



2016 Information Seeking, Consumption and Use Report

**NORTH AMERICA AND EUROPE
FOR CHEMICAL MANUFACTURING
COMPANIES**

Understanding and applying the latest information on domestic and international regulations, market conditions, and advances in the field are essential for success in the chemical manufacturing sector. Given the imperative to drive new products through the pipeline to industrial and consumer markets as quickly as possible, the need to share content with chemical manufacturing industry professionals is more important than ever. Much of that content is copyright-protected.

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 how information is consumed, used, and shared in multiple industries, including today's chemical manufacturing companies.

The 2016 Outsell survey revealed that chemical manufacturing industry professionals share published information at an average rate of more than five times per week and forward that content to an average of nearly 10 different people each time. Some 39% of third-party published material consumed by chemical manufacturing companies comes from outside sources. Further, almost three-quarters (74%) of respondents reported receiving third-party published information daily, several times a week or weekly from colleagues or business partners. In all, there's a significant dependence on sharing copyrighted material.

Additionally, Outsell's research shows that more than a third (34%) of chemical manufacturing industry professionals are not aware of the specifics relating to their company's copyright policies. Another 21% of respondents indicated they are either not aware of a policy or none is in place in their firm; combined that's more than half who lack proper knowledge of their company's copyright policy. At the convergence of frequent content usage and less-than-ideal copyright awareness, there is risk.

This report highlights five key categories compiled from Outsell's chemical manufacturing industry survey respondents:

- 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

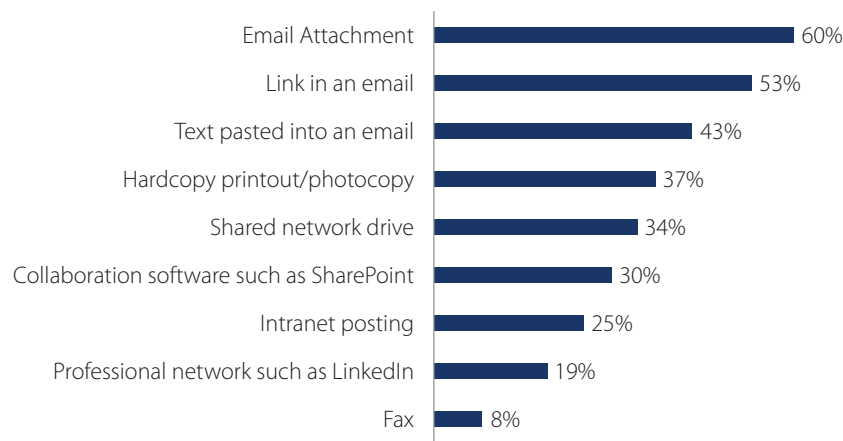
Outsell, Inc. the world’s only research and advisory firm focused solely on media, information and technology, undertook primary quantitative research and analysis through an online survey questionnaire organized into four topic areas: Information Access and Consumption; Content Usage and Document Delivery; 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 and surveyed over more than 900 business professionals in North America and Europe.

SHARING METHODS SHIFT GEARS

Email remains the most frequent way to share information amongst chemical manufacturing industry respondents; sharing via hardcopy or print follows email use. Shared network drives, intranet postings and other collaborative tools are becoming more common, but are not yet at the volume of use other industry sectors are experiencing.

When forwarding information to others, respondents use a variety of methods (see Figure 1). E-mail attachments are the top choice followed by a link in an email, then text pasted in an email.

Figure 1. Methods of Information Sharing

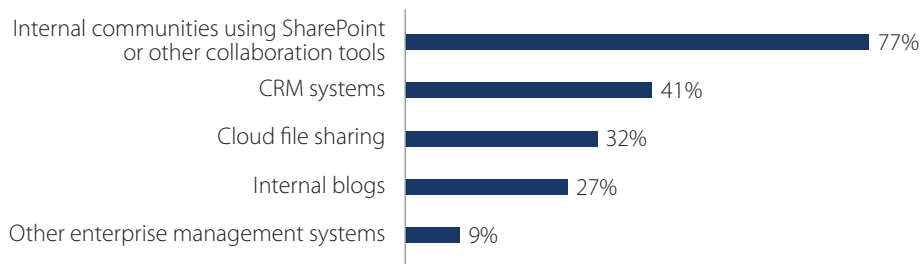


Q15: When you forward information to others, how is it delivered?

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Of respondents who use collaboration systems to deliver information, internal communities like SharePoint are most common (see Figure 2).

Figure 2. Systems Used to Collaborate



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

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THE VELOCITY OF CONTENT SHARING IS STEADY

On average, chemical manufacturing industry respondents indicated that they share content weekly with multiple people (see Figure 3). Survey findings show that chemical manufacturing professionals rely more heavily on published content compared to respondents in other industries.

Figure 3. Content Sharing

	Total Sharing
Frequency of sharing per week (mean)	5.3
Number of people shared with	9.8
% of information shared that is externally sourced	39%
Number of potential instances of unlicensed sharing by employees	20.3

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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The knowledge worker's immediate team is the largest beneficiary of information-sharing, according to the report. Outsell's research shows nearly all professionals in the chemical manufacturing industry (99%) reported forwarding content to their immediate team. Cross-functional sharing is second with 95% of participants followed by sharing with executives at 85% (see Figure 4).

Figure 4. Sharing with Constituent Groups



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

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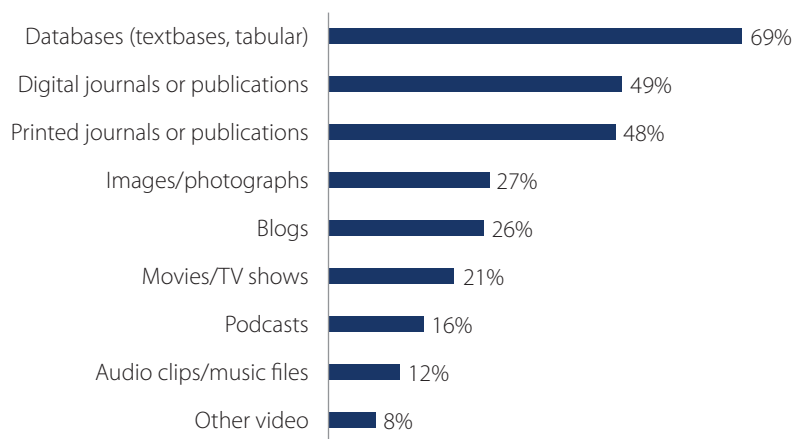
IMPORTANCE OF PUBLISHED CONTENT AND EXPANDING INFORMATION TYPES

Confirming the ever-increasing importance of third-party information, chemical manufacturing industry respondents noted that, on average, seven publications (print or digital) are critical to their jobs. Print still matters but is no longer the most important information medium; it is now the third most important category after databases and digital journals or publications (see Figure 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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Figure 5. Importance of Information Types



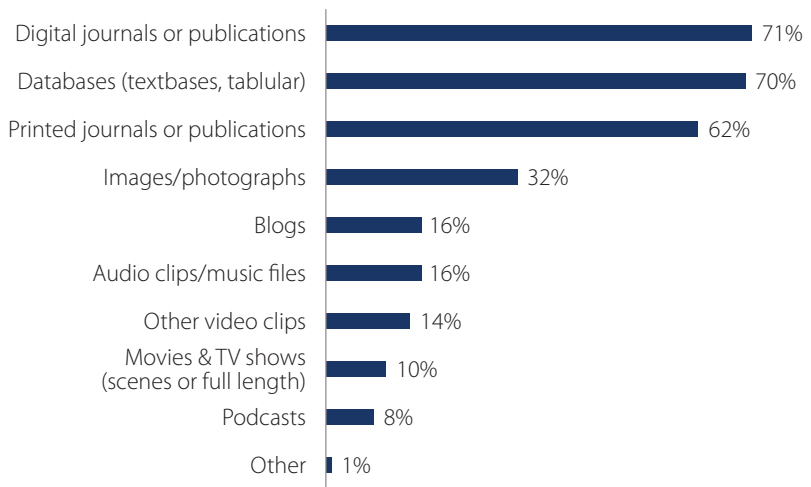
Q11: Please indicate how important each of the following types of information is in the course of your work.

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DIGITAL JOURNALS TOP THE LIST OF MOST SHARED CONTENT

Outsell asked chemical manufacturing industry respondents to indicate the top three types of media they send to others (see Figure 6). For the first time in conducting these surveys, digital journals/publications topped the list with databases being the second most popular, followed by a close third — printed journals/publications.

Figure 6. Top 3 Types of Media Shared



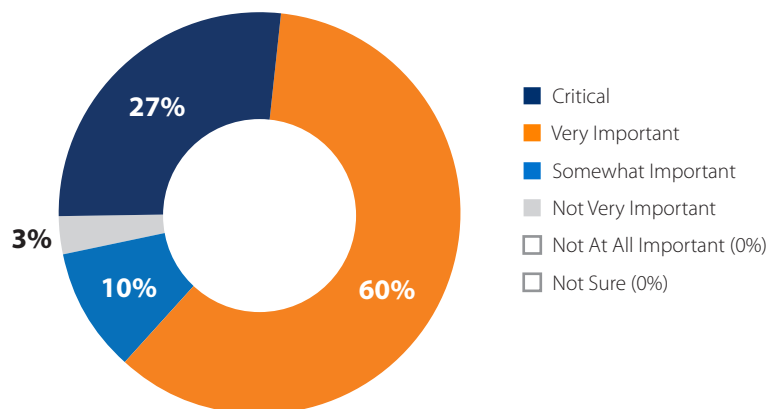
Q21. What are the top three types of media that you share for business purposes?

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THERE'S IRONY IN ATTITUDES TOWARD INTELLECTUAL PROPERTY

According to Outsell's research, more than 87% of participants in the chemical manufacturing industry said protecting their company's intellectual property (IP) is very important or critical (see Figure 7). Not surprisingly, respondents in the chemical manufacturing sector are significantly more likely to find the protection of organizational IP to be "critical" or "very important," compared to other verticals.

Figure 7. 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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Interestingly, this respect for IP does not necessarily carry over into their daily practices regarding the IP of others. Only 62% of survey respondents take responsibility for verifying that information is okay to share (see Figure 8). More than half (52%) of the chemical manufacturing respondents perceive getting copyright permissions as an obstacle to sharing information.

Figure 8. Attitudes Toward Copyright Issues

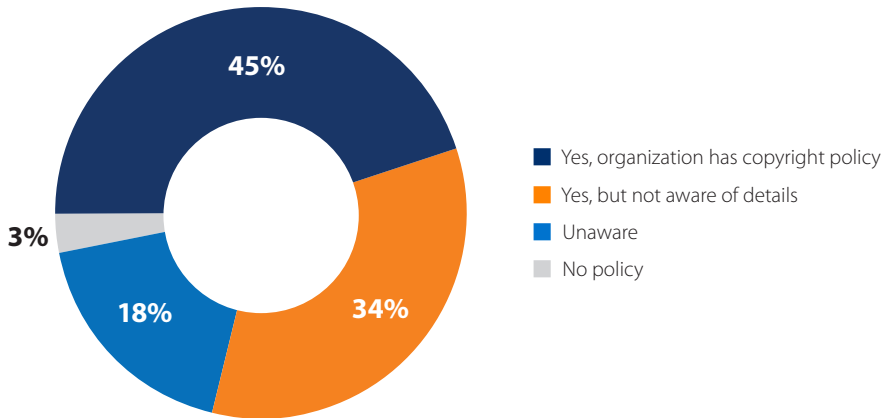
(% Strongly/Somewhat Agree)	Total
If I obtain free information on the open web or in print, sharing is permitted.	74%
Information purchased by my company that I can access in digital form, through portals or in the library, is permissible to share with others inside my organization.	73%
There are serious risks and implications to copyright infringement.	70%
I believe my organization takes appropriate measures to provide information and ensure copyright compliance.	70%
In competitive, mission-critical or time-critical situations, I will forward any and all relevant information that will help my organization be more competitive.	69%
I think about copyright implications before I store third-party content on my company's network or centralized content repository system.	63%
I take responsibility for verifying whether I have permission to share third-party information.	62%
I think about copyright issues before I forward information.	60%
The issue of getting permission creates obstacles to sharing information.	52%

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

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While almost half (45%) of chemical manufacturing industry respondents report their organization has a copyright policy, Outsell's survey found that one-third (34%) are not aware of the details of the policy. Another 18% of respondents report that they are unaware whether their organization has a copyright policy. The responses in Figure 9 further illustrate the level of copyright awareness among respondents and their beliefs on sharing published information.

Figure 9. Copyright Policy Awareness



Q25. Does your organization have a copyright policy regarding the sharing of information?

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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. Consider the content access and licensing challenges your employees face and how the technologies they use to access and share content reflect your organization's copyright compliance initiatives.

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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