Copyright Clearance Center

RightsDirect
A Copyright Clearance Center Subsidiary

# 2016 Information Seeking, Consumption and Use Report

## NORTH AMERICA AND EUROPE

**In the workplace, content-sharing is essential for collaboration and is a driving force in guiding the R&D process. Over the past six years, Copyright Clearance Center (CCC), a leading provider of content workflow and licensing solutions, and its subsidiary RightsDirect have engaged research and advisory firm, Outsell, Inc., to identify important trends in how information is consumed, used and shared in today's workplace.**

The 2016 survey revealed that business professionals share information an average of 5.5 times per week with nine people and 36% of that information is published by third-parties such as scientific journals, news sources, and other publications. While email continues to be the standard means of exchanging information, the study also showed an increased reliance on shared networks, company intranets and collaboration platforms such as Microsoft SharePoint, as a means to make information available to colleagues. The survey also indicated a low level of copyright awareness among respondents, with nearly a quarter reporting that they did not know the specifics of their company's copyright policy.

In addition to the insights gathered in the study around the velocity of information sharing and copyright awareness, some new themes emerged this year: Respondents' lack of visibility into their company's content holdings, uncertainty whether a subscription is in place, and if a document was previously purchased before using the materials in their research efforts. When respondents were asked what actions they take when they don't know if a company subscription exists, 42% of respondents stated they check a central repository while 35% said they refer to a list of online subscriptions. The results were similar when survey respondents were asked about what actions they took to determine whether an article had already been purchased.

## We've compiled key findings from the Outsell survey in this report in five categories:

1. Ways Professionals Exchange Information
2. Frequency of Sharing Content at Work
3. Types of Content Shared
4. How Information Is Accessed and Acquired
5. Attitudes Toward Copyright

## SURVEY METHODOLOGY

Outsell, the world's only research and advisory firm focused solely on media, information and technology, undertook primary quantitative research and analysis through an online survey questionnaire organized into four topic areas: Information Access and Consumption; Content Usage and Document Delivery; Information Sharing Behaviors; Intellectual Property and Copyright Awareness. The firm designed the survey with input from CCC and RightsDirect. Outsell recruited respondents from panels of professionals in information-intensive business-to-business environments. Outsell surveyed over 900 business professionals in North America and Europe to achieve a 95% confidence level in its findings with a margin of error of plus or minus 3.26%.

## SURVEY PARTICIPANTS BY SIZE

Figure 1. Information Seeking, Consumption & Use Study Research Sample

| | Small (250 – 999) | Medium (1,000 – 5,000) | Large (5,001+) | TOTAL |
|---|---|---|---|---|
| Life Sciences | 30 | 30 | 30 | 90 |
| Banks/Insurance/Real Estate/ Holding Companies | 30 | 30 | 30 | 90 |
| Telecommunications Services | 30 | 30 | 30 | 90 |
| Chemicals & Fuels | 30 | 30 | 30 | 90 |
| Computers & Electronic Components | 30 | 30 | 30 | 90 |
| Electric & Gas Utilities | 30 | 30 | 30 | 90 |
| Consulting & Research | 30 | 30 | 30 | 90 |
| Food & Tobacco | 30 | 30 | 30 | 90 |
| Law Firms | 30 | 30 | 30 | 90 |
| Software & Systems | 30 | 30 | 30 | 90 |
| Transportation & Automotive | 30 | 30 | 30 | 90 |
| **TOTAL** | **330** | **330** | **330** | **990** |

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Figure 2. Respondents by Job Level

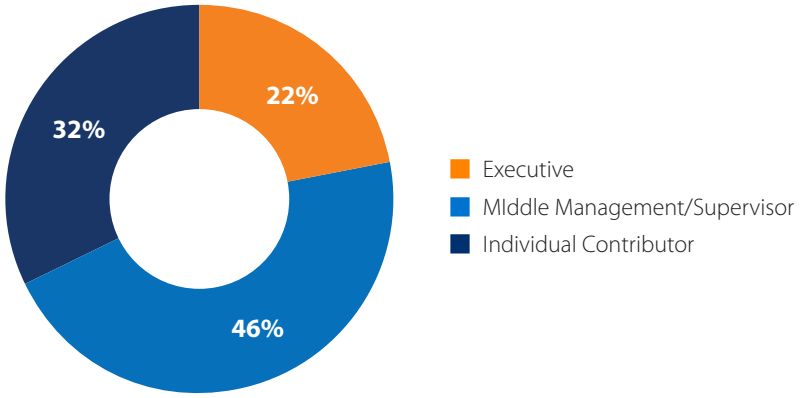


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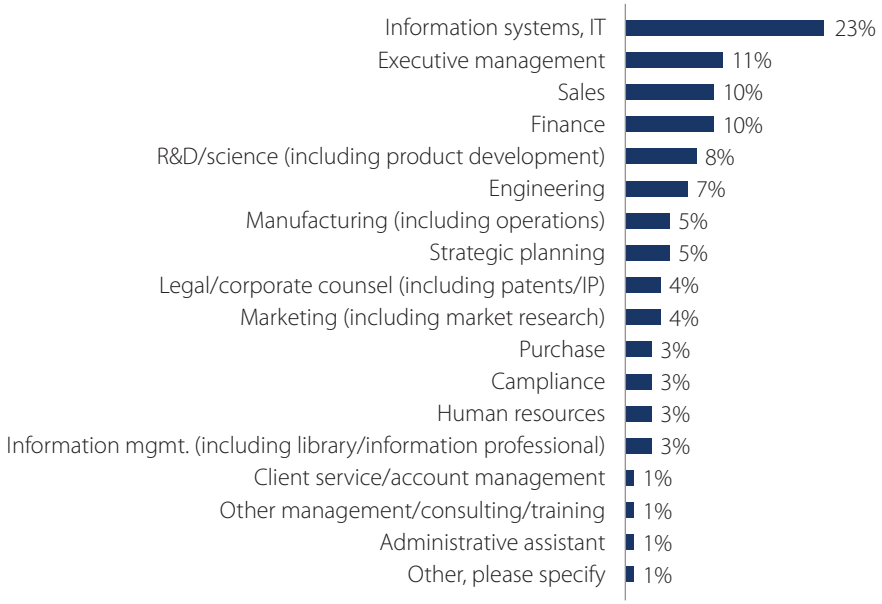
Figure 3. Respondents by Primary Functional Responsibility




Q1. From the following list, please indicate the one that best describes your primary functional area or department in your organization.

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## SHARING METHODS SHIFT GEARS

Information sharing methods are beginning to shift as users rely less on the act of overtly sending information and instead on making information available to colleagues through shared network drives, intranet postings and other collaboration tools.

Email remains the most frequent means of sharing information across all respondents, such as sending an email attachment (66%), a link in an email (51%), or text pasted into an email (39%). But that is changing; information sharing via an email attachment has actually gone down in use (87% to 66%) from a similar survey conducted by Outsell in 2013*; while intranet postings (24% to 29%), and collaboration tools are gaining in popularity (11% to 24%).

Just under one-third of respondents use a shared network drive (31%) or intranet posting (29%). Earlier surveys did not ask users about shared drives or intranets as a means of sharing.

*Copyright Clearance Center 2013 Information Consumption and Use Survey 2013
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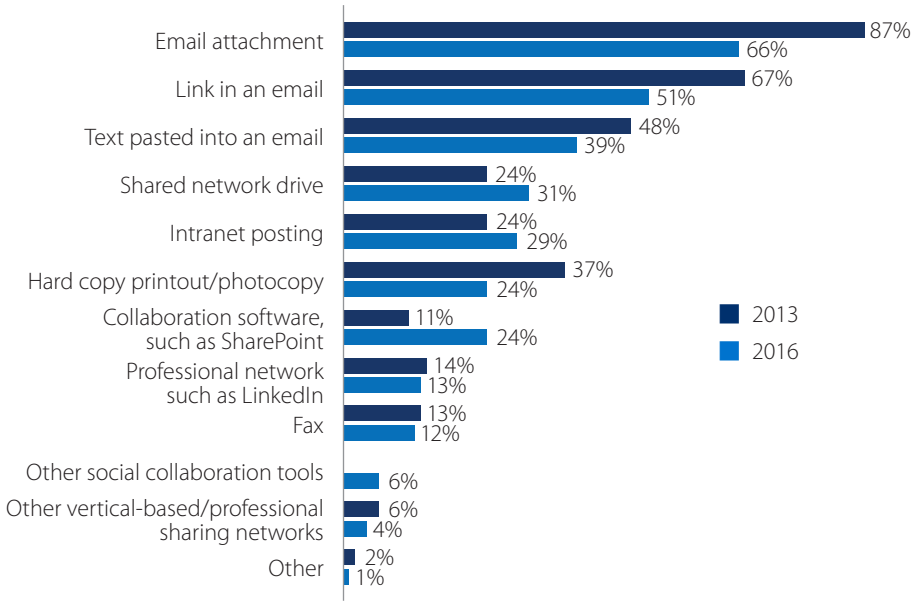
## Figure 4. Methods of Information Sharing — Trending




Q15. When you forward information to others, how is it delivered?

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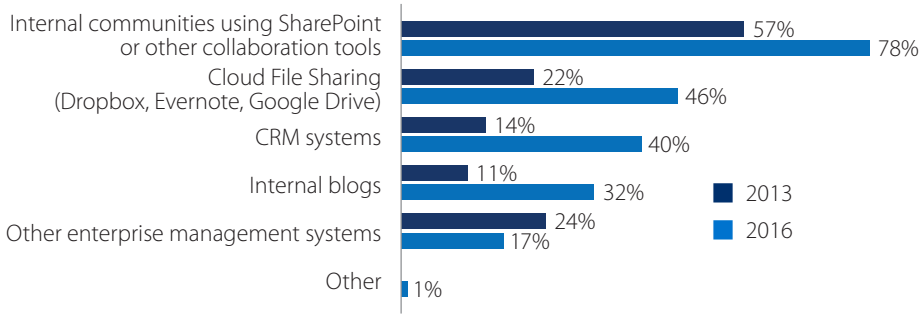
Collaboration systems are now very much part of the workflow for respondents, as indicated by Figure 5. Some 78% of respondents use Microsoft SharePoint or other collaboration tools within their internal communities compared to 57% of respondents from the 2013 survey. Cloud sharing has increased significantly (22% to 46%), as has the use of CRM systems.*

## Figure 5. Systems Used to Collaborate — Trending




Q22. What systems do you use to collaborate within your organization?

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## THE VELOCITY OF CONTENT SHARING IS STEADY; BEHAVIORS ARE SHIFTING

Figure 6 shows the frequency of content sharing in the workplace. Professionals say they share content an average 5.5 times per week with nine people, a frequency that is fairly consistent regardless of company size.

Figure 6. Velocity of Content by Company Size

| | Small (250 – 1,000) | Medium (1,000 – 5,000) | Large (5,000+) | TOTAL |
|---|---|---|---|---|
| Frequency of sharing per week (mean) | 5.5 | 5.7 | 5.3 | 5.5 |
| Number of people shared with | 8.9 | 9.9 | 8.1 | 9.0 |
| % of information shared that is externally sourced | 37% | 37% | 36% | 36% |
| **Number of potential instances of unlicensed sharing by employees** | **18.1** | **20.9** | **15.5** | **17.8** |

Q17. How many times during an average week do you forward work-related information such as articles, pictures, video clips, book excerpts, blog posts, datasets, etc., from digital or print sources to others? Q19. When you forward work-related information via email, postings, social networks, fax, or hard copy print-out/photocopy, how many people do you typically forward it to? Q14. What percentage of the information you share is published internally versus content published by third parties?

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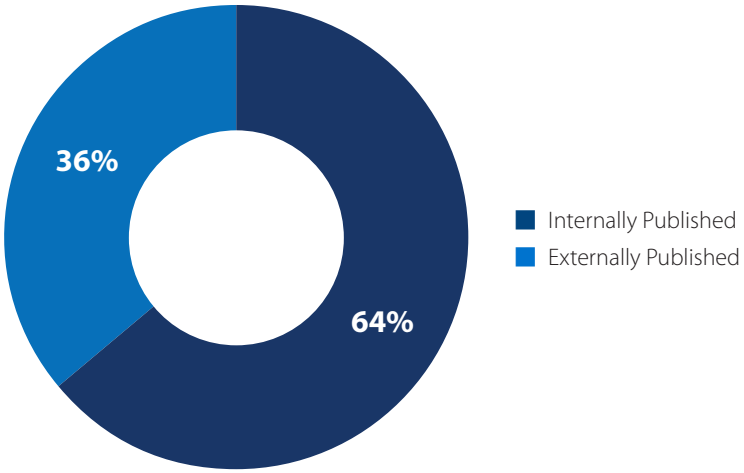
## WORKERS RELY ON THE EXCHANGE OF PUBLISHED CONTENT

Respondents were questioned about the percentage of internal and external information they shared. As Figure 7 shows, more than one-third of shared information is externally published content (36%). There were no differences in the percentage of external information shared by company size. However, there were some differences by role: Executives share a higher percentage of external information (41.4%) than either middle management (35.8%) or individual contributors (33.6%).

Figure 7. Source of Information Shared




Q14. What percentage of the information you share is published internally versus content published by third parties?

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Interestingly, Figure 8 indicates that executive respondents have a greater appetite for content than middle management and individual contributors; they share it more regularly, with more people, and are more likely to share information published by third-parties, which we refer to as "external information," than internal information, or material produced by colleagues within the company.

Figure 8. Velocity of Content Sharing, by Job Role

| | Executives | Middle Management | Individual Contributor |
|---|---|---|---|
| Frequency of sharing per week (mean) | 6.9 | 6.0 | 3.8 |
| Number of people shared with | 12.0 | 9.3 | 6.7 |
| % of information shared that is externally sourced | 41.4% | 35.8% | 33.6% |
| **Number of potential instances of unlicensed sharing by employees** | **34.3** | **20.0** | **8.6** |

Q17. How many times during an average week do you forward work-related information such as articles, pictures, video clips, book excerpts, blog posts, datasets, etc., from digital or print sources to others? Q19. When you forward work-related information via email, postings, social networks, fax, or hard copy print-out/photocopy, how many people do you typically forward it to? Q14. What percentage of the information you share is published internally versus content published by third parties?

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Figure 9 shows information sharing habits of executives, middle managers and individual contributors on a monthly or more frequent basis. Executives are the most prolific sharers across every constituency with 100% of respondents sharing with their immediate teams.

### Figure 9. Frequency of Sharing Business Information, by Job Role

| Sharing Monthly or More Often | Total | Executives | Middle Management | Individual Contributor |
|---|---|---|---|---|
| Your immediate team | 97% | 100% | 99% | 93% |
| Collegues across functions | 90% | 97% | 93% | 80% |
| Executives within your company | 82% | 99% | 91% | 59% |
| Clients | 69% | 92% | 70% | 51% |
| Business partners | 68% | 92% | 75% | 42% |
| Consultants, contractors, part-time workers | 66% | 89% | 72% | 42% |
| Colleagues in international locations | 65% | 92% | 70% | 39% |
| Suppliers | 61% | 88% | 67% | 35% |
| People outside the organization | 57% | 80% | 59% | 37% |
| Agencies | 55% | 88% | 60% | 27% |
| **Stockholders of board members** | **53%** | **92%** | **60%** | **17%** |

Q13. How often do you share business information with each of the following?

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Most executives indicate they will share any and all information (including published material) when faced with competitive or mission-critical/time-critical situations. See Figure 10.

### Figure 10. Executive Behavior and Immediate Information Needs

| Top 2 Box (% Strongly/Somewhat Agree) | Total | Executives | Middle Management | Individual Contributor |
|---|---|---|---|---|
| In competitive, mission-critical or time-critical situations, I will forward any and all relevant information that will help my organization be more competitive. | 60% | **73%** | 62% | 48% |

Q23. Please indicate how strongly you agree or disagree with each of the following statements pertaining to your organization.

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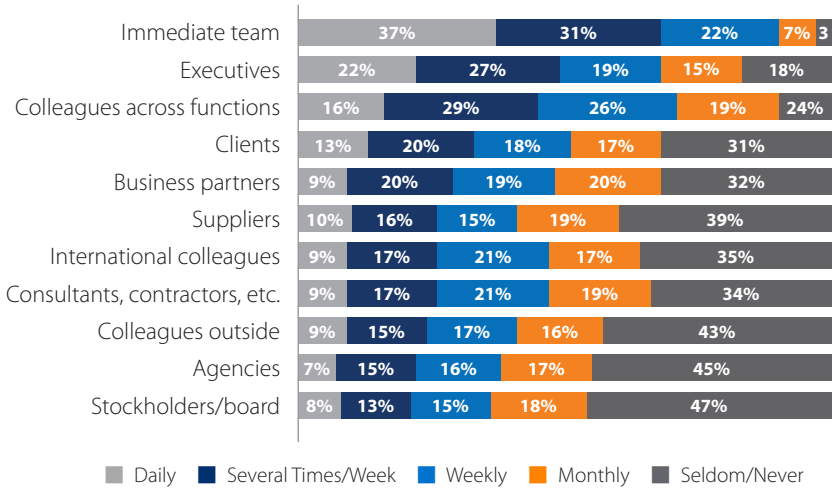
Information sharing has increased significantly among all types of users. Figure 11 shows that, within an organization, 90% of respondents share internal and external information weekly with immediate teammates but also the with executives (68%) and colleagues across functions (71%).

Significant numbers of respondents are sharing information on a daily basis. About half indicated they regularly share internal and external information outside their company — at least weekly — with clients, business partners and contractors.

Figure 11. Frequency of Exchanging Information with Constituent Groups




Q13. How often do you share business information with each of the following?

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## IMPORTANCE OF PUBLISHED CONTENT AND EXPANDING INFORMATION TYPES

The majority of survey respondents (97%) indicated that at least one publication is critical to them, confirming the ever increasing importance of information. Looking at countries outside the United States, workers in France (9.6) had the highest number of publications critical to their jobs, while Denmark had the lowest (5.5).

Q7. Thinking about the information that you rely on in performing your job responsibilities, how many different print or digital publications do you consider critical to your job function?

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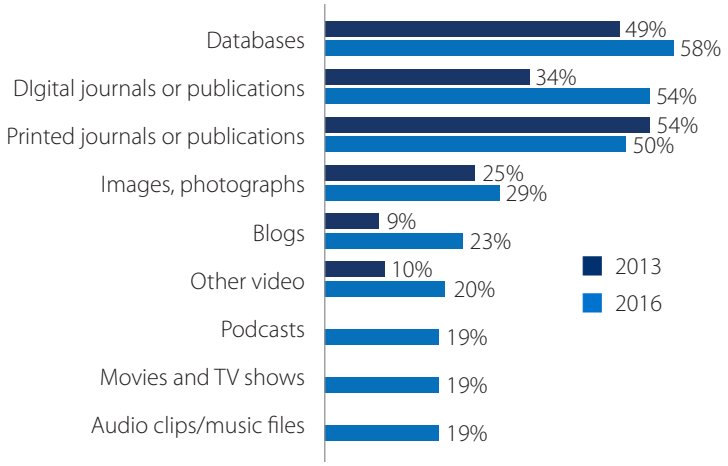
The relative importance of content types to respondents' work has changed dramatically over the past few years. Not surprisingly, print is no longer considered most important. Figure 12 charts the shift by showing 58% of respondents deem databases as being critical/very important to their work and digital journals or publications the second most important category at 54%. Print is still an important medium but the survey reveals a slight decline. In fact, print is also the only information category to have declined in importance over the past few years.

Figure 12. Importance of Information Types — Trending




Q11. Please indicate how important each of the following types of information is in the course of your work.

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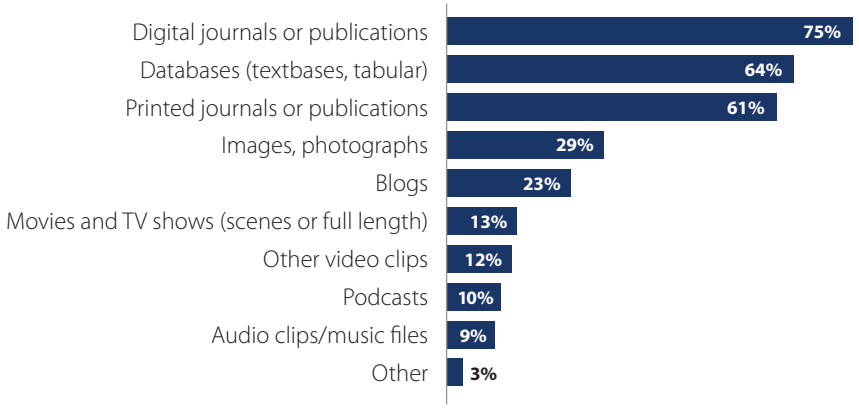
Overall, the information types most likely to be shared by respondents (See Figure 13) are digital journals/publications (75%), databases (64%) and printed journals/publications (61%), matching the top three most important information types noted above in Figure 12. Images and photographs are a distant fourth at 29%.

## Figure 13. Top 3 Types of Media Shared




Q21. What are the top three types of media that you share for business purposes?

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When looking at media shared by company size (Figure 14), we see slightly higher figures for users at larger companies when it comes to sharing digital journals/ publications than those at small-to-medium sized firms. We also see more users at medium-sized companies sharing podcasts, but other percentages are relatively close across the board.

## Figure 14. Top 3 Types of Media Shared by Company Size

| | Total | Small (250 – 1,000) | Medium (1,000 – 5,000) | Large 5,000+ |
|---|---|---|---|---|
| Digital journals or publication | 75% | 75% | 70% | **83%** |
| Databases (textbases, tabular) | 64% | 64% | 62% | **65%** |
| Printed journals or publications | 61% | 62% | 58% | 65% |
| Images, photographs | 29% | 30% | 32% | 26% |
| Blogs | 23% | 23% | 25% | 22% |
| Movies and TV shows (scenes or full length) | 13% | 14% | 14% | 12% |
| Other video clips | 12% | 11% | 11% | 13% |
| Podcasts | 10% | 9% | **14%** | 7% |
| Audio clips/music files | 9% | 10% | 10% | 5% |
| Other | 3% | 3% | 4% | 3% |

Q21. What are the top three types of media that you share for business purposes?

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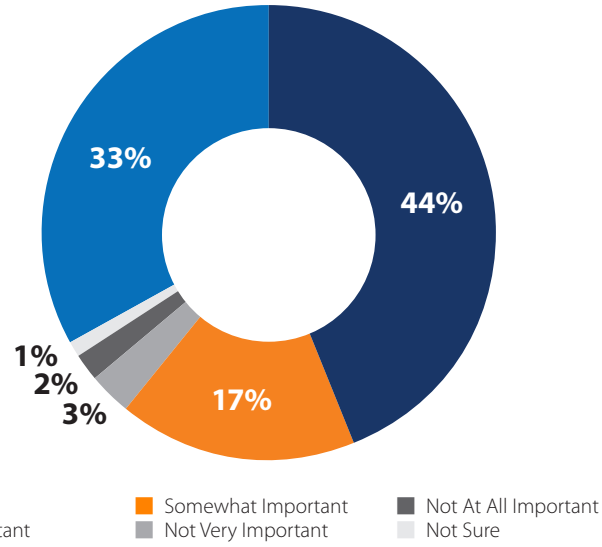
## THERE'S IRONY IN ATTITUDES TOWARD INTELLECTUAL PROPERTY

A vast majority of respondents (94%) indicated they believe it is important to protect their organization's intellectual property (IP). See Figure 15 below. Despite that, however, respect for the IP of others does not appear to carry over into respondents' daily practices, as seen in Figure 16.

Figure 15. Importance of Protecting Corporate Intellectual Property




Q5. In your opinion, how important is protecting your organization's own intellectual property (i.e., patents, trademarks, copyright and other creative material?

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Figure 16 shows that more than 2/3 (68%) of executives are comfortable sharing information accessed in print or on the Web; with many middle managers (66%) and more than half (59%) of individual contributors in accord with that thinking. Further, some 3/4 (78%) of executives surveyed also believed that it is okay to share company-purchased content with others within their organizations. While executives are accustomed to sharing information found on the Web and in print, 79% of respondents acknowledged there are serious risks and copyright implications associated with exchanging published information. A similar number of respondents (78%) reported that digital information purchased by their company is permissible to share with others across the organization.

While the same number of respondents (78%) in executive roles said that they verified whether they had permission to share third-party published information, a smaller number of respondents (54%) in individual contributor positions reported checking for permissions before sharing copyrighted material. Nearly half of individual contributor respondents (53%) think about copyright issues before forwarding published information.

Figure 16. Attitudes toward Copyright Issues

| Top 2 Box (% Strongly/Somewhat Agree) | Total | Executives | Middle Management | Individual Contributor |
|---|---|---|---|---|
| There are serious risks and implications to copyright infringement. | 74% | **79%** | 74% | 70% |
| I believe my organization takes appropriate measures to provide informaiton and ensure copyright compliance. | 73% | 75% | 73% | 71% |
| Information purchased by my company that I can access in digital form, through portals or in the library, is permissible to share with others inside my organization. | 71% | **78%** | 74% | 63% |
| I take responsibility for verifying whether I have permission to share third-party information. | 66% | **78%** | 68% | **54%** |
| If I obtain free information on the open web or in print, sharing is permitted. | 64% | **68%** | **66%** | **59%** |
| I think about copyright implications before I store third-party content on my company's network or centralized content repository system. | 64% | 73% | 65% | 55% |
| I think about copyright issues before I forward information. | 62% | **74%** | 64% | **53%** |
| Incompetitive, mission-critical or time-critical situations, I will forward any and all relevant information that will help my organization be more competitive. | 60% | 73% | 62% | 48% |

Q23. Please indicate how strongly you agree or disagree with each of the following statements pertaining to your organization.

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# IN CONCLUSION

Published content is at the heart of innovation. The ease with which teams can access and share that information can influence the pace at which new products are delivered to market. Managers at all levels of the organization should:

- Consider the content access and licensing challenges their employees face
- Ensure that technologies used to access and share content
- Empower users and mitigate risk by clearly reflecting the organization's IP protection and copyright compliance initiatives
- Improve employee understanding as to what materials can be shared with and/or distributed to colleagues and external contacts

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### 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 clients stay more focused, save time, and grow revenue in a fast-changing digital world. **www.outsellinc.com**

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