



Australian
Library and
Information
Association

Australian Library and Information Association

9-11 Napier Close, Deakin ACT 2600
PO Box 6335, Kingston ACT 2604

Phone: (02) 6215 8222
Fax: (02) 6282 2249
Email: enquiry@alia.org.au
Web: www.alia.org.au

ABN: 40 090 953 236

ALIA INTERNET ACCESS IN PUBLIC LIBRARIES SURVEY 2011



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Executive summary

High rate of response

Once again, public libraries responded en masse to the ALIA *Internet access in public libraries survey*, with some 201 participants representing more than 820 library service points – 55% of the total. This meant that the sample size was more than adequate for a statistically credible result, and it indicated the degree of importance placed on internet access by library managers.

Number and use of public access terminals in public libraries

There had been a dramatic increase in the number of public access terminals over the last three years (+26%), compared with the increase in the size of population (+4%) in the areas covered by survey respondents. This showed significant further growth in demand for internet access in public libraries.

Availability of wifi

Wifi had developed rapidly as a service that most individual libraries and library services offered in order to satisfy library user demand. However, there were concerns that investment in wifi was stretching internet access budgets to the limit and placing a question mark over future affordability.

Support staff

IT support was shared between the library staff and council IT department in most cases. This raises the issue of staff training, the development of special skills, and making the time available in amongst all the other necessary tasks associated with running a library.

User feedback

Library users loved the fact that they could access the internet in libraries and they could do so for the most part free of charge. However, there were frustrations with slow speeds, insufficient terminals and restrictions or limitations on internet access and use. There was also a request for more assistance from library staff.

Policies

Most libraries had a policy that had been updated in the last three years, was signed off at a senior level and was well publicised. However, few had gone through the process of public consultation.

Time slots

Nearly three quarters of libraries had a booking system and the favoured time slot was one hour.

Internet training

Public libraries provided a range of internet training, from informal assistance on an ad hoc basis, through to sessions for seniors, toddlers, people whose first language was not English. The sessions went from beginners' classes through to advanced courses. Most training was free of charge.

Complaints

The number of complaints has decreased over the last nine years. It started from a low base and has reduced year-on-year. Most complaints continue to be about sexually explicit content.

Internet filtering

A third of libraries used filters, and of these, a third operated them at a high level. Most were geared to filter out offensive content. Some 44% of libraries had received complaints from their users about the use of filtering.

Services for children

In 19% of cases, there were separate terminals for children in the library and in 48% of cases there were recommended links to third party material designed for younger age groups. Parental consent was required for young people to access the internet in libraries, often up to the age of 18, and parental presence was required in 65% of cases until at least 12 years of age.

The ACMA cybersafety help button was an increasingly common feature on library websites.

Monitoring internet use

Two thirds of libraries monitored internet use, with staff visually monitoring the situation and the collection of system data. Data collected was used to identify inappropriate internet use, for management reporting, and to improve services to library users.

Connection speed and cost

Only 39% of libraries had broadband connection and many were operating at below the very basic broadband speed. Ongoing affordability was a concern, with demand for public access terminals continuing to grow and a new expectation of wifi in libraries.

Effect of the National Broadband Network

More than a third of libraries thought the NBN would increase the number of library users; 55% thought it would make no difference. Many saw it as creating change and providing positive benefits in terms of faster internet access, improved services and the opportunity to attract new users.

However, few had begun to plan for the arrival of the NBN.

Hardware

Over a third of terminals in libraries were more than three years old and would need to be replaced soon.

Role of ALIA

More than two thirds of participating libraries were institutional members of ALIA; the vast majority of these (86%) were aware of ALIA policies on content regulation and internet services in public libraries, and 62% had made use of them.

Summary

The survey painted a picture of a highly-rated, greatly in demand service, which was not without its frustrations for library users. It highlighted the difficult budget and resource issues facing library managers going forward, and the need to revisit strategies and policies on a frequent basis, to keep up with the rapid changes in technology and consumer expectations.

1. Introduction

The Australian Library and Information Association (ALIA) *Internet access in public libraries survey 2011* is the fifth in a series of reports, the first published in 2002, which together provide the most comprehensive indication of how public library internet services have been managed, delivered and used throughout Australia over the past decade.

<http://www.alia.org.au/advocacy/internet.access/>

ALIA continues to be active in this space, promoting the strongly held beliefs of its members through its involvement with the likes of Google and Yahoo, as a founder member of the Safer Internet Group.

<http://www.alia.org.au/internetfiltering/>

About the survey

The 2011 survey is based on the same questionnaire used in 2002, 2005 and 2008. However, in light of recent and anticipated developments in internet services and government policy, questions relating to cybersafety and the likely impact of the National Broadband Network (NBN) were included. Questions dealing with the provision of wireless access were expanded.

The survey considered a range of questions relating to the provision of internet access in public libraries including: how internet services are delivered and supported; development and implementation of internet use policy; education and training; complaints from users about internet content; the use of filtering software with specific reference to the use of the internet by children; monitoring of internet use and the likely impact of the NBN.

Requests to complete the online survey (using Survey Monkey) were communicated through the ALIA Public Libraries Advisory Committee networks. The survey contained two strands: one for people answering on behalf of a library service with a number of service locations, and the other for individual libraries.

Results

This report analyses approximately 200 responses representing contributors from every State and Territory, located in metropolitan, greater metropolitan, regional and rural communities.

Survey respondents provide public library services in more than 820 locations that include central libraries, branch libraries, mobile libraries, combined community and school libraries and a range of other library service models.

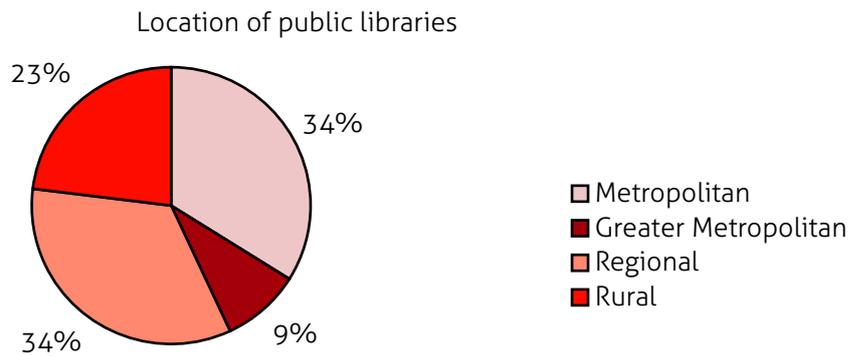
The survey records responses from approximately 55% of the 1,480 public library service points recorded in the most recent *Australian public libraries statistical report*¹. Respondents range from large metropolitan library services with 14 branches and over 260,000 registered users, to remote rural libraries with fewer than 50 registered users. It can be concluded that the survey respondents represent the range of public library services available throughout Australia.

1 *Australian public libraries statistical report 2008-2009. Final report.* Compiled by Public & Indigenous Library Services, State Library of Queensland December 2010 for National and State Libraries Australasia (NSLA). <http://www.nsla.org.au/publications/statistics/2010/pdf/NSLA.Statistics-20101203-Australian.Public.Library.Statistics..2008.2009.pdf>

Which best describes your location?

Total number of responses = 250

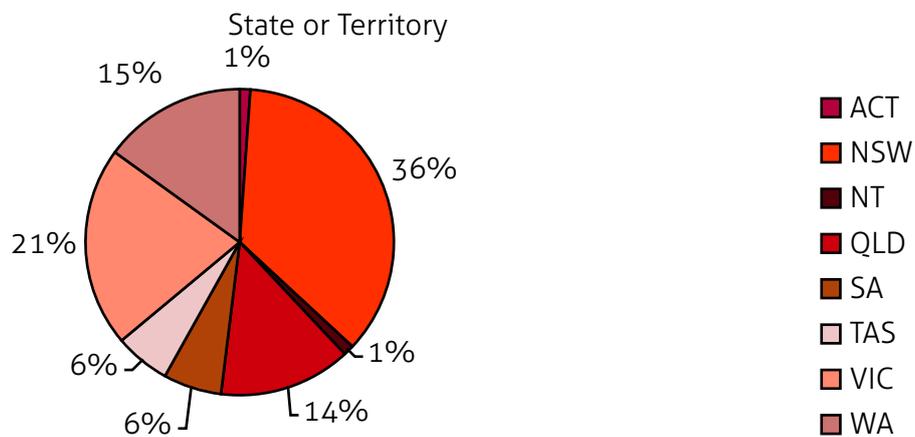
136 library services + 114 individual libraries = 778 public libraries



Which State or Territory?

Total number of responses = 251

137 library services + 114 individual libraries = 824 public libraries



2. Public library internet access

Number and use of public access terminals

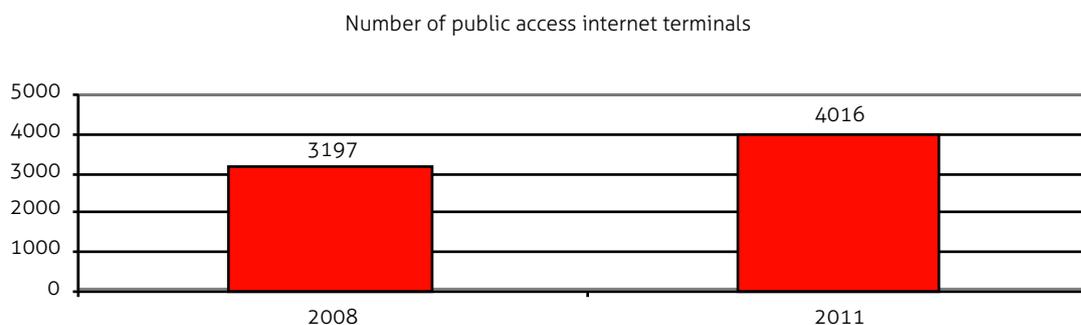
The 2011 survey responses represent public libraries serving a total of 5,939,319 registered users; approximately 60% of registered users nationwide.²

Respondents representing 714 public libraries had a total of 4981 internet access terminals, which gave an average of seven terminals per library. Respondents representing 585 public libraries gave a total number of users per week figure of 133,279. This was an average per library service point of 228 and an average per terminal (assuming a five day week) of 6.5 users per day. As the vast majority of libraries were booked out for one-hour sessions, this meant that the use of public access terminals was close to full capacity.

When asked about the number of public access internet terminals in 2011, compared with the number in 2008, there were fewer respondents (representing 564 public libraries). They gave a figure of 4016 in 2011, compared with 3197 in 2008, showing an increase of 26% over the last three years. However, the population growth in the areas covered has been only c4%.

How does the number of public access internet terminals in 2011 compare with the number in 2008?

Responses on behalf of 564 public libraries



What is the size of the population you serve now, compared with 2008?

Total number of responses = 156

104 library services + 52 individual libraries = 525 public libraries

Population size 2008 total	11,166,929
Population size 2011 total	11,591,121

Increase in size of population served 424,192 (c4%)

Average population per library 2008	21,270
Average population per library 2011	22,078

Availability of wifi

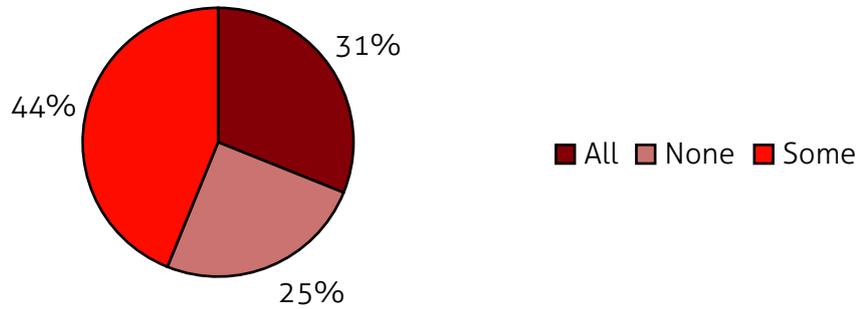
Nearly one third of library services offer wifi in all their libraries and 75% of libraries provide wifi in some or all of their service points. At least a quarter of libraries don't offer wifi.

Where wifi is offered, in 75% of cases, it is only during library opening hours. In 30% of libraries, this is because of cost; in 15% it's the result of a ruling by council. Other reasons included security concerns, password restricted access (the password is only available when library staff are on hand to provide it), commercial decision (an internet café lobbied council to prevent the library offering wifi), the fact that library opening hours were considered sufficient.

² *ibid*

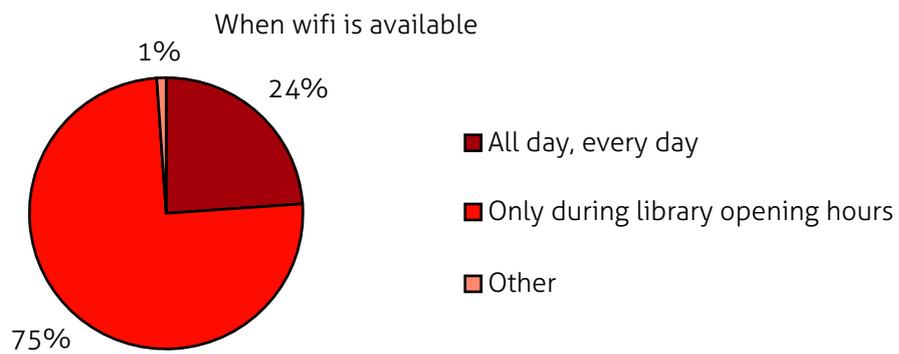
How many of your public libraries offer wireless access?

Total number of responses = 224
134 library services + 90 individual libraries = 772 public libraries
Public libraries offering wireless access



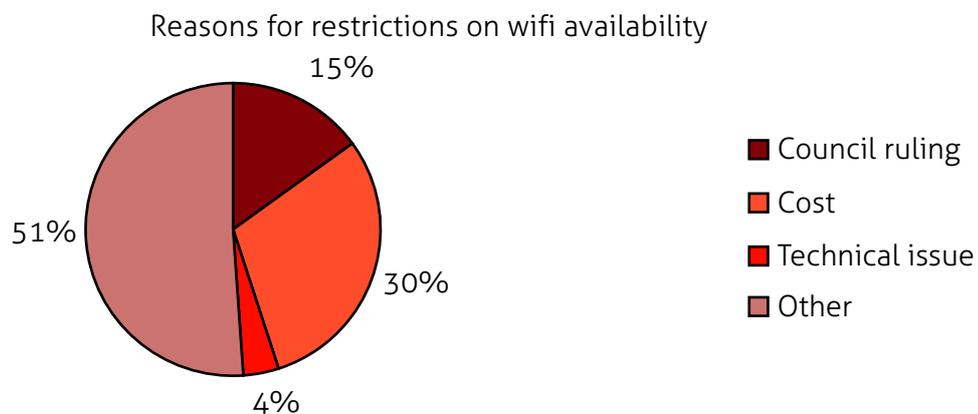
Where there is wifi, when is it offered?

Total number of responses = 155
101 library services + 54 individual libraries = 559 public libraries



If you don't offer wifi in some branches, or it is restricted to opening hours, why is this?

Total number of responses = 164
106 library services + 58 individual libraries = 602 public libraries



3. Public library internet support

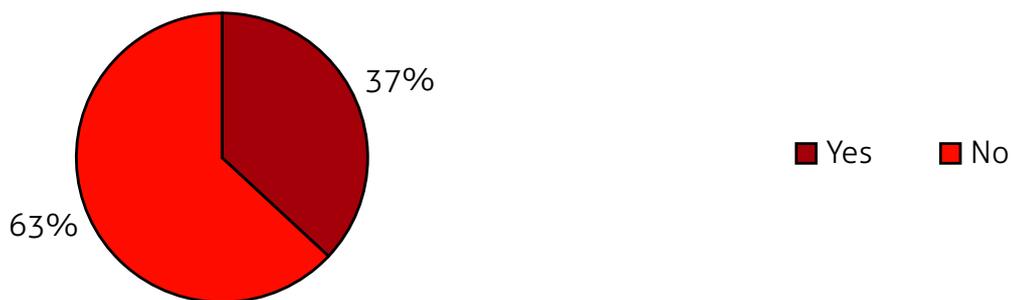
Despite the high level of internet use in public libraries, only 37% of service points had staff dedicated to supporting internet services. In a third of cases, the council IT department looked after technical support; in just over a quarter (27%) it was the responsibility of members of the library team. In 38% of cases, it was a shared responsibility between council IT and the library team.

Do you have staff dedicated to supporting internet services?

Total number of responses = 224

133 library services + 91 individual libraries = 791 public libraries

Staff dedicated to supporting internet services in the library

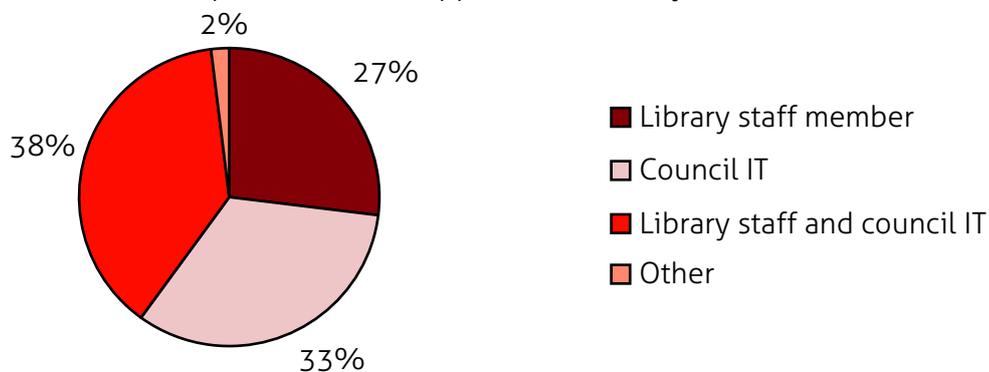


Who is responsible for IT system administration, troubleshooting, support etc for your library?

Total number of responses = 221

132 library services + 89 individual libraries = 737 public libraries

Responsible for IT support in the library



4. Library user feedback

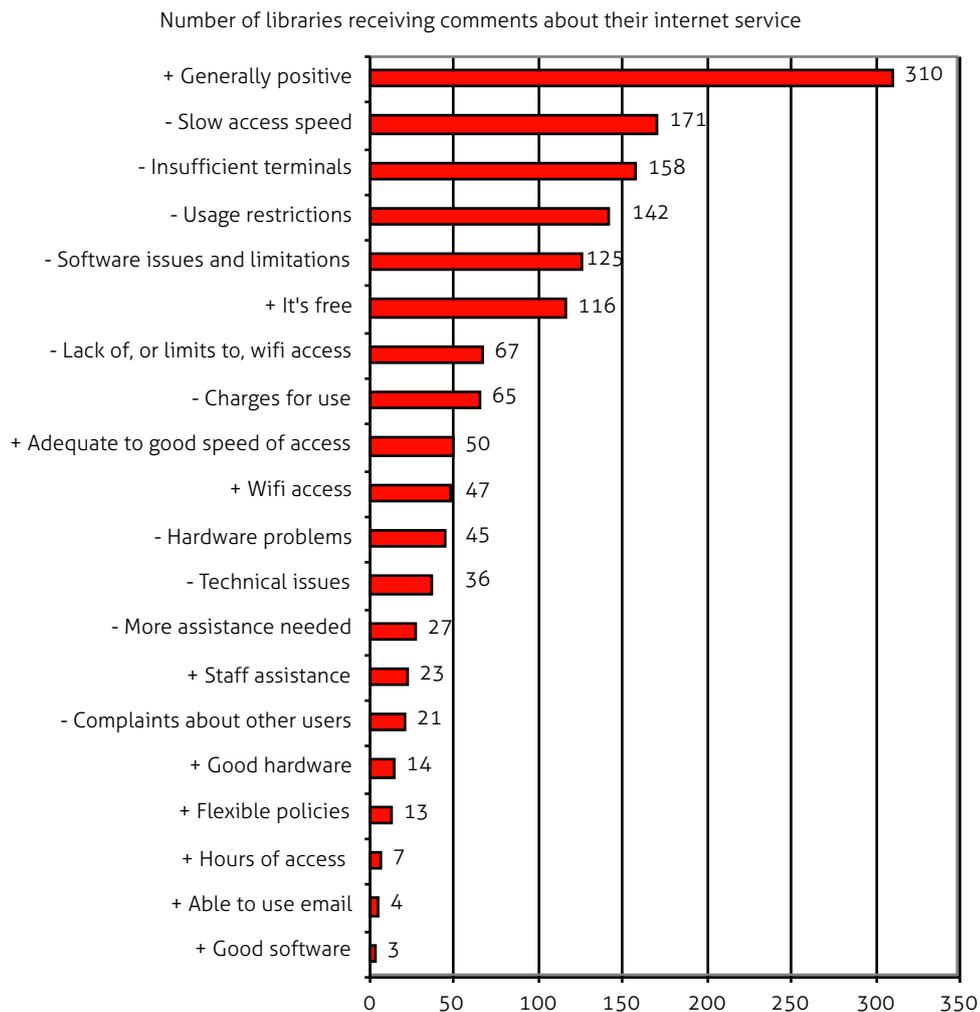
Among the general comments received from library users, respondents representing 310 library service points reported them as being generally positive. However, a significant number of libraries had complaints about slow access speed, insufficient terminals, usage restrictions, software issues and limitations, and lack of, or limits to, wifi access.

People appreciated the fact that it's free. An almost equal number of libraries received positive comments about staff assistance and feedback about the need for more assistance.

What has been the user feedback about internet access in the library?

Total number of responses = 180

117 library services + 63 individual libraries = 545 public libraries



5. Internet policies

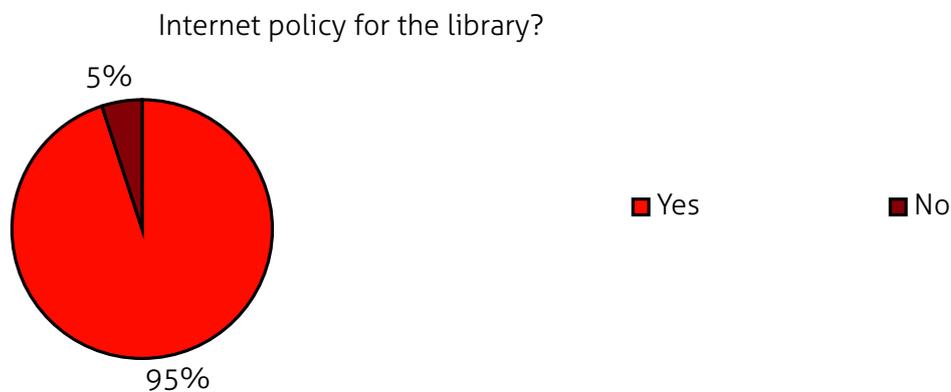
Most libraries (95%) had an internet policy and in 84% of cases it had been reviewed within the last three years. In almost all cases (98%), it covered internet use behaviour, and 93% of library service points publicised the policy with signs near terminals, information on the library website, brochures and other methods. These included users needing to sign an agreement when joining the library or when logging on to library PCs and signing on for wifi access.

Mostly library internet policies were developed by the library team. Community consultation took place in only 11% of cases. Suggestions boxes, public meetings and surveys were popular methods of gaining feedback. Other responses included focus groups, notices seeking opinion posted in the library, requests via newspapers, on the website, informal consultation and research with other libraries. The council or council officers signed off on nearly half (46%) of all internet policies. For joint use (school and community libraries), the policy was endorsed by the school governing council.

Do you have an internet policy?

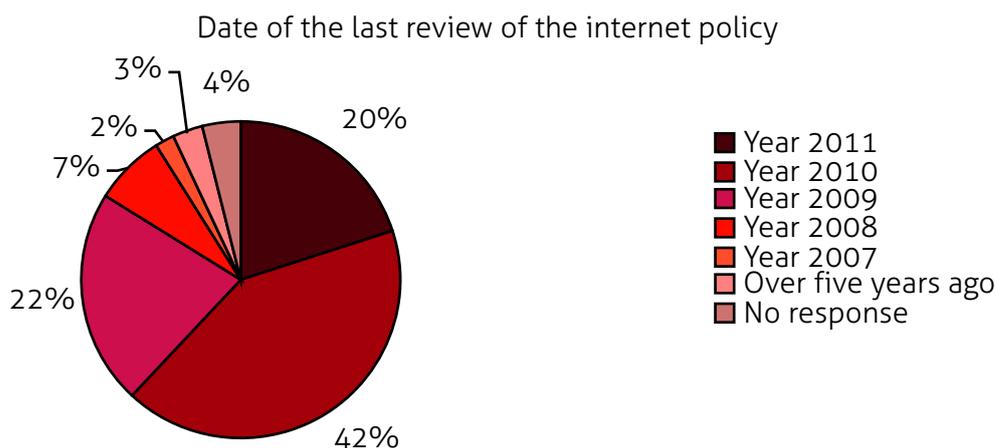
Total number of responses = 225

135 library services + 90 individual libraries = 784 public libraries



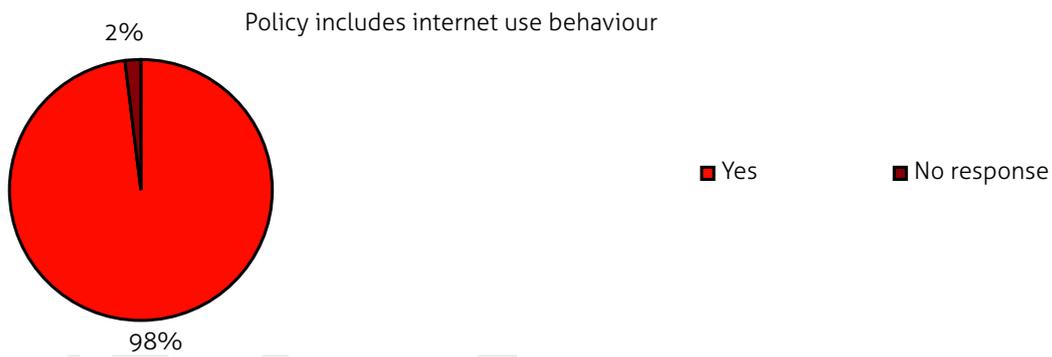
When was it last reviewed?

Responses on behalf of 742 public libraries (answering 'yes' to previous question)



Does the policy include internet use behaviour?

Responses on behalf of 742 public libraries (answering 'yes' to original question)



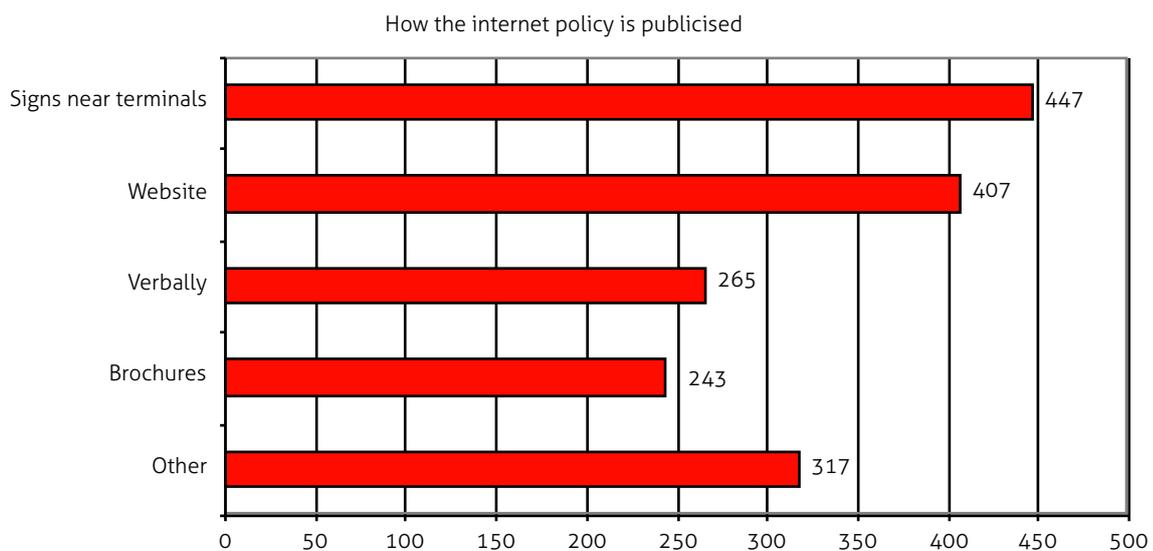
Do you publicise your internet policy?

Responses on behalf of 740 public libraries (answering 'yes' to original question)



How do you publicise your internet policy?

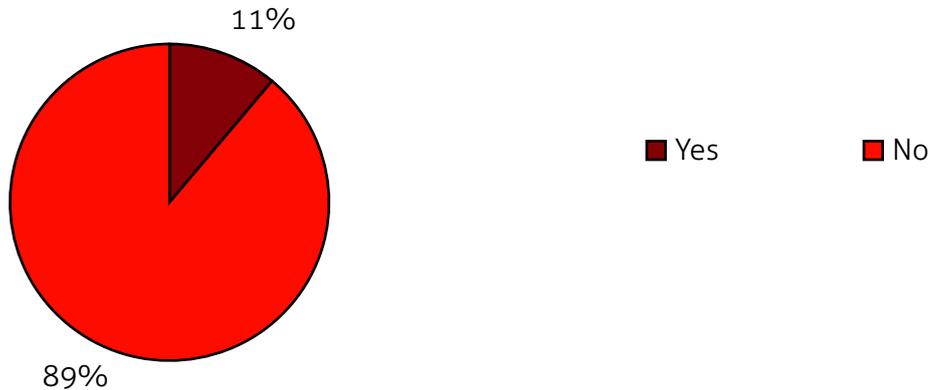
Responses on behalf of 740 public libraries (answering 'yes' to original question)



Was the community consulted about the development or review of the library internet policy?

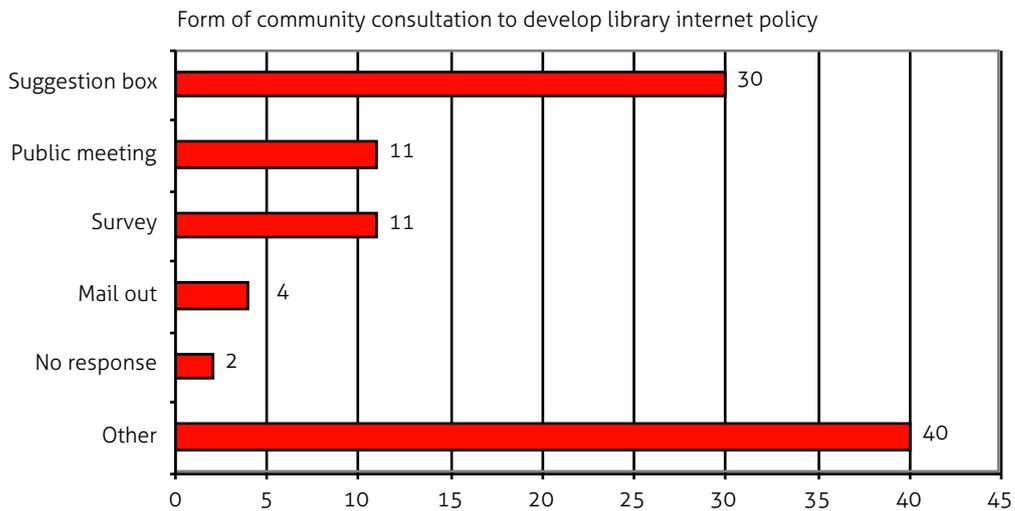
Responses on behalf of 737 public libraries (answering 'yes' to original question)

Was the community consulted about the internet policy?



What form did the consultation take?

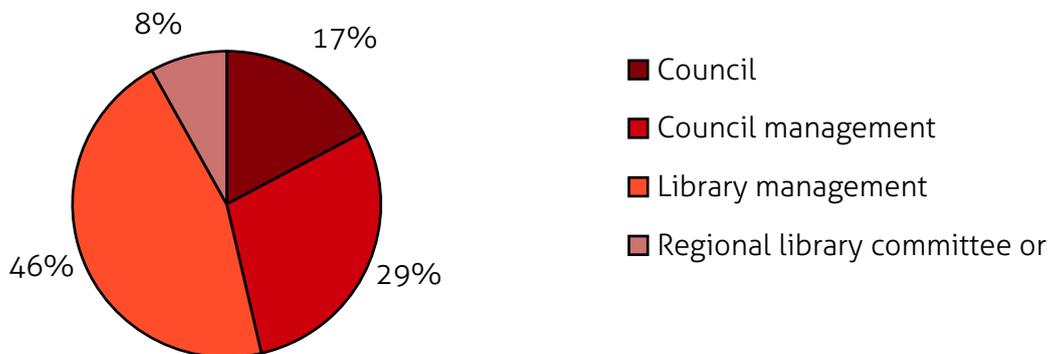
Responses on behalf of 80 public libraries (answering 'yes' to original question)



At what level was the library internet policy endorsed?

Responses on behalf of 649 public libraries (answering 'yes' to Q13)

Level at which the internet policy was endorsed



6. Time slots

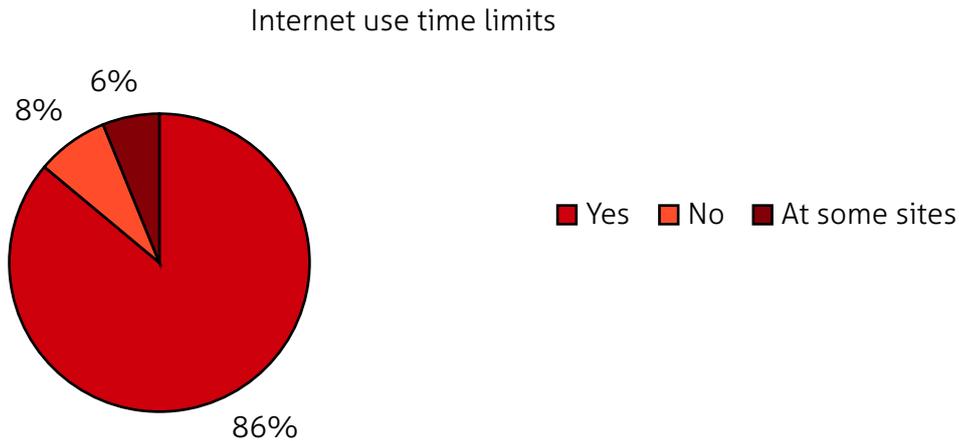
Most respondents (92%) said that time limits were applied to internet use. Often, libraries applied different time limits to terminals in the same location. The favoured time limit was one hour.

More than two thirds of libraries (70%) had a booking system. Where only some access points in a library service had a booking system, the most frequent explanation was that only the main branch library, the biggest or the busiest libraries used a booking system.

Are time limits imposed for internet use?

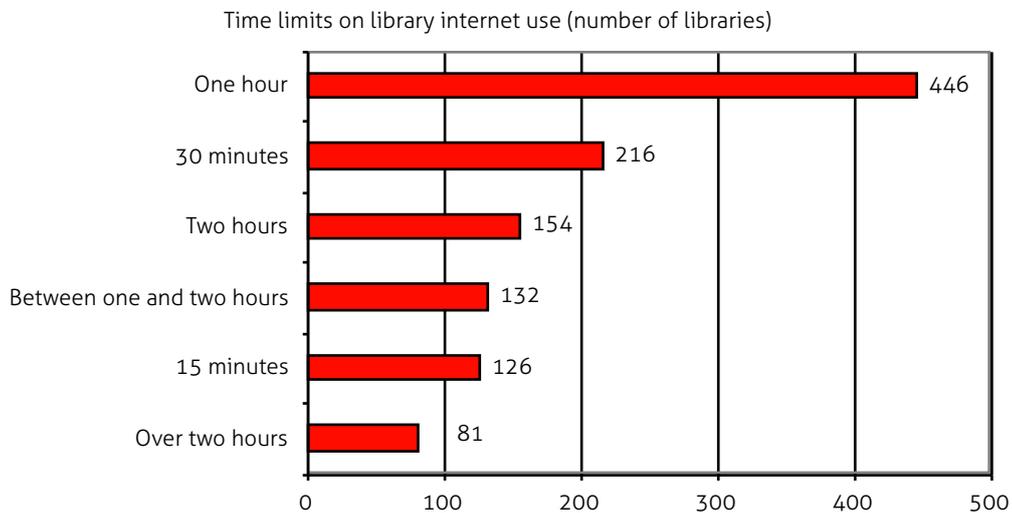
Total number of responses = 220

135 library services + 85 individual libraries = 779 public libraries



What are the time limits?

Responses on behalf of 720 public libraries (answering 'yes' or 'at some sites')

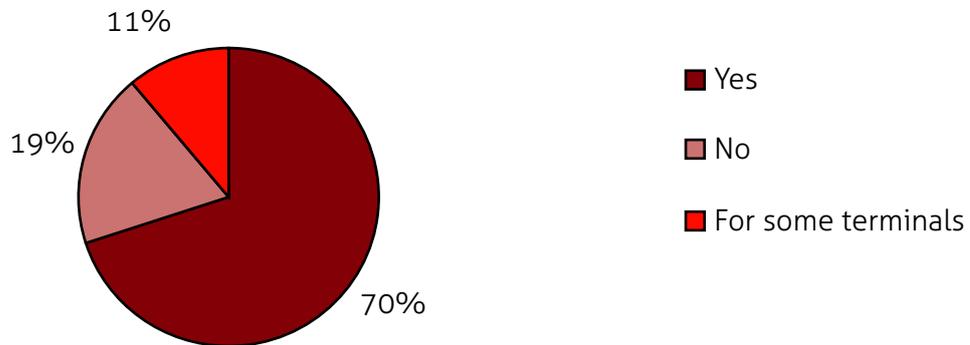


Is there a booking system for internet use?

Total number of responses = 220

135 library services + 85 individual libraries = 779 public libraries

Booking system for internet use



7. Internet training

Informal assistance was by far the most common form of internet training in libraries, with four out of five libraries offering this service. Formal training was offered in just over half of all libraries (54%).

Training aimed at parents and children was offered in 15% of libraries, taking the form of cybersafety, homework and tutoring, and sessions catering for parents, students and toddlers. Training for seniors was much more common – in two thirds (69%) of libraries. This was mainly at an introductory level: computer use, email, social networks and internet search skills. Many courses were run in conjunction with the Broadband for Seniors Kiosk program or U3A.

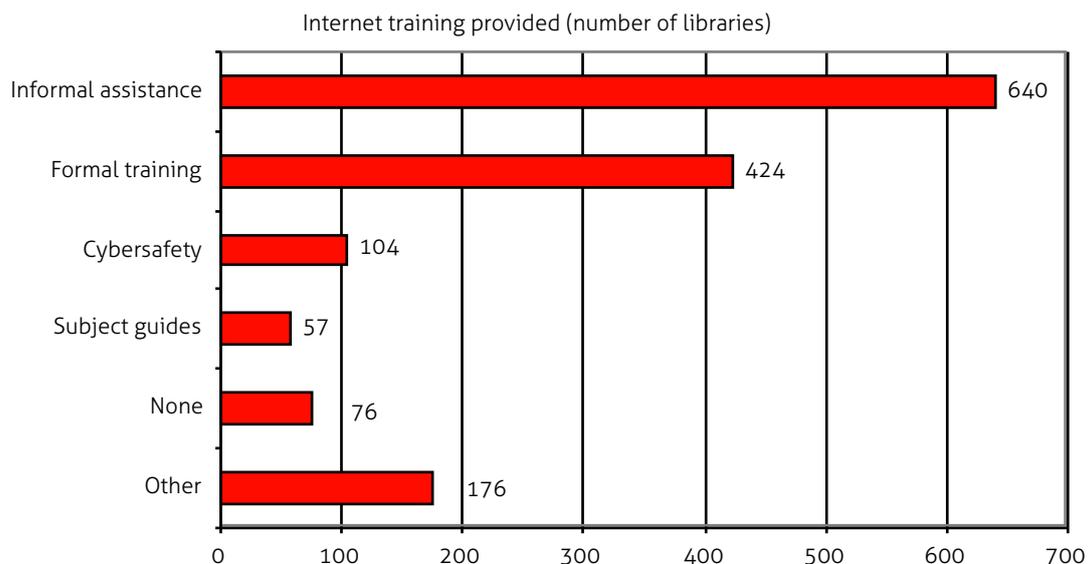
There was a broad range of training on offer, including internet for beginners, emailing, social media use and research. There was also training provided in languages other than English.

In the majority of cases (76%), training was provided free of charge. Where training was part free, part paid for, the most common explanations were that there was a booking charge to discourage no-shows; the basic courses were free, but there were charges for the more advanced versions; special events were free, but regular scheduled classes were fee-based, and training was free to concession holders, seniors and school students.

What internet training is provided in the library?

Total number of responses = 219

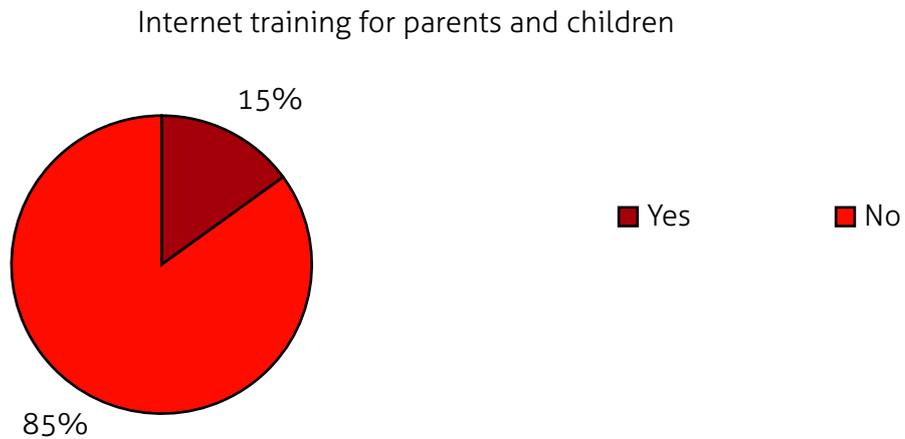
135 library services + 84 individual libraries = 778 public libraries



Do you provide internet training for parents and children?

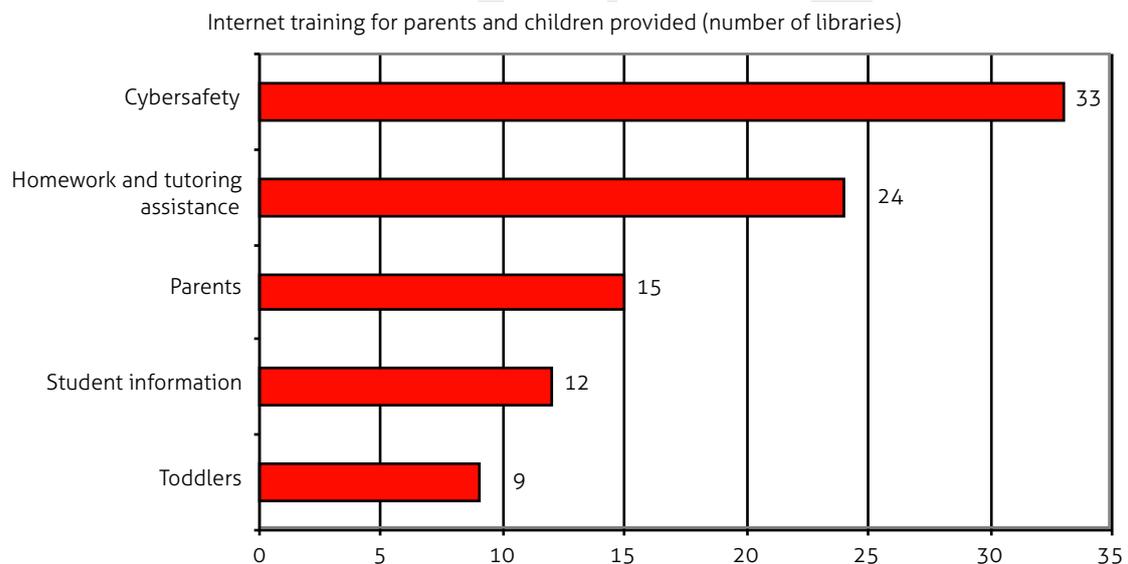
Total number of responses = 192

127 library services + 65 individual libraries = 716 public libraries



What kind of internet training for parents and children?

Responses on behalf of 108 public libraries (answered 'yes' to previous question)

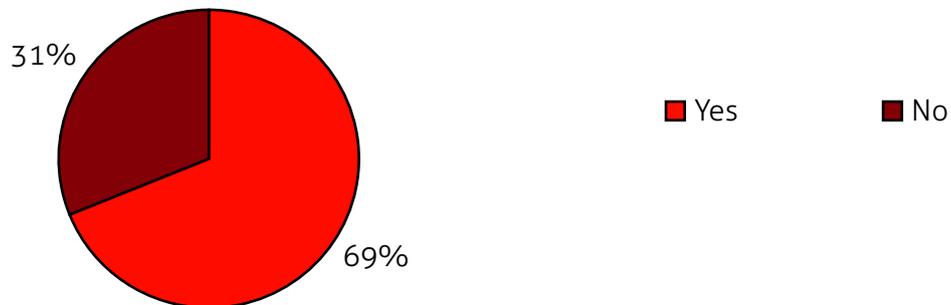


Do you provide internet training for seniors?

Total number of responses = 192

127 library services + 65 individual libraries = 716 public libraries

Internet training for seniors

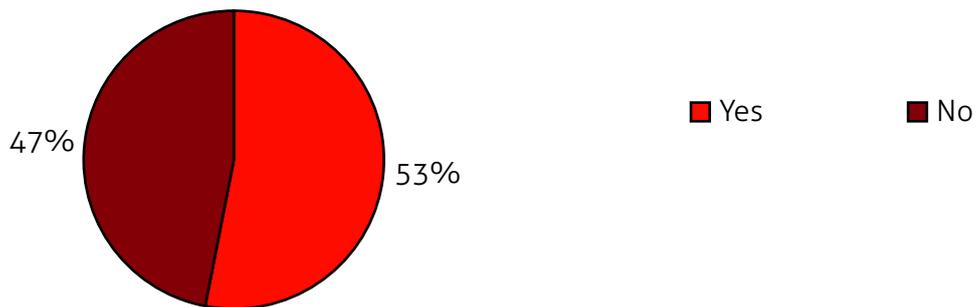


Do you provide other kinds of internet training?

Total number of responses = 113

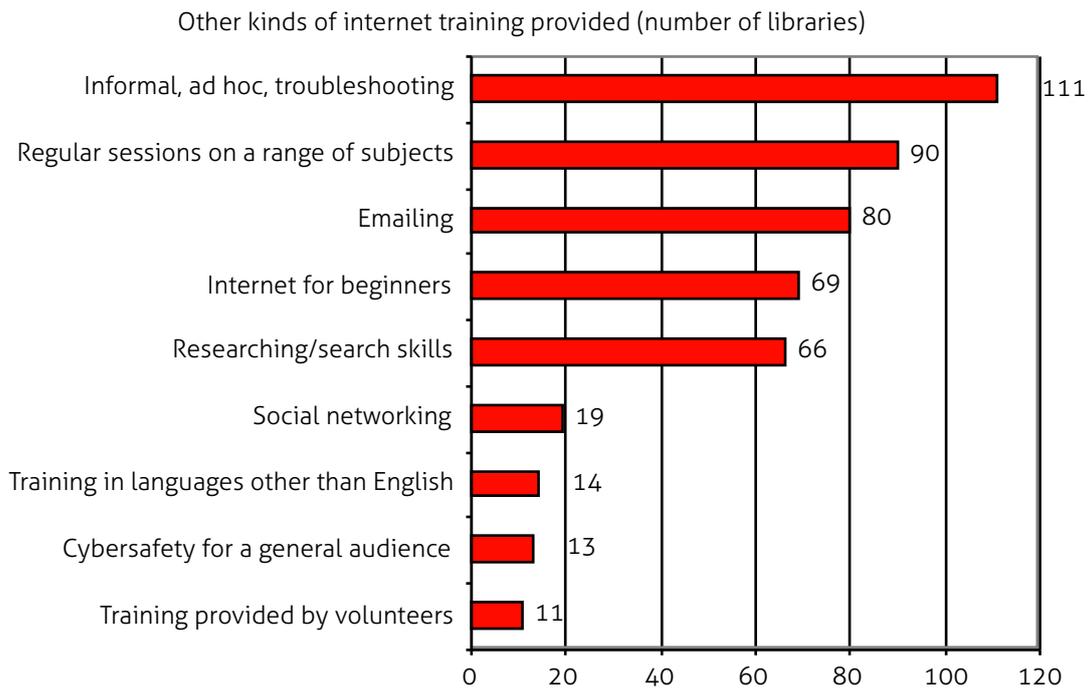
80 library services + 33 individual libraries = 461 public libraries

Other kinds of internet training



What other kinds of internet training do you offer?

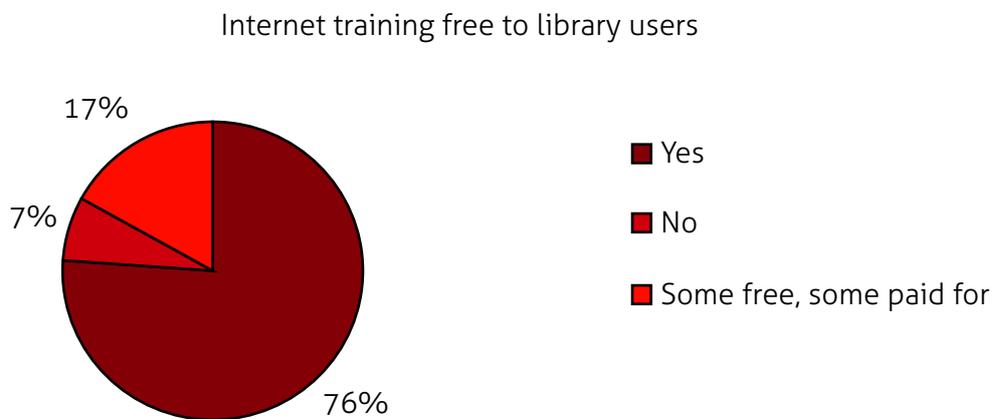
Responses on behalf of 243 public libraries (answered 'yes' to previous question)



Is internet training free to the library user?

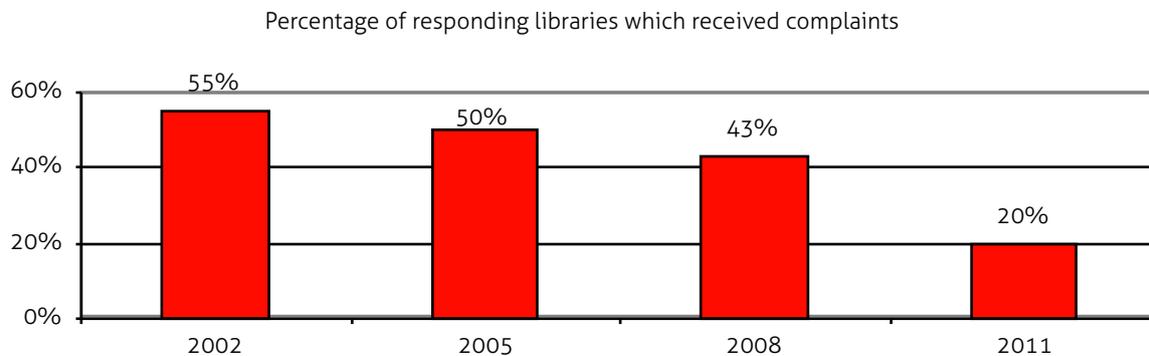
Total number of responses = 168

114 library services + 54 individual libraries = 656 public libraries



8. Complaints

Fewer than half of the libraries represented in the survey had received complaints about internet content, and of these, only 61% were in the last 12 months. This meant that only one in five libraries had received a complaint about internet content in the last 12 months – and in the vast majority of cases, it was limited to just one complaint. The level of complaints about internet content was already low, as indicated by previous years' surveys, but it had decreased still further.



Complaints about sexually explicit content outnumbered all other types of complaints, including violence and racism, by more than 2:1. In one third of cases, the complaint related to access by children, a similar result to the 2008 survey.

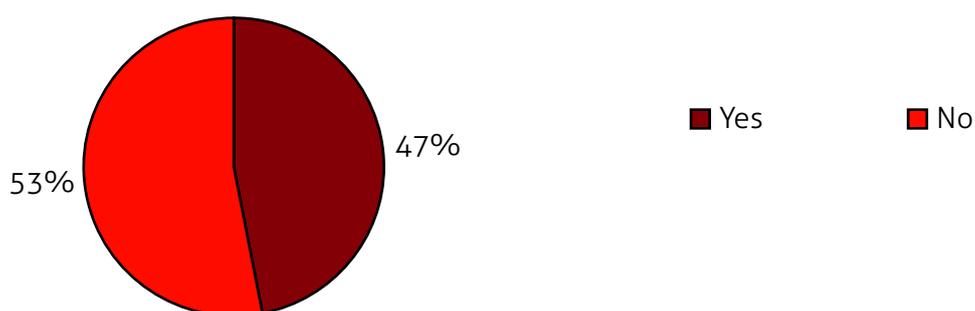
Only 2% of complaints about internet content were referred to the Australian Communications and Media Authority (ACMA). Most incidents were dealt with 'on the spot' by library staff. Often these were complaints from library users about what they could see on other people's screens. Very occasionally the police were involved.

Has the library received complaints about internet content?

Total number of responses = 215

132 library services + 83 individual libraries = 766 public libraries

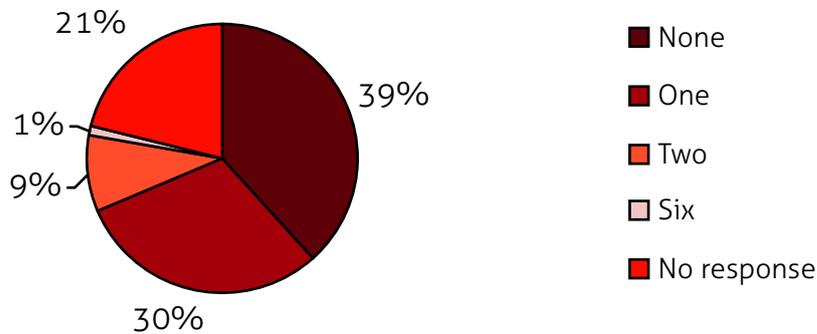
Complaints about internet content



How many complaints about internet content?

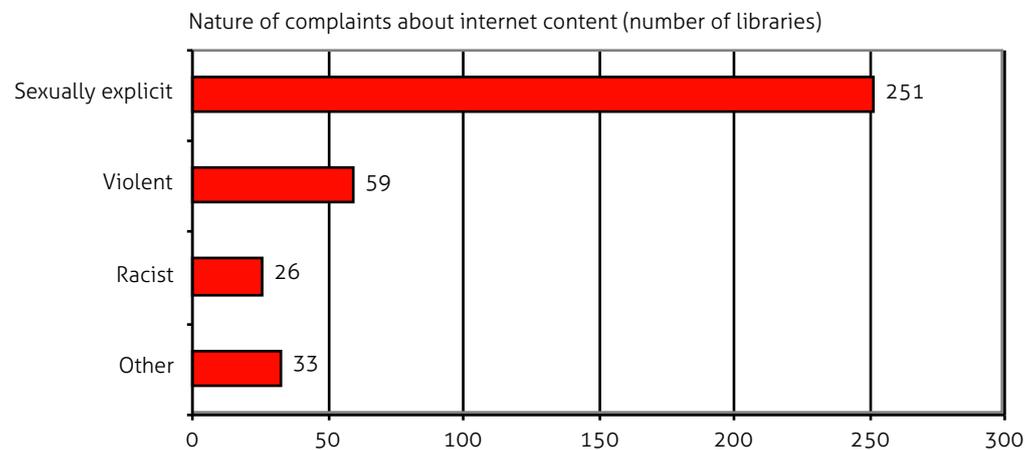
Responses on behalf of 357 public libraries (answered 'yes' to previous question)

Number of complaints received about internet content in the last 12 months



What were the subjects of the complaints about internet content?

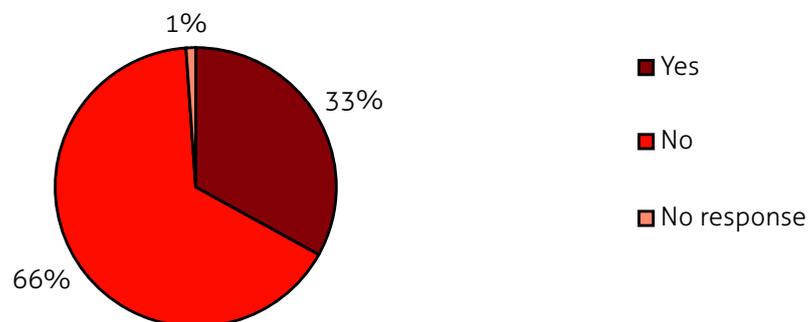
Responses on behalf of 322 public libraries (answered 'yes' to original question)



Did complaints about internet content relate to access by children?

Responses on behalf of 322 public libraries (answered 'yes' to original question)

Complaints about internet content relating to access by children

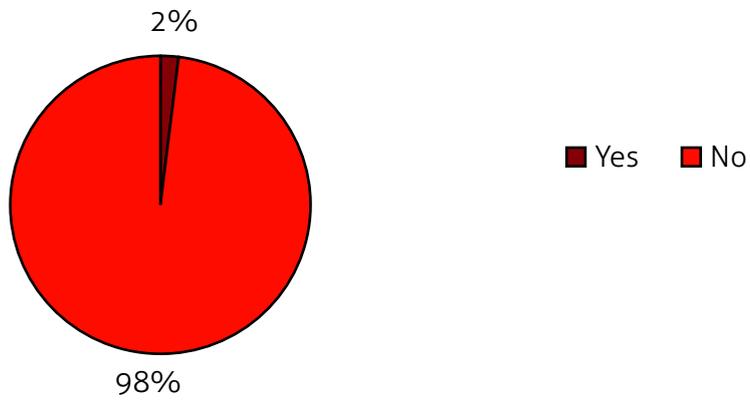


Were complaints about internet content referred to ACMA?

Total number of responses = 213

130 library services + 83 individual libraries = 717 public libraries

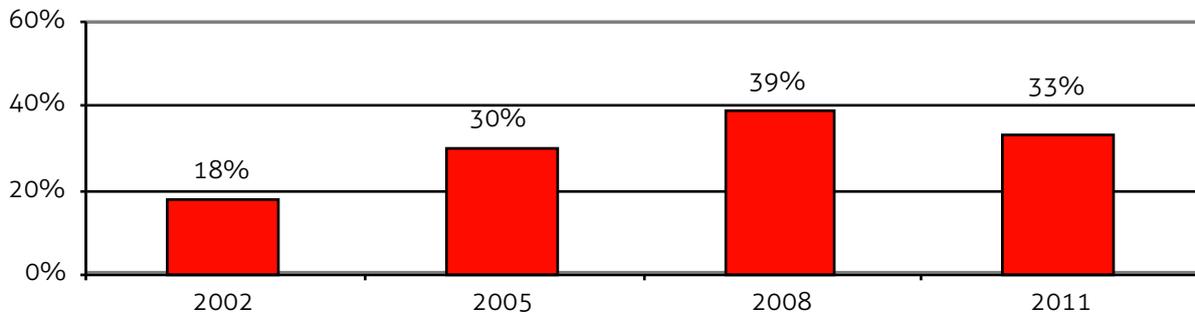
Complaints about internet content referred to ACMA



9. Internet filtering

A third of libraries said they used filters, roughly in line with the surveys carried out in 2005 and 2008. Filtering software included: WebMarshall (18 users), McAfee (14 users), Symantec/ Message Labs (13 users), Sophos (12 users), Websense (10 users), Network Box (9 users), ContentKeeper (7 users), Surf Control (7 users), Webroot (7 users), Net Nanny (6 users), Blue code (4 users), eset (4 users), Surfnet (4 users), WebGuard (4 users), Open DNS (3 users), Norton's Internet Security (2 users), Web monitor (2 users).

Percentage of responding libraries using filters



While most filters operated at a low to medium level (41% of libraries), 32% of libraries were filtering at a higher level. Most were set to filter out offensive content. Other named items were very large files, file sharing, games and social networking sites. Only 5% of library service points had, or were considering providing, unfiltered terminals for adult library users.

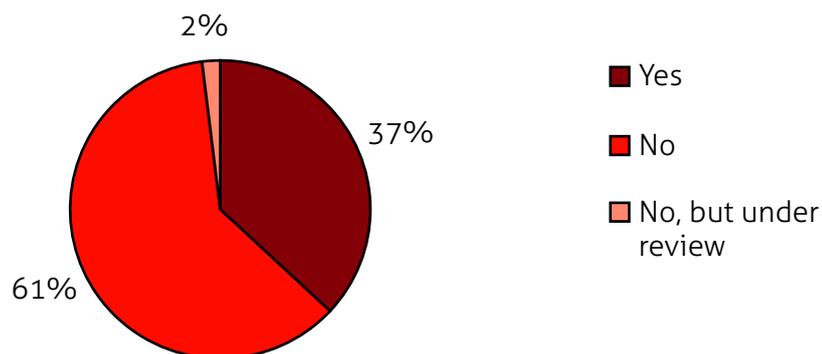
Some 44% of libraries responding to the question, said they had had complaints about filtering. Complaints related to the blocking of sites connected with games, social networking (Facebook and YouTube) and email access (Yahoo and Hotmail); restricted access because filters blocked valid, legitimate, inoffensive sites in error; limits on file size downloads, and general objections to the ethos of filtering.

Does your library use filters?

Total number of responses = 213

131 library services + 82 individual libraries = 762 public libraries

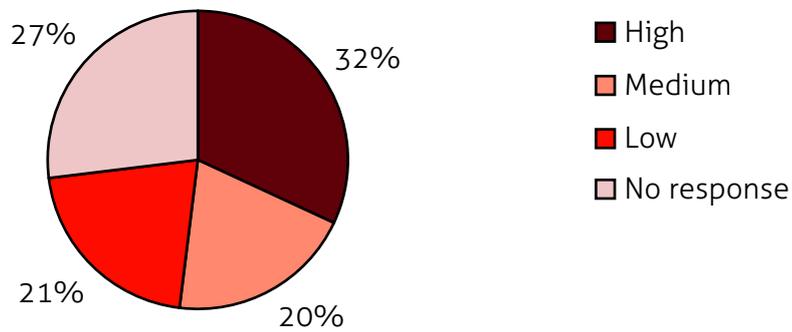
Libraries using filters



At what level are the filters set?

Responses on behalf of 280 public libraries (answered 'yes' to previous question)

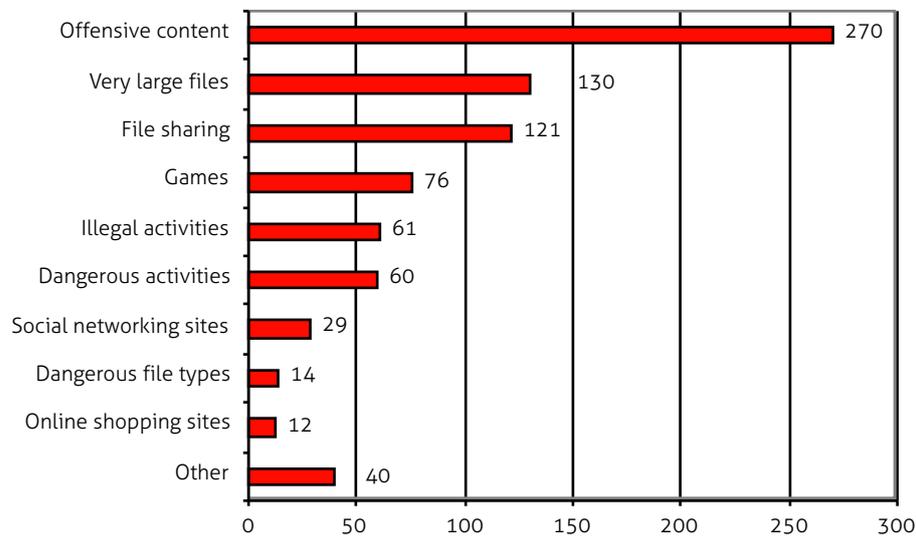
Level of filtering of internet content in the library



What do you, or what might you, filter?

Responses on behalf of 250 public libraries (answered 'yes' to original question)

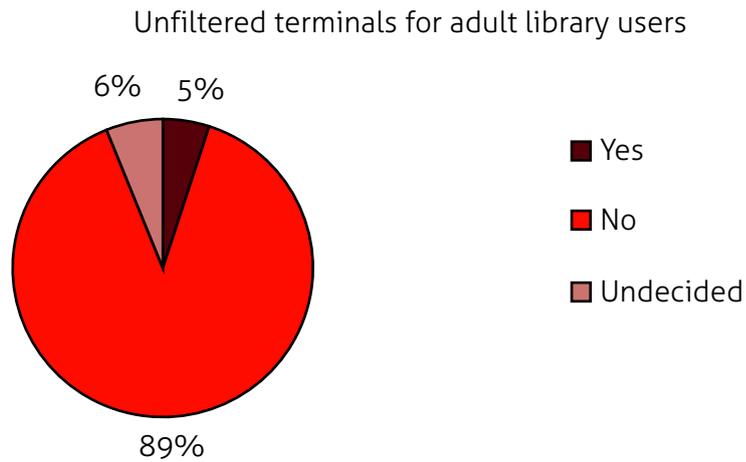
Internet content filtering (number of libraries)



Do you have, or are you planning to have, unfiltered terminals for adults to use?

Total number of responses = 77

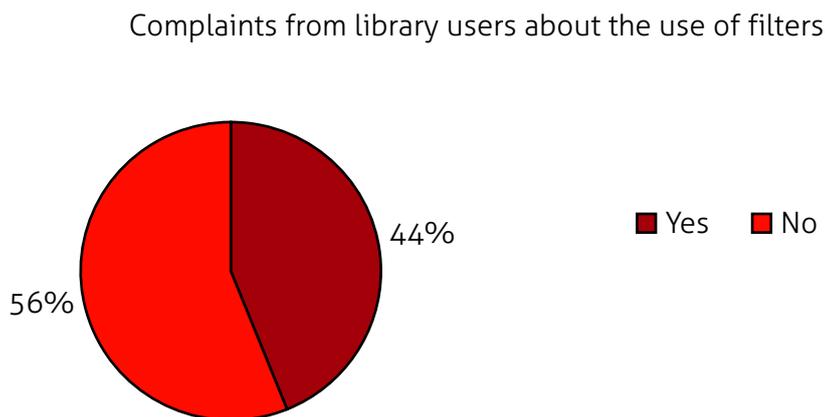
53 library services + 24 individual libraries = 283 public libraries



Have you received complaints about the use of filters?

Total number of responses = 81

54 library services + 27 individual libraries = 301 public libraries



10. Services for children

Approximately one in five library service points had separate terminals for the use of children and nearly half linked to third party content recommended for children and young adults.

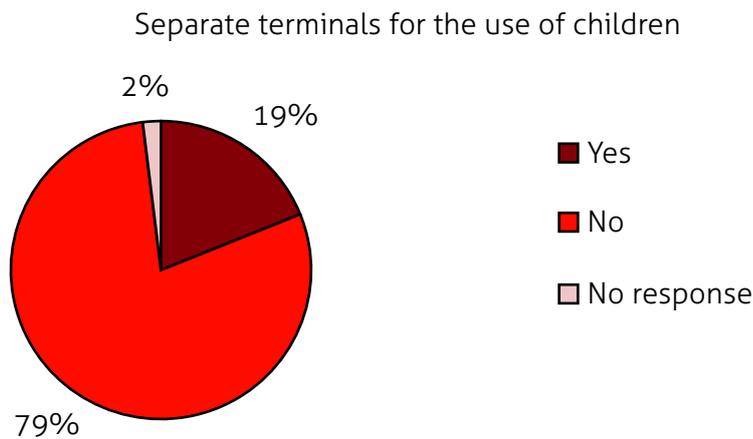
In most libraries (81%), parental consent was required for children to use the internet on library terminals, and this was generally up to the age of 18 (62%). Parental supervision was generally required up to the age of 12.

Some 15% of libraries were already using the ACMA cybersafety help button, and a further 12% planned to introduce it in the next three months.

Does your library have separate terminals for children?

Total number of responses = 211

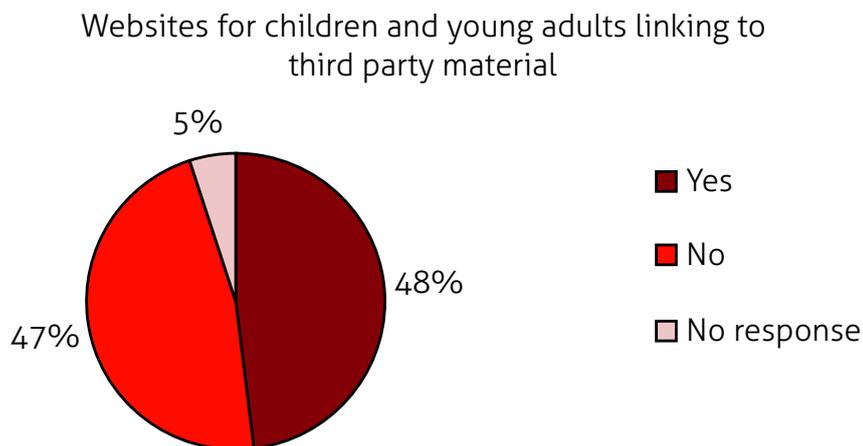
131 library services + 80 individual libraries = 760 public libraries



Does your library have websites for children and young adults that link to third party material?

Total number of responses = 211

131 library services + 80 individual libraries = 760 public libraries

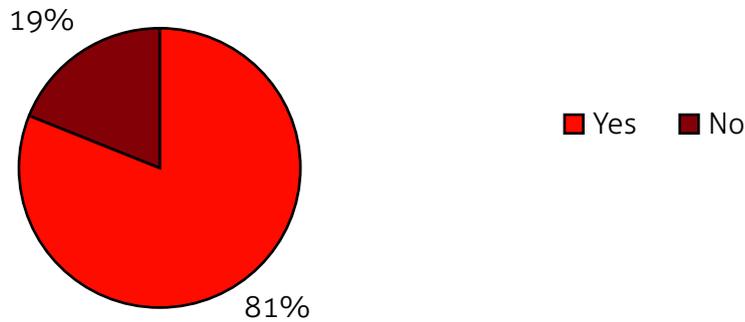


Is parental consent required for children to access the internet?

Total number of responses = 211

131 library services + 80 individual libraries = 760 public libraries

Parental consent required for children and young adults to access the internet

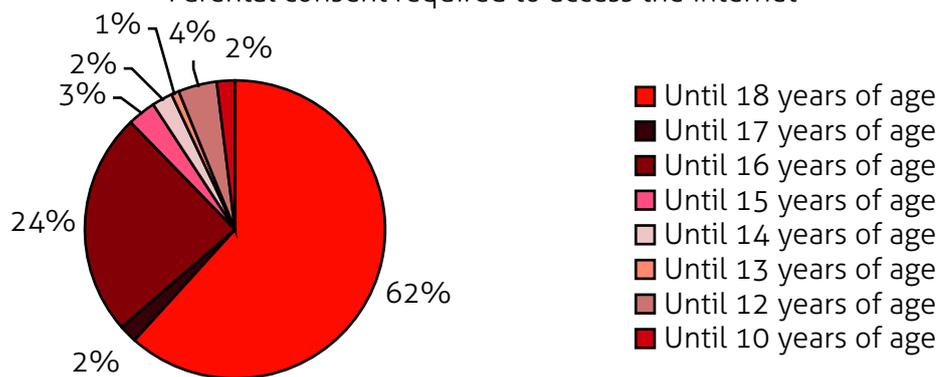


Up to what age is parental consent required for children to access the internet?

Total number of responses = 160

111 library services + 49 individual libraries = 576 public libraries

Parental consent required to access the internet

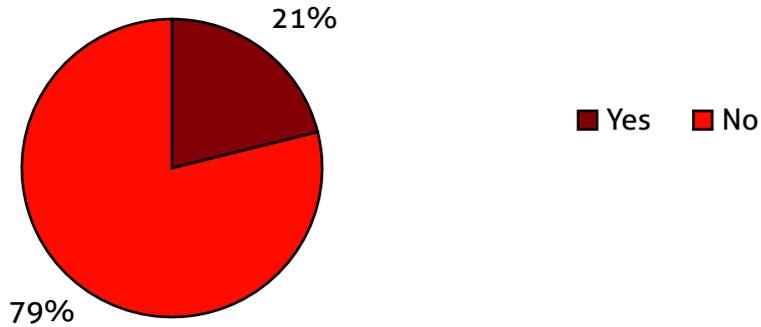


Is there an age requirement for parents to be present with children who are using the internet?

Total number of responses = 208

129 library services + 79 individual libraries = 699 public libraries

Parents to be present for children to access the internet

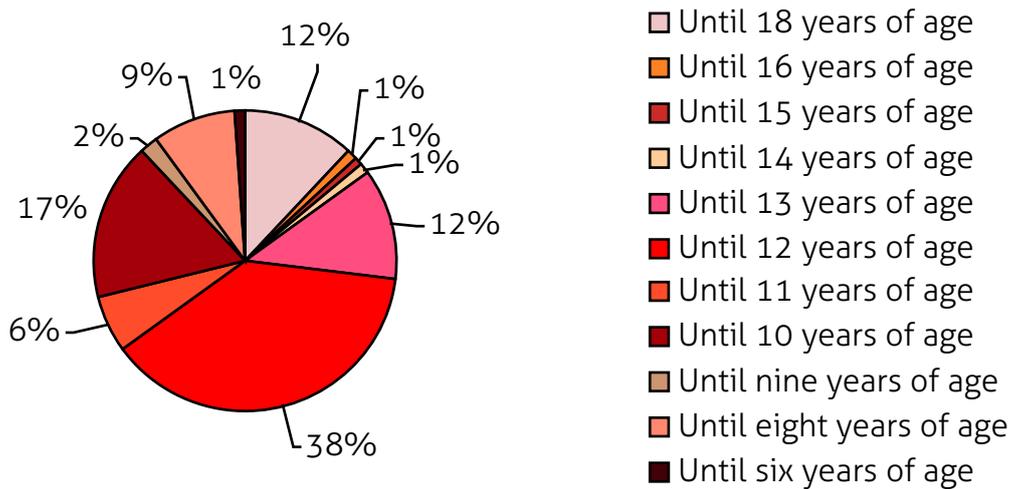


Up to what age must parents be present for children to access the internet?

Total number of responses = 54

30 library services + 24 individual libraries = 140 public libraries

Parental consent required to access the internet

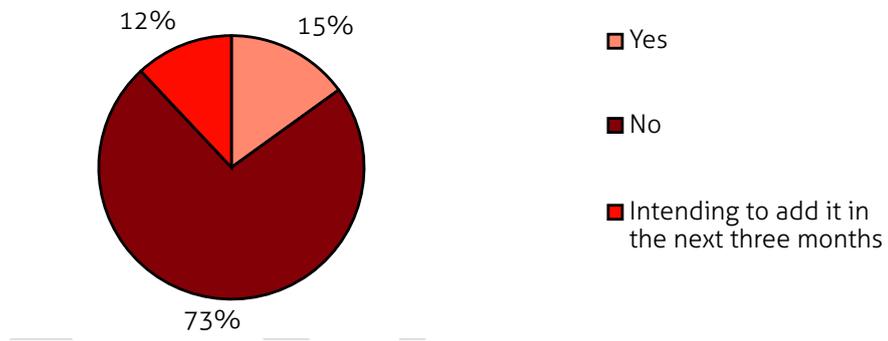


Do you use the ACMA Cybersafety help button on terminals?

Total number of responses = 210

130 library services + 80 individual libraries = 754 public libraries

Using the ACMA Cybersafety help button on terminals



11. Monitoring internet use

Two thirds of libraries (67%) monitored internet use, through visual monitoring by library staff and the collection of system data. Other ways included monitoring use via the PC booking system and library users reporting inappropriate use. Data was collected by 66% of libraries, mainly around the sites accessed by library users, but also about bookings and terminal usage.

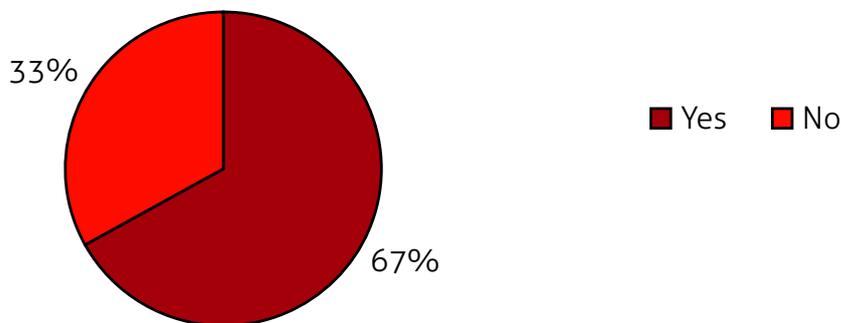
The data was used to monitor inappropriate content, for management reporting, to identify popular websites and databases, to review site classification and filtering, for planning, policy and decision-making.

Does your library monitor internet use?

Total number of responses = 210

130 library services + 80 individual libraries = 754 public libraries

Public libraries monitoring internet use

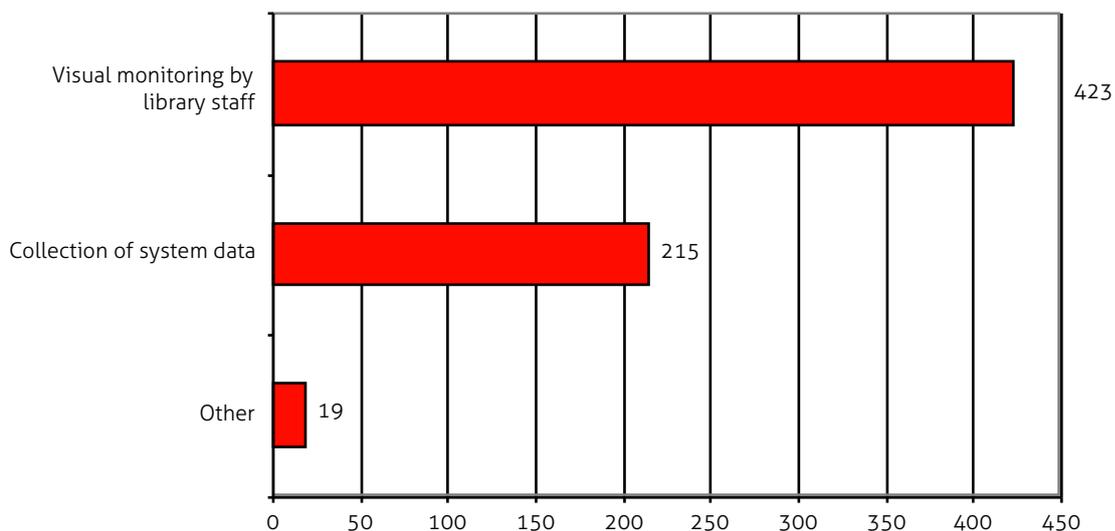


How does your library monitor internet use?

Total number of responses = 118

81 library services + 37 individual libraries = 499 public libraries

Methods of monitoring internet use (number of libraries)

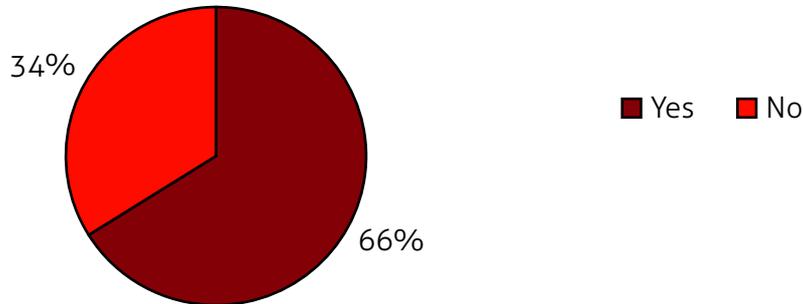


As part of the monitoring activity, do you collect data?

Total number of responses = 102

80 library services + 22 individual libraries = 437 public libraries

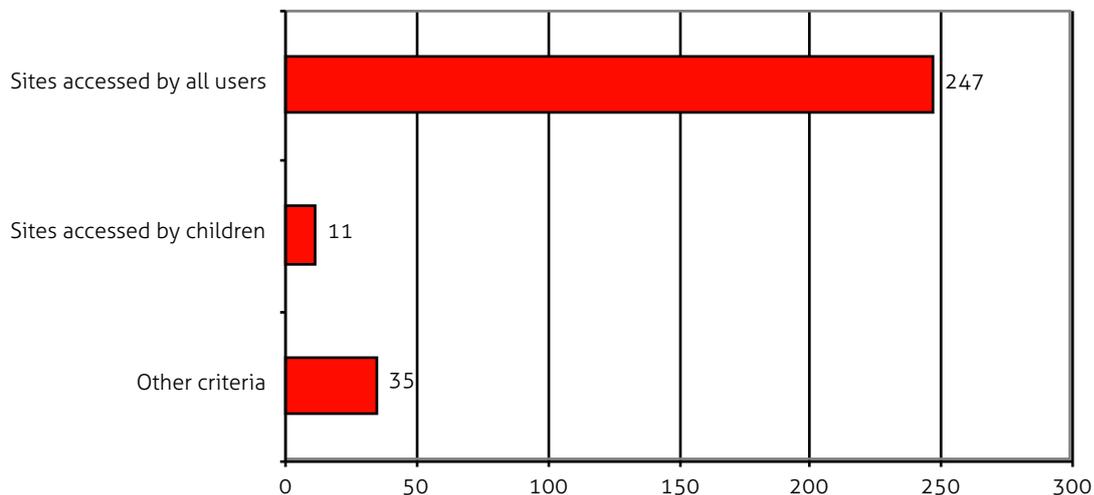
Public libraries collecting data on internet use



What do you collect data on?

Responses on behalf of 288 public libraries (answered 'yes' to previous question)

Collection of data on internet use (number of libraries)

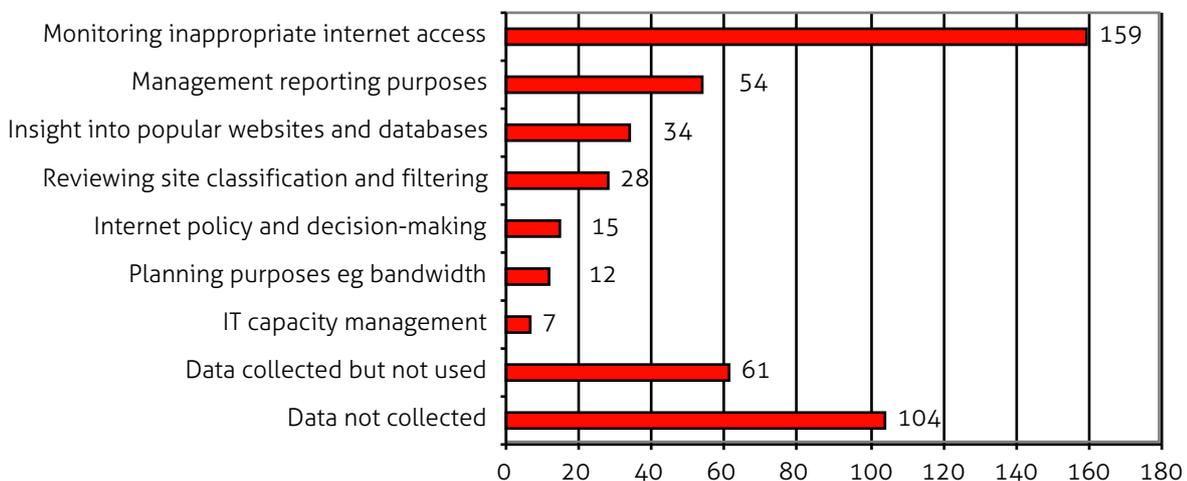


How is monitoring information used?

Total number of responses = 114

76 library services + 38 individual libraries = 430 public libraries

How public libraries use internet monitoring information (number of libraries)



12. Connection speed and cost

Only 39% of libraries had broadband internet connection; 60% were still using ADSL and less than 1% had a dial up connection. Internationally, the very basic broadband speed is considered to be 4 Mbps. Although many public libraries were unable to state their connection speed, of those that could (representing 200 libraries), at least a third were below 2 Mbps and more than half were below 8 Mbps.

Costs of providing an internet service varied from \$600 per annum for a single branch, up to more than \$6,000, but the range tended to be between \$1,200 and \$5,000 per annum per library service point.

Although many libraries could not provide precise costings for the provision of internet services, a greater number were able to describe the cost in terms of affordability. While 10% said it was easily affordable, 12% found it hardly affordable. Even where respondents described internet service provision as currently affordable, there were concerns about future affordability.

"Affordable at current capacity, but increasingly this fails to meet customer requirements of faster speed, more downloads and additional/newer terminals and we cannot afford to upgrade."

"Affordable as costs covered (or partially covered) by council/state level resourcing or service supplied via council/state level network and costs not directly charged to library service."

"Affordable because council insists we charge for use of computers."

"I had to push to keep this amount in the budget for the upcoming year."

"It is the cost of computers and internet access together that limit the number of access points available."

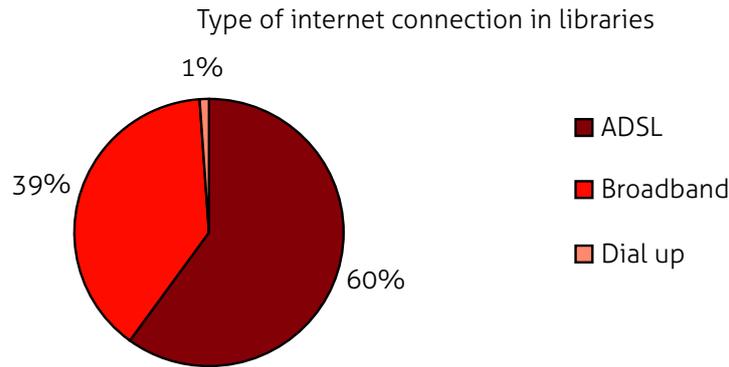
"The cost of the internet line is one of the issues preventing us connecting our wireless hotspot."

"Because of public access, the library is a high internet user in the organisation and gets regular pressure at budget time to reduce access or charge users for that access."

What sort of internet connection does your library have?

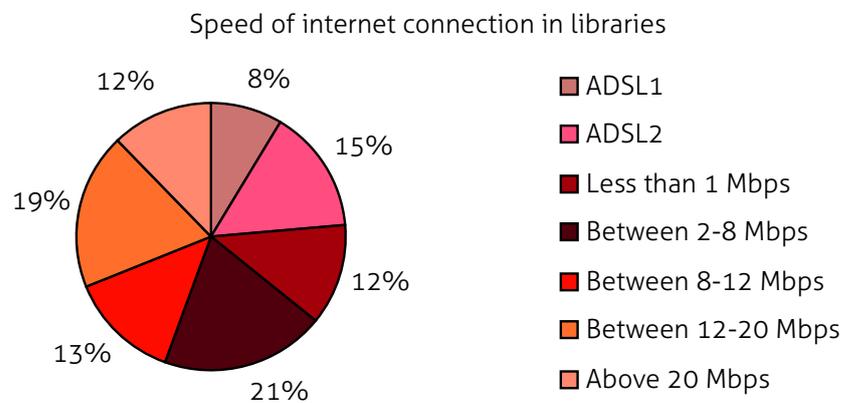
Total number of responses = 182

117 library services + 65 individual libraries = 658 public libraries



What is the speed of your internet connection?

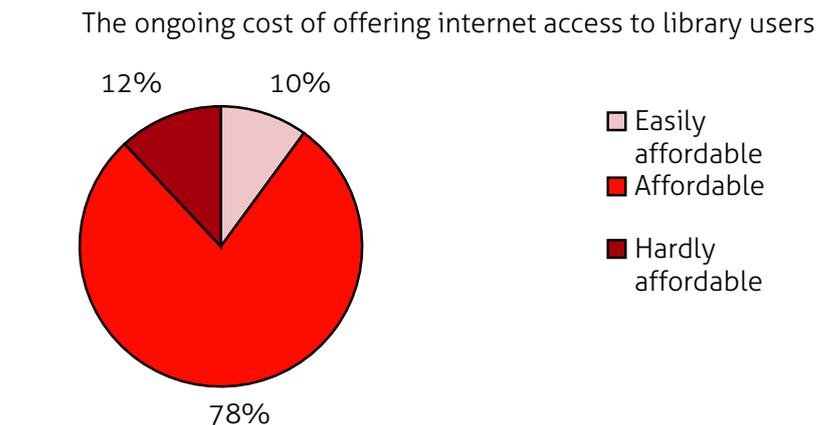
Responses on behalf of 200 libraries



How would you describe the ongoing cost of offering internet access to library users?

Total number of responses = 164

110 library services + 54 individual libraries = 577 public libraries



13. Effect of the National Broadband Network

More than a third of survey respondents (37%) felt that the NBN would increase the number of library users, while 55% felt it would have no difference. Only 8% thought it would reduce the number of library users.

Other changes were foreseen in terms of faster internet access, greater focus on online resources, changes in the way the internet was used in libraries, and the potential to attract new user groups, including business people.

"Depends on how affordable it is for households. If it is less affordable then libraries will have more people wanting to use their internet service."

"Faster speeds will enable us to extend our physical services such as video conference facilities and open up new possibilities for our online presence."

"Great potential for the library to be exhibition space for NBN related services and technologies - digital hub role."

"Hopefully it will make it easier for people to download e-resources at home."

"I think internet access at the library will still be predominantly those people who cannot afford or do not want a home computer. Plus in this area a large number of tourists."

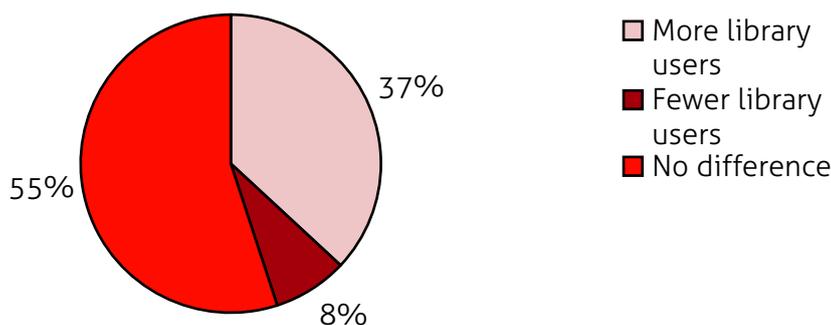
Only 13% of respondents said they had begun to plan their strategy for the arrival of the NBN, but 29% had had discussions with council and other bodies about its arrival.

What do you think the result of the NBN will be in terms of the number of people using your library?

Total number of responses = 188

120 library services + 68 individual libraries = 679 public libraries

How libraries think the NBN will affect the number of library users

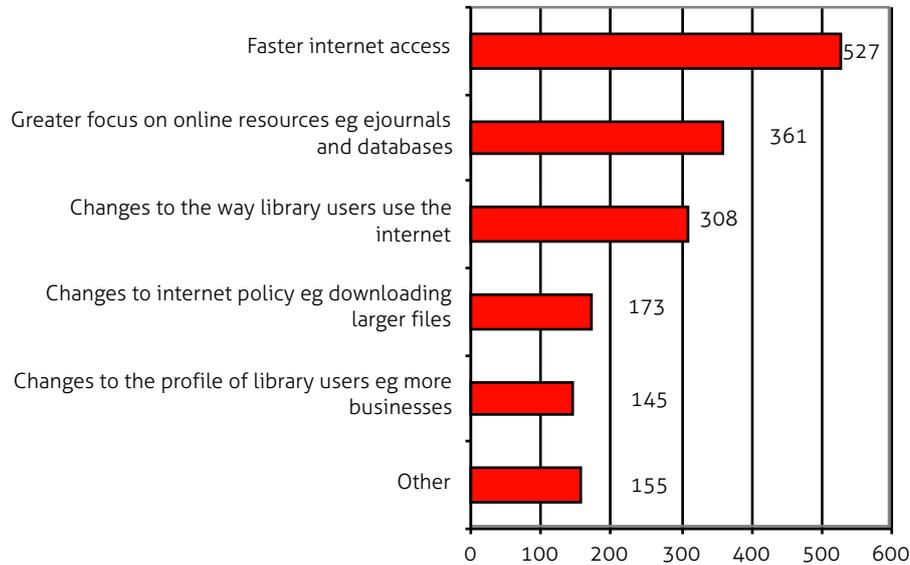


How do you think the NBN roll out will affect what your library offers?

Total number of responses = 168

106 library services + 62 individual libraries = 618 public libraries

How libraries think the NBN roll out will affect services (number of libraries)

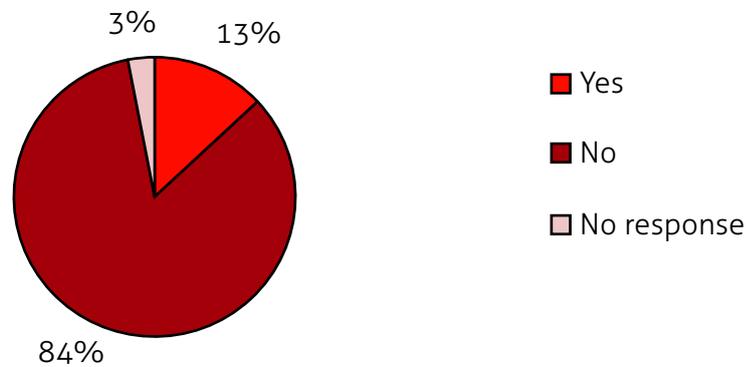


Have you begun to develop your strategy for the arrival of the NBN?

Total number of responses = 195

123 library services + 72 individual libraries = 705 public libraries

Have libraries begun to develop their strategy for the arrival of the NBN?

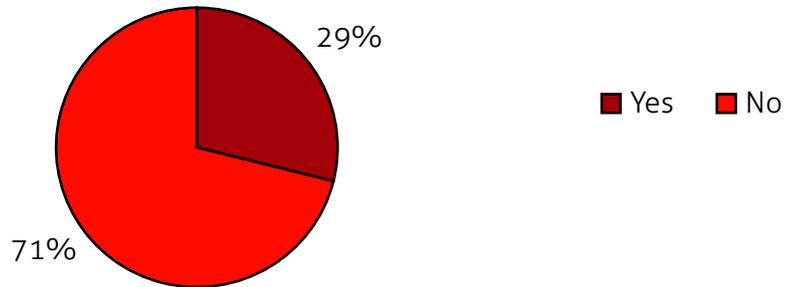


Have you been in discussions with council or other bodies about the NBN coming to your area?

Total number of responses = 195

123 library services + 72 individual libraries = 705 public libraries

Discussions with council and other bodies about the arrival of
the NBN?



14. Other comments about internet access in libraries

In response to an open question about internet access in public libraries:

"Brings otherwise non-users into the library and they generally stay to use other parts of the library."

"Can't wait for National Broadband as we are unable to offer services such as audio book downloads from website."

"Council has a conservative approach to the provision of services that may impact on council security. This approach is sometimes at odds with the needs of the public library to be innovative and creative. Council sometimes makes decisions about the roll out of versions of new server software and office applications that are behind community expectation."

"Customer expectations of high speed reliable connection are increasing. We need to be in a position to meet this need now and in the future. It is not clear as yet how we can meet these expectations within our budgetary constraints."

"In our region the libraries are often the only facilities providing public internet access so it is an important service for our community."

"Increasingly referrals for people to access government information via internet eg Centrelink forms, RTA. People regularly need assistance and expect library staff to have knowledge and skills to retrieve information for them."

"It has created an entire new clientele who see the public library from another perspective."

"It is a vital service to our community. Costs involved in providing PCs, access and staff support are increasing. Statewide/federal access to consortia deals for libraries on providing low-cost software packages (including Virus protection) would make our services more affordable, as well as grants to purchase PCs."

"Many government services now offer some of their services/forms only online, and many in our community do not have internet access at home. Internet access for the community needs to be widely supported to allow libraries to meet these needs. Wireless will become much more widely used, and we will need to be able to provide and support a wider range of systems."

"Providing access with a booking system, monitoring bookings and troubleshooting PC problems has drastically changed the way we do business. I think the cost of this staff time is often understated when resourcing libraries."

"We have a community with a low proportion of computer owners. The library is the place they come to connect with the world."

"Even in an age where much of the population has home access, public access is critical for many because of reasons such as economic circumstance, home situation that does not allow use there, or need for information at a particular moment. Provision of wifi has not lessened the use of in house PCs, with wifi now constituting about a third of total library internet use here."

"For social equity it is important that libraries can provide free, fast, secure internet access, a big impost on small local councils."

"We still cannot offer a sufficient number of PCs at peak times and are turning customers away."

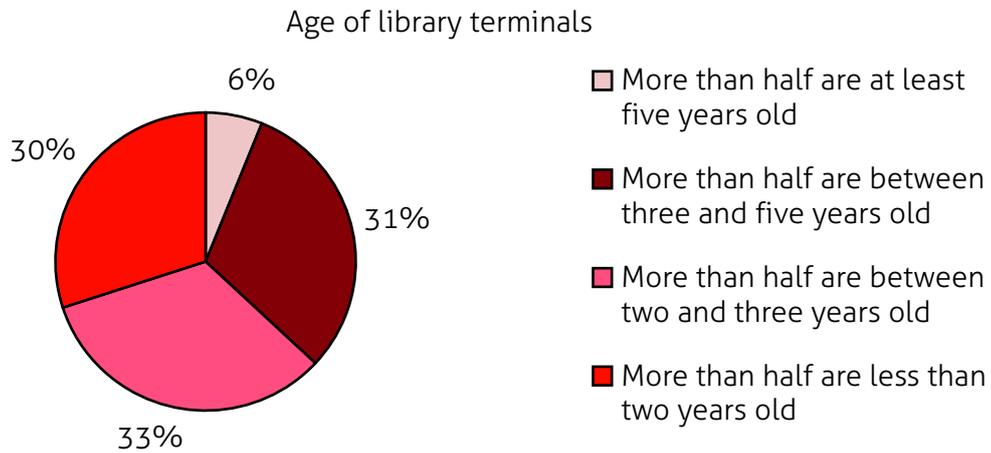
15. Hardware

Over a third of terminals in libraries were more than three years old, which suggests that a significant investment will be required in computer hardware over the next 12 months.

How old are your terminals?

Total number of responses = 193

124 library services + 69 individual libraries = 706 public libraries



16. The role of ALIA

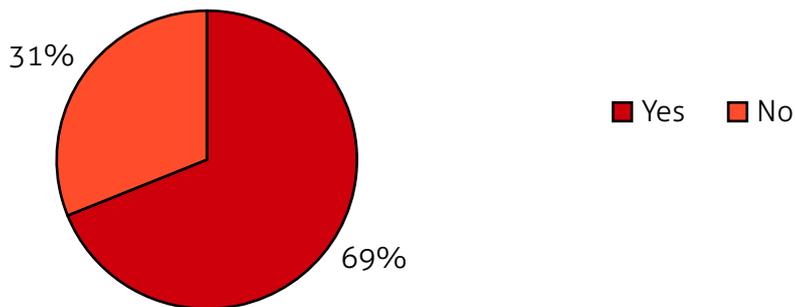
Two thirds of participating libraries were institutional members of ALIA; 86% were aware of ALIA policies on content regulation and internet services in public libraries, and 62% had made use of them.

Is your library an institutional member of ALIA?

Total number of responses = 227

136 library services + 91 individual libraries = 791 public libraries

Participating libraries - institutional membership of ALIA

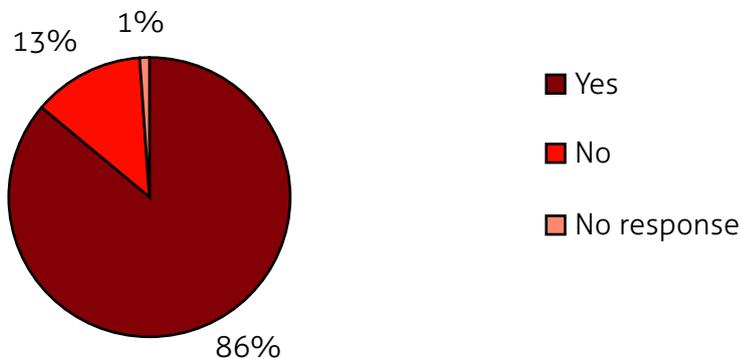


Are you aware of ALIA policy on content regulation and internet services in libraries?

Total number of responses = 216

133 library services + 83 individual libraries = 771 public libraries

Awareness of ALIA policy on content regulation and internet services

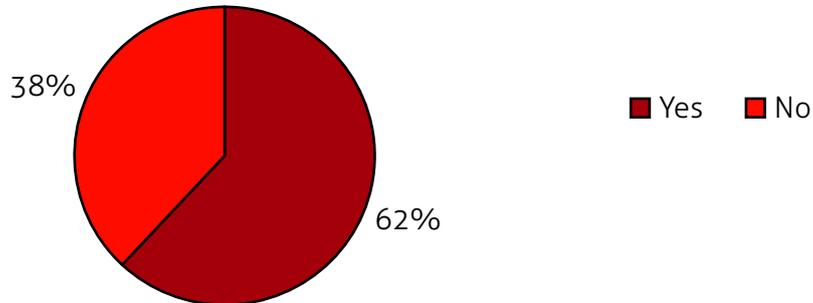


Have you made use of the ALIA policy on content regulation and internet services in libraries?

Total number of responses = 216

133 library services + 83 individual libraries = 771 public libraries

Use of ALIA policy on content regulation and internet services



17. Conclusion

Internet access in public libraries has become a core offering, providing equity of access for people without the benefit of a PC at home, and the demand from library users has been on a consistently upward trend for more than a decade.

The responses to the 2011 survey suggested that, while library managers were doing their best to meet this demand within the limits of their resources, these resources were becoming over-stretched and there were concerns about their ability to maintain service levels in the future.

At the same time, the arrival of the NBN provided tantalising possibilities for improving services to existing users and for attracting new user groups.

Libraries will continue to face a tough juggling act to deliver what library users want and need, within the limitations of their current budgets and within the capacity of their existing staff.

Acknowledgements

ALIA would like to thank its *Public Library Advisory Committee* for its assistance in compiling this survey.

AUGUST 2011