the university's funding must come from students paying tuition and designated fees, from research grants, from contracts for services, and from private gifts. As a result, both private and public universities must devote time and resources to compete with each other for students, grants, contracts, and donations. University administrations are investing more in marketing consultants and staff to leverage their competitive advantage.

Within the university, offices, academic units, and the library also compete for the funds to be allocated to their budgets so that they can support necessary functions. No department receives enough financial support to do the quantity and quality of work it would like to do on behalf of its students and faculty. Librarians must justify why the university should allocate scarce funds to support library collections and services, rather than hiring more teaching faculty in other academic departments or repairing deteriorating classrooms. The importance of the library cannot be assumed, but must be weighed in relation to other critical needs like classroom and laboratory space, teaching and research faculty, support staff, and student services. Library directors are expected to cultivate individuals who will donate money to the library to help support its work. Librarians are under pressure to write grant proposals to private foundations and to government programs in order to receive outside funding to pay for specific collections or projects.

Managing an academic library is no longer a matter of receiving a budget at the beginning of the fiscal year and making sure that it is not overspent during the year. Now, library administrators must do long-range planning to project short- and long-term costs and how they will be lowered or paid. They must make strategic decisions concerning how they will generate funding and where they will spend limited resources for staff, facilities, and collections.

Those of us working in libraries are aware of the misconceptions our users and the larger community have about libraries. Many believe that the world wide web now provides access to all of the world's accumulated knowledge. A simple Google search will provide all the relevant information a person may desire about a topic. They do not know that valuable information will never become available in machine-readable form and that much digitized information is only available for a price. In academic libraries, we find that our students do not realize that their password protected access to databases of full-text journals is not information freely available on the web, but is licensed information to which librarians have negotiated purchased access. Campus students and faculty are not always aware of the enrichment that information literacy instruction from librarians can provide in meeting learning and teaching goals. The general public does not know that it takes a sizeable budget to maintain library facilities, purchase and license rights to collections, hire staff with specialized expertise. A majority are not aware of the role academic libraries play in the collection, preservation, and provision of access to materials that no other institution does.

It is not common knowledge that librarians in the USA have earned masters degrees in library science and many also have earned additional graduate degrees that make them specialists in particular subject areas. They need to organize and provide access to original materials and those in all types of formats and in many languages. Our own campus administrations have difficulty understanding the justification for large library budgets, for we have not done an adequate job of articulating our value and cost effectiveness to the campus mission.

Our campus graduates must compete with graduates from the best institutions for the same graduate school appointments, and jobs. Our faculty compete with faculty from prestigious universities for the same research grants, contracts, and positions. They submit articles to the same leading journals in their fields and book manuscripts to the same prominent publishers. Librarians need to make a better case for the value that quality librarians, research collections, and information technology contribute to the competitive ability of students and faculty.

Strategic planning concepts borrowed from business

A management tool borrowed from the business world that academic libraries are finding useful in looking at their futures and how to manage them is strategic planning. A strategic plan provides a structure for analyzing the current and future opportunities and challenges an organization faces. It forces the library to articulate clearly its vision for what its services will be at a future date, and what its key mission is in relation to its parent university's mission. The plan includes specific goals that would result in the library realizing its vision, the activities that must take place to achieve the goals, and what personnel and fiscal resources will be garnered and allocated to those activities (Lewis, 2000).

Increasingly, academic libraries are finding that applying marketing principles and techniques can facilitate their strategic planning and goal achievement (De Saez, 2002). An entire journal focusing on the topic, *Marketing Library Services,* features articles on the importance of and how to market library services, and describes numerous examples of how libraries have implemented marketing techniques to the benefit of their users (Riverside Data, 1987). Reed's (2001) book, *Making the Case for Your Library* gives practical suggestions for library advocacy.

Marketing is centered on the customers, or library users (Hoekstra *et al.*, 1999). In order better to meet user needs and communicate effectively with users, market research is required to gather the data on which strategic decisions and enhancement of services must be based. In a case study from Kenya, Kavulya (2004) emphasizes that marketing is more than advertising what services are available, but also is a process by which research is gathered to inform institutional goals and the strategic actions needed to achieve those goals.

Regular market research about library users not only helps determine what current and future collections and services the users may require, but also provides valuable information about how librarians might best communicate so that users know about and understand how to maximize the potential of the services available to them. Roberts (1995) did a study to determine how well informed about library services the faculty were at the University of the West Indies. She found that the faculty were aware of only 47 percent of the library services, creating a false understanding of the library's usefulness to them. Because the demographics and needs of users change and because new library collections and services continue to be developed, an assumption in any marketing planning is that changes will occur (Adeyoyin, 2005). Once marketing plans are written, they must be regularly revised in light of new information, goals, aspirations, and service enhancements (Kassel, 1999).

As essential as marketing services and collections to library users is, it is equally critical to identify other audiences to whom marketing strategies should be applied. By identifying an audience, such as university administrators or private donors, librarians can use marketing techniques to understand better and consider their particular points of view and values when recruiting their support for library funding. Strategic marketing provides libraries with a process through which audience research can be conducted and its results used to deliver the most relevant product or message in the most audience-appropriate way to capture the attention and understanding of the audience. The results can be improved delivery of library services and collections, better funding, higher visibility and appreciation from students, faculty, and those who affect funding, and public policy.

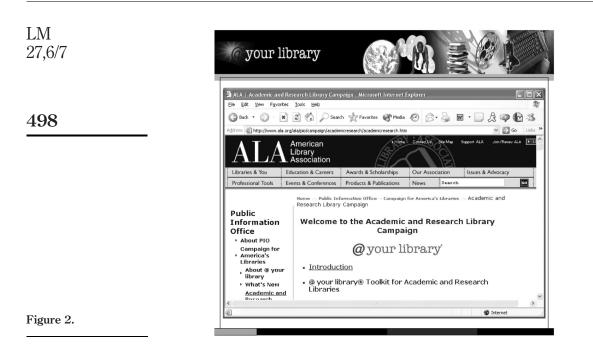### ACRL campaign for academic and research libraries

In April 2001, the American Library Association (ALA) initiated a multi-year campaign to raise the visibility of the value of school, public, academic, and special libraries to the people who depend on them. The web site (see Figure 1) with campaign materials for the ALA Campaign for America's Libraries is freely available for use by libraries around the world (American Library Association, 2006a).

In 2002-2003, the Association of College and Research Libraries (ACRL), in partnership with ALA, customized the ALA Campaign for America's Libraries for academic libraries (see Figure 2). Many of the resources developed by ACRL are available over the world wide web (American Library Association, 2006b).

@ your library®
The Campaign for America's Libraries
@你的圖書館®

Figure 1.

Figure 2.

This paper highlights the concepts incorporated in this campaign and provides examples of how some academic libraries have customized for their use the concepts and resources to successfully meet critical local goals. ACRL's Academic and Research Library Campaign provides tools to assist librarians in better understanding their library users and the services they need, incorporating this information into service improvement, and communicating more effectively what the library can deliver. The process can result in users who are more satisfied with library service, and a wider community who have a greater appreciation for what academic librarians and library resources do to facilitate learning and research.

ACRL member volunteers, with 3M Library Systems (St Paul, Minnesota), and consultant A.B. Reynolds, developed materials and workshop designs for academic librarians to learn and apply marketing planning in their libraries. The materials are based on the work of Schewe and Hiam (1998), who wrote *The Portable MBA in Marketing*. Available is *Strategic Marketing for Academic and Research Libraries Facilitator Guide*, which is a manual to train librarians to serve as facilitators in workshops where other librarians can learn to use a marketing approach in their libraries. A manual for the workshop attendees also is available and is titled, *Strategic Marketing for Academic and Research Libraries Participant Manual*, as well as a guide to train librarians to train other people with use of this material. The manuals are available through the 3M Library Systems web site (Association of College and Research Libraries *et al.*, 2003a).

A summary of the program and concepts of the marketing strategic planning process is published in *Toolkit for Academic and Research Libraries: Messages, Ideas, and Strategies for Promoting the Value of Our Libraries and Librarians in the 21st*

Century (American Library Association, 2003a), which is available to purchase in print from ACRL or to download from the ACRL web site (American Library Association, 2003b).

With these tools, librarians have guidelines for developing a strategic marketing plan that can be adapted to meet the unique needs of a library. The toolkit has key messages, outreach strategies, media relations materials and communication suggestions. Manuals and worksheets guide librarians through a strategic planning process that can be customized for the individual library's needs. Also provided at the ACRL web site are downloadable graphics and customizable publicity materials for use in designing bookmarks, newsletters, posters, web sites, etc.

Goals

The potential benefits of a strategic marketing plan for a library include:

- Awareness of the role the academic library plays in higher education and in society.
- Increased visibility and funding for the library.
- Librarians with more knowledge and confidence in leading discussions and teaching about public policy issues related to access to information.
- Better user understanding of available collections and services and how to best use them to achieve academic and research goals.
- Providing visibility for librarianship as a desirable career choice for bright college graduates.

Key messages

In promoting academic libraries and helping the higher education community and general pubic understand the value they play in society, key messages were created that underlie the strategic marketing process. The key messages emphasized in the ACRL Campaign for Academic and Research Libraries are:

- College and research libraries are an essential part of the learning community.
- College and research libraries connect you to a world of knowledge.
- College and research libraries are investing in the future while preserving the past.

Each of these key messages can be communicated in a variety of ways to specific audiences Each of them expresses an important role of the academic library in teaching and learning, research, and the collection, organization, and preservation of material for future generations.
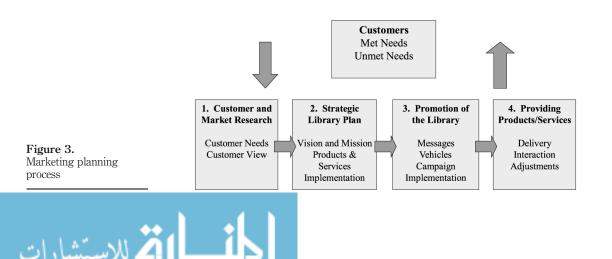
Strategic marketing planning process

The strategic marketing planning process is a cyclical process that must be a continuing activity of the library undertaking it. It is a data-driven, decision-making and service quality improvement process that must begin with market research of the target audience, such as undergraduate students. The gathered data must be analyzed to determine what the met and unmet needs of the audience are from the audience's perspective. Objectively gathering and analyzing the data requires the librarians to avoid assuming what the audience perceives, wants, or needs. By avoiding

assumptions, and being open to information that may be new or unexpected, librarians can better understand the target audience, better communicate with them, and better meet their current and future needs. The library is better positioned to develop successful communication and service delivery goals, and to design communication tools that are most effective in reaching the target audience. Assessment is an essential part of the strategic marketing planning process, for analyzing measurable goal outcomes enables the library to improve services and set new, relevant goals for the future (Association of College and Research Libraries *et al.*, 2003b).

A strategic marketing plan (see Figure 3) includes:

- Customer and market research which generates data on customer needs and customer perspectives on library service.
- The context of current and future opportunities and challenges facing the library that allow it to clarify its vision, mission, and prioritized services.
- Long-term goals to achieve, such as, "Faculty understand the value of the library's role in supporting the campus' teaching mission".
- Objectives to accomplish, such as, "A librarian will contact each new faculty member within the first term of the faculty member's appointment".
- The description of the desired elements of the library's image as perceived by others.
- The most important key messages to deliver frequently and consistently to others through the most appropriate communication methods.
- Prioritized key audiences, such as library users, campus administrators, government officials, as well as how and when to communicate with them.
- Implementation of strategies, for delivering key messages and services as appropriate to key audiences.
- Evaluation for measuring outcome achievement that represents progress toward goals and suggests how to improve communication and service delivery.
- Incorporating assessment information into market research to adjust and improve the planning and service implementation processes.

Figure 3.
Marketing planning process

Status inventory
Once an audience, such as undergraduate students, is targeted, a status inventory is
suggested in which answers can be sought to evaluate how effective current
understanding of that audience is. Questions include:

· What do undergraduate students need from the library?

· Is the library best designed to meet their needs?

· In educating them about the library, are the messages reaching them effectively?

· Is the library delivering what it promises to undergraduate students?

The status inventory worksheet has 26 steps to guide market research on an audience,
identify the pieces of the strategic plan, sequence a promotion plan and prioritize
library services for improvement. Through the market research, librarians can learn
whether their students know what the library has to offer, whether it is worth students'
time and effort to take advantage of the library services, whether they make good use
of the library services, and how they describe the library's services to others.

Services and benefits map
The answers to the status inventory worksheet questions allow a library to build a
services and benefits map, with a particular user need mapped to a particular service
and to the outcome that provides a tangible service to the user. Merely announcing
what library services are available might not capture library users' attention or provide
them with enough information to make best use of the services. However, carefully
analyzing what personal benefit that is important to the user would be gained by use of
a library service and explaining the service in terms that capture the user's motivation
will result in the most successful marketing of the service and the greatest benefit to
the user.

As the plan is implemented and library services are delivered, the marketing plan
must be adjusted as new data and assessment information are taken into consideration.
The process must be integrated into the library routine. The staff must be fully
involved and trained so that they have the skills and confidence to design and deliver
new services required by library users. As an organization, it is important to celebrate
goal achievement and generate energy and excitement to continue planning for and
providing ever-improving collections and services. By accurately understanding and
targeting an audience with an effective marketing plan, both the library and the users
realize mutual success that provides incentive to continue incorporating the process in
the library's operation.

Successful marketing in US libraries
Academic libraries in the USA are generous in sharing their innovative concepts and
successes. The ACRL Campaign for Academic and Research Libraries web site
provides examples of some of these marketing ideas (American Library Association,
2006c, d, e).

Ideas include the following. At Illinois State University in Normal, Illinois, the
library used a clever play on words with the name of the town in which the university
is located. In creating a brochure to help raise money for the library, they used the
slogan, "Redefining 'normal' @ your library®." The University of Missouri-Kansas

City (UMKC) Libraries made large color posters, featuring faculty members with quotes about library services they believe are valuable library services. For example, with the annual marketing theme of "Get It Fast, Get It Friendly @ your library®," UMKC Pharmacy Professor Dr Yuen-Sum Lau's picture is on a poster with a quote from him about how helpful the library is in providing interlibrary loan document delivery directly to his laboratory location. UMKC features their faculty posters in the library and around campus, as well as at their web site (University of Missouri-Kansas City Libraries, 2006).

In partnership with sponsors, ACRL is now providing an annual award to an academic library for an outstanding and successful marketing effort. These award winning ideas are shared at the ACRL web site and through press releases so that other libraries may benefit from their experiences. The first winner of the Best Practices in Marketing Academic and Research Libraries @ your library® was American University Library in Washington, DC. They targeted undergraduates to raise their awareness of services available for them at the library. They used the themes, "Are you in the know?" and and created a successful year-long campaign of welcome kits, posters, articles, mugs, and post-it notes. Key messages were, "Ask @ your library® We can find the books you need," and, "Ask @ your library® We can save you time," and, "Ask @ your library®, Librarians can make your research simple" (American Library Association, 2006f).

The University of Hawaii at Manoa drew attention to their services during National Library Week 2002 with the theme, "Let Ideas Flow @ your library™," (see Figure 4) and the picture of lava flowing down from a volcano tip as Hawaii Island is well known for its volcanoes (American Library Association, 2006e).

Conclusion

Academic libraries are finding that incorporation of marketing concepts and techniques can facilitate the achievement of important organizational goals. Market research allows libraries to understand better the points of view of their student and faculty library users, as well as the perspectives of campus administrations and the community external to the college. With this information libraries can analyze what information and services would be most useful to deliver and how to deliver them most effectively. The result is that the library is more successful in gaining visibility and support for its efforts, and library users are more successful in making the best use of the services available to them to meet their academic and research goals.

ideas flow @ your library™

University of Hawaii at Manoa
Honolulu, HI

*Program for National Library Week 2002 that highlighted the rich
academic collections and services of the state's only public university
system while raising awareness of all libraries in the state*

Figure 4.

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