



2019 Information Seeking, Consumption and Use Survey

UNITED STATES



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The information, analysis, and opinions (the "Content") contained herein are based on the qualitative and quantitative research methods of Outsell, Inc. and its staff's extensive professional expertise in the industry. CCC did not have any influence on the outcome of the results.

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Executive Summary

In many organizations, employees are accessing a great deal of externally published content and sharing it — in far too many cases, without obtaining the necessary rights to do so.

For more than 16 years, Copyright Clearance Center (CCC) has been conducting research to identify trends in how information is accessed, used, and shared in the workplace. It's no surprise that the behaviors and attitudes of business professionals have shifted over time — and dramatically in recent years — as they seek to establish a competitive edge in an ever-changing landscape.

In fact, this year's research revealed a dramatic increase in the amount of information being shared across professional environments. On average, respondents share work-related content at least once per workday (5.9 times per week) with an average of 21 people. Considering that 45% of that content is sourced from external providers, there is the potential that every employee is violating someone's copyright 56 times per week. This “velocity of content” is more than three times higher than it was in a similar survey we completed in 2016 and reverses a trend of decline witnessed since 2013.

Sharing information is critical to efficient collaboration — and to every organization's ability to innovate — but this practice can put businesses at risk of copyright infringement. Without the right programs in place, that could mean a potential hit to both their bottom line and reputation.

Read on for other essential insights from this year's study — and practical steps you can take to keep your employees compliant and your innovation engine humming.



The latest in a series of surveys for CCC

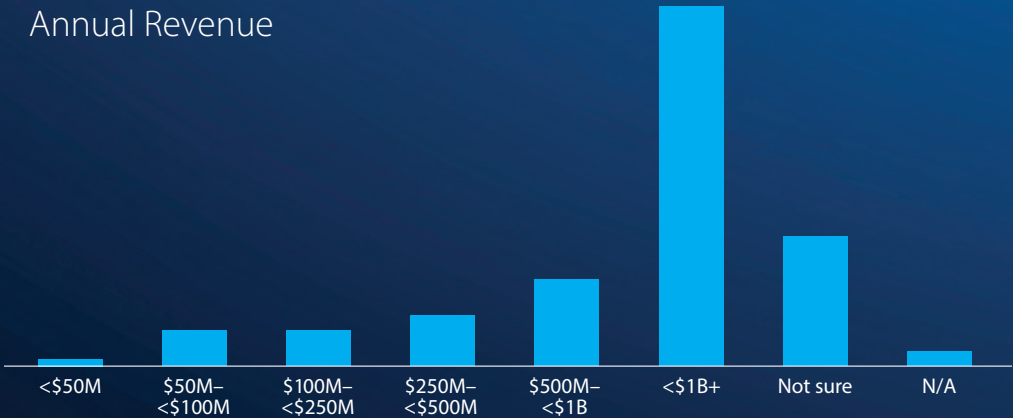
Since 2003, Copyright Clearance Center has engaged Outsell, Inc., the voice of the data and information industry, to conduct research on how professionals across industries think and behave around how information is consumed, used, and shared in the workplace. The 2019 *Content Seeking, Consumption and Use* study focused on the speed, volume, and scale at which external content is being shared.

Who Did We Survey?

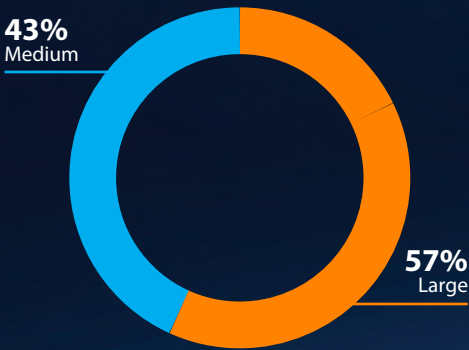
350 qualified respondents who:

- Are US-based enterprise knowledge workers across seven industries:
 - Chemicals & Fuels
 - Computers & Electronic Components
 - Consulting & Professional Services
 - Energy (Electric & Gas Utilities)
 - Finance & Insurance
 - Law Firms
 - Life Sciences (including Pharmaceuticals, Biotechnology, Medical Devices, and Scientific Equipment; EXCLUDING Hospitals and Healthcare Providers)
- Are employed full time by an organization with at least 1,000 employees
- Use externally published content in the course of doing their jobs across various primary functions and job levels

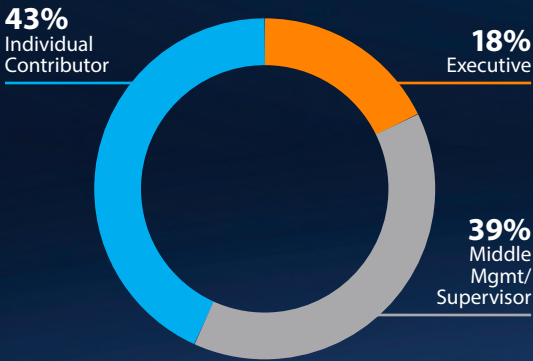
Annual Revenue



Company Size by Number of Employees
(Avg: 34,515)



Job Level



The image is a composite graphic. It features several hands holding various mobile devices: a tablet at the top, a smartphone at the bottom left, and another tablet at the bottom right. Overlaid on these devices and the background is a network diagram consisting of numerous circular icons, each containing a stylized human figure. These icons are interconnected by thin, glowing lines, creating a web-like structure. The background has a warm, golden-brown hue with a subtle texture, and there are some glowing light effects, particularly a bright blue and white glow emanating from the center of the network. A solid blue rectangular box is positioned on the right side of the image, containing the title text in white.

The Changing Nature of Information Markets

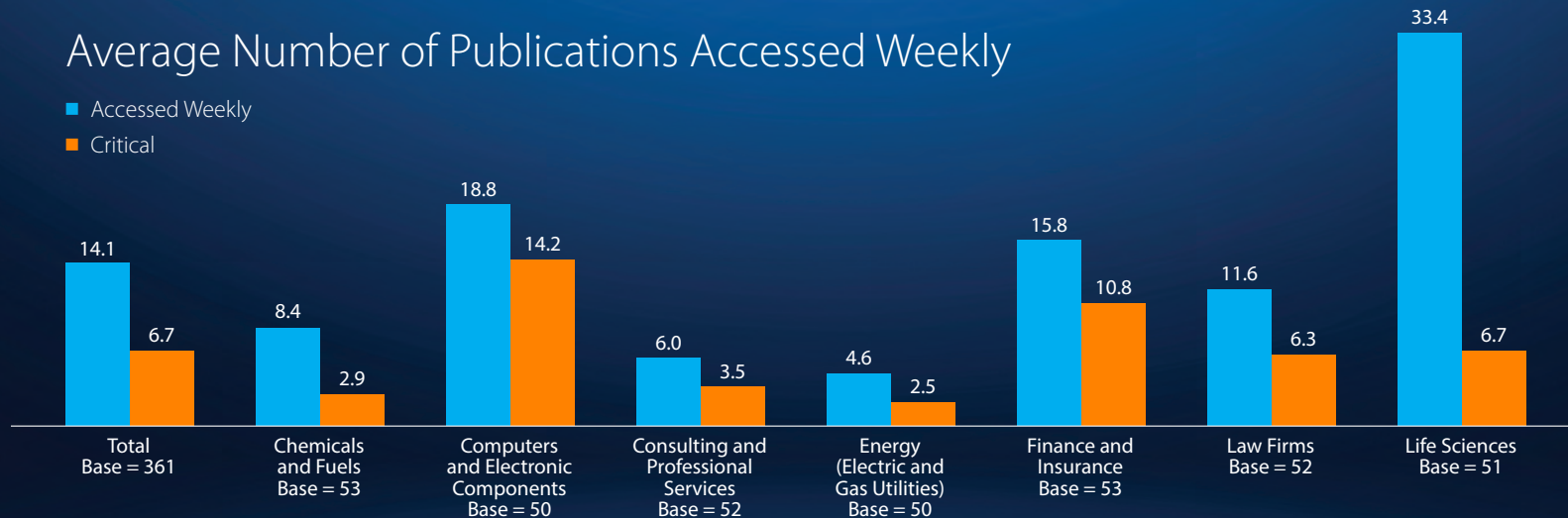
Importance of Content

Published content is at the heart of innovation. The ease with which teams can access and share information can influence the pace at which organizations and their teams can drive innovation and deliver products and services to market.

The number of publications accessed weekly that are critical to the job varies by industry. Employees from just three of the seven industries surveyed report publication access in the single digits each week. **Employees from the other four industries surveyed access over 18 publications on average each week per employee, with Life Sciences topping the list at an average of 33 publications.** Bottom line: across industries, employees are heavily relying on external content to innovate.

Average Number of Publications Accessed Weekly

■ Accessed Weekly
■ Critical





Employees at All Levels Access External Content

According to the survey, employees at all levels — from individual contributors to middle management and executives — use external content in the course of doing their jobs. In a typical week, on average executives access just over 20 publications, middle management accesses just under 18, and individual contributors access over eight. **Of those publications accessed, roughly 50% are critical to executives’ jobs, about 30% are essential to middle management, and about 60% are crucial to individual contributors.**

	EXECUTIVES	MIDDLE MANAGEMENT	INDIVIDUAL CONTRIBUTOR
Publications accessed per week	20.3	17.5	8.4
Number critical to job	10.3	6.7	5.1

Content Sharing Is on the Rise

Today's professionals share more content with more people. While the number of times employees share content per week hasn't risen much **since 2016, the number of people on the receiving end has jumped dramatically: from an average of nine in 2016 to 21 in 2019.**



5.9 times per week with
21 people
(2019)



5.5 times per week with
9 people
(2016)

When just one employee shares information 5.9 times per week with 21 people, it adds up to almost 124 shares. Now extrapolate that across your employee base, and you see how quickly information makes the rounds.

What might be causing this dramatic increase in content sharing?

- Frictionless sharing due to growing adoption of collaboration tools and social media?
- The mistaken belief that posting on “personal” social media sites is not the same as sharing in a professional context?
- Changing attitudes toward sharing among younger generations?
- Employees not understanding the distinction between freely accessible information and freely shareable information?
- Certain employees — such as executives and managers — believing they are exempt from sharing restrictions?

Whatever the reasons, this dramatic upward trend in sharing with a greater number of individuals significantly increases the possibility of copyright violation.



Content Sharing by Job Role

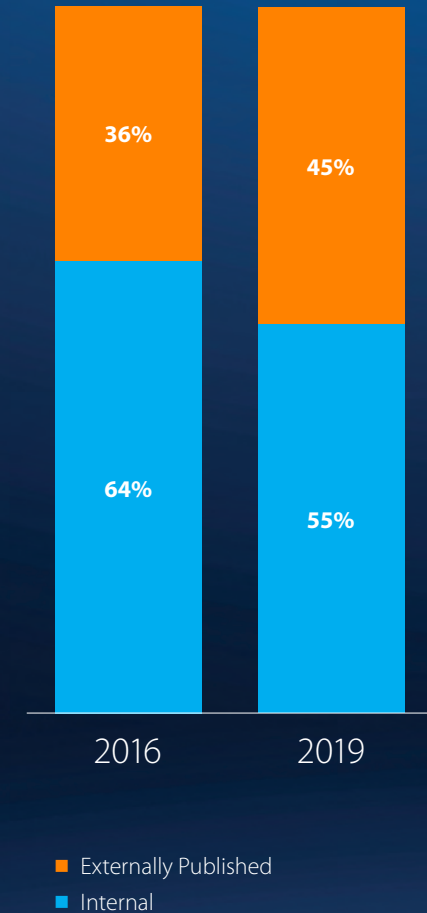
Employees up and down the corporate hierarchy share information with co-workers. Just as we saw in our last survey, **executives remain the most prolific content sharers, averaging just over 12 shares per week**. Middle managers share 5.5 times per week, while individual contributors share 3.7 times per week on average.

Middle management shares that work-related information with more people on average (30), compared to the 17 people that executives share with and the 15 that individual contributors share with on average. This is a shift from 2016, when executives were sharing a higher percentage of external information than either middle management or individual contributors.

	EXECUTIVES	MIDDLE MANAGEMENT	INDIVIDUAL CONTRIBUTOR
Frequency of sharing per week (mean)	12.3	5.5	3.7
Number of people shared with	17	30	15

More Externally Published Information Is Being Shared

Employees aren't just sharing more content with more people — they're sharing more externally sourced content. **We've seen a 9% rise in the sharing of externally published information in just two years, from 36% in 2016 to 45% in 2019.**



A conceptual image showing a hand typing on a laptop keyboard. Overlaid on the scene are various translucent icons and letters. There are several envelope icons representing email, as well as letters 'T', 'N', 'R', 'E', 'S', and 'A' in square boxes. Some letters are accompanied by '@' symbols. The background is a soft-focus view of the laptop and the hand, with a blue and white color palette.

Why This Matters

Rising Risk of Copyright Infringement

Sharing information with co-workers drives collaboration and innovation, but the unauthorized sharing of information also carries enormous potential risk. Ordinary office exchanges that come so naturally in the digital world can increase the risk of copyright infringement, trigger costly lawsuits or settlements, and result in damage to brand reputation. And that risk is growing exponentially.

With respondents sharing work-related content on average 5.9 times per week with 21 people and 45% of that content coming from external sources, the survey found that organizations experienced **56 potential instances of unlicensed sharing per employee per week** in 2019 compared to just 18 in 2016.

At the individual contributor level, it adds up to nearly 24 potential instances of unlicensed sharing per week. And at the executive level, it's as high as 90 per week.

Regardless of who is sharing third-party information, it opens the door for a concerning number of potential copyright violations if the appropriate protections aren't in place.

	TOTAL	EXECUTIVES	MIDDLE MANAGEMENT	INDIVIDUAL CONTRIBUTOR
Frequency of sharing per week (mean)	5.9	12.3	5.5	3.7
Number of people shared with	21	17	30	15
% of information shared that is externally sourced	45%	43%	48%	44%
Number of potential instances of unlicensed sharing	56	90	79	24

A person is holding a tablet computer. Overlaid on the image is a network diagram consisting of white icons (envelopes and people) connected by thin white lines. The background is a warm, blurred image of a desk with a laptop and papers.

What You Can Do

Protect Your Organization with Education and Solutions

It starts with education. In this case, what your employees don't know can hurt them — and the organization as a whole.

Ask Yourself

How would your organization fare if you audited your environment to uncover the rate of unauthorized information sharing? And how well would your existing compliance policies address this new reality?

Start by considering these questions:



- How many publications does your organization subscribe to?
- Who manages those subscriptions and how?
- Who maintains records for written permission releases?
- What percentage of your employee population has access to the Internet?
- Do the systems your employees rely on to access and share content reflect your organization's IP protection and copyright compliance initiatives?
- Do your employees understand what materials can be shared with colleagues and external contacts?
- Do your employees understand that copyright infringement can result in multi-million-dollar lawsuits?
- Do you have a current copyright policy?
- Does your copyright policy address how different employees should handle different situations (e.g., the CEO who wants to share legal information with the board vs. an individual contributor who wants to share a journal article with colleagues)?
- How often do you communicate your copyright policy to employees and how (e.g., email, intranet, company-wide meetings)?
- How frequently does your organization provide copyright training sessions?
- Who is the designated copyright policy contact (or contacts) within your organization?
- Do your employees know where to find your copyright policy?

Steps to Success

- 1 First, if you don't have a copyright policy, create one.
- 2 Then publish it and make every employee aware of the policy and its details, including guidelines for using third-party materials.
- 3 Educate employees about the policy, post it where it's easily accessible, and send periodic reminders about how employees can access it and why they should.
- 4 Promote additional copyright education with copyright materials, webinars and courses on www.copyright.com/learn
- 5 Secure needed permissions and annual licenses and rights management tools for easier compliance.

LEARN MORE

For more information on how to promote collaboration, accelerate your company's access to knowledge and simplify copyright compliance, contact us at:

-  www.copyright.com/acl
-  licensing@copyright.com
-  +1.978.750.8400 (option 3)

By taking steps to balance compliance with employees sharing information among trusted colleagues and associates, your company can take advantage of the rise in content sharing to help drive collaboration and innovation.

Certain publishers' enterprise subscriptions include rights to share the content within your company. Unfortunately, what is allowed in these agreements often varies by publisher and subscription.

Respecting copyright is an important aspect of getting high-quality information. By obtaining the appropriate licenses and permissions, you can apply broader protections for employees to share content from the most valued journals, blogs, news publications, and more among trusted colleagues. CCC's Annual Copyright License is a single source of global rights that empowers your entire company to efficiently use and share published content, accelerate business results, and simplify copyright compliance.



Appendix

Appendix A

Velocity of Content Sharing by Market — Chemicals and Fuels

The Chemicals & Fuels market is above the combined industry average for number of people with whom information is shared (26 compared to 21) and the percentage of information shared that is externally sourced (47% vs. 45%). However, it falls below the overall industry average when it comes to frequency of sharing per week (3.2 compared to 5.9 overall) and the number of potential violations per employee (37.8 vs. 56 across industries).

	TOTAL	CHEMICALS AND FUELS
Frequency of sharing per week (mean)	5.9	3.2
Number of people shared with (mean)	21	26
% of information shared that is externally sourced (mean)	45%	47%
Number of potential violations per employee	56	37.8





Appendix B

Velocity of Content Sharing by Market — Computers and Electronic Components

The Computer and Electronics market is above the overall industry average for frequency of sharing per week (8.1 compared to 5.9 overall). However, it is below the overall industry average when it comes to the other three key areas: The number of people with whom information is shared (11 compared to 21), the percentage of information shared that is externally sourced (36% vs. 45%), and the number of potential violations per employee (32.5 vs. 56 across industries).

	TOTAL	COMPUTERS AND ELECTRONIC COMPONENTS
Frequency of sharing per week (mean)	5.9	8.1
Number of people shared with (mean)	21	11
% of information shared that is externally sourced (mean)	45%	36%
Number of potential violations per employee	56	32.5

Appendix C

Velocity of Content Sharing
by Market — Consulting and
Professional Services

The Consulting and Professional Services market is below the overall industry average only for frequency of sharing per week (4.4 compared to 5.9 overall). It is above the overall industry average for the other three key areas (and significantly in two of those): The number of people with whom information is shared (46 compared to 21), the percentage of information shared that is externally sourced (50% vs. 45%), and the number of potential violations per employee (101 vs. 56 across industries).

	TOTAL	CONSULTING AND PROFESSIONAL SERVICES
Frequency of sharing per week (mean)	5.9	4.4
Number of people shared with (mean)	21	46
% of information shared that is externally sourced (mean)	45%	50%
Number of potential violations per employee	56	101





Appendix D

Velocity of Content Sharing by Market — Energy

The Energy market is below the overall industry average for three of the four areas: frequency of sharing per week (2.5 compared to 5.9 overall), the number of people with whom information is shared (11 compared to 21), and the number of potential violations per employee (13.2 vs. 56 across industries). It is just over the overall industry average for the percentage of information shared that is externally sourced (47% vs. 45%).

	TOTAL	ENERGY
Frequency of sharing per week (mean)	5.9	2.5
Number of people shared with (mean)	21	11
% of information shared that is externally sourced (mean)	45%	47%
Number of potential violations per employee	56	13.2

Appendix E

Velocity of Content Sharing by Market — Finance and Insurance

The Finance & Insurance market is just below the overall industry average for the number of people with whom information is shared (20 compared to 21) and the percentage of information shared that is externally sourced (42% vs. 45%). It is above industry average for frequency of sharing per week (12.9 compared to 5.9 overall) and significantly above the industry average for the number of potential violations per employee (107.2 vs. 56 across industries).

	TOTAL	FINANCE AND INSURANCE
Frequency of sharing per week (mean)	5.9	12.9
Number of people shared with (mean)	21	20
% of information shared that is externally sourced (mean)	45%	42%
Number of potential violations per employee	56	107.2



Appendix F

Velocity of Content Sharing by Market — Law Firms

Law Firms are just above the overall industry average for frequency of sharing per week (6.3 compared to 5.9 overall) and the percentage of information shared that is externally sourced (50% vs. 45%). It is below the overall industry average for the number of people with whom information is shared (just 11 compared to 21) and the number of potential violations per employee (only 33.2 vs. 56 across industries).

	TOTAL	LAW FIRMS
Frequency of sharing per week (mean)	5.9	6.3
Number of people shared with (mean)	21	11
% of information shared that is externally sourced (mean)	45%	50%
Number of potential violations per employee	56	33.2

Appendix G

Velocity of Content Sharing
by Market — Life Sciences

The Life Sciences market is just below the overall industry average for frequency of sharing per week (3.9 compared to 5.9 overall), the percentage of information shared that is externally sourced (44% vs. 45%), and the number of potential violations per employee (37.6 vs. 56 across industries). It is slightly above the industry average for the number of people with whom information is shared (22 compared to 21).

	TOTAL	LIFE SCIENCES
Frequency of sharing per week (mean)	5.9	3.9
Number of people shared with (mean)	21	22
% of information shared that is externally sourced (mean)	45%	44%
Number of potential violations per employee	56	37.6

