BECOMING A MARKETING SPECIALIST IN AN ACADEMIC LIBRARY

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Abstract
The paper discusses the librarian’s role as a marketing professional, and the educational needs required to prepare for this work. Starting with an introduction to library marketing and related literature, the paper draws its data from two surveys of Swedish schools of library and information science and Swedish university libraries. The paper concludes with suggestions for professional development for librarians involved in library marketing.

Introduction
Before discussing the educational background, special qualifications and continuing professional development of the marketing professional in an academic library, it is necessary to briefly consider what is meant by marketing in a library, including a short introduction to marketing theories.

Marketing is not a new concept in libraries, but librarians are now working in circumstances where the strategic value of marketing is seen to be increasing. Libraries have worked with at least one aspect of marketing – promotion – for several decades. It is now necessary to take this approach further and adapt the marketing concepts used in the wider service industries for use in libraries.

In general terms the driver for this change is the ubiquity of the web. Until recently libraries were unchallenged in the information market. The library was the place to go when information was needed. This situation has changed rapidly, however, and there have never been so many choices of sources for information, reading and entertainment as there is today. In short, libraries now operate in a highly competitive environment. One of the dangers for libraries in this environment is that in becoming too self-sufficient users will no longer understand the value of the work librarians do ‘in the background’. If users can find information themselves from their desktop they will often fail to appreciate that to a great extent it is librarians making this information available. Eventually the resulting invisibility of librarians will have detrimental effects on library funding, as users ask why they should pay for something that they can do for themselves?

The onus is therefore on libraries to change the focus of their marketing from promoting the use of library resources to educating users to the extent that librarians’ skills can add value to their information use. This is more important than simply making users appreciate that it is the library that makes resources available to them. Librarians need to shift the marketing focus to building relationships and partnerships with users that are as substantive as the resources and services they have spent so long developing. If these relationships are nurtured in order to create a loyal customer base, then the users will in turn do some of our marketing for us. How do you build relationships with customers? There are several ways of doing this, but the most important is to move out of the library, and to take part in the wider activities of the parent institution. This is a strategic choice made for the future of the library.
Marketing mix theory

One of the most widely taught marketing concepts has been the marketing mix theory, based on the ‘4 Ps’ of product, price, place and promotion.

- **Product (or service):** working from a precise knowledge of customer need, a product or service is designed to meet that need
- **Price:** the product must be made at a cost that allows the company to market it at a price the customer can afford and that is competitive with alternative products
- **Place (distribution):** once the product or service is developed, a distribution system must be designed to make the product conveniently available to the customer
- **Promotion:** the product’s availability, advantages, and price must be made known to the purchasing public. This may be accomplished through a variety of approaches ranging from word of mouth to aggressive advertising.

The marketing mix approach has been criticized for being incomplete by not bearing in mind properly the needs of the customer, and disregarding services marketing. In order to overcome some of its deficiencies, the 4Ps have been expanded, to 5, 6, 7 and even 15Ps. Both the marketing mix and relationship marketing (see below) are – in theory at least – based on the marketing concept which puts customers and their needs as the focus. In practice, the 4Ps are too often used for manipulation of customers, exploiting customer ignorance. Many individuals think of marketing only in terms of the last P, or advertising. In fact, the true marketing concept is an integral part of strategic planning that starts with the identification of customer need and ends with the successful sale and distribution of the product or service.

Relationship marketing

There are many descriptions of the goal of relationship marketing, one being that, “Traditional marketing is about getting customers. Relationship marketing addresses the twin concerns – getting and keeping customers”. A working definition of relationship marketing by one of the pioneers of the concept it is marketing undertaken in order to, “establish, maintain, and enhance ... relationships with customers and other partners ... so that the objectives of the parties are met. This is achieved by a mutual exchange and fulfilment of promise”.

Relationship marketing is based on the notion of trusting cooperation with known customers. This is a fundamental concept supported by many libraries. A library frequently provides services to a known set of customers. Libraries also operate on a degree of trust. When a customer walks into the library or contacts the library, they trust that the librarian will act professionally to locate the material or information the user needs. The library in turn trusts that the user will return borrowed items within the specified borrowing period. Users, however, are the reason that libraries exist. It seems evident that the way to create a dynamic library organisation is by understanding and cultivating users. Libraries are, however, built around a series of relationships not only with users, but booksellers, library suppliers, publishers, database providers and library consortia. Relationship marketing therefore seems to be an obvious fit for libraries. The 4Ps and their extensions will always be needed, but the shift to a marketing paradigm reaching beyond promotion increases their role from that of being founding parameters of marketing to being contributing parameters to relationships, networks and interaction.

What then is a relationship with a user? It consists of an episode of encounters through resources, facilities, services, and service providers, which may extend over many
transactions and several years. It is commonly asserted that the attitudes that are most useful are those that are formed through personal behaviour. A library user who has a direct, positive personal library experience will have a more enduring positive attitude than one who reads about library services in a newsletter. Repeated exposure to services is also extremely important. The different relationships a library can form is described in detail by Besant and Sharp, adapting the relationship marketing theories by Payne and Gummesson to a library setting.

Relationship marketing is an activity that does not work effectively unless participants believe in it. It should be ‘everywhere’ in the sense that there has to be a marketing aspect in all roles, tasks and departments of a service organisation. In other words, there has to be an appreciation of the user in all tasks that are performed in a library, and the user is the responsibility of everyone in the library. Marketing is a question of the attitudes of the staff and the entire organisation. Goods are used, but services are experienced. The people who work in the library are the most important marketing resource. The deciding factors for success are attitude and commitment to not only users, but to service providers, other libraries and employers. The concept of relationship marketing must guide all functions and departments of the library and must be understood and accepted by everyone.

Service managers need to know/collect and act on a lot of information about their customers. This can be obtained in various ways, including customer feedback, surveys, focus groups or one-on-one transactions. A systematic relationship marketing approach requires an analysis of the customers of a library, and an understanding of the aspects of the services that creates value. The challenge is then to develop a series of value generating activities that continue to forge relationships with customers.

Literature review

Finding literature on the subject of continuing professional development and workplace learning for library professionals working with marketing proved to be a difficult task. Repeated database searches using a range of search terms provided only a few references, most of them not relevant to the subject. The databases searched were LISA, Eric, PubMed, Cinahl, Nordiskt BDI-index (Nordic LIS-database), Libris (Swedish union catalogue), and Academic Search Elite. The literature search was initially limited to references from 1995 and onward. When very little was found the searches went further back, and finally two older relevant references were found and included in the review.

The most important publication on the subject is the proceedings from the IFLA satellite meeting of the Management and Marketing Section in 2001. The first part of the publication deals with the teaching of marketing in schools of library and information science (LIS) in North and South America, and the UK. Similar surveys were sent out to LIS schools, and the findings were similar in the UK and North America, with less than half the responding schools teaching marketing. There is a difference in perception of the importance of marketing as a subject for librarians; in North America it is perceived as less important, while in the UK 69% of the respondents judge the topic as important or very important. In the North American schools 90% of the given units in marketing were elective, while in the UK the undergraduate marketing units were elective but for the postgraduate courses offering marketing they tend to be required units. It is interesting to note that even though marketing is perceived by both LIS schools and library practitioners in the UK to be important or very important, the subject is only offered by a few schools. The survey in South America showed that only Brazil offered LIS education, and the survey was therefore limited to this country. Six out of nine institutions completed the questionnaire, with three of these offering an optional marketing unit on an irregular basis.
In another section of the IFLA proceedings nine two examples of continuing professional development in marketing for library practitioners are given; one from the US and one from Estonia. In the American example the author thirteen discusses the advantages and disadvantages of various methods for supplying continuing education, concluding that web-based distance learning courses are advantageous since they appear cost effective. She goes on to draft a course aimed at librarians in public libraries focusing on what she describes as a key to marketing in public libraries - demographic and geographic data describing users and the boundaries of the market area, as well as statistics on library use. The course is described as including: 1) marketing research; 2) Geographic information system software; 3) sample case study; and 4) appendices including secondary data, marketing research bibliography etc. In the Estonian example the author fourteen describes the huge interest from Estonian librarians in marketing issues, and how it is met by basic courses in LIS education, as well as specialized courses for library practitioners. These include courses on different marketing topics (strategies, planning etc); courses based on different target groups (academic libraries, public libraries etc); as well as the development of a library marketing portal as a forum for library and information professionals.

In the only published guidelines for the teaching of marketing to information professionals, Savard fifteen describes in detail how he perceives the education of “marketing librarians” should look. The content of the guidelines is based on the wide experience of the author, “who has been responsible for initial training courses at various levels and continuing training for varied groups in a number of developed and developing countries”. The main part of the document sets out in six modules the possible content of such training:

1. the marketing approach as a management tool in the context of information services,
2. marketing and behaviour patterns in the information field,
3. marketing research,
4. the marketing mix – supply,
5. the marketing mix – communication strategies,
6. marketing strategy and planning.

The modules are based on the marketing mix theory, and even though the author describes marketing as a help in making organisations achieve something which they by nature seek – a closer relationship with their public - the concept of relationship marketing is not raised. When reading the guidelines it is evident how the library and marketing fields have changed since these guidelines were published in 1988. Even though the information in the guidelines feels dated it could perhaps be used by someone putting together a new course in library marketing, since many of the concepts of the marketing mix theory are used alongside more relationship oriented approaches. No evidence on the use or implementation of these guidelines was found in the database searches.

Greiner sixteen discusses, in an article from 1990, the roles of the non-M.L.S. professionals in the (public) library emphasising the positive effects of library staff with a mixed background. The author argues that M.L.S. students should be provided with administrative, management, and marketing training, and that librarians who are employed in academic, special, and public libraries all need to understand marketing principles in order to maximise their effectiveness. This doesn’t, however, mean that librarians should fill all marketing/administrative positions in a library. The article provides five examples of non-M.L.S. professionals working in libraries, and concludes that employing these ‘other’ professionals “allows the library organisation to more efficiently utilize the strengths of library professionals”.

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An important article was published recently by Ashcroft\(^1\) wherein she describes the changing world for librarians and how they need to adapt to the new professional environment. A large part of the article is focused on marketing and communication skills, and argues that knowledge of effective marketing, promotional and evaluative techniques are increasingly important for information professionals, as well as self-promotion, evaluation techniques including statistics, and performance management. Ashcroft concludes that librarians need knowledge in effective communication and market research skills. Unfortunately she does not describe how this will be done, but cites evidence that “points to the need for teaching departments to incorporate emerging requirements... into their syllabi”.

An article\(^2\) written by the Coordinator of Continuing Professional Development (CPD) at the Danish library education in Copenhagen describes ‘CPD in practice’. The article focuses on public libraries and describes the new skills librarians need, including skills in selling, communication, and measuring/evaluating.

Almost all articles discussing marketing in libraries\(^3\) argue that the importance of marketing is growing, but unfortunately none of them goes on to describe in detail exactly what skills librarians need and how to obtain them.

Therefore in order to provide data relevant to the question of the requisite educational background, and to collect information comparable with the surveys mentioned above, two email surveys asking questions regarding marketing in libraries were distributed. One of these went to the LIS educators in Sweden and one to twelve university libraries in Sweden.

**Survey of library and information science educators in Sweden**

In Sweden there are six university colleges/universities offering education in library and information science. These are Borås University College, and the universities in Umeå, Uppsala, Linköping, Lund and Växjö. A survey was sent by email to the person in charge of LIS education at each of these institutions asking:

- is there a course during the LIS education dealing with marketing? If not - why? If it does, please describe the course briefly.
- which skills do you consider important for someone working with marketing in a library?
- what kind of educational background would be relevant for someone working with marketing in a library (LIS degree, journalist or other)?

Four of the institutions, Lund, Umeå, Uppsala and Borås, responded to the survey. Even though it is well known among Swedish librarians that the LIS educational institutions have different focus, the answers were surprising, particularly for the first question.

One respondent stated that marketing is not sufficiently important for a special course and another that marketing for libraries is no different than other kinds of marketing. The third respondent describes marketing studies as part of other courses, i.e. information resource management. The students are made aware of the marketing mix theory and a marketing project is conducted. In another course some literature on marketing is included, and the students are then free to choose areas in which they want to deepen their knowledge. One possible subject is marketing, and a course paper is then produced on the chosen topic. The fourth respondent stated that marketing is the cornerstone of the LIS education, and describes in detail how the students are trained in both theoretical and practical aspects of marketing. This respondent also argued that marketing must occur at all levels of an organisation, and that different staff can be responsible for different tasks (planning, writing etc).

The conclusion reached by this final respondent is that the person responsible for marketing could be a librarian, or some other non-LIS professional with the right skills for the task at hand. Of the other respondents two answered that it could well be a librarian.
responsible for marketing if he/she has the right skills (marketing, psychology, subject knowledge relevant for the library) and qualities (outgoing, imaginative, initiative). The final respondent argued that since there is no difference between marketing in libraries and other organisations, the responsible staff should have a degree in business administration specialising in marketing, or be a public relations officer.

None of the LIS educators who responded offer shorter courses in marketing for postgraduate students.

Survey of Swedish university libraries

A survey was sent by email to the library director/librarian of eleven Swedish university libraries (Stockholm, Göteborg, Umeå, Linköping, Lund, Karlstad, Växjö, Örebro, Luleå, SLU, Kungliga Biblioteket and Uppsala) and the National Library, asking:

- do you have a member of staff with the responsibility for marketing/information/communicating with your users/customers?
- if yes, what is the educational background of this person, and how is his/her need for CPD met?
- if you were to hire a new member of staff with the above responsibilities, which educational background would you look for in the new employee?

Ten of the library directors/librarians answered the questions, but some did not give full answers.

Seven of the responding university libraries had someone responsible for marketing, one of them on a temporary basis. Of these seven, four were librarians and one was shifting from being a librarian to a public relations officer. One of them had a background as a journalist. The final respondent did not specify the educational background.

Of the three libraries without a staff member responsible for marketing, one had a group of three (librarians) working with these tasks. One respondent answered that the responsibility for marketing is delegated to all heads of departments, and that marketing must occur at all levels of the organization, and be integral to all meetings with users and funding bodies. The final library indicated that they have reorganized the library and the three groups with responsibility for user services are the ones most involved in marketing activity. They added that the need for marketing is great and that the best way of marketing is personal contacts.

When it comes to the question regarding CPD, six of the universities responded. The answers were all the same; CPD is provided by individual participation in courses, seminars and conferences. None mentioned keeping up to date with the marketing literature, in and outside the library field. One of the respondents listed the most important courses and associations that had helped building the marketing skills, and concluded by saying that it is basically “learning by doing”. This often occurred outside the traditional library arena and in different development projects, complemented by shorter courses, and was the means to becoming a competent marketing professional.

Five of the libraries answered the last question about the preferred background of someone they would hire to work with marketing. Two stated that it would be a librarian, preferably also with an education in media and communication. One answered that the newly educated librarians “are good at marketing and information”. Considering the answers from the LIS educators provided above, this would perhaps not be true of graduates from all LIS educational institutions in Sweden. One library answered that they would like to hire a marketing specialist, but didn’t specify the preferred educational background.

Another library reported that the preferred background would be someone with the same educational level as the faculty of the university, with knowledge of marketing and
communication. This might be a librarian, but it would not be the first choice. The final library could see several possibilities:

- someone with a background in communications, complemented with knowledge of the situation of the customers or,
- a journalist interested in science or,
- a researcher with knowledge in communication and pedagogy or,
- a librarian with knowledge in communication and pedagogy.

One conclusion from this survey is that one reason to hire a librarian to work with marketing is the possibility to use him/her for other tasks in the library, as well as for his/her knowledge about libraries and how they function. To be able to decide who should work with marketing the individual library must decide what they mean by marketing, and what is their level of ambition in this regard. If the library director isn’t devoted to the issue of marketing it will be almost impossible to do more than promotion.

The most important background for someone working with marketing in a library is specialised knowledge in marketing and communication. It could be a librarian with additional marketing education, a journalist, a business administrator specializing in marketing, a public relations officer or someone similar. Of course this person also needs some particular knowledge about, and interest in, the organization they represent. This means that non-librarians may need complementary education in library and information science to be able to understand the peculiarities of the library they represent.

Libraries must start to consider, on a broader scale, how to recruit for different positions in the library. Is a librarian always the best choice? For most of us the days when the best head of acquisitions department was the acquisition expert are gone. This is not relevant only for heads of departments. As Greiner states, employing these other professionals “allows the library organisation to more efficiently utilize the strengths of library professionals”. Librarians can no longer afford to view other professionals in the library as a threat.

If the library director is dedicated to marketing and knowledgeable about marketing trends, relationship marketing should be a focus for the library. Since relationship marketing emphasises that all library staff are responsible for marketing in all contacts in and outside the library, a very important task for the marketing professional is to build the appropriate corporate culture. The modern academic library needs to have a professional attitude to marketing. This means employing the most suitable individual for the task, working in a user centred manner, and emphasising the importance of ‘outreach’.

**CPD for librarians working with marketing**

Undergraduate training – LIS education – must acknowledge marketing as an important issue for the future of libraries. This means training students in theoretical and practical marketing, with relevant case studies and experience of strategic planning.

For librarians already working with marketing one must hope that they are in an organization dedicated to the importance of marketing, which understands that the marketing librarian requires ongoing professional development. It would be preferable for marketing librarians to get a degree in business administration specializing in marketing or in media and communication, in addition to their LIS degree. For most librarians, however, a second (or third) degree is not a possibility, and we have to rely on CPD and workplace learning. This doesn’t mean surrendering the possibility of doing university courses within the marketing area. In several countries (including Sweden) adult students are welcome at universities, not only to study for a degree but also to take shorter courses. Interested librarians need to find and attend interesting courses at university level. Ideally employers should be willing to contribute towards the time, money, and textbooks needed.
It is also very important to read widely. There is at least one library journal - *Marketing Library Services* - dedicated to marketing and many library journals publish articles on marketing at least occasionally. But keeping abreast of the library literature on marketing is not sufficient. To be able to adopt new thinking and new methods you will also need to follow marketing literature in other environments. Many relevant new ideas and concepts are found in the literature related to marketing for service industries. This might mean spending more time than the average librarian on reading. It is advisable to read the most prominent ‘gurus’ on marketing; such as Kotler, Grönroos and Gummesson. A good way of getting further than just reading the literature is to meet with colleagues who the same responsibilities in other libraries in order to discuss recent additions to the literature. This could lead to the formation of a journal reading club devoted to marketing.

Networking - between libraries, with the university department for public relations, nationally and internationally - is also important to the professional development of the marketing librarian. Starting at the parent organization a good relationship with the public relations department of the university is vital, both for professional development and for identifying marketing channels and receiving professional help with layout and production of marketing material. Building networks with colleagues working with marketing in other universities will provide informal channels to new knowledge and invaluable possibilities for discussions on practical aspects of the job. Without these contacts being responsible for library marketing can be a lonely job, as you try to gain and maintain an outsider’s view of the library that no one else in the library has.

Networking nationally and internationally in library and other associations is very important for professional development, since it provides wider networks for information and inspiration. Many national library associations have a special section on marketing. For example, in the UK the Chartered Institute of Library and Information Professionals has its Publicity and Public Relations Group (http://www.cilip.org.uk/groups/pprg/index.html), and the Swedish Library Association has a section dedicated to marketing. Internationally there is the IFLA section on Management and Marketing with its newsletter (http://www.ifla.org/VII/s34/somm.htm). The IFLA section organises pre-conference meetings to the IFLA conferences, and also provides the annual IFLA 3M International Marketing Award. Another way of distance networking is to join one of the email discussion lists devoted to library marketing, i.e. mrktlib@listserv.louisville.edu.

Last but not least there are different kinds of courses and conferences available. Some are organized by library associations, but it is advisable to attend courses given to other professional groups, i.e. public relations officers/managers, or other service industries. Again it is important to have the support of the library management because the non-library courses and conferences can be priced very differently from library events, but looking at the return for investment it may be very good value, since this is where new ideas originate.

**Conclusion**

It is apparent that knowledge about marketing theories and how to apply them in practice is very important to librarians. Without the theoretical knowledge the marketing efforts of the library tend to go no further than promotion. Unfortunately the library literature on marketing, as well as courses and conferences arranged by library associations, tend to focus too much on examples, with little connection to theory or discussion about why certain user groups were targeted or certain methods of communication preferred.

Librarians have to move beyond the library environment in search of new ideas, and acquire theoretical as well as practical marketing knowledge. Using the words of one of the respondents of the survey to Swedish universities; with a LIS educational background it is
basically “learning by doing”, often outside the traditional library arena and in different development projects, complemented by shorter courses, that is the solution to becoming a competent marketing professional.

References