

2015 Biennial Survey of Federal Depository Libraries & Library Needs Assessment

Report prepared for: U.S. Government Publishing Office (GPO)

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Background and Objectives

- In 2009, Outsell completed a multi-step project for the U.S. Government Publishing Office (GPO) to segment the Federal Depository Library Program (FDLP) libraries and to understand user needs and how well the GPO serves users. In 2015, the GPO asked Outsell to repeat the study and compare these results to those from the previous project.
- The primary goal of this study is to understand what depository libraries need from the FDLP and how well they are serving their users. As part of the process, Outsell analyzed and segmented the six main types of libraries that are depository libraries for GPO to understand their various characteristics and needs.
- FDLP libraries are required to participate in a biennial survey, which is a pre-set list of questions. This research combined the biennial survey with a library needs assessment study.



Methodology

Library segmentation analysis, quantitative survey

- Outsell reviewed the existing FDLP segmentation of library types and mapped each of the participating libraries in a spreadsheet format.
- With minor modifications to the 2009 questionnaire, Outsell programmed and fielded a web-based quantitative survey to all FDLP libraries. The survey gathered benchmark metrics and assessed FDLP library needs.
- Topics addressed included deployment of depository collections, most important services provided, unmet user needs, satisfaction with FDLP services, and performance metrics utilized by the libraries.
- Data was collected from November 2, 2015, through January 18, 2016.
- A total of 1,139 libraries participated out of 1,156 representing a 98% response rate.



Methodology

Deliverables and project team

- Deliverables include the survey instrument, this detailed report, and cross-tabulations and a data file from the quantitative survey in Excel format. Additionally, Outsell will present the results to GPO representatives via conference call, WebEx or on-site, per GPO's option.
- The project lead for this study was Jim Hydock, VP & Practice Leader for Outsell's IM Service. Also on the team was Sheila King, Affiliate Research Manager, Outsell's primary research expert who oversaw all aspects of study design and execution. Jim was responsible for the project's overarching success and key opinions and recommendations. Outsell co-founder and CEO Anthea Stratigos provided input on project design and reviewed client deliverables before submission.



Methodology

Analytic comments

- Results from this research were analyzed in total, in comparison to the 2009 study results, and by the following library type segments:
 - Academic
 - Public
 - Special
 - Federal Government
 - State Government
 - Local Government
- Statistically significant differences between these segments have been circled in red in the charts and tables. For example, on slide 32, Federal Government libraries are significantly more likely than the other segments to report fewer than 100,000 potential users.

Potential users

Libraries are struggling to support growing markets, which is a good problem to have, but this is causing a strain on FDLP libraries. Many potential users are not being reached because libraries are under budget constraints; at the same time, libraries want to drive usage.

- FDLP libraries overall estimate approximately 1.4 million potential users, on average.
 In the 2009 study, the average was just over 900,000.
- Academic libraries and Public libraries each estimate 1.2 million. This represents an increase for both types. In 2009, Academic libraries estimated 700,000 and Public libraries estimated just under 900,000.



Actual users

FDLP libraries are supporting many more users compared to 2009. Again, this is creating a strain on library budgets, staff, and other resources.

- FDLP libraries overall estimate approximately 185,000 actual users. In the 2009 study, the average was just over 110,000.
- Public libraries serve nearly 400,000 users, on average, with one-fifth (21%) reporting they serve 300,000 or more.
- All library types report many more actual users compared to the 2009 study. Most notably, Federal Government libraries report a six-fold increase in actual users supported.



Potential vs. actual users

State Government libraries in particular need to increase their mobile and remote access to reach more of their potential user base.

- State Government libraries estimate that they only serve about 4% of those who would likely benefit from their services.
- Local Government libraries, on the other hand, estimate that they serve 63% of their potential market.



Key subject categories used

Content usage covers a wide spectrum of needs that must be maintained.

- Eight out of 10 respondents (81%) report "Politics & Law" as the subject category used most often by their library's patrons.
- "Business & Economy" is the second-most used subject category, by 68% of responding libraries. This subject is significantly more likely to be key to Academic library patrons.
- Academic and Public libraries are significantly more likely to name "Health & Safety" and "Education" as key subject categories.
- Academic libraries are significantly more likely to name "Environment" and "International" as key subject categories.
- Public libraries are significantly more likely to name "People & Culture" and "Computers & Internet" as key subject categories.



Problems and challenges

Since the 2009 study, issues with technology and user training appear to have leveled off, which makes self-service a feasible option. Leveraging self-service tools is a good way to mitigate budget constraints and staffing shortages while managing an increased workload.

- "Budget constraints," "staff shortages," and "increased workload" topped the list of problems or challenges to providing information and services.
- Compared with the 2009 study, "keeping up with technology," "user training," and "cost containment" are perceived as less problematic.
- Federal Government libraries are significantly more likely to cite "budget constraints," "cost containment," and "transition of print to electronic format" as major or minor problems.
- Public libraries are significantly more likely to cite "marketing," "user training," and
 "lack of training on how to search and use resources" as major or minor problems.



Services and content management activities

FDLP libraries offer a wide spectrum of services and content management activities that must be sustained.

- Nearly all libraries offer "reference desk/help desk" (98%), "providing electronic access to documents" (96%), and "managing physical library print collections" (95%).
- Academic libraries are significantly more likely to offer the following services: "virtual reference assistance," "managing digital collections," "collaborative workspace, in the library," "workshops conducted at the library," "locating subject matter experts," "consulting services," and "website management."
- Federal Government libraries are significantly more likely to offer the following services: "managing physical library and print collections," "document delivery," "content evaluating and/or purchasing," "conducting secondary research," "current awareness/alerting services," "customized info products/packages," "content integration into other documents or processes," and "analysis/synthesis of information."



Tools, methods, applications

Increasing use of social and mobile reinforces the use of a self-service model for FDLP libraries, which will help ease some of the strain on resources and keep users connected.

- Use of social networking and mobile devices has exploded since the 2009 study, with social networking increasing from 35% to 68%, and mobile devices increasing from 9% to 45%.
- Public libraries are more likely to use social networking and mobile devices.
- Fewer than 10% of respondents report using audio blogs, mash-ups, vlogs, podcasts, and virtual worlds.
- Only 3% of responding libraries claim they do not use any of these tools, methods, or applications.



Library performance measurements

Conducting regular, consistent needs assessments and satisfaction studies is critical to efficient library operations.

- Only about one-fourth of responding libraries use qualitative studies on user needs (25%) and quantitative user needs assessments (24%).
- Nearly one-third of responding libraries do not utilize any type of library performance measurement studies (30%).
- State Government libraries are most likely to report they do not use any of these library performance measurement studies (58%).



Performance metrics

Regularly measuring performance on such attributes as customer satisfaction, ease of access/use, and overall quality is essential to providing a positive user experience.

- A little more than half of responding libraries (56%) measure customer satisfaction related to their library's content collection usage.
- Nearly one-fourth (23%) do not measure their library's performance at all. The good news is that this represents a decrease from 2009 when 27% said they did not measure library performance.



Most important services

Services that allow users to serve themselves are considered most important. This includes access to depository materials, user access tools, free access to fee-based Government databases, the FDLP.gov site, webinars/webcasts, etc.

- More than three-fourths named having access to depository materials as the most important service (78%).
- Since the 2009 study, the importance of user access tools has increased from 40% to 56% and webinars/webcasts have increased from 3% to 33%.



Unmet needs

Historical coverage of content is conspicuously inadequate and appears to be the biggest gap for FDLP libraries and their patrons.

- The most frequently mentioned need is for digitized historical collection of Government publications (66%), followed by additional historical coverage of titles in FDsys (52%) and pre-1976 cataloging records to OCLC (45%). The theme here is "historical" coverage.
- Eight percent (8%) claimed no unmet needs. This is an increase from 2% in the 2009 study, which is an improvement.



Satisfaction with FDLP services and tools

Efforts to increase customer satisfaction with services and tools are mostly showing improvement over the previous survey.

	2009	2015
FDLP.gov	86% ←	→ 86%
Training/webinars	42%	75%
Free access to Government fee-based databases	57%	65%
Public access assessments	30%	39%
Operational guidance (LRPR)	75%	49%





Recommendations and Essential Actions

Beef up the historical offerings

- Historical collections (e.g., government publications, additional coverage of titles in FDsys, and pre-1976 cataloging records to OCLC) top the list of unmet needs.
- Enabling access to this content will close the largest gap mentioned in the research.

Market and promote to drive usage

- Marketing/promoting services and awareness ranks fourth on the list of challenges overall.
- Increased awareness and user training work together to provide a better user experience.
- Public libraries especially need the impetus to market.



Recommendations and Essential Actions

Meet the demand

- Compared to 2009, users increasingly want self-service and time-shifting to meet their needs.
- User access tools and webinars/webcasts have grown dramatically in importance.
- Emphasize offerings that allow self-service: user access tools, mobile apps, and responsive design.

Be aware of the budget crunch

- The number of actual users supported has increased dramatically since 2009.
- Libraries strain under budget, staff shortages, and increased workload.
- Federal Government libraries cite budget shortfalls, indicating a need to prioritize the allocation of financial resources (if there are any) from the GPO.



Recommendations and Essential Actions

Optimize for mobile

- Compared to 2009 results, mobile access is growing.
- Responsive design and mobile apps are key to keeping users connected.

Don't forget to be social

- Like mobile usage, social presence has grown in importance since 2009.
- Develop a social media presence (Twitter, Facebook, etc.) to drive engagement and help with marketing.

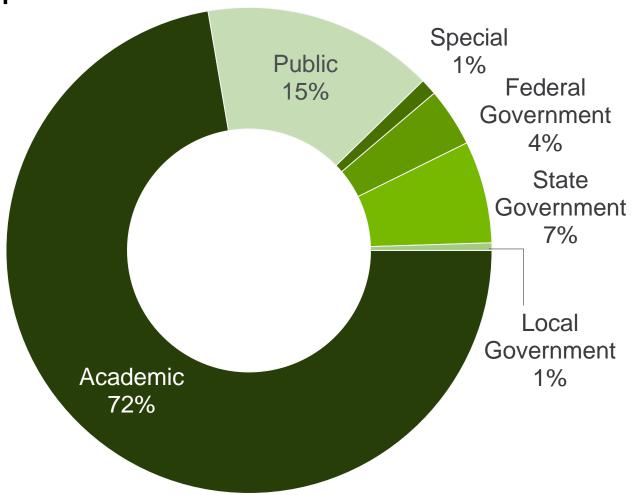
Focus on metrics

- Nearly 60% of State Government libraries do not use any type of library performance measurements.
- Keep an eye on key metrics to ensure the library's services and content align with user needs and expectations.



Quantitative Results: Segmentation Analysis

Library Types



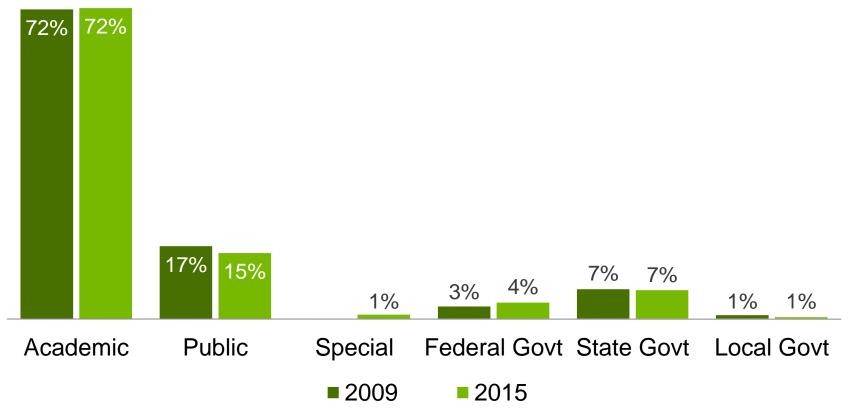
Source: Q1. Which of the following best describes your library type?

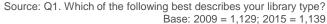
Base: 1,139

Note: Please use caution interpreting results for Special and Local Government libraries due to low base sizes.



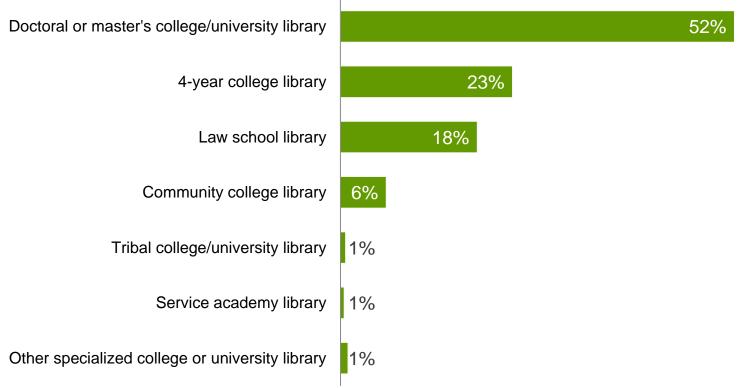
Library Types – Trending







Academic Library Sub-types

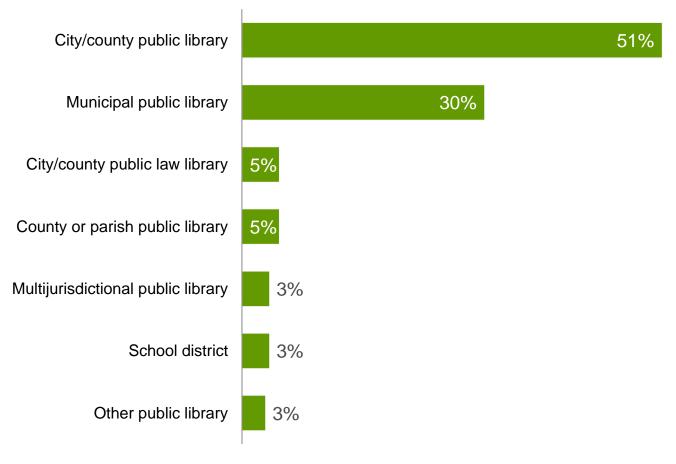


Source: Q1. Which of the following best describes your library type?

Base: 823



Public Library Sub-types

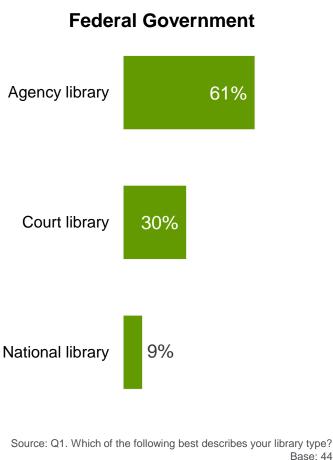


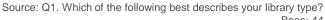
Source: Q1. Which of the following best describes your library type?

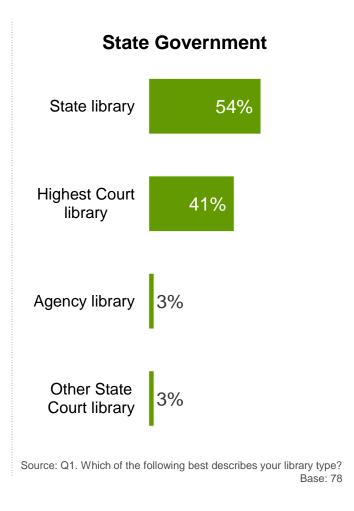
Base: 175



Government Library Sub-types







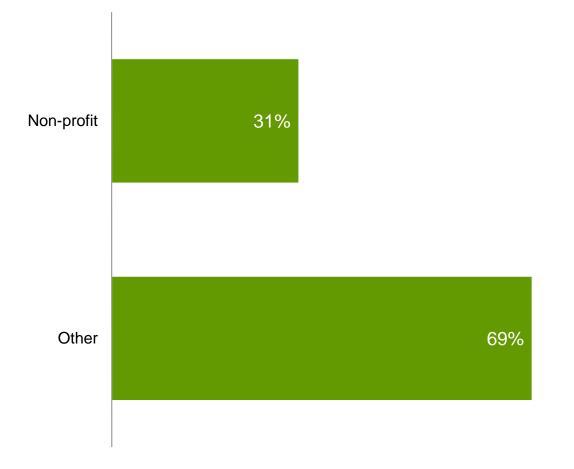
Local Government

100% County or city government library

Source: Q1. Which of the following best describes your library type? Base: 6



Special Library Sub-types



- Other responses:
- Business and Career Library
- College/Academic
- District Public
- Legislative Reference Library
- Naval War College Library
- Navy Department Library
- Special District
- State Historical Society
- Tribal College

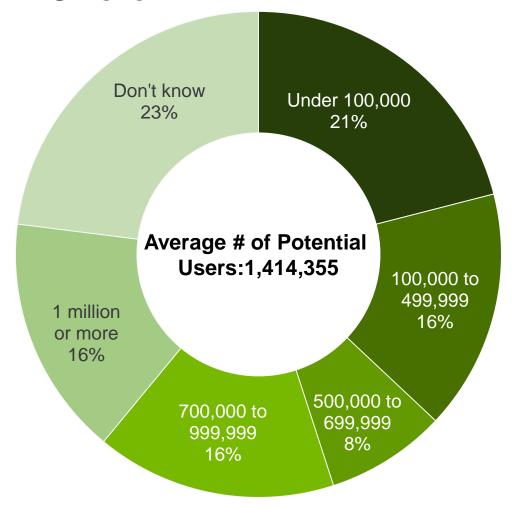
Source: Q1. Which of the following best describes your library type?

Base: 13



Potential Users – Overall

- FDLP libraries overall estimate approximately 1.4 million potential users, on average.
- One-fifth (21%) estimate under 100,000.
- Another 16% estimate 1 million or more.
- There were 23% who were unable to estimate their potential market.



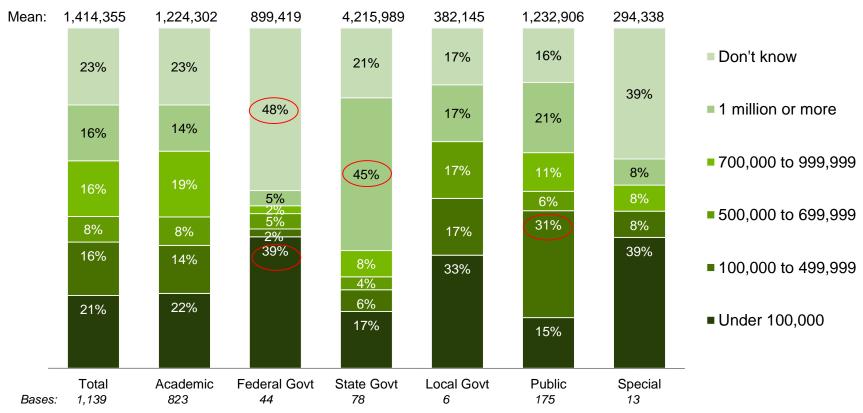
Source: Q2. What is your best estimate of the approximate number of <u>potential users</u> (those in your depository service area who would likely benefit from these services) and the approximate number of actual users that your library supports?

Base: 1.139



Potential Users – by Library Type

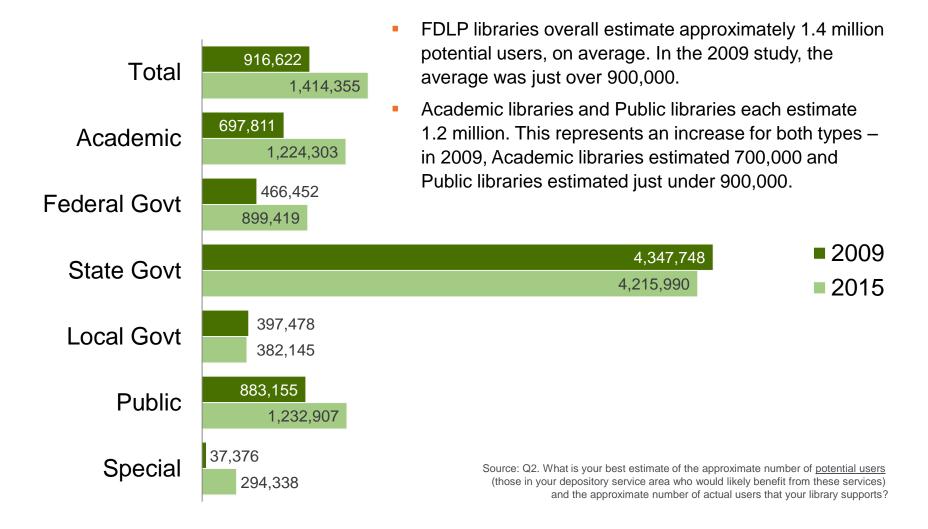
- Almost half of Federal Government libraries (48%) were unable to estimate potential users. Another 39% report under 100,000 potential users.
- State Government libraries estimate their potential users at more than 4.2 million. Nearly half of these libraries (45%) report one million or more.



Source: Q2. What is your best estimate of the approximate number of <u>potential users</u> (those in your depository service area who would likely benefit from these services) and the approximate number of actual users that your library supports?



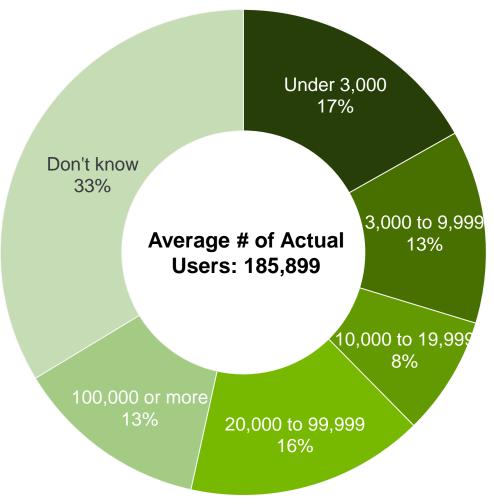
Potential Users – Trending





Actual Users - Overall

- FDLP libraries overall estimate approximately 185,000 actual users.
- About one-third (30%) estimate supporting fewer than 10,000 users.
- Just over one-third (38%) estimate supporting more than 10,000 users.
- The remaining one-third (33%) were unable to approximate their actual market.



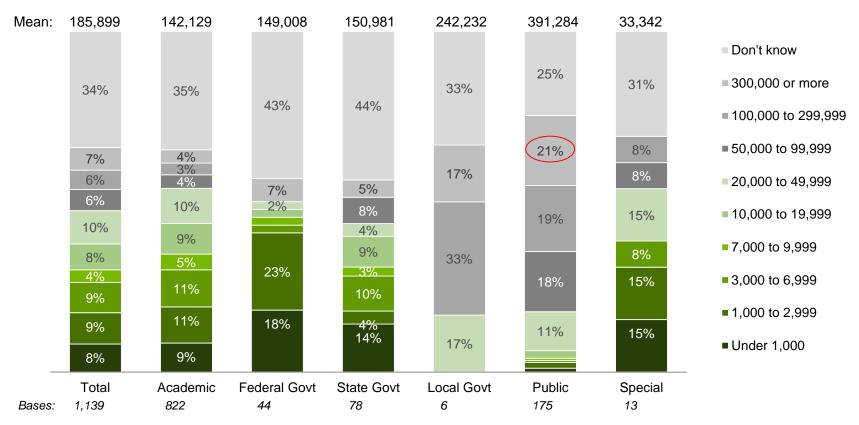
Source: Q2. What is your best estimate of the approximate number of potential users (those in your depository service area who would likely benefit from these services) and the approximate number of <u>actual users</u> that your library supports?

Base: 1,139



Actual Users – by Library Type

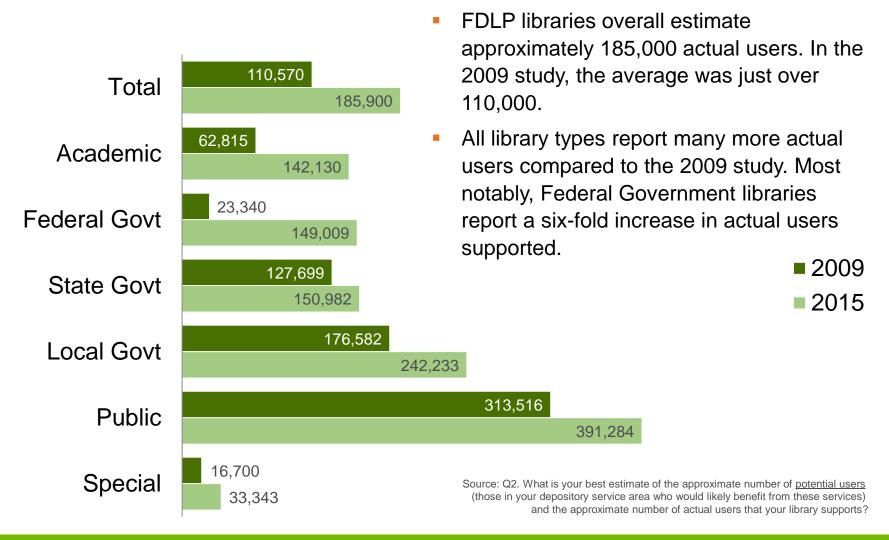
Public libraries serve nearly 400,000 users, on average, with one-fifth (21%) reporting that they support 300,000 or more.



Source: Q2. What is your best estimate of the approximate number of potential users (those in your depository service area who would likely benefit from these services) and the approximate number of actual users that your library supports?



Actual Users – Trending



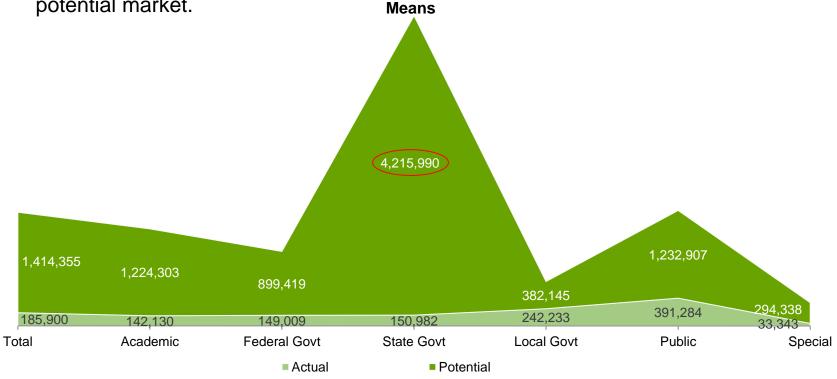


Potential vs. Actual Users

 State Government libraries estimate that they only serve about 4% of those who would likely benefit from their services.

Local Government libraries, on the other hand, estimate that they serve 63% of their potential market.

Means



Source: Q2. What is your best estimate of the approximate number of <u>potential users</u> (those in your depository service area who would likely benefit from these services) and the approximate number of <u>actual users</u> that your library supports?

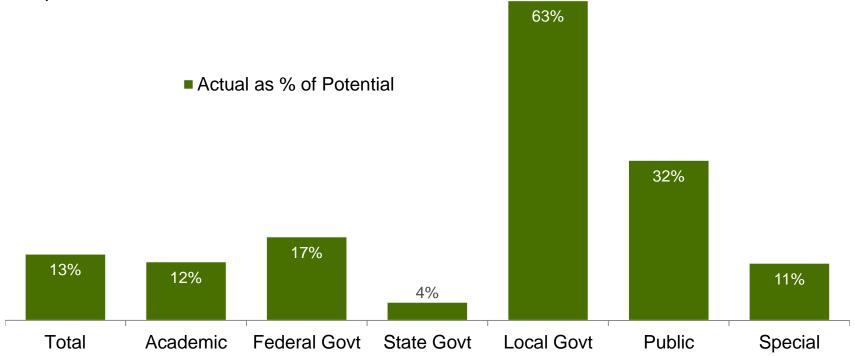


Percent of Potential Users Supported

 State Government libraries estimate that they only serve about 4% of those who would likely benefit from their services.

Local Government libraries, on the other hand, estimate that they serve 63% of their

potential market.

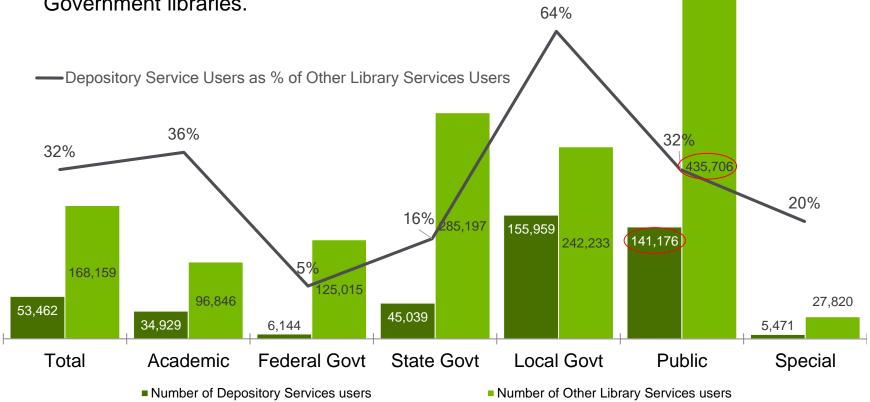


Source: Q2. What is your best estimate of the approximate number of <u>potential users</u> (those in your depository service area who would likely benefit from these services) and the approximate number of actual users that your library supports?



Users of Depository vs. Other Library Services

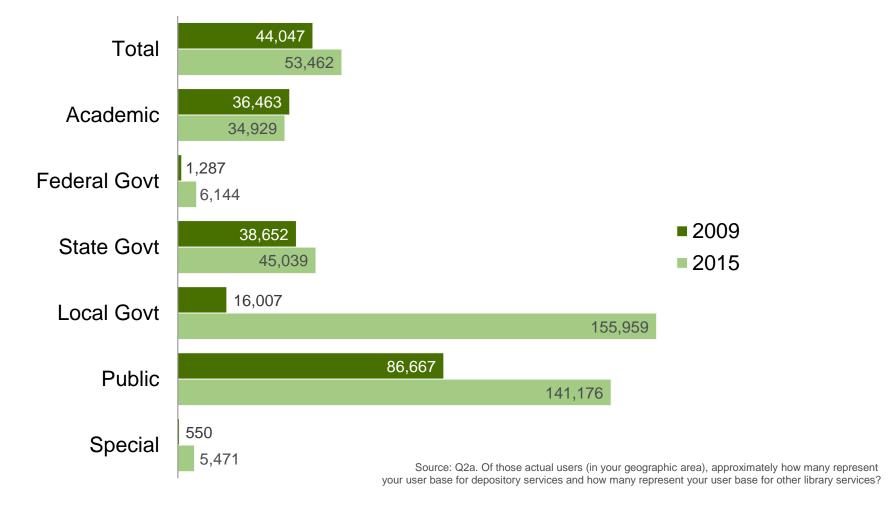
 Users of Depository Services represent about one-third (32%) of Users of Other Library Services, on average. This proportion varies from as low as 5% for Federal Government libraries to as high as 64% for Local Government libraries.



Source: Q2a. Of those actual users (in your geographic area), approximately how many represent your user base for depository services and how many represent your user base for other library services?

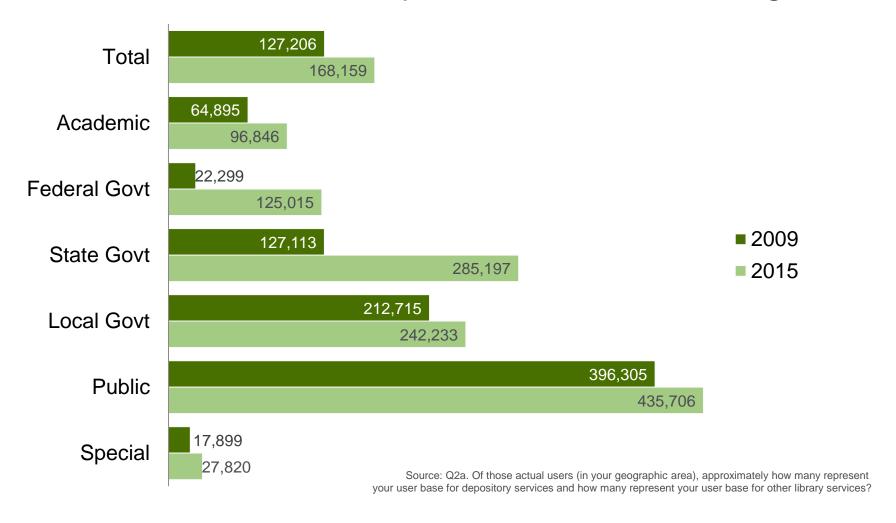


Users of Depository Services – Trending





Users of Other Library Services – Trending





Quantitative Results:Library Needs Assessment

Key Subject Categories Used – by Library Type

	Total	Academic	Public	Special	Federal Gov't	State Gov't	Local Gov't
Base	1,138	822	175	13	44	<i>78</i>	6
Politics & Law	81%	82%	73%	62%	84%	89%	83%
Business & Economy	68%	72%	67%	62%	50%	41%	50%
History	61%	63%	67%	62%	32%	41%	50%
Health & Safety	60%	64%	68%	31%	25%	36%	33%
Census, Demographics, Urban Planning	59%	62%	59%	54%	25%	51%	83%
Education	58%	64%	59%	46%	14%	27%	33%
Environment	57%	63%	41%	39%	41%	42%	17%
Reference	47%	46%	53%	39%	30%	45%	67%
Science & Technology	46%	51%	38%	31%	36%	26%	
International	40%	49%	16%	31%	30%	12%	
Defense & Military	39%	41%	35%	31%	34%	24%	17%
People & Cultures	34%	33%	51%	39%	11%	24%	17%
Computers & Internet	32%	30%	48%	39%	27%	19%	
Recreation & Travel	19%	14%	50%	23%	7%	10%	
Other	7%	6%	9%	8%	9%	8%	

Source: Q3. What are the key subject categories that your patrons use most regularly?

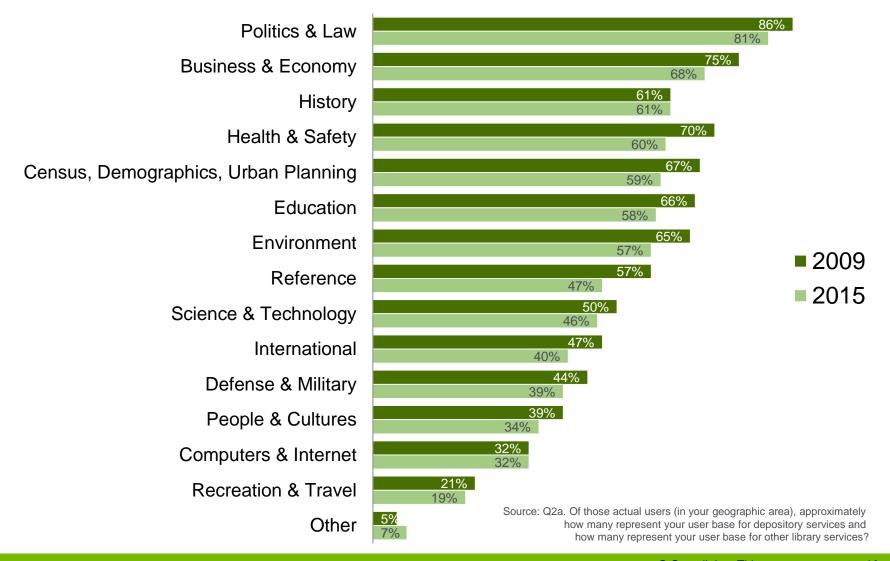


Key Subject Categories Used – by Library Type

- Eight out of 10 respondents (81%) report Politics & Law as the subject category used most often by their library's patrons.
- Business & Economy is the second-most used subject category, by 68% of responding libraries. This subject is significantly more likely to be key to Academic library patrons.
- Academic and Public libraries are significantly more likely to name Health & Safety and Education as key subject categories.
- Academic libraries are significantly more likely to name Environment and International as key subject categories.
- Public libraries are significantly more likely to name People & Culture and Computers
 & Internet as key subject categories.



Key Subject Categories Used – Trending

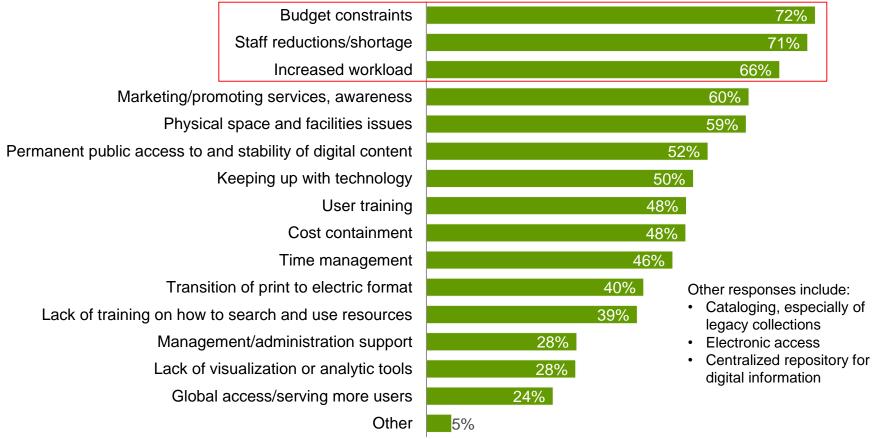




Problems and Challenges – Overall

 Budget constraints, staff shortages, and increased workload topped the list of problems or challenges to providing information and services.

% Major/Minor Problem



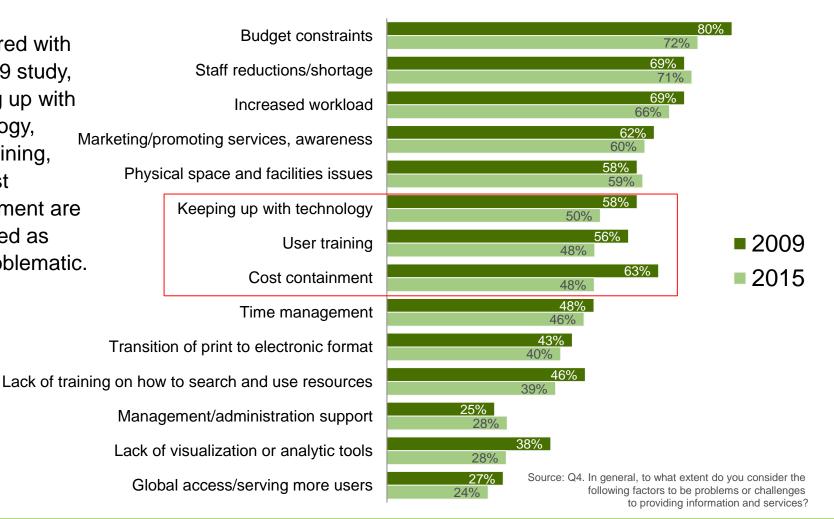




Problems and Challenges – Trending

% Major/Minor Problem

 Compared with the 2009 study, keeping up with technology, user training, and cost containment are perceived as less problematic.





Problems and Challenges – by Library Type

% Major/Minor Problem	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	823	44	<i>78</i>	6	<i>175</i>	13
Budget constraints	72%	72%	86%	78%	67%	67%	77%
Staff reduction/shortage	71%	71%	73%	67%	83%	71%	62%
Increased workload	66%	64%	71%	62%	83%	72%	77%
Marketing/promoting services-awareness	60%	58%	46%	67%	83%	69%	54%
Physical space and facilities issues	59%	59%	59%	55%	83%	64%	54%
Permanent public access to and stability of digital content	52%	51%	61%	62%	67%	50%	69%
Keeping up with technology	50%	44%	68%	56%	33%	69%	69%
Cost containment	48%	48%	73%	51%	67%	40%	46%
User training	48%	45%	46%	46%	67%	62%	62%
Time management	46%	44%	52%	41%	50%	54%	54%
Transition of print to electronic format	40%	36%	64%	44%	50%	55%	23%
Lack of training on how to search and use resources	39%	35%	32%	41%	50%	60%	39%
Lack of visualization or analytic tools	28%	27%	32%	32%	17%	29%	46%
Management/administration support	28%	27%	36%	24%	67%	29%	31%
Global access/serving more users	24%	22%	27%	32%	50%	27%	31%

Source: Q4. In general, to what extent do you consider the following factors to be problems or challenges to providing information and services?



Problems and Challenges – by Library Type

- Federal Government libraries are significantly more likely to cite budget constraints, cost containment, and transition of print to electronic format as major or minor problems.
- Public libraries are significantly more likely to cite marketing, user training, and lack
 of training on how to search and use resources as major or minor problems.

Source: Q4. In general, to what extent do you consider the following factors to be problems or challenges to providing information and services?



Problems and Challenges – Major

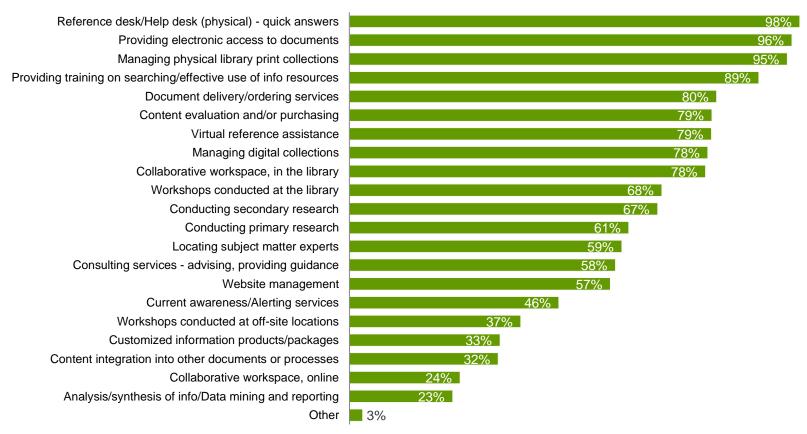
% Major Problem	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	823	44	<i>78</i>	6	<i>175</i>	13
Budget constraints	38%	38%	46%	46%	33%	33%	31%
Staff reduction/shortage	33%	32%	39%	36%	50%	35%	31%
Increased workload	27%	26%	32%	19%	50%	30%	39%
Physical space and facilities issues	23%	24%	16%	17%	33%	25%	31%
Permanent public access to and stability of digital content	18%	20%	27%	15%	17%	9%	15%
Cost containment	17%	18%	27%	8%	17%	14%	8%
Marketing/promoting services-awareness	14%	11%	9%	14%	50%	24%	15%
Keeping up with technology	10%	7%	18%	15%	17%	15%	8%
Time management	10%	10%	7%	9%	17%	12%	23%
User training	8%	6%	5%	8%	17%	17%	8%
Transition of print to electronic format	8%	6%	11%	8%	17%	12%	-
Management/administration support	6%	5%	14%	1%	17%	6%	8%
Lack of training on how to search and use resources	5%	5%	-	4%	17%	9%	8%
Lack of visualization or analytic tools	4%	5%	2%	4%	-	3%	8%
Global access/serving more users	3%	3%	2%	-	17%	3%	15%

Source: Q4. In general, to what extent do you consider the following factors to be problems or challenges to providing information and services?



Services and Content Management Activities – Overall

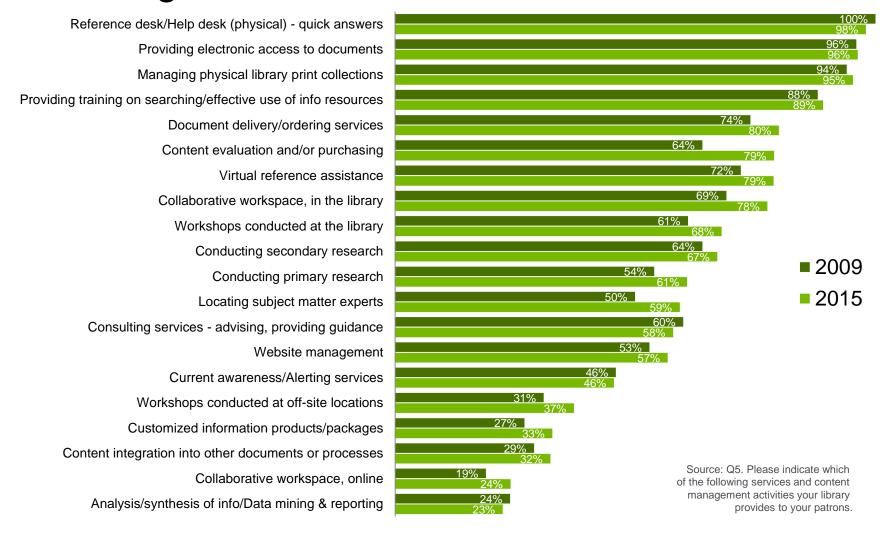
• Nearly all libraries offer reference desk/help desk (98%), providing electronic access to documents (96%), and managing physical library print collections (95%).



Source: Q5. Please indicate which of the following services and content management activities your library provides to your patrons.



Services and Content Management Activities – Trending





Services and Content Management Activities – by Library Type

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1, 139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Reference desk/Help desk (physical) - quick answers	98%	98%	96%	97%	83%	99%	100%
Providing electronic access to documents	96%	98%	98%	94%	67%	91%	100%
Managing physical library and print collections	95%	96%	100%	94%	100%	93%	85%
Providing training on searching and effective use of info	89%	92%	86%	85%	67%	79%	69%
Document delivery/ordering services	80%	86%	89%	77%	17%	54%	39%
Virtual reference assistance	79%	82%	43%	58%	83%	81%	69%
Content evaluation and/or purchasing	79%	83%	84%	72%	67%	64%	54%
Managing digital collections	78%	81%	77%	67%	50%	67%	92%
Collaborative workspace, in the library	78%	85%	66%	51%	50%	59%	39%
Workshops conducted at the library	68%	71%	61%	50%	67%	67%	39%
Conducting secondary research	67%	69%	80%	71%	33%	58%	54%
Conducting primary research	61%	62%	71%	71%	33%	47%	77%

Source: Q5. Please indicate which of the following services and content management activities your library provides to your patrons.



Services and Content Management Activities – by Library Type *(continued)*

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Locating subject matter experts	59%	63%	61%	42%	33%	51%	54%
Consulting services-advising, providing guidance	58%	65%	46%	54%	17%	35%	15%
Website management	57%	60%	59%	47%	17%	49%	54%
Current awareness/Alerting services	46%	48%	75%	36%	17%	34%	31%
Workshops conducted at off-site locations	37%	38%	32%	46%	17%	35%	23%
Customized info products/packages	33%	31%	61%	37%	17%	33%	23%
Content integration into other documents or processes	32%	36%	41%	21%	-	21%	15%
Collaborative workspace, online	24%	28%	23%	19%	-	11%	23%
Analysis/synthesis of information/Data mining and reporting	23%	23%	43%	24%	17%	14%	54%

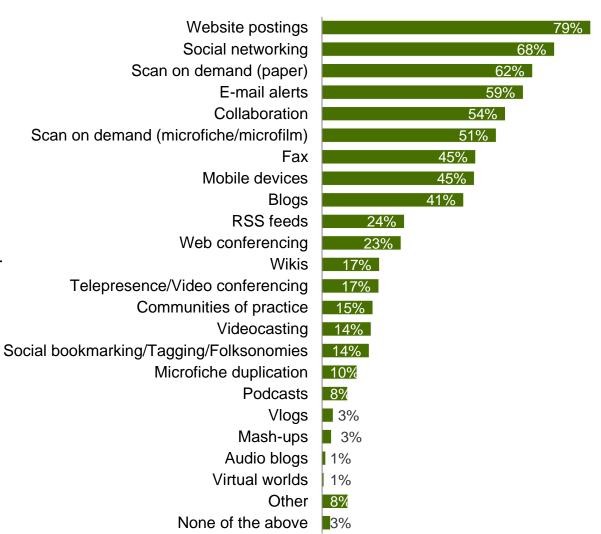
- Academic libraries are significantly more likely to offer several services, including virtual reference
 assistance, managing digital collections, collaborative workspace in the library, workshops conducted at
 the library, locating subject matter experts, consulting services, and website management.
- Federal Government libraries are significantly more likely to offer the following: managing physical library and print collections, document delivery, content evaluating and/or purchasing, conducting secondary research, current awareness/alerting services, customized info products/packages, content integration into other documents or processes, and analysis/synthesis of information.

Source: Q5. Please indicate which of the following services and content management activities your library provides to your patrons.



Tools, Methods, Applications – Overall

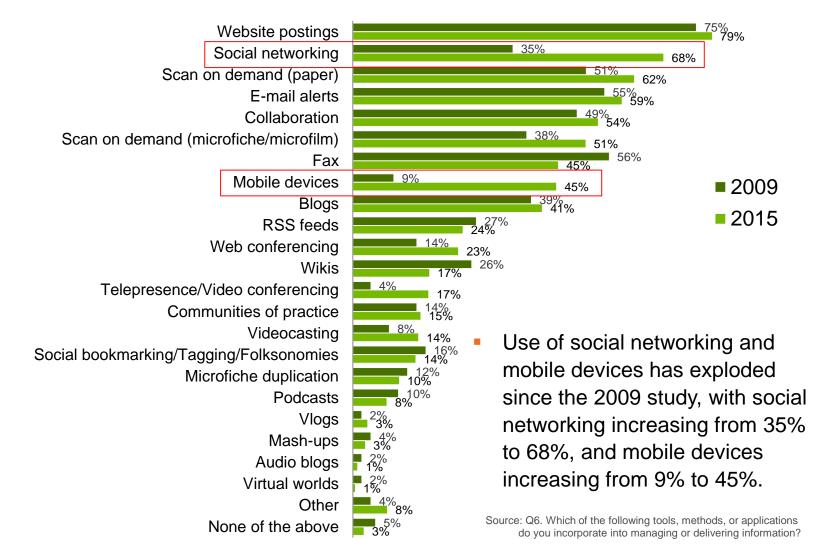
- Website postings are the most incorporated tool for managing or delivering information, used by 79% of respondents.
- At least half also use social networking (68%), scan on demand-paper (62%), e-mail alerts (59%), collaboration (54%), and scan on demandmicrofiche (51%).
- Less than 10% of respondents report using audio blogs, mash-ups, vlogs, podcasts, and virtual worlds.
- Only 3% of responding libraries claim they do not use any of these tools, methods, or applications.



Source: Q6. Which of the following tools, methods, or applications do you incorporate into managing or delivering information?



Tools, Methods, Applications – Trending





Tools, Methods, Applications – by Library Type

 Academic libraries are more likely to use collaboration tools. Public libraries are more likely to use social networking and mobile devices.

 Federal Government libraries are more likely to use website postings, web conferencing, and telepresence/video conferencing. State Government libraries are more likely to use scan on demand (paper)

(paper).			Federal	State	Local		
	Total	Academic	Gov't	Gov't	Gov't	Public	Special
Base	1, 139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Web site postings	79%	78%	86%	67%	83%	84%	54%
Social networking	68%	70%	25%	55%	33%	79%	39%
Scan on demand (paper)	62%	62%	66%	74%	50%	54%	54%
Email alerts	59%	59%	73%	54%	33%	61%	31%
Collaboration	54%	58%	52%	44%	-	42%	23%
Scan on demand (microfiche/microfilm)	51%	51%	61%	58%	33%	43%	77%
Mobile devices	45%	47%	30%	22%	50%	47%	15%
Fax	45%	41%	57%	54%	5-%	54%	46%
Blogs	41%	43%	27%	37%	17%	40%	31%
RSS feeds	24%	25%	32%	18%	-	19%	23%
Web conferencing	23%	24%	43%	26%	-	15%	15%
Telepresence/Video conferencing	17%	17%	32%	19%	-	13%	8%
Wikis	17%	18%	18%	17%	-	12%	-

Source: Q6. Which of the following tools, methods, or applications do you incorporate into managing or delivering information?



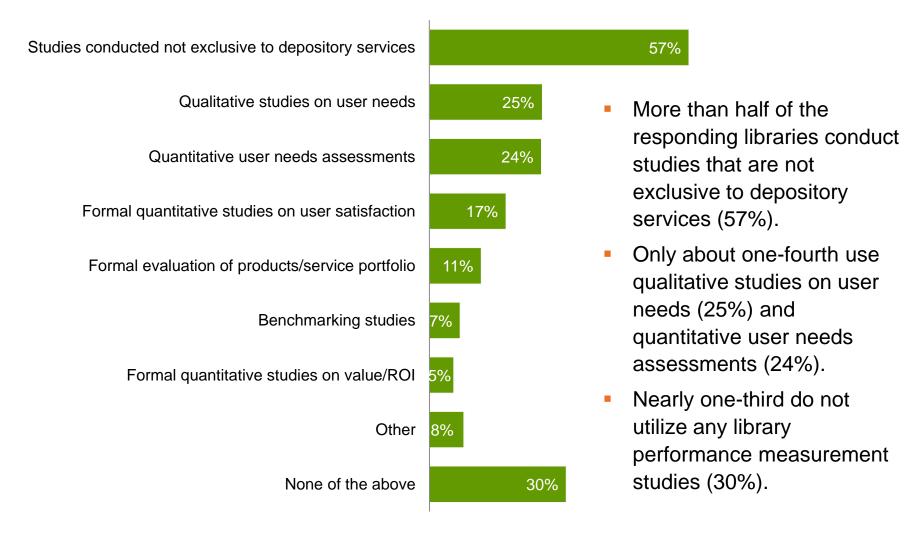
Tools, Methods, Applications – by Library Type *(continued)*

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1, 139	823	44	<i>78</i>	6	<i>175</i>	13
Communities of practice	15%	17%	23%	12%	-	7%	-
Social bookmarking/Tagging/Folksonomies	14%	14%	8%	12%	-	16%	15%
Videocasting	14%	17%	18%	10%	-	5%	-
Microfiche duplication	10%	10%	11%	15%	-	7%	-
Podcasts	8%	8%	5%	6%	-	9%	8%
Mash-ups	3%	3%	-	1%	-	2%	-
Vlogs	3%	3%	7%	3%	-	4%	-
Audio blogs	1%	1%	-	-	-	2%	-
Virtual worlds	1%	1%	-	-	-	1%	-
Other	8%	7%	9%	10%	17%	8%	15%
None of the above	3%	2%	2%	3%	-	2%	15%

Source: Q6. Which of the following tools, methods, or applications do you incorporate into managing or delivering information?



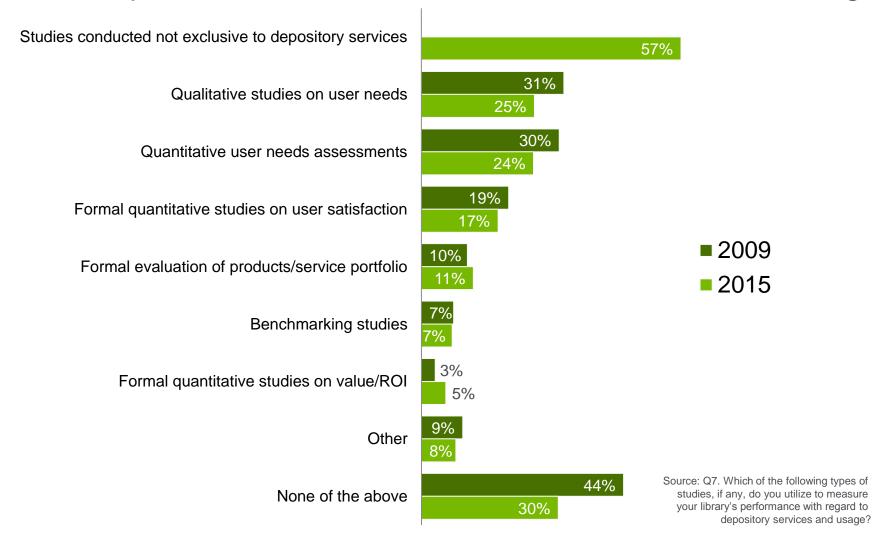
Library Performance Measurements – Overall



Source: Q7. Which of the following types of studies, if any, do you utilize to measure your library's performance with regard to depository services and usage?



Library Performance Measurements – Trending





Library Performance Measurements – by Library Type

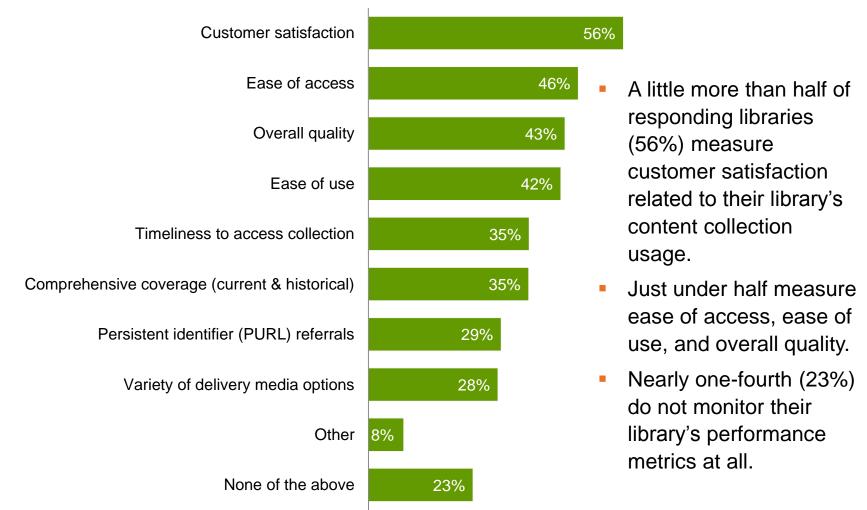
- Academic, Public, and Federal Government libraries are more likely to conduct studies not exclusive to depository services. Academic libraries are more likely to utilize qualitative user needs studies and formal quantitative user satisfaction studies.
- Nearly six out of 10 State Government libraries report they do not use any of these library performance measurement studies (58%).

0144100 (0070).			Federal	State	Local		
	Total	Academic	Gov't	Gov't	Gov't	Public	Special
Base	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Studies conducted not exclusive to depository services	57%	62%	52%	30%	33%	46%	15%
Qualitative studies on user needs	25%	27%	27%	17%	17%	19%	15%
Quantitative user needs assessments	24%	27%	23%	21%	-	18%	-
Formal quantitative studies on user satisfaction	17%	19%	16%	8%	-	10%	23%
Formal evaluation of product/service portfolio	11%	12%	16%	10%	-	7%	15%
Benchmarking studies	7%	7%	14%	4%	-	5%	8%
Formal quantitative studies on value/ROI	5%	5%	11%	9%	-	3%	8%
Other	8%	7%	14%	8%	-	7%	-
None of the above	30%	24%	34%	58%	67%	38%	62%

Source: Q7. Which of the following types of studies, if any, do you utilize to measure your library's performance with regard to depository services and usage?



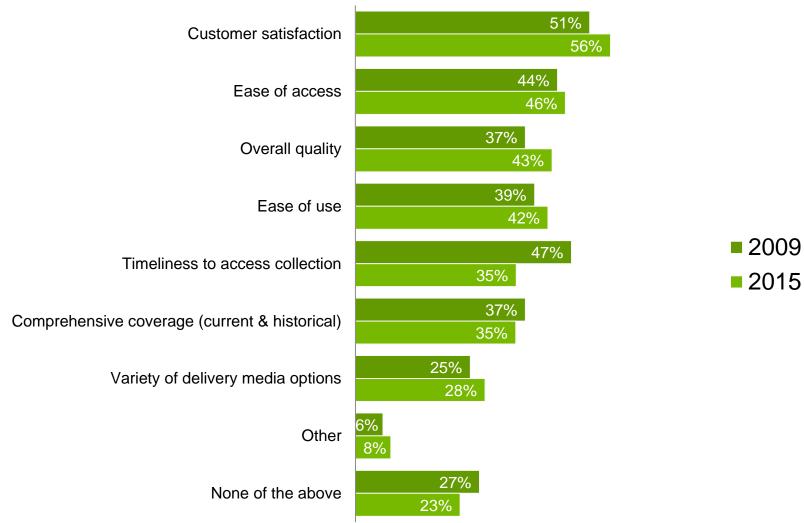
Performance Metrics – Overall



Source: Q8. Which of the following performance metrics, if any, do you measure related to your library's content collection usage?



Performance Metrics – Trending



Source: Q8. Which of the following performance metrics, if any, do you measure related to your library's content collection usage?



Performance Metrics – by Library Type

Academic and Public libraries are more likely to measure a variety of delivery media options.

Academic libraries are more likely to measure ease of access and persistent identifier (PURL)

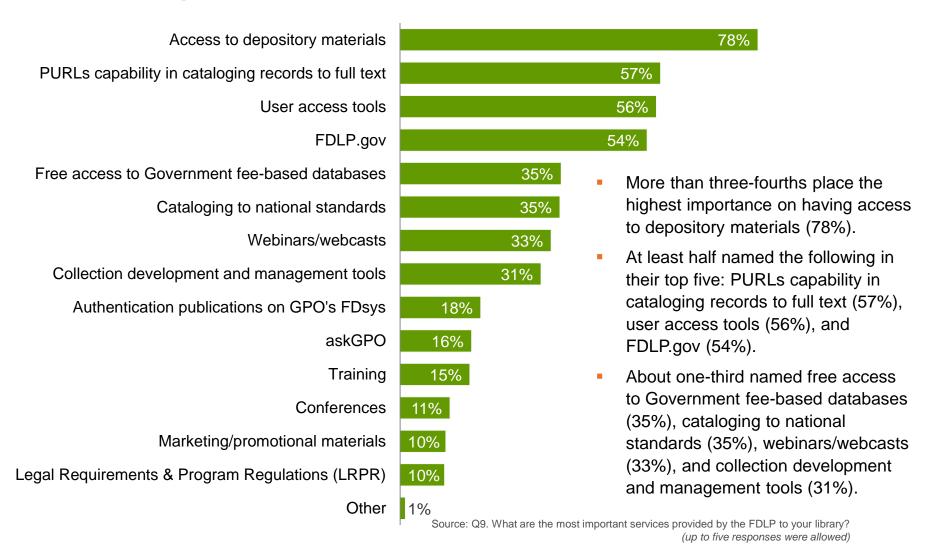
referrals.

reletials.	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1, 139	823	44	<i>78</i>	6	<i>175</i>	13
Customer satisfaction	56%	58%	57%	41%	33%	53%	39%
Ease of access	46%	48%	46%	30%	17%	46%	46%
Overall quality	43%	45%	55%	22%	33%	41%	31%
Ease of use	42%	44%	46%	26%	33%	39%	39%
Comprehensive coverage	35%	36%	43%	28%	33%	31%	31%
Timeliness to access collection	35%	36%	34%	27%	17%	35%	39%
Persistent identifier (PURL) referrals	29%	32%	18%	17%	-	26%	8%
Variety of delivery media options	28%	29%	23%	18%	17%	31%	8%
Other	8%	9%	9%	5%	17%	3%	-
None of the above	23%	20%	25%	39%	50%	27%	54%

Source: Q8. Which of the following performance metrics, if any, do you measure related to your library's content collection usage?

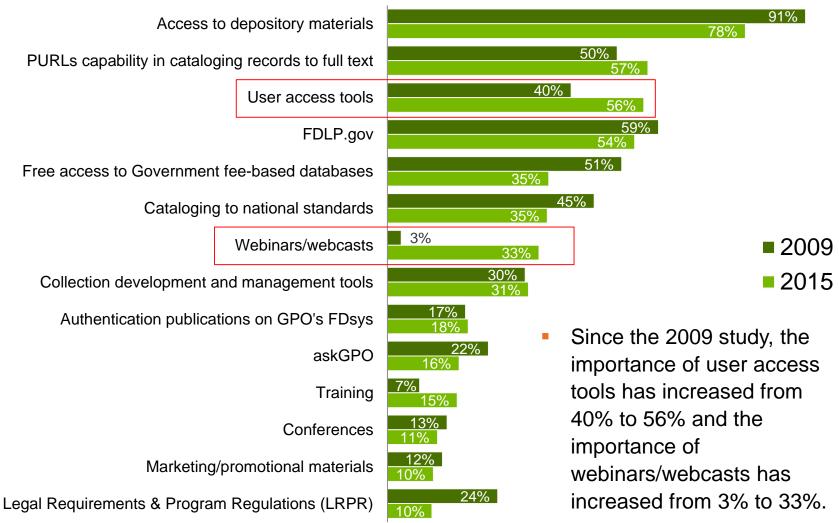


Most Important Services - Overall





Most Important Services – Trending



Source: Q9. What are the most important services provided by the FDLP to your library?



Most Important Services – by Library Type

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	823	44	<i>78</i>	6	<i>175</i>	13
Access to depository materials	78%	78%	75%	74%	83%	77%	92%
Persistent identifier (PURLs) capability in cataloging records to full text	57%	62%	41%	54%	-	42%	23%
User access tools	56%	58%	59%	58%	67%	47%	31%
FDLP.gov	54%	52%	34%	63%	17%	65%	69%
Cataloging to national standards	35%	39%	39%	26%	67%	20%	23%
Free access to Government fee-based databases	35%	36%	36%	27%	17%	35%	31%
Webinars/webcasts	33%	32%	23%	31%	33%	40%	39%
Collection development and management tools	31%	32%	25%	30%	17%	29%	15%
Authentication publications on GPO's FDsys	18%	18%	23%	28%	-	10%	8%
askGPO	16%	15%	5%	26%	17%	19%	15%
Training	15%	14%	9%	17%	-	21%	23%
Conferences	11%	12%	9%	5%	-	9%	8%
Legal Requirements & Program Regulations (LRPR)	10%	10%	9%	6%	-	10%	8%
Marketing/promotional materials	10%	9%	7%	10%	-	17%	23%
Other	1%	1%	2%	1%	33%	1%	-

Source: Q9. What are the most important services provided by the FDLP to your library?



Most Important Services – by Library Type

- Academic libraries are more likely to name persistent identifier (PURLs) capability in cataloging records to full text in the top five services.
- Public libraries are more likely to name FDLP.gov, webinars/webcasts, and marketing/promotional materials in the top five services.
- State Government libraries are more likely to name authentication publications on GPO's FDsys and askGPO in the top five services.

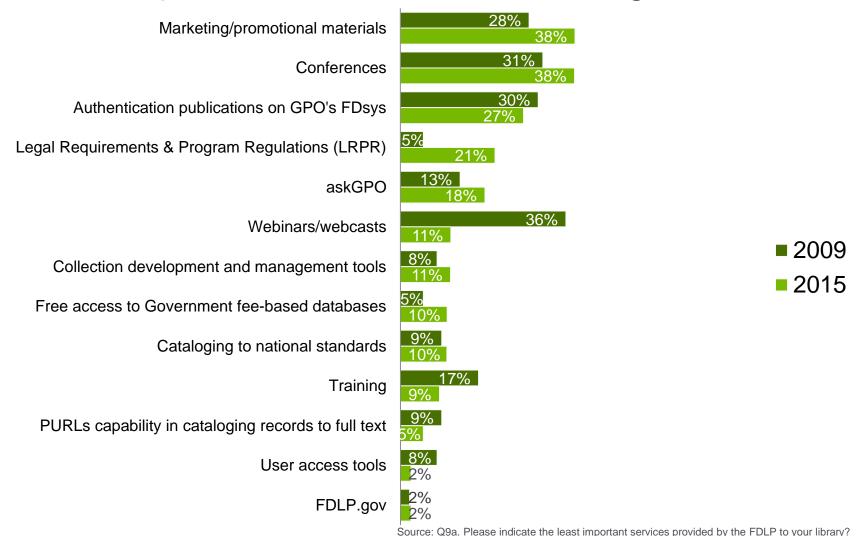


Least Important Services – Overall





Least Important Services – Trending





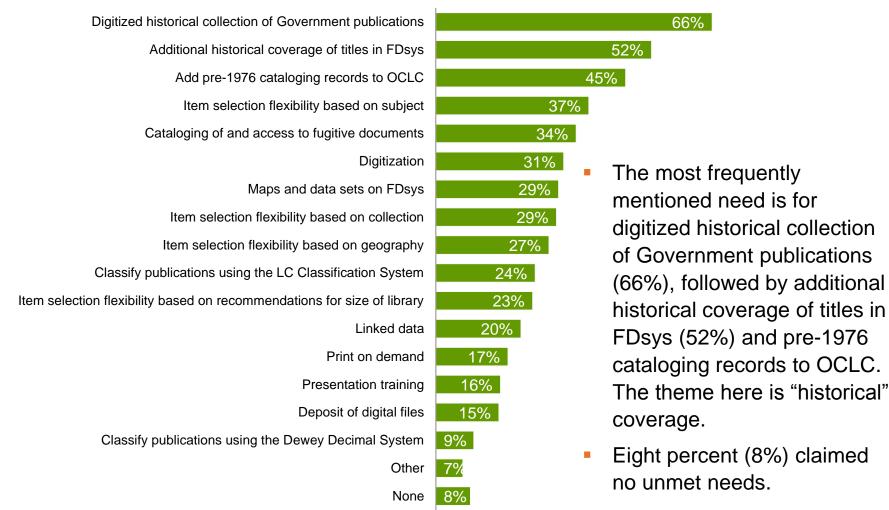
Least Important Services – by Library Type

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	823	44	78	6	<i>175</i>	13
Marketing/promotional materials	39%	42%	50%	39%	17%	23%	23%
Conferences	38%	35%	25%	45%	50%	49%	46%
Authentication publications on GPO's FDsys	27%	25%	14%	22%	33%	38%	62%
Legal Requirements & Program Regulations (LRPR)	21%	19%	21%	22%	33%	25%	31%
askGPO	18%	19%	23%	17%	-	13%	39%
Collection development and management tools	11%	10%	18%	13%	17%	12%	15%
Webinars/webcasts	11%	11%	11%	5%	-	11%	15%
Cataloging to national standards	10%	8%	11%	14%	-	15%	31%
Free access to Government fee-based databases	10%	10%	7%	9%	-	12%	8%
Training	9%	10%	5%	4%	17%	5%	23%
Persistent identifier (PURLs) capability in cataloging records to full text	5%	4%	9%	6%	50%	5%	8%
FDLP.gov	2%	2%	9%	3%	17%	-	8%
User access tools	2%	2%	-	1%	-	3%	23%
Access to depository materials	1%	2%	-	-	-	1%	-
Other	8%	9%	7%	8%	-	5%	-

Source: Q9a. Please indicate the least important services provided by the FDLP to your library?



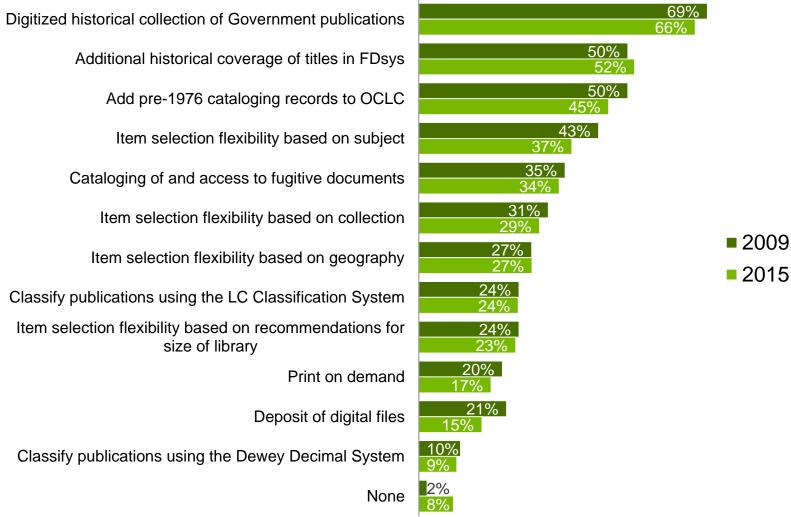
Unmet Needs – Overall



Source: Q10. What services and/or resources do you need from FDLP that are currently not being provided?



Unmet Needs – Trending



Source: Q10. What services and/or resources do you need from FDLP that are currently not being provided?



Unmet Needs – by Library Type

- Academic and State Government libraries are more likely to lack pre-1976 cataloging records to OCLC as well as cataloging of and access to fugitive documents.
- Public libraries are more likely to need item selection flexibility based on geography and on recommendations for size of library. Academic libraries are more likely to need maps and data sets on FDsvs and linked data.

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	Total	Academic	Gov't	Gov't	Gov't	Public	Special
Base	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Digitized historical collection of Government publications	66%	69%	64%	64%	50%	53%	85%
Additional historical coverage of titles in FDsys	52%	54%	59%	56%	33%	38%	54%
Add pre-1976 cataloging records to OCLC	45%	48%	34%	51%	67%	33%	23%
Item selection flexibility based on subject	37%	38%	32%	27%	17%	37%	39%
Cataloging of and access to fugitive documents	34%	37%	30%	37%	17%	19%	8%
Digitization	31%	30%	43%	32%	67%	27%	46%
Item selection flexibility based on collection	29%	29%	21%	23%	17%	32%	23%
Maps and data sets on FDsys	29%	33%	21%	18%	-	23%	23%
Item selection flexibility based on geography	27%	26%	7%	28%	33%	37%	31%
Classify publications using the LC Classification System	24%	27%	30%	24%	17%	7%	23%
Item selection flexibility based on recommendations for size of library	23%	23%	16%	12%	17%	32%	23%
Linked data	20%	23%	18%	12%	-	15%	8%

Source: Q10. What services and/or resources do you need from FDLP that are currently not being provided?



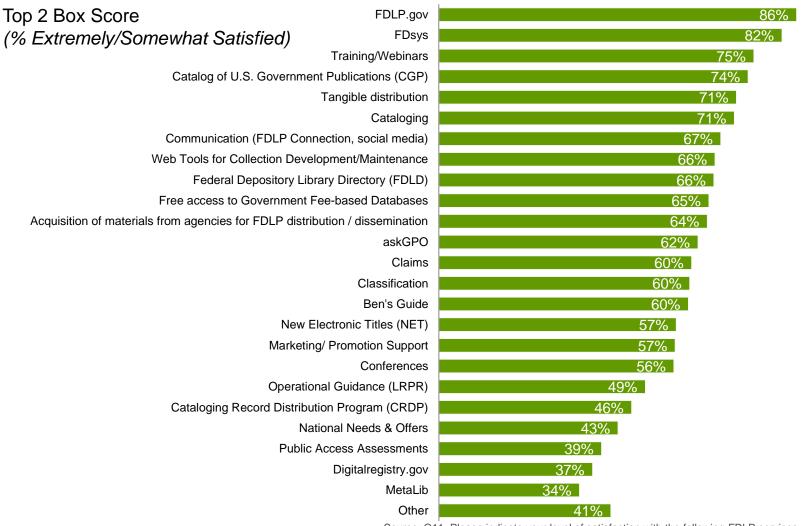
Unmet Needs – by Library Type (continued)

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Print on demand	17%	17%	30%	14%	-	20%	15%
Preservation training	16%	14%	18%	24%	17%	18%	23%
Deposit of digital files	15%	16%	18%	8%	17%	14%	23%
Classify publications using the Dewey Decimal System	9%	4%	-	9%	17%	34%	23%
None	8%	7%	9%	6%	17%	13%	-
Other	7%	7%	-	1%	-	10%	-

Source: Q10. What services and/or resources do you need from FDLP that are currently not being provided?



Satisfaction with FDLP Services & Tools – Overall







Satisfaction with FDLP Services & Tools – Trending

Top 2 Box Score (% Extremely/Somewhat Satisfied)

Training/webinars Tangible distribution Cataloging

FDLP.gov

Communication (FDLP Connection, social media)

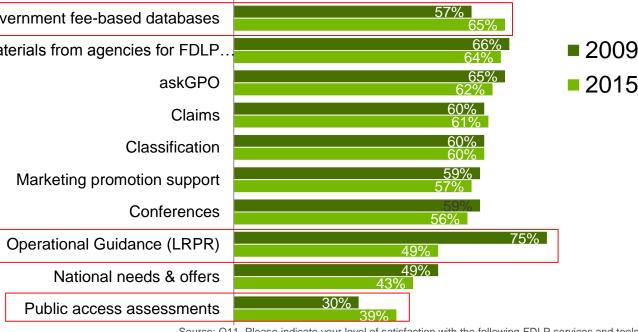
Web tools for collection development/maintenance

Free access to Government fee-based databases

Acquisition of materials from agencies for FDLP...

2009

- Satisfaction with FDLP.gov remains strong with 86% Extremely or Somewhat Satisfied.
- Satisfaction with training/webinars has increased from 42% in 2009 to 75% most recently.
- Satisfaction with operational guidance (LRPR) has decreased from 75% in 2009 to 49% most recently.



Source: Q11. Please indicate your level of satisfaction with the following FDLP services and tools.

42%



75%

68%

69%

64%

66%

Satisfaction with FDLP Services & Tools – by Library Type

Mean Score on 5-point Scale (1 = Extremely Dissatisfied; 5 = Extremely Satisfied)	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	823	44	<i>78</i>	6	175	13
FDLP.gov	4.3	4.3	4.2	4.4	4.3	4.3	4.3
FDsys	4.2	4.2	4.4	4.2	4.2	4.1	4.1
Training/Webinars	4.1	4.2	4.1	4.1	3.8	4.1	3.8
Cataloging	4.0	4.0	3.9	4.0	3.8	3.8	3.8
Communication (FDLP Connection, social media)	4.0	4.0	3.9	4.0	3.6	4.0	3.6
Tangible distribution	4.0	4.0	3.7	4.1	3.8	3.9	3.7
Catalog of U.S. Government Publications (CGP)	4.0	4.0	4.0	4.0	3.8	4.1	3.9
Federal Depository Library Directory (FDLD)	4.0	4.0	4.0	4.2	4.3	4.0	4.1
Free access to Government fee-based databases	3.9	3.9	3.7	3.9	3.5	4.1	4.0
Ben's Guide	3.9	3.9	3.8	4.1	4.2	4.0	4.3
Acquisition of materials from agencies for FDLP distribution/dissemination	3.8	3.8	3.5	4.0	3.8	3.8	3.8
askGPO	3.8	3.8	3.7	4.0	4.0	3.9	3.9
Claims	3.8	3.8	3.4	3.9	4.2	3.9	3.5
Classification	3.8	3.8	3.6	3.8	3.7	3.6	3.7



Satisfaction with FDLP Services & Tools – by Library Type

Mean Score on 5-point Scale (1 = Extremely Dissatisfied; 5 = Extremely Satisfied)	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Conferences	3.8	3.9	3.8	3.8	3.0	3.6	3.6
Web Tools for Collection Development/Maintenance	3.8	3.8	3.7	3.8	4.0	4.0	3.7
New Electronic Titles (NET)	3.8	3.8	4.0	3.8	3.7	3.8	3.6
Cataloging Record Distribution Program (CRDP)	3.7	3.7	3.4	3.8	3.8	3.5	3.4
Marketing Promotion Support	3.7	3.7	3.4	3.9	3.3	3.7	3.8
Operational Guidance (LRPR)	3.6	3.7	3.4	3.8	3.5	3.6	3.2
Public Access Assessments	3.5	3.5	3.2	3.6	3.2	3.5	3.4
National Needs & Offers	3.5	3.4	3.1	3.5	3.8	3.6	3.8
Digitalregistry.gov	3.5	3.5	3.5	3.5	3.6	3.4	3.6
MetaLib	3.4	3.4	3.5	3.5	3.2	3.3	3.4
Other	3.0	2.8	3.5	3.2	3.0	3.0	-



Satisfaction with FDLP Services & Tools – by Library Type

Top 2 Box Score (% Extremely/Somewhat Satisfied)	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base (varies)	1,139	823	44	<i>78</i>	6	<i>175</i>	13
FDLP.gov	86%	85%	79%	93%	83%	86%	73%
FDsys	82%	83%	81%	87%	67%	76%	80%
Training/Webinars	75%	77%	70%	72%	83%	72%	55%
Catalog of U.S. Government Publications (CGP)	74%	74%	69%	76%	67%	75%	64%
Tangible distribution	71%	73%	59%	75%	67%	65%	46%
Cataloging	71%	72%	62%	74%	67%	62%	73%
Communication (FDLP Connection, social media)	68%	68%	70%	70%	40%	66%	46%
Federal Depository Library Directory (FDLD)	66%	65%	65%	78%	83%	62%	64%
Web Tools for Collection Development/Maintenance	66%	66%	53%	60%	67%	71%	44%
Free access to Government fee-based databases	65%	65%	49%	60%	50%	70%	67%
Acquisition of materials from agencies for FDLP distribution/dissemination	64%	65%	42%	71%	50%	66%	64%
askGPO	62%	62%	54%	71%	67%	61%	67%
Claims	61%	62%	40%	64%	67%	58%	40%
Classification	60%	62%	50%	65%	50%	50%	60%



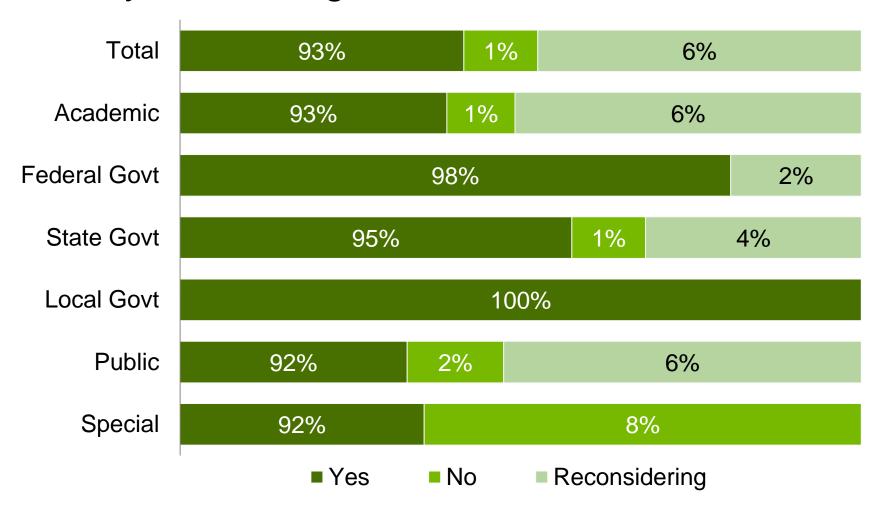
Satisfaction with FDLP Services & Tools – by Library Type *(continued)*

Top 2 Box Score (% Extremely/Somewhat Satisfied)	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1, 139	<i>823</i>	44	<i>78</i>	6	175	13
Ben's Guide	60%	57%	52%	64%	80%	68%	78%
Marketing Promotion Support	57%	56%	33%	69%	33%	60%	55%
New Electronic Titles (NET)	57%	57%	58%	55%	50%	55%	50%
Conferences	56%	60%	58%	55%	-	40%	44%
Operational Guidance (LRPR)	49%	50%	41%	54%	33%	47%	22%
Cataloging Record Distribution Program (CRDP)	46%	49%	35%	50%	50%	36%	33%
National Needs & Offers	43%	42%	19%	52%	67%	47%	50%
Public Access Assessments	39%	39%	15%	49%	20%	42%	33%
Digitalregistry.gov	37%	38%	39%	38%	40%	31%	50%
MetaLib	34%	36%	26%	37%	20%	25%	33%
Other	41%	40%	50%	60%	-	25%	-



Quantitative Results: Biennial Survey Questions

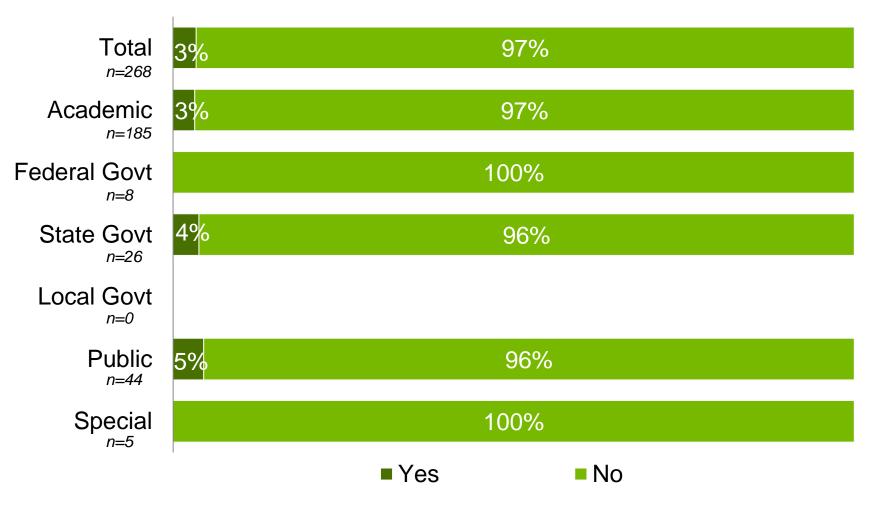
Library Remaining in FDLP



Source: Q12. Does your library plan to remain in the FDLP?



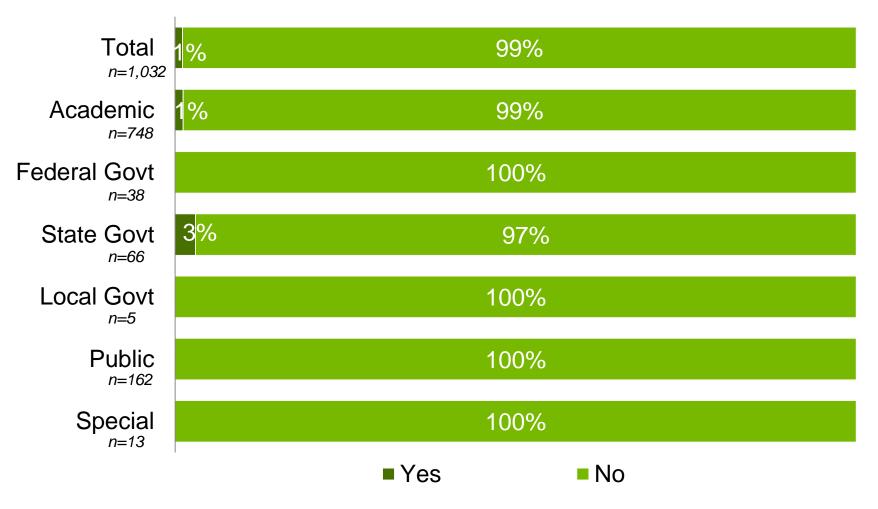
Regionals: Considering Change to Selective



Source: Q12a. Are you considering changing your designation from regional to selective?



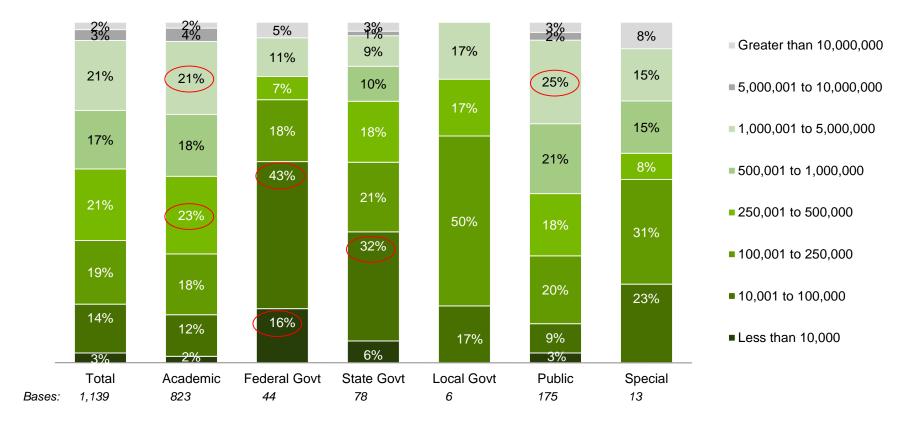
Selectives: Considering Change to Regional



Source: Q12b. Are you considering changing your designation from selective to regional?



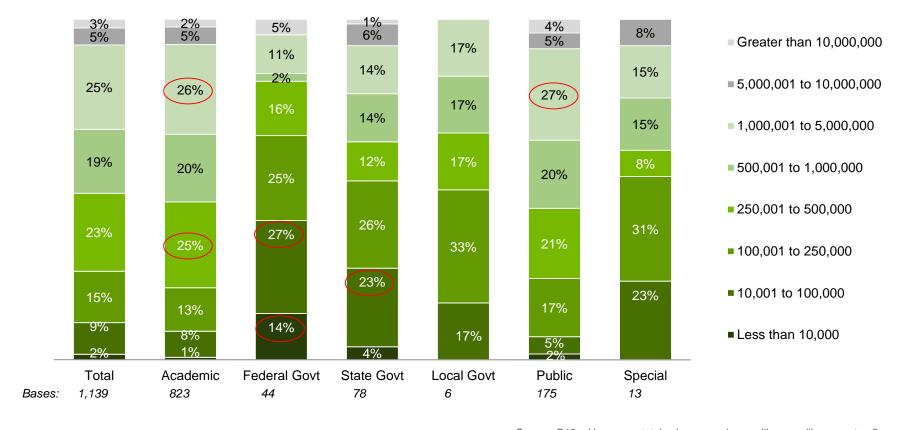
Physical or Tangible Publications – by Library Type



Source: Q13. How many physical or tangible publications are in your library or library system other than government documents?



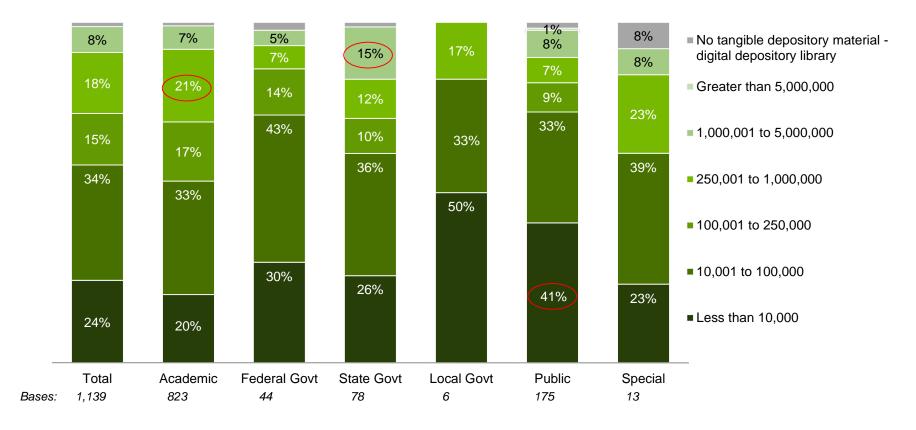
Total Volumes – by Library Type



Source: Q13a. How many total volumes are in your library or library system?



Tangible Depository Collection – by Library Type

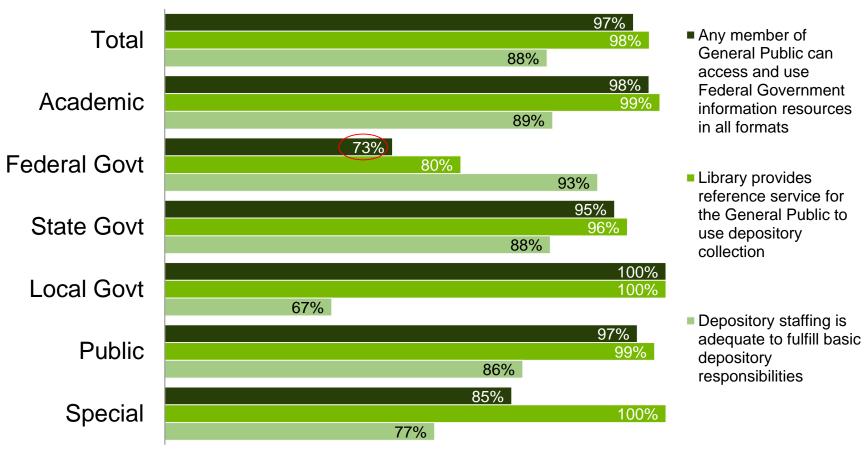


Source: Q13b. Estimate the size of the tangible depository collection at your institution.



Depository Access and Staffing

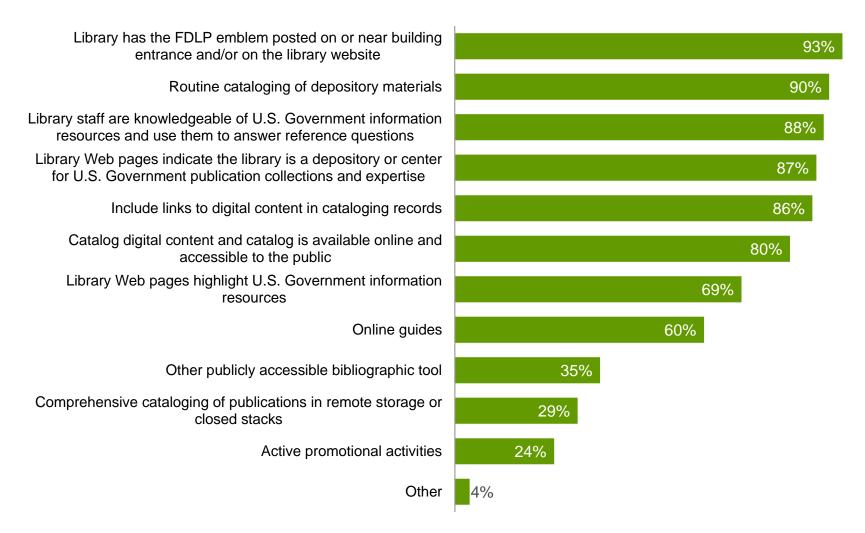
% Yes



Source: Q14/Q15/Q16



Public Visibility – Overall







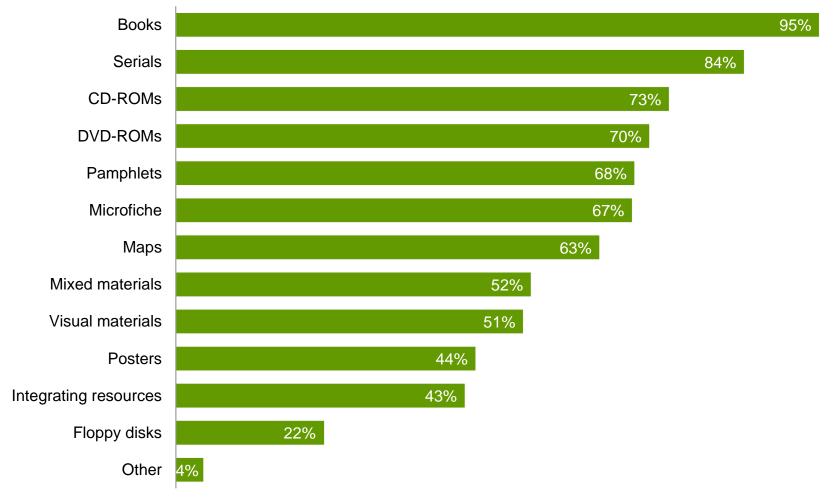
Public Visibility – by Library Type

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base (varies)	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Library has the FDLP emblem posted on or near building entrance and/or on the library website	93%	94%	75%	91%	50%	94%	85%
Routine cataloging of depository materials	90%	91%	82%	92%	100%	85%	69%
Library staff are knowledgeable of U.S. Government information resources and use them to answer reference questions	88%	89%	89%	95%	100%	81%	77%
Library Web pages indicate the library is a depository or center for U.S. Government publication collections and expertise	87%	89%	50%	87%	83%	86%	85%
Include links to digital content in cataloging records	86%	91%	68%	77%	67%	71%	62%
Catalog digital content and catalog is available online and accessible to the public	80%	85%	52%	74%	33%	69%	62%
Library Web pages highlight U.S. Government information resources	69%	73%	46%	53%	50%	63%	39%
Online guides	60%	73%	25%	27%	33%	25%	39%
Other publicly accessible bibliographic tool	35%	39%	25%	22%	17%	26%	15%
Comprehensive cataloging of publications in remote storage or closed stacks	30%	31%	30%	27%	33%	26%	23%
Active promotional activities	24%	26%	7%	14%	17%	22%	15%
Other	4%	3%	7%	10%	-	3%	-

Source: Q17. How does the library make the depository publications in all formats visible to the public?



Piece Level Records for Tangible Materials – Overall







Piece Level Records for Tangible Materials – by Library Type

, , , , , ,			Federal	State	Local		
	Total	Academic	Gov't	Gov't	Gov't	Public	Special
Base (varies)	1,139	823	44	<i>78</i>	6	<i>175</i>	13
Books	95%	96%	96%	95%	100%	94%	69%
Serials	84%	86%	86%	81%	83%	78%	46%
CD-ROMs	73%	76%	52%	72%	100%	63%	46%
DVD-ROMs	70%	74%	43%	67%	67%	62%	62%
Pamphlets	68%	72%	36%	65%	67%	59%	46%
Microfiche	67%	72%	41%	65%	50%	54%	62%
Maps	63%	66%	18%	54%	67%	62%	31%
Mixed materials	52%	56%	23%	45%	67%	46%	39%
Visual materials	51%	56%	14%	49%	67%	42%	31%
Posters	44%	48%	9%	39%	33%	38%	31%
Integrating resources	43%	48%	25%	45%	-	25%	15%
Floppy disks	22%	23%	7%	28%	-	18%	8%
Other	4%	4%	7%	3%	-	4%	15%

Source: Q18. Please indicate if you provide piece level records for the following types of tangible materials received within the past five years.



Online Materials Included in Catalog – by Library Type

	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base (varies)	1,139	823	44	<i>78</i>	6	<i>175</i>	13
Books	91%	94%	82%	91%	67%	83%	85%
Serials	87%	91%	77%	90%	50%	73%	69%
Pamphlets	60%	66%	30%	60%	50%	42%	54%
Databases or data sets	59%	64%	32%	50%	17%	45%	39%
Maps	56%	63%	14%	54%	17%	42%	31%
Integrating resources	50%	57%	32%	49%	-	26%	31%
Other	6%	4%	9%	5%	17%	13%	15%

Source: Q18a. Do you include records in your catalog for the following types of online materials disseminated through the FDLP?



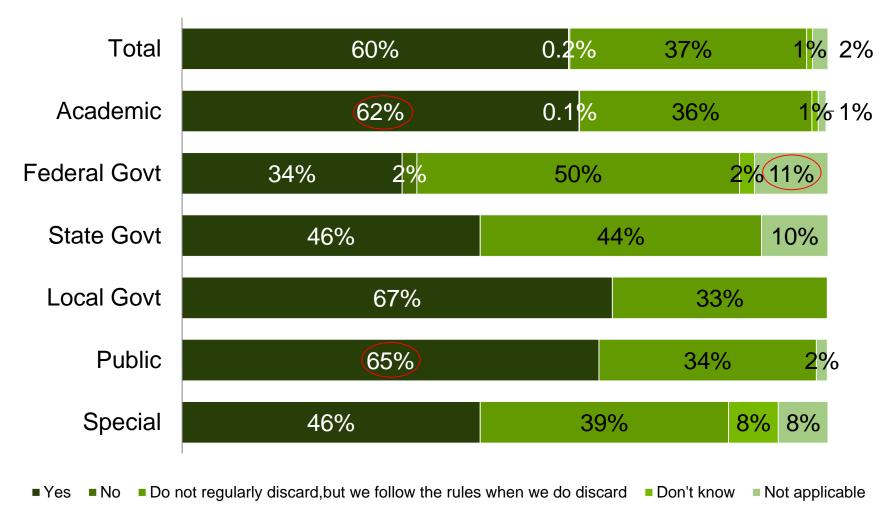
Digital Files of Online Publicationsby Library Type

% Yes	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base (varies)	1,139	<i>823</i>	44	<i>78</i>	6	175	13
Are you interested in receiving digital files on deposit?	24%	25%	39%	21%	-	20%	39%
Have you discussed this with your library director/dean?	51%	55%	36%	51%	17%	39%	39%
Is there administrative support for receiving digital files on deposit?	21%	21%	30%	21%	-	17%	8%

Source: Q18b Please answer the following questions related to receiving deposit digital files of online publications on deposit:



Discard in Conformance with GPO Instructions



Source: Q19. Are depository discards regularly processed in conformance with GPO instructions found in the Legal Requirements and Program Regulations (LRPR) and regional guidelines or state plans, if applicable?



Barriers to Depository Resources – by Library Type

1 9 0 0			Federal	State	Local		
	Total	Academic	Gov't	Gov't	Gov't	Public	Special
Base (varies)	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Patron authentication on public access computers	26%	(27%)	9%	10%	67%	30%	15%
Not open to the general public	21%	18%	50%	49%)	-	11%	31%
Difficult access to depository collection within the library	18%	16%	5%	35%	33%	20%	46%
Special items from the collection on reserve, in special collections, or in remote storage and not available to all patrons	11%	12%	2%	9%	17%	10%	8%
Restricted admittance or institutional identification requirements for building access	10%	11%	46%	3%	-	1%	15%
Filtering or blocking software on public access computers	8%	2%	16%	22%	17%	27%	23%
Computer equipment that does not accommodate persons with disabilities	7%	8%	14%	8%	-	5%	-
Security guards restrict entry	7%	5%	59%	6%	-	1%	23%
Difficult access into the building	4%	3%	2%	8%	-	4%	23%
Age restrictions to depository collections	4%	4%	2%	1%	-	3%	-
Restricted usage policies or instructions displayed on library Web pages or played on library telephone messages	3%	3%	7%	1%	-	2%	8%
Signage in public service areas indicates barriers to access with no direction to overcome barriers	<1%	<1%	-	-	-	1%	-
Other	3%	3%	7%	5%	17%	4%	-
No barriers exist	40%	(43%)	21%	17%	33%	(44%)	31%

Source: Q20a. Are there any barriers to depository resources (tangible and electronic) for the public?



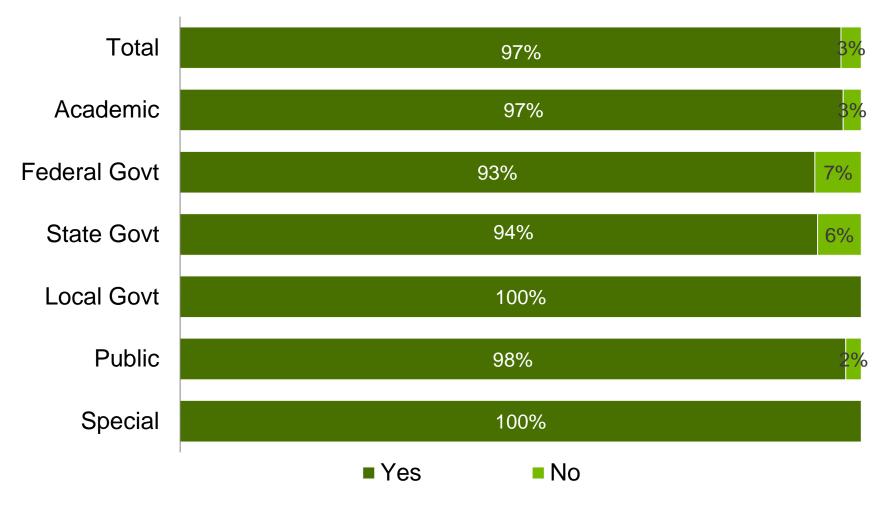
Preservation – by Library Type

% Yes	Total	Academic	Federal Gov't	State Gov't	Local Gov't	Public	Special
Base	1,139	<i>823</i>	44	<i>78</i>	6	<i>175</i>	13
Does your library have a preservation/conservation program that includes, but is not limited to activities such as book repair, making boxes or other enclosures for fragile items, or moving materials to a special climate controlled storage area?	76%	79%	59%	68%	67%	66%	69%
Do you have Federal publications stored in a high- density storage facility?	22%	24%	25%	13%	17%	16%	39%
Is the high-density storage facility at or near capacity?	10%	11%	11%	5%	-	7%	15%
When you catalog Federal publications or Federal digital content do you use the 583 MARC field to record preservation or digitization actions?	13%	14%	23%	13%	-	9%	39%
Does your library digitize Federal publications?	9%	8%	46%	12%	-	3%	-
Does your library harvest or capture content from Federal agency websites?	10%	9%	39%	17%	-	7%	8%

Source: Q21. Please answer each of the following questions related to preservation:



Signed up to Receive FDLP Communication



Source: Q22. Is at least one person in your library signed up to receive official FDLP communication through the News and Events service?



About Outsell

The rapid convergence of information, media, software and technology is reshaping businesses every day. Enter Outsell, Inc., the only research and advisory firm focusing on these three sectors. As the trusted advisor to executives, our analysts turn complexity into clarity, and provide the facts and insights necessary to make the right decisions. Our proven blend of big data, research, proprietary intelligence, and exclusive leadership communities produces tangible results and a strong ROI. We promise to deliver "wow" and ensure our clients stay more focused, save time, and grow revenue in a fast-changing digital world.





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