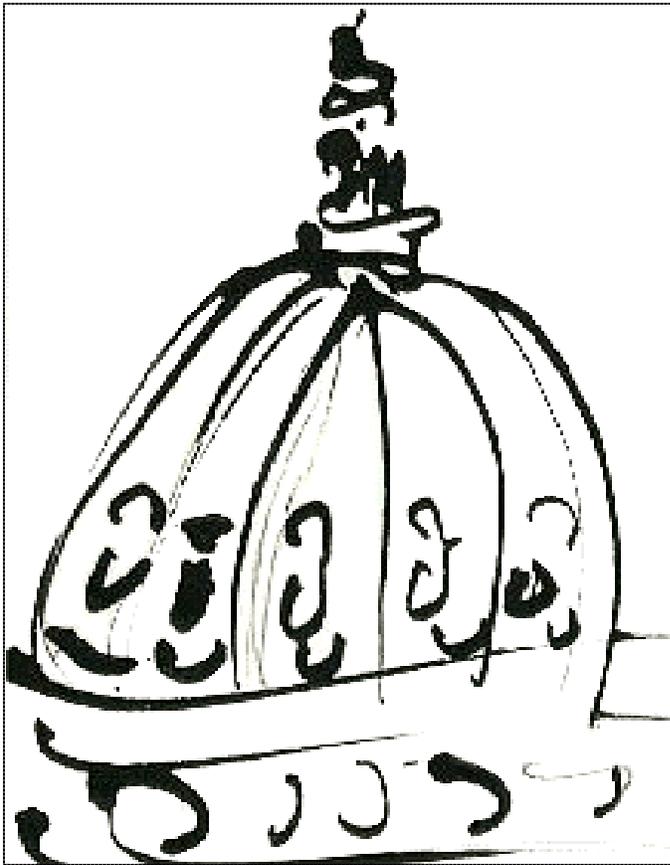




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Public Libraries and the Internet 2004: Survey Results and Findings

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EXECUTIVE SUMMARY

This report presents national and state data from the *Public Libraries and the Internet 2004* survey funded by the Bill & Melinda Gates Foundation and the American Library Association. A primary goal of the study is to provide the library community with current information that describes public library activities in the networked environment. The report summarizes findings at the library outlet and system level for all questions on the survey.¹

Overall, the survey results show high levels of public access computing in public libraries but signs of cracks in the quality of service and the ability to sustain programs. The data also highlight disparities among rural and urban systems, in which rural libraries are more likely to have slower connectivity; fewer workstations to meet demand; and fewer training opportunities compared to urban libraries. At the same time, patrons in high poverty areas have access to the highest levels of connectivity, bandwidth, and wireless access, as high poverty outlets tend to be part of urban library systems. By contrast, high poverty libraries also indicate that they consistently cannot meet the demand for public access workstations.

Key issues identified from this research project show that public libraries are:

- Continuing to increase Internet availability and provide an important link to technology for library patrons. Compared to 1994 when only 20.9% of public libraries were connected to the Internet, 99.6% of all public library outlets are connected to the Internet in 2004. Of those libraries connected to the Internet, 98.9% offer public access computing for their patrons.
- Struggling to meet public demand. Public libraries have as many workstations as they can afford or their building space will allow, yet more than 85% of libraries report not being able to meet demand for computers consistently or at certain times during the day.
- Needing ongoing support to sustain public access computing. 13.3% of libraries reported a decrease in their technology budgets from the previous year, and 50.6% indicated their technology budgets stayed the same with no increase for inflation or demand for services.
- Continuing to increase their connectivity bandwidth. High-speed connectivity is still not evenly distributed across libraries or necessarily sufficient for increased bandwidth-intensive applications. While 48% of public libraries have connection speeds of 769kbps or greater, 73% of urban libraries have connection speeds of greater than 769kbps as compared to only 34% of rural libraries.
- Exploring wireless Internet connectivity for patrons, with nearly 18% of public libraries already having wireless Internet access, and 21% planning wireless access within the next year.
- Continuing to filter their public access workstations. Nearly 40% of all public libraries filter their public access Internet connectivity in some way, thus limiting access to a variety of Internet-based content. The study demonstrates evidence that the filtering

¹ The term “outlet” refers to a public library facility (e.g., main branch or branch). The term may also refer to bookmobiles, but this study excluded bookmobiles. A library “system” comprises all facilities (i.e., main branch and all branches).

requirement in return for E-rate funding is limiting participation in the program by public libraries.

- Providing training to help raise patrons' skill levels. Seniors, people without Internet access at home, and adults seeking continuing education are the primary audiences of technology training. While a majority of libraries offer training, only 28% offer training on a scheduled basis (either weekly or monthly). That percentage drops to approximately 16% for patrons served by rural libraries, but increases to nearly 64% for patrons served by urban libraries.
- Lacking upgrade schedules for technology. Most libraries do not have plans for keeping systems running. Nearly 70% of libraries have no set upgrade schedule for hardware, 77.4% have no set schedule for software, and 96.4% have no set schedule for connection speed.

These findings represent only a small number of the many noteworthy results presented in this 2004 study. A key theme throughout the findings is that, for the vast majority of public libraries, the online environment is an essential part of the services offered to patrons. But as the networked environment evolves, there are many issues libraries face to maintain, enhance, and develop high quality networked information and services. To successfully address these challenges, public libraries will need ongoing and continued support to sustain and enhance high quality public access Internet-based services and resources.