

Environmental Scan for Library Planning

Pew Research Center studies show: "Nearly 9-in-10 (86%) smartphone owners used their phone in the past month to make real-time queries in their daily lives. Men are more likely than women to use their phones to find information to settle an argument. Parents with kids are more likely to use their phone to decide whether to visit a local business, such as a restaurant." (7 May 2012) "While the number of Americans who go online has increased substantially over the years, about one-in-five adults still do not use the internet. Differences in internet access exist among different demographic groups, especially when it comes to access to high-speed broadband at home. Age (being 65 or older), a lack of a high school education, and having a low household income are the strongest negative predictors for internet use." (12 April 2012.)

The new *Nebraska State of the Schools Report* shows:

- More students are meeting the state's reading standards. The new report shows that 72 percent of the students tested in grades 3-8 and 11 were proficient in 2010-11, compared to 69 percent in 2009-10.
- 63 percent of the students tested in grades 3-8 and 11 were proficient on the state mathematics test, which was given to students for the first time in 2010-11.
- New writing and science student performance results are also available. In writing, 89 percent of the 4th graders were proficient and 90 percent of the 8th graders met or exceeded the state standards. Science results ranged from 96 percent proficient at grade 4 to 87 percent proficient at grade 11.

Number of Nebraskans who Completed college = 19.1% of rural, 34.2% of urban, 27.7% total. Those with some college = 33.3% rural, 32.2% urban, 32.7% total. Number who completed high school only, 35.7% rural, 25.0% urban, 29.6% total. People who did not complete high school 11.9% rural, 8.6% urban, 10.0% total. *USDA Nebraska State Facts*

The population of Nebraska is experiencing a shift. Between 2000 and 2010 the population of individuals 14-24 years old increased by 0.3%, whereas the population of individuals 55-99 years old increased by 23.1%, according to 2010 Census figures. These age groups are also from different generations, with the younger group being part of the Millennial Generation, also known as Generation Y, characterized by their use of technology, especially via the Internet and social media. The older age group spans two generations, the Silent Generation and Baby Boomers, who have seen rapid social and technological changes throughout their lifetime. The younger population is more diverse than the older population. Individuals age 15-24 are 82.2% white and 17.8% minority. In comparison, the population age 55 and over is 94.5% white and 5.5% minority. More of the younger population is Hispanic or Latino, comprising 11.7% of the population 15-24 and 2.6% of the population 55 and over. Nebraska Dept. of Labor, Nebraska Workforce trends, December 2011.

A substantial issue in the provision of access to government information has been the dramatic surge in the use of e-government by federal, state, and local governments to

deliver information, communication, and services to citizens, with much of this content and services now available only online. For the average citizen, e-government access—rather than government information access— now stands as the primary means of getting government information and interacting with government (Bertot, Jaeger et al. 2009). Many people, however, lack the individual means to access e-government and must find an outlet to engage it to accomplish necessary educational, economic, social, and political functions. In most cases, they have no choice but to turn to the public library. People predominantly seek access to e-government information to fulfill an important personal need—unemployment benefits, voter registration, license application and renewal, tax payments, school enrollment for children, immigration, and similar important functions (Bertot, McClure, and Jaeger 2008; Gibson, Bertot, and McClure 2009; Holt and Holt 2010). And access to e-government is not just an issue of benefit to members of the public, as access to government content is a central premise of self-government. Democratic governance relies on access to the information of governance; otherwise, discourse about governance by the public has no content (Schudson 1997).

Responsibility Rolls Down: Public Libraries and the Social and Policy Obligations of Ensuring Access to E-government and Government Information Jaeger, Paul T.; Bertot, John Carlo. *Public Library Quarterly*, Apr-Jun2011, Vol. 30 Issue 2, p91-116, 26p; DOI: 10.1080/01616846.2011.575699 Literature review references other sources

In 2010, one in six Nebraska residents received Social Security. While 67% of beneficiaries are retirees, 33% are not: 26,264 are widows and widowers; 39,846 are people with disabilities; 13,436 are spouses; and 21,192 are children. *AARP, Social Security 2012 Nebraska Quickfacts*

Both nationally and in Nebraska, circulation of library materials has fluctuated over the past five years, but seems to be leveling out. During the period of 2007 through 2011, the total circulation increase in Nebraska was 5.1%, but in a comparison of 2009 to 2011, this number showed a minute change of minus 0.40%. This is less an indication of a decline in usage than it is a confirmation that the number of items borrowed is no longer a useful performance measure for public libraries unless examined in concert with other indicators. The way people use libraries for obtaining information also continues to change. The number of reference transactions (information requests) has been trending downward dramatically for several years and the latest library survey indicates a continuation of this tendency. This reduction suggests that fewer customers are using the library to request information from library staff, preferring to find the answers themselves using the library's electronic resources. During the same period, use of library computers and the number of computers available have increased at an impressive rate. The effect of technological change has also influenced collection development in public libraries. Although the percentage of library collections composed of print material is still quite high – 77.3% in 2011 – expenditures on new material continue to indicate that the highest rate of growth is in the acquisition of electronic media. Public library budgets began to reflect the country's overall economic downturn in 2011, with a 1.9% decrease in local government revenue. *John Felton, Nebraska Library Commission, with data from the Nebraska Public Libraries Statistical Survey.*

The "Millennial" generation (teens and people in their twenties) are seen as "confident, self-expressive, liberal, upbeat and open to change." They are more ethnically and racially diverse than older adults. They're less religious, less likely to have served in the military, and are on track to become the most educated generation in American history. • Two years after the U.S. labor market hit bottom, the economic recovery has yielded slow but steady gains in employment for all groups of workers. "Just a third of Americans have a favorable opinion of the federal government, the lowest positive rating in 15 years. Yet opinions about state and local governments remain favorable, on balance. As a result, the gap between favorable ratings of the federal government and state and local governments is wider than ever." "After four decades that brought 12 million current immigrants—most of whom came illegally—the net migration flow from Mexico to the United States has stopped and may have reversed." About half (53%) of Americans consider themselves to be middle class and the median annual family income of this group is just over \$52,000. They believe that their standard of living has stagnated in the past five years and Census data backs up the claim. *Pew Research Center, 2010, Social & Demographic Trends*

This report details 2,797 responses to the 2010 NE Rural Poll to get at Nebraskan's perceptions about their community and retail shopping. Even though most small communities have experienced population decline since 2000, Rural Nebraskans are positive about their communities--the smaller, the more positive on social dimensions and sentiment. Most rural Nebraskans (94%) plan to stay in their community. Most rural Nebraskans purchase at least 1/2 of retail goods and services in or near their community, but over 2/3 made online purchases (compared to 1/3 in 2000). However, the percentage of rural Nebraskans satisfied with community retail shopping has declined from 53% in 1997 to 41% in 2010. Can library services be compared to retail goods and services--do they supplant the need for some retail goods and services? -*University of Nebraska-Lincoln, Center for Applied Rural Innovation Report: •Living and Shopping in Nonmetropolitan Nebraska (2012)*

The percentage of the population that is minority (non-White or Hispanic/Latino) increased between 2000 and 2010 in each 5-year age category (under 5 years through age 85 or older). While 50 percent of the state's White non-Hispanic population resides in the state's most populous three counties of Douglas, Lancaster, and Sarpy, these "big 3" counties contain more than 60 percent of the state's population ages 20-24 and 25-29. Conversely, they only contain 35 percent of the state's 85 and older population. Households that contain three or more generations are becoming more prevalent in Nebraska. Nebraska 2010 homeownership rates were higher than in 2000 for households headed by someone relatively younger (under 35), while homeownership rates declined among older households. *Summary of Detailed Demographics from the 2010 Census: Nebraska and its Counties, University of Nebraska Omaha, Center for Public Affairs Research*

As of September, 2011, Pew Research Center studies show that 79% of Americans are online and 62% have broadband access in their homes. 84% of Americans use mobile phones, so reaching mobile users will be a crucial activity for public libraries. The estimated number of mobile subscribers in the U.S. in 2011 was 327.6 million compared to just .03 million in 1985. That's greater than the entire population of the United States (315.5

million). At least 35% of these subscribers and as many as 50% own a smartphone. Social networking is another way libraries need to be connecting with their users, as 65% of internet users use social networks. In May, 2011, surveys indicate the following percentage of social networking site use by age group: 18-29 = 83%, 30-49 = 70%, 50-64 = 51%, 65+ = 33%. What does this mean? Online social networks and social media are becoming more important than traditional sources of information. Libraries need to become nodes on their users' networks, because people increasingly expect "on demand" information and turn first to their social network for answers.

"Technologies are changing fast, but so are consumers. An understanding of the major demand-side dynamics is critical in order to build a 360-degree view of how the volatile market for digital technologies and services will evolve the next 10 years," - Nick Ingelbrecht, research director at Gartner. Consumers are increasingly ignoring mainstream news sources in favor of social network channels. Technology has empowered consumers by providing them with "real-time, nonstop, ubiquitous connectivity," which gives them enhanced access to information. This trend has not given people more free time, however, so they are looking for products and services that help them fill their time more productively. The economic crisis has damaged consumers' trust in traditional institutions, so libraries should present themselves as trustworthy, reliable organizations that can help people cope with hard times. *Gartner Research, "Gartner Outlines 10 Consumer Macro Trends to Impact Technology, Media and Service Providers for Next 10 Years"*

Wireline service coverage (Cable, DSL, and Fiber) in the state continues to spread, although there are still gaps in the northwest. Fixed wireless service is readily available except for the center of the state. This technology is especially advantageous in serving rural areas. Mobile wireless (cellular service) coverage is available in about 85% of Nebraska, with gaps, again, in the less populous center and northwest parts of the state. *Nebraska Public Service Commission, Nebraska Broadband Mapping Project*