Digital Inclusion Survey: Executive Summary

This year's Digital Inclusion Survey, funded by the Institute of Museum and Library Services and conducted by the American Library Association and the Information Policy & Access Center at the University of Maryland, marks 20 years of Public Libraries and Internet data.

Over this time, we have seen libraries in a constant evolution in tandem with advances in technology. Just as libraries offered word processing software before personal computers were commonplace in homes and offered many people their first chance to try the Internet, public libraries now enable many patrons to explore e-readers, tablets and maker spaces.

Many challenges remain, such as the scant capacity faced by many small and rural libraries and a persistent digital divide that continues to strongly impact Americans with the lowest incomes. Public libraries, whose services have innovatively adapted to the shifting economic and social landscape of the past two decades, are well positioned to act as a national network supporting communities in an age of digital disruption.

> *Broadband is the great technology equalizer of our time, but it can only be so if everyone has access*. – FCC Commissioner Mignon Clyburn.

Libraries act as technologically enabled hubs where people – including librarians, partner organization staff, and community volunteers – offer services to the public. These services include both training on how to make use of new technologies, and assistance with their application to a range of learning, work, health, and government services contexts.

1994: 21% of libraries provide free public Internet access

Today: nearly *all* libraries provide free public Internet & Wi-Fi

The 2014 national study finds that most libraries, for example, offer basic technology training and nearly two-thirds have a specific focus on familiarizing community members with new technologies. Teaching online safety and building social media skills also are supported in a majority of all libraries. This broad range of digital literacy training meets people "where they are" and builds the skills needed to thrive in the Digital Age.

> *Those who receive formal digital literacy training were significantly more likely to use the internet to pursue economic opportunities and cultivate social ties. Those who received formal training were 15 percentage points more likely to use the internet to look for a job.* – Internet researcher John Horrigan

36% of libraries offer after-school programs

35% of libraries offer GED courses

34% of libraries offer STEAM events

In an age in which books continue to exist alongside digital devices, libraries excel at blending the old with the new. When it comes to education and learning, summer reading programs for children lead all categories, with 95% of libraries offering the service. More than one-third of all libraries support GED preparation, basic literacy development, STEAM (science, technology, engineering, art and math) events, and afterschool programs.

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On the digital end of the spectrum, a similar proportion of libraries today (33%) support formal online education content and use, with over 70% of these libraries offering assistance in accessing online degree courses and exam proctoring or testing services. These services are offered in the context of geography: while city libraries are likely to provide more services generally, town libraries lead the pack with formal online learning at 40%, and rural libraries are the most likely to provide assistance in accessing online degree courses, such as virtual high school or online higher education.

When it comes to supporting health-related activities, libraries (60%) offer programs to help Americans identify health insurance resources and get better informed on health topics (more than 56% of libraries offer programs on locating and evaluating free health information and using subscription health databases). Libraries also host services designed to directly meet physical health needs. Close to one in five libraries, for instance, offer fitness classes or bring in health providers to offer screenings. As the needs and interests of our communities shift, so do libraries transform to meet these demands.

A library's ability to provide these services is closely related to the quality of its infrastructure. Overall, advances have been seen in recent years both in terms of infrastructure and associated technology, but challenges still remain, especially for rural libraries. This year's survey reflects that virtually all libraries (98%) now offer Wi-Fi. Median subscribed download speeds all inched up over last year, as well. Forty-four percent of libraries report fiber optic connections, up five percentage points from one year earlier, and roughly two-thirds of libraries report upgrades to technology infrastructure in past 24 months. Rural libraries lag 15-20 percentage points behind all others.

Significantly, this year's survey provides the first data in recent memory on library building age and renovation. Because the average age of libraries (1970) predates the digital age, they face the ongoing challenge of upgrading and adapting buildings to today's requirements. One in five libraries report renovations in the last five years, with city libraries more than twice as likely (33%) to report this than rural libraries (15%). The most common renovations were upgrading the physical plant (electric/network) at 72% – likely correlated with the need to accommodate greater technology— and enhanced or added general use spaces (69%).

1970: Average age of a public library

20%: Libraries renovated in past 5 years

Survey analysis further suggests that libraries are significantly more likely to offer certain types of services to patrons, including new and emerging technology activities, if their buildings have been constructed or renovated within the last five years. The reasons for these differences deserve further investigation, but the data demonstrate libraries' abilities to offer modern services cannot be divorced from the state of their facilities.

In sum, as libraries prepare for the next two decades – likely to bring as much or more change than the past two – we can expect them to continue building on their adaptive strengths: blending the physical and the digital, children's story time and 3D printing, and enabling people to harness technology for education, employment, entrepreneurship, individual empowerment and community engagement—also known as *The E's of Libraries*®. At the same time, we must work to ensure this promise extends from our largest urban libraries and cities to our most geographically remote rural libraries and small towns.

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