

>> 2015

# Washington in the Information Age

National Journal  
Communications Council



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45 minutes: *Full text reading*

20 minutes: *Skim text reading*

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## Statement of Purpose

Since 2002, Washington in the Information Age (WIA) has periodically provided insights on the state of information consumption inside the Beltway, focusing primarily on how the growth in online channels and sources of information have impacted the way professionals in the policy community go about their daily work.

Much has changed since the survey was last fielded in 2012, and National Journal's Communications Council is thrilled to share with its Members an exclusive, in-depth, updated look at Washington Insiders' views, habits and preferences for consuming media today—and recommendations on how organizations can best adapt their strategies to account for the trends and changes.

The 2015 insights allow communications professionals to pinpoint the specific channels, content formats and timing to maximize reach and influence decision-making among policy insiders. Findings illuminate the roles of social media, mobile, video and events—among other channels and tools—in respondents' day-to-day policy work, and how these roles are anticipated to change in the future.

We hope that you and your team will find immense value in this work, and we look forward to continuing the conversation as the media landscape continues to evolve.

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## Methodology

National Journal Group's Communications Council research team conducted an online survey of Washington Insiders in February 2015, targeting Capitol Hill staff, private-sector public affairs professionals and federal government executives primarily based in the Washington, D.C. area.

Nearly 1,200 Washington Insiders completed the survey over the course of four weeks, including more than 120 Capitol Hill staff, more than 600 respondents from the private sector public affairs community and almost 400 federal executives.

This year's WIA survey leveraged some of the questions used in the 2012 iteration, but numerous questions were added or updated to reflect the rapidly shifting nature of media consumption within the Beltway. For this reason, not all data collected in 2015 was directly compared to 2012 data as part of this research.

As in previous years, the 2015 survey format encouraged respondents to share more directed written feedback and perspectives on select multiple-choice questions. Each question generated compelling elaborations on the issues and themes presented, and responses ranged from one word to several paragraphs in length. Respondents' remarks provided helpful additional insight into their answer choices and uncovered the crux of broader trends embedded within the research team's firsthand observations and quantitative data analysis.



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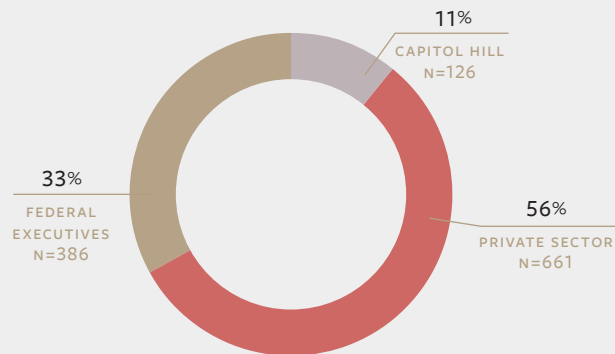
>> PART I.

# Demo- graphics of Survey Respon- dents

## 01) A Snapshot of Washington Insiders

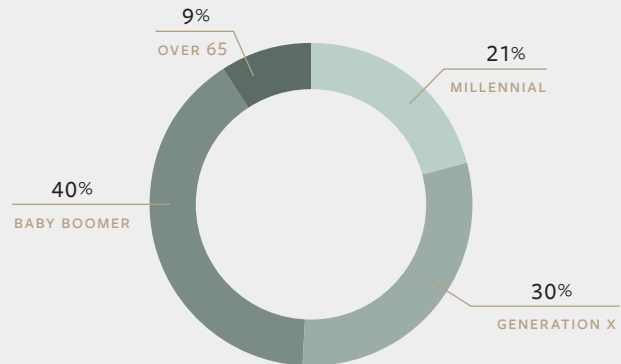
### Composition of Survey Respondents

Percentage of Respondents, n=1,173



### Generational Breakdown of Survey Respondents

Percentage of Respondents by Sector



Source: National Journal Communications Council research and analysis.

Now, more than ever, influence on policy decisions can be exerted by a wide variety of individuals working both inside and outside of what's traditionally considered "official Washington"—elected officials and their staffs, and senior appointed officials. Thus, as in previous editions of WIA, the definition of *Washington Insiders* encompasses respondents representing Capitol Hill staff, senior-level federal executives, and policy professionals from the private sector. The 2015 respondent breakdown reflects the relative sizes of each group in the broader policy landscape.

Where possible, the 2015 analysis highlights differences (both expected and unexpected) among the generations represented within the broader set of Washington Insider respondents. There can be significant disagreements over the age cut-offs for generations; for the purposes of this research, the research team relied upon the official definitions put forth by the White House Council of Economic Advisers.

#### **Millennials:**

Respondents below the age of 35

#### **Generation X:**

Respondents between the ages of 35 and 50

#### **Baby Boomers:**

Respondents between the ages of 51 and 65

#### **Over 65:**

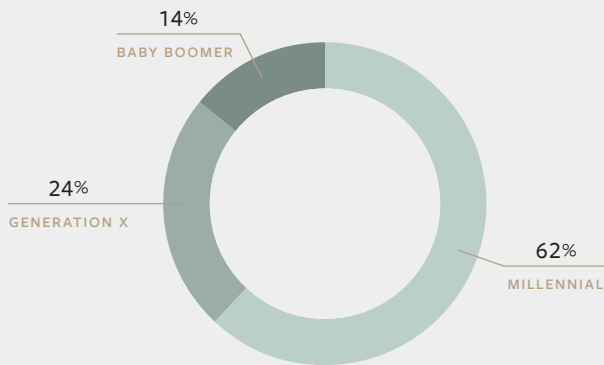
Respondents over the age of 65 representing members of both the Baby Boomer generation and the "Silent" generation based on data set cut-offs



## 02) Capitol Hill Respondents in Focus

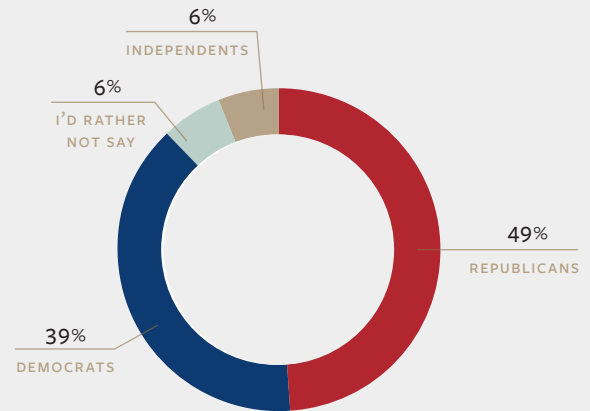
### Generational Breakdown

Percentage of Respondents, Capitol Hill



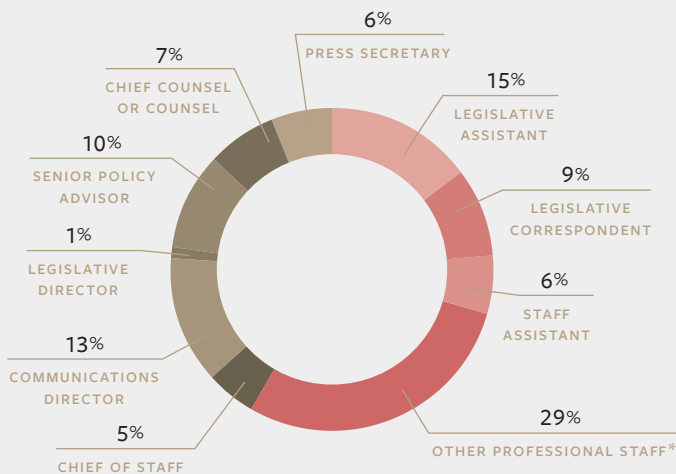
### Party Affiliation

Percentage of Respondents, Capitol Hill



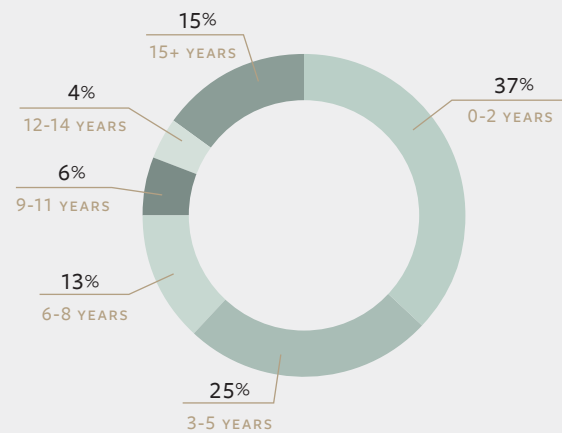
### Job Title

Percentage of Respondents, Capitol Hill



### Tenure

Percentage of Respondents, Capitol Hill



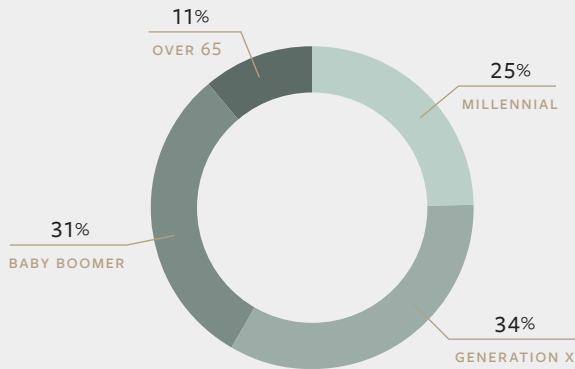
\*e.g. Economist, Fellows, Intelligence Advisor, Deputy positions

Survey respondents from Capitol Hill reflect the demographics of the overall Capitol Hill population, in both age and tenure, as well as in party affiliation. Respondents' tenure distributions align with the typical age of the relatively young Capitol Hill workforce and, as expected with a Republican majority in both chambers, also are in alignment here. Of the 126 respondents from Capitol Hill, 42 percent hold senior-level positions.

### 03) Private Sector Respondents in Focus

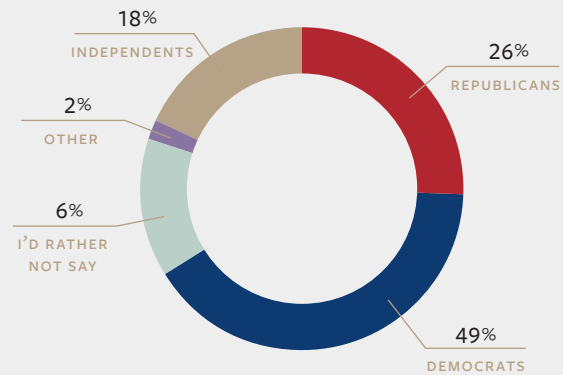
#### Generational Breakdown

Percentage of Respondents, Private Sector



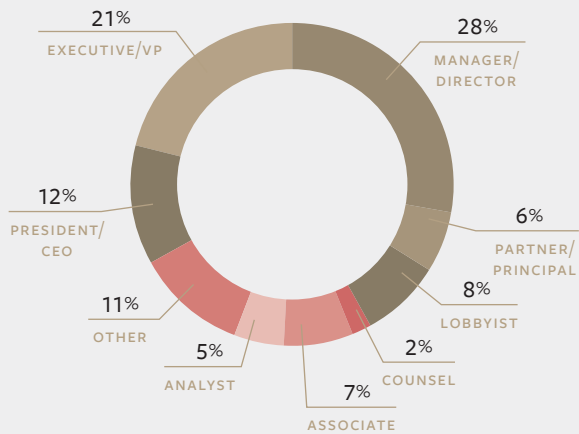
#### Party Affiliation

Percentage of Respondents, Private Sector



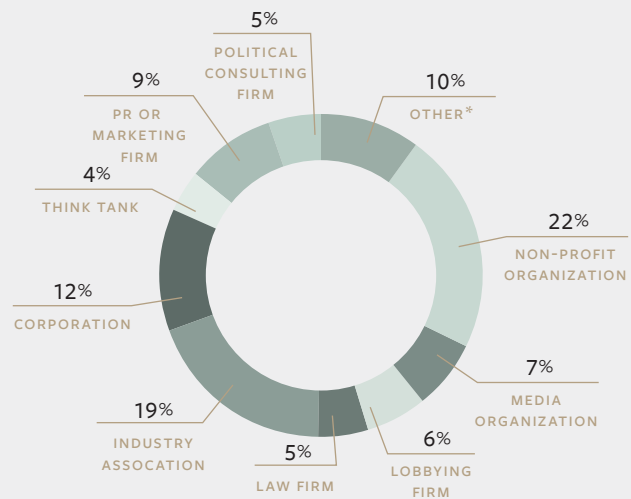
#### Job Title

Percentage of Respondents, Private Sector



#### Professional Affiliation

Percentage of Respondents, Private Sector



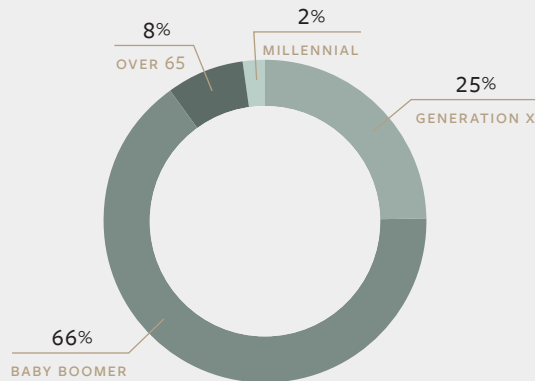
\*“Other” for Professional Affiliation includes Coalition or Interest Group, University or Educational Institution and Union figures.

Private sector respondents represent all of the key players in “unofficial Washington,” ranging from lobbyists and public affairs practitioners, to senior executives in corporations, trade associations and nonprofits, to think tanks and interest groups. They contribute perspectives honed from years on the job—50 percent of respondents have worked in their fields for more than 15 years, and 75 percent currently hold senior-level positions.

## 04) Federal Executive Respondents in Focus

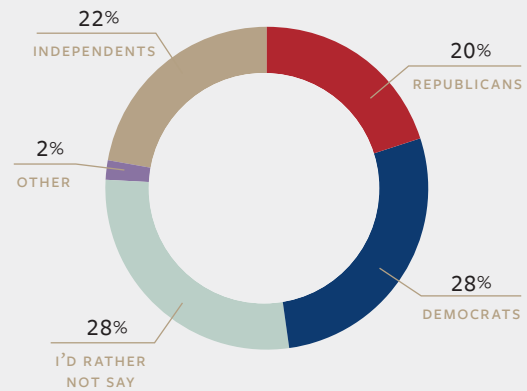
### Generational Breakdown

Percentage of Respondents, Federal Executives



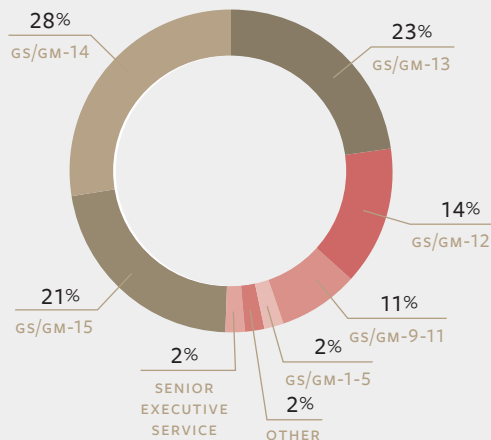
### Party Affiliation

Percentage of Respondents, Federal Executives



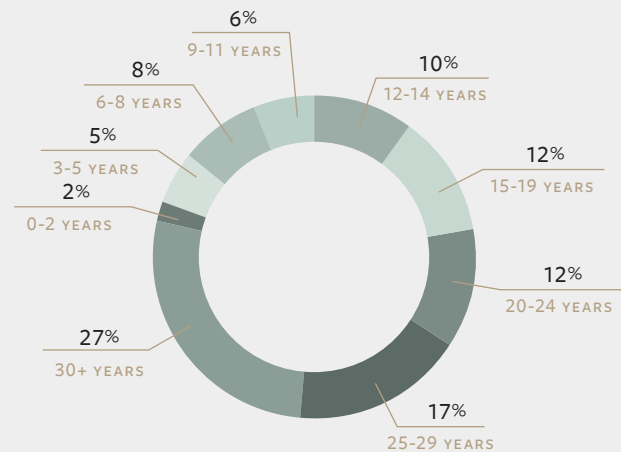
### Civil Service GS Level

Percentage of Respondents, Federal Executives



### Tenure in Federal Government

Percentage of Respondents, Federal Executives



Federal executives comprising the third category of Washington Insiders are the most senior group surveyed. Nearly 7 out of 10 have worked in the federal government for more than 15 years, and a slightly higher percentage occupy senior-level positions. Respondents come from all 15 federal executive departments, as well as an additional 12 independent agencies and commissions.

#### Agencies with the highest representation include:

Department of Homeland Security, Department of Veterans Affairs, Department of Agriculture, Department of the Treasury, Department of Health and Human Services, Department of the Interior, Department of Commerce, Department of Transportation, Department of Justice, Department of State

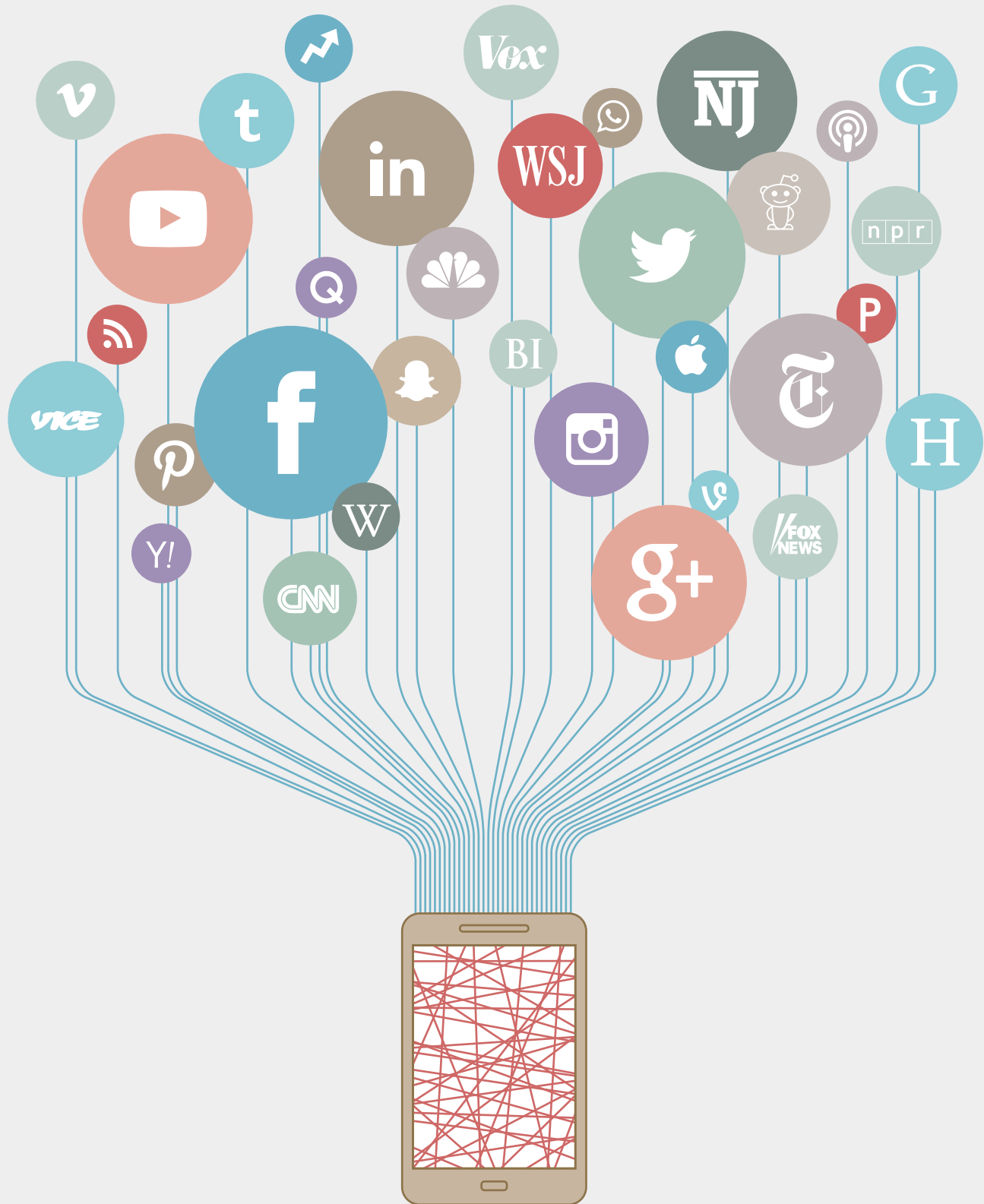


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>> PART II.

# Since We Last Met...

Overall Changes in the Media  
Consumption Landscape

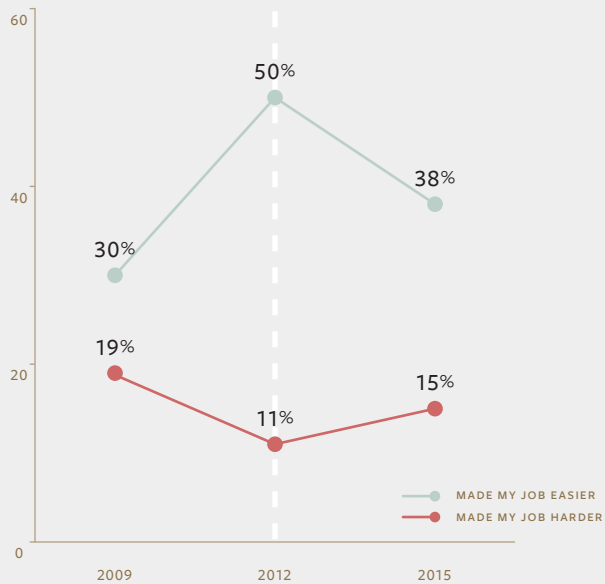


## 05) After Rapid Adjustment Period, Moods Have Sobered

Respondents' Feelings About the Impact of Available Information on Job Performance Reverting Back to 2009 Levels

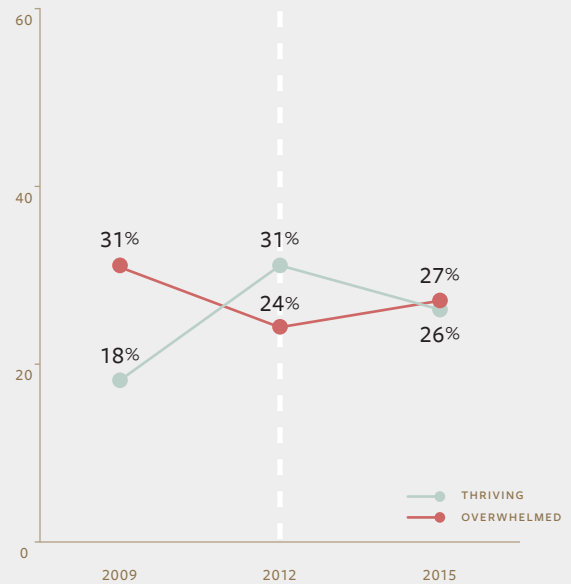
### 2009-2015: Impact of Media Proliferation on Job

Percentage of All Respondents



### 2009-2015: Reactions to Proliferation of Media Content, Sources and Platforms

Percentage of All Respondents



**It's easier than ever for Washington Insiders to obtain information today, but harder than ever for them to make sense of it all.**

Three years ago, it seemed that the increased flow of information was largely good for Washington Insiders. They adjusted to the rapid expansion of sources in the years preceding the 2012 Washington in the Information Age survey, and a majority reported feeling like their jobs had been made easier by the changes.

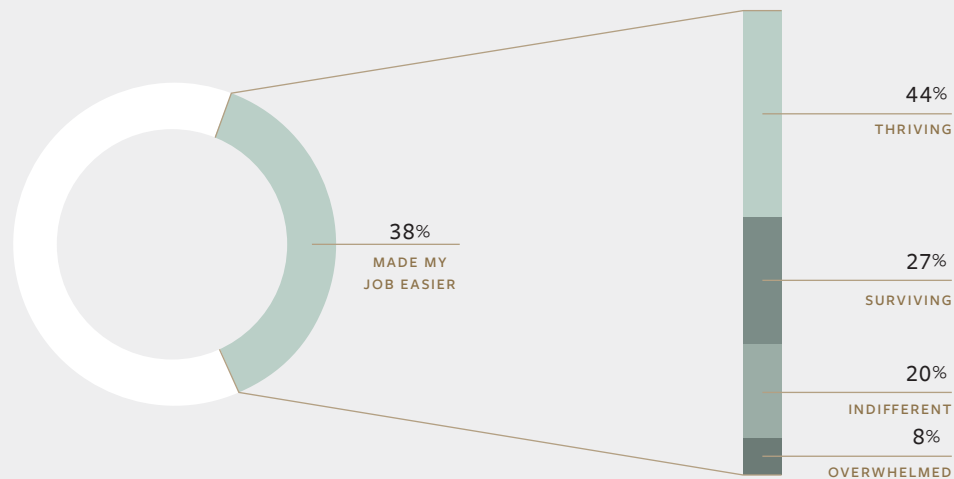
The years since the 2012 presidential election tell a different story—one of increasing partisanship and policy gridlock inside the Beltway, and of continued acceleration and diversification of the ways in which information is consumed and shared.

## 06) Even the Most Well-Adjusted Aren't Entirely Confident

Fewer Than Half of Respondents Whose Jobs Have Been Made Easier Report Thriving

### Impact and Reactions to Proliferation of Media

Percentage of All Respondents



Even for those Insiders who have the best chance—those among the 38 percent who report their jobs have been made easier in 2015—fewer than half report thriving in their day-to-day work. This gap highlights phenomena observed throughout the 2015 survey.

- The current glut of information may actually leave people somewhat paralyzed—lacking confidence in individual sources and information, and unable to see a clear link between information and action.
- Respondents trust individual sources of information but still need validation via multiple other sources to feel confident in their opinions.

**So what can organizations that wish to influence policy do about this? What's the best way to help Washington Insiders make sense of it all?**



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**“Quality and accessibility of Inside-the-Beltway information has gone up dramatically with lots of competition and more exclusive content offerings—at a price. Has it helped the process? One underlying problem is the process we’re all gathered around—i.e. Capitol Hill policymakers and government—has become so dysfunctional that more chatter and commentary and access to information is a new reality, but one that is not always contributing to measurable outcomes. Some days it’s just more chatter to watch, engage in and worry about.”**

— Baby Boomer, *Private Sector*

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# Watching, Engaging & Worrying: Key Trends in 2015

**1 / Rather than trying to cut through the clutter, it's increasingly necessary to employ a surround sound approach—being present everywhere Insiders are looking for information.**

Trust and confidence no longer go hand-in-hand for Washington Insiders, who have adopted the journalistic mindset of validating information from a variety of sources, channels and platforms. This is good news for associations and other organizations with a distinct point of view; Insiders won't shy away from "biased" sources, but rather use them to balance out their expanded portfolios of information when formulating opinions and making decisions. It's important to be present across all of the channels Insiders use today, while accepting the fact that there's no longer a silver bullet that will elevate a single source above all others.

**2 / The rapid expansion of information sources yields an opportunity to be a resource, rather than merely an informer.**

Given Insiders' current difficulty in making sense of the vast amounts of information being shared by an ever-growing pool of trusted—but not necessarily reliable—sources, the most savvy organizations and content creators will shift focus to curating and sense-making activities. Quality content, whether produced by an organization or merely re-packaged and shared, will continue to earn loyalty for sources.

**3 / There is a discernable, growing advocacy story gap in Washington.**

Organizations that are in the best position to put a human face on their industries—associations—are largely passed over as providers of compelling advocacy stories in Washington. Insiders don't seek them out, not because of a lack of demand, but rather a lack of supply. And organizations that don't participate in the storytelling game risk having their stories told by someone else.

**4 / Professional use of social media as a discovery tool is on the rise, but the platforms' credibility is only as strong as the content being shared.**

While the primary purposes of being on social media remain largely personal for Washington Insiders, professional usage has become a byproduct of being present on and regularly consuming information through those channels. But Insiders will be quick to point out that it's not the channels themselves, but the content being shared (and the original sources of that content) that are most helpful in formulating opinions and influencing actions.

**5 / Growing concerns about social media use will continue to shape the channels of choice in Washington.**

As concerns about existing in the hybridized professional-personal social media space continue to grow, Insiders will continue to look to social platforms that can potentially mitigate these challenges, as well as to rely on more private means of sharing (such as email) to conduct their day-to-day policy work.

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**6 / True social media influence is only possible when approached with a two-way mindset.**

Social media continues to rank lower as both a channel of choice for sharing Washington information and as a trusted source of information—and this is due in part to the approach of those sharing the content. Organizations looking to leverage peer-to-peer influence must target those Insiders most willing to engage—not just to inform—when sharing on social media.

**7 / If content is the currency of trust, it must be optimized for mobile today.**

Insiders rely on their mobile devices throughout the day, but the current experience on smaller screens leaves much to be desired. Organizations that don't provide content optimized for mobile devices will quickly become irrelevant as impatient Insiders phase them out in favor of content providers that can offer more streamlined, accessible experiences.

**8 / As digital delivery of media content continues to improve, print is becoming more experiential—and the respective merits of digital and print can no longer be divorced from the overall media brand.**

Print publications are still consumed regularly by Washington Insiders, but as digital has made gains in usability and access, print's primary purposes have shifted away from convenience and ease of use and toward an experience to be savored when time is not of the essence. Traditional print-first brands, such as national daily publications or Inside-the-Beltway publications, remain sought-after sources of information, but Insiders can no longer distinguish the credibility of the print component from its corresponding digital properties or from the overall brand.

**9 / Washington watches a lot of online video—just not for policy work (yet).**

While Insiders frequently consume online video, they find it neither particularly applicable to policy work nor preferable to reading the same information. Organizations looking to succeed in online video should focus on producing web-native, short, story-driven content to compete with more established video content providers.

**10 / Digital content should be an extension of in-person events.**

Events mainly reach an organization's existing supporters, making them unlikely to contribute to changing or advancing any partisan or issue-specific viewpoints among people who disagree. Increasingly, events can and should be used as a source of digital content that can be used across the year—which can also be used to encourage conversation among more than just those attendees in the room.



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>> PART III.

# Who Washington Insiders Trust

## KEY TRENDS

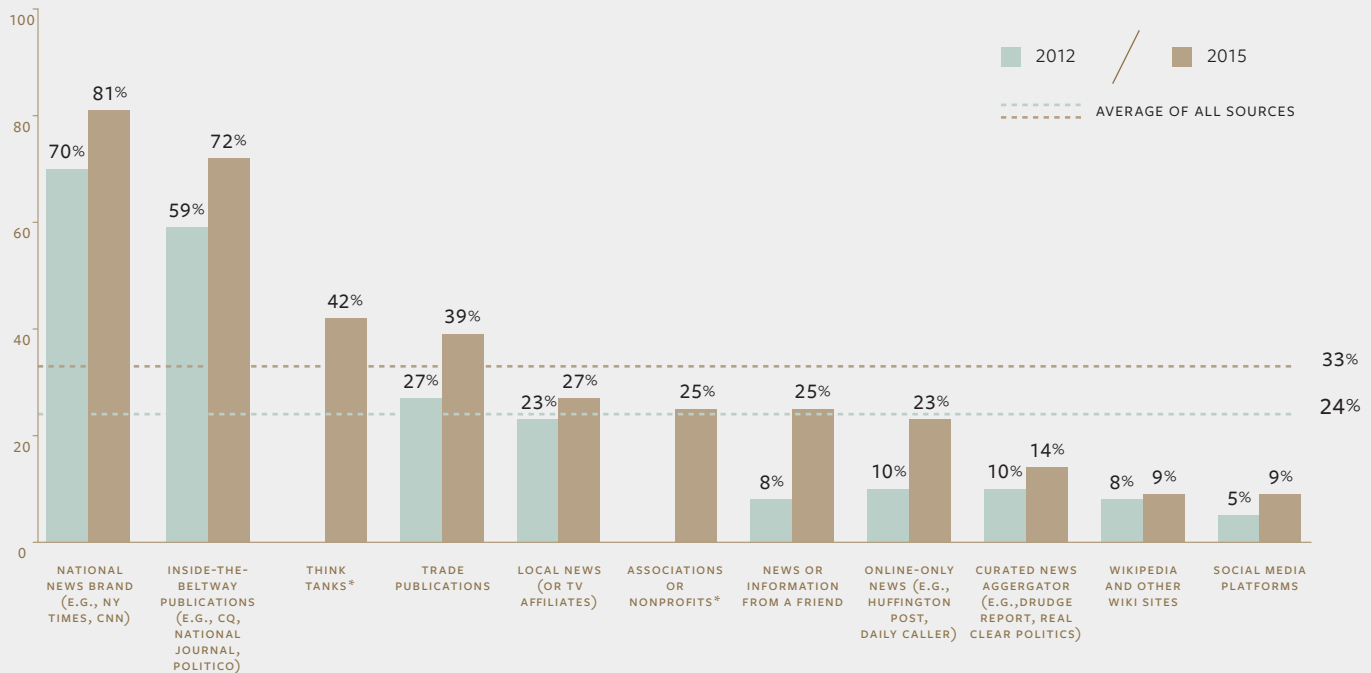
- ➊ / Rather than trying to cut through the clutter, it's increasingly necessary to employ a surround sound approach—being present everywhere Insiders are looking for information.
- ➋ / The rapid expansion of information sources yields an opportunity to be a resource, rather than merely an informer.
- ➌ / There is a discernable, growing advocacy story gap in Washington.

## 07) All Sources Outperform 2012 Trust Levels

But Trust No Longer Equates to a Reliance on Any Single Source of Information

### Historical Comparison of Trusted Sources of Information Among Washington Influentials

Percentage of Respondents



\*No 2012 WIA data available for think tanks or associations and nonprofits; data reflects only those who work in the Washington, DC metro area.

Washington Insiders today have largely adopted the mindset of journalists, seeking out and verifying information from a broader variety of sources in order to confidently formulate their own opinions.

- Despite acknowledging in qualitative comments that most—if not all—sources of information are presented with inherent biases, respondents report higher levels of trust in individual sources across the board since WIA was last fielded in 2012, as well as higher trust in the aggregate.
- **Trust and confidence are not as inextricably linked as they once were**, and it is ultimately earned when information is consistent and any biases are transparent.

**“I trust consensus – news in the aggregate.”**

— Over 65-er,  
Federal Executive

**“I view all of these as equally important, including partisan / biased media. You need to know how each issue is framed to each audience.”**

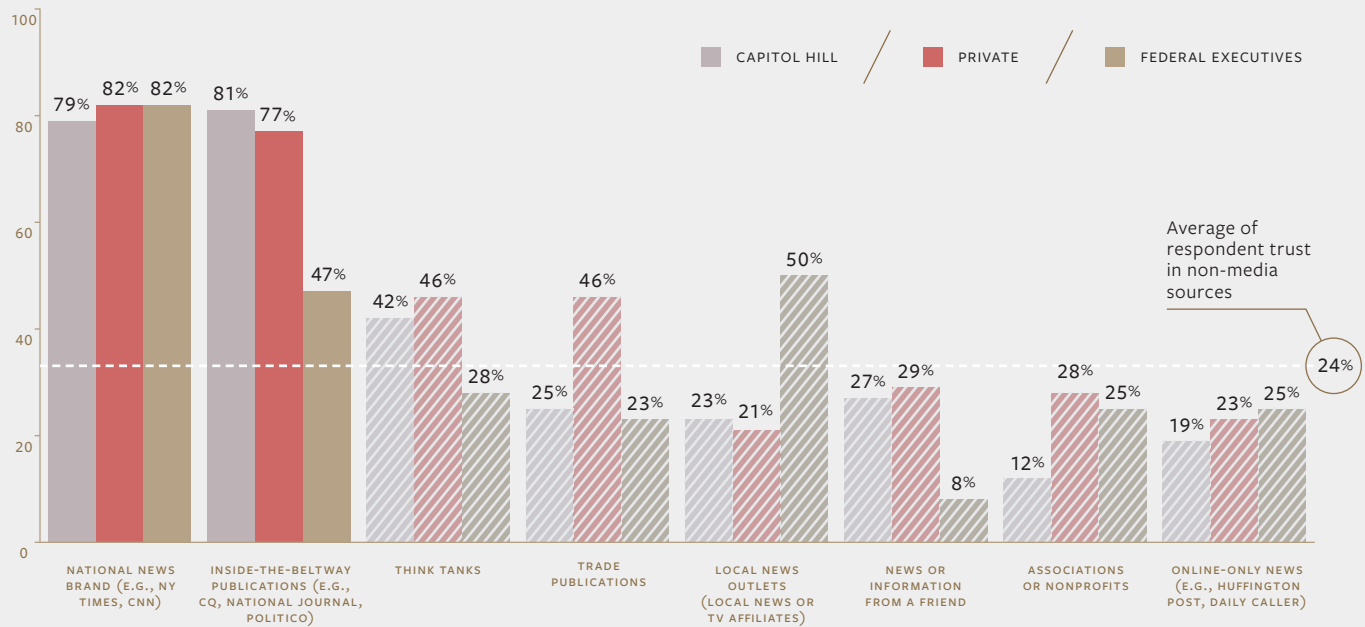
— Millennial,  
Private Sector

## 08) Trust Remains Concentrated Among Established Media Brands

Yet Insiders Will Consume a Variety of Sources Within Any Given Category to Counteract Perceived Biases

### Most Trusted Sources of News and Information

Percentage of Respondent by Sector



\*Data reflects reflects only those who work in the Washington, D.C. metro area.

Washington Insiders continue to place their trust predominantly in established media brands (whether national, Inside-the-Beltway, or local in the case of federal executives).

As respondents look to balance their portfolios of information sources, it appears that third party validation is still more trustworthy than receiving it directly from an organization—despite the increasing diversity of channels organizations can choose to share their own messages.

#### Partisan Trust Differences

While the majority of information sources are trusted equally among Democrats and Republicans, there are a few key differences. Democrats place higher trust in national news brands (92%) and online-only news brands (29%) than their Republican counterparts (73% and 17%, respectively). Republicans are more likely to trust news or information from a friend (32%, vs. 21% of Democrats).

**“Anything that is verified by lots of people I weight more heavily. I also tend to trust sources that freely admit their biases more heavily.”**

— Millennial,  
Capitol Hill Staffer

\_03.1

## **Opportunity**

The role of paid and earned media in an organization’s overall media strategy continues to persist. Organizations should amplify earned media coverage in their owned channels (websites, social media) and should also continue to invest in strategic paid opportunities to demonstrate third party credibility and benefit from the “trust halo” associated with established media brands.





## 09) When Forming and Sharing Opinions, Validation is Key

At Any Given Moment, Insiders Will Rely On Approximately Four Different Information Conduits to Accomplish Objectives

### Primary Channels Utilized During Three Phases of Preparing for a Critical Vote

Percentage of Respondents



When their proverbial feet are held to the fire, Washington Insiders triangulate—relying on a different mix of sources to accomplish different objectives along the policy formulation and decision-making continuum.

- When initially gathering information in preparation for a crucial vote, Insiders turn to news websites and search engines to quickly get up to speed.
- In the opinion formulation phase, printed publications and white papers see a healthy increase in utilization, as do organizational websites.
- And when it comes time to influence others to adopt those opinions, Insiders give social media a bit of a boost—though they are very likely using these channels to share content created by or found on one of the higher ranking sources.

**“As an LC, it’s my job to respond to the crazies so I need reliable, well-respected, and deeply factual news sources. Vox has quickly become my go-to for general background (replacing Wikipedia as a good place for basic background info and sources to begin my search).”**

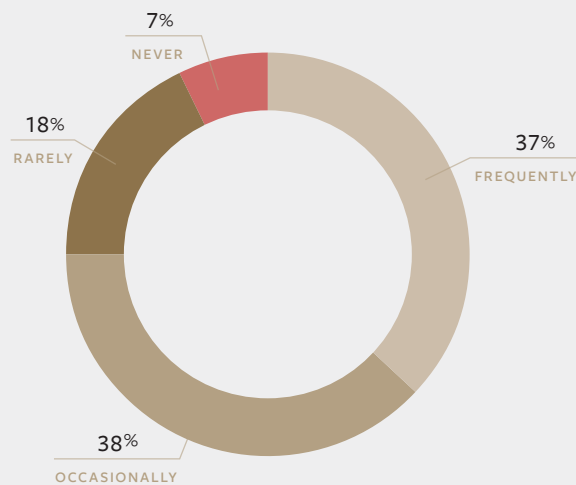
— Millennial,  
Capitol Hill Staffer

## 10) Not the Only Voice, But Still an Important One

Associations, Nonprofits and Think Tanks Acknowledged as Regular Sources of Information, Despite Lower Trust

### Frequency of Using Associations, Nonprofits or Think Tanks to Gather Information

Percentage of Respondents



While think tanks, associations and nonprofits ranked lower on the overall trust scale (at 42 percent and 25 percent, respectively), Washington Insiders still regularly rely on these organizations to provide useful information. Among respondents, 75 percent either frequently or occasionally gather information from associations, nonprofits or think tanks.

**Organizations must increasingly be comfortable being one of many sources of information, instead of striving to be the singular voice.**

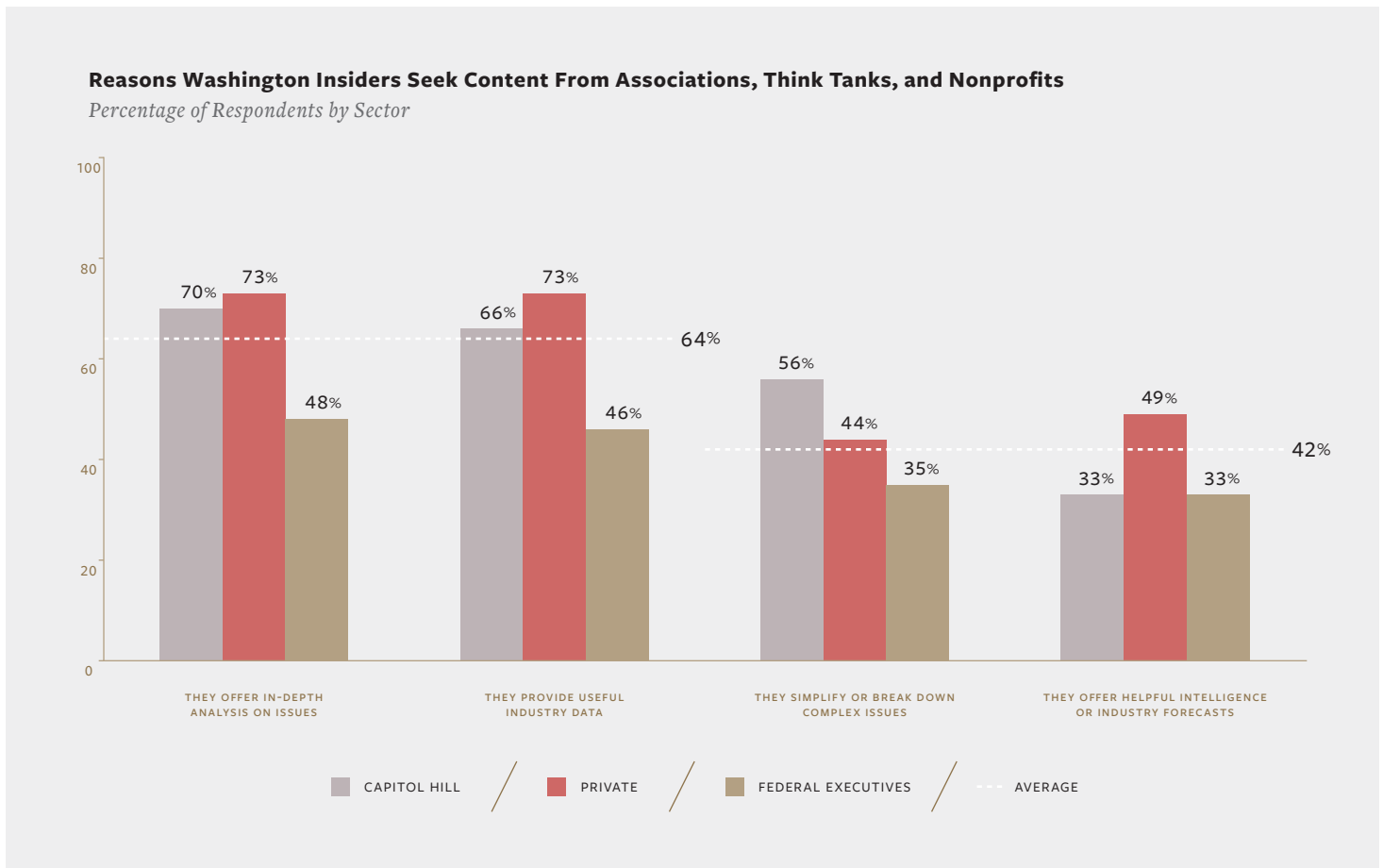
- Rather than cutting through the clutter, embrace the clutter—by being present across all the various sources of information Insiders rely upon when consuming and sharing.
- The most savvy organizations will serve as resources to their audiences—curating, packaging and sharing others' content while helping Insiders more easily accomplish their validation and fact-checking missions.

**“They provide information that more traditional or online media [platforms] overlook.”**

— Baby Boomer,  
Private Sector

## 11) Valued For Data and Depth, Not Simplification

Respondents Appreciate Expertise and Industry Perspectives They Can't Find Elsewhere



Associations, nonprofits and think tanks create a variety of content and messaging, but what Washington Insiders tend to seek from them favors substance over simplification, and data over opinions. Respondents want data and deep analysis—emphasizing the quality of content, not necessarily the quantity of content. Other players in the trust game (e.g., national news brands or other media) have the speed and simplification markets cornered. While simplicity can be a useful strategy for promoting content to a broader audience, it needs to link back to deeper material.

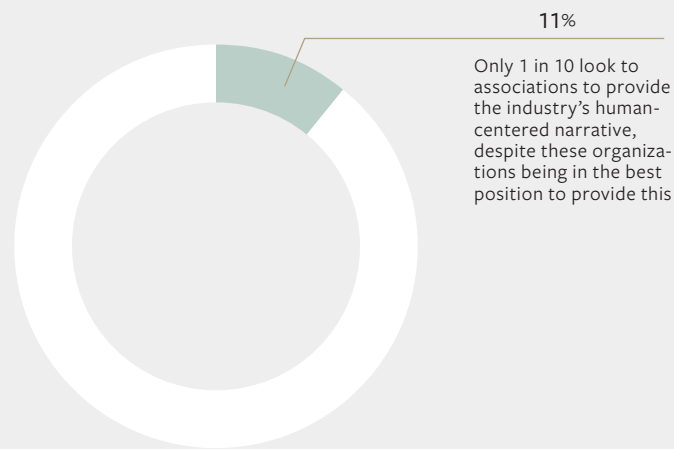
**\*Note: For a breakdown of purposes by generation, see page 69.**

## 12) A Dearth of Advocacy Stories

Likely a Shortage of Supply—Not Demand—Driving Low Recognition for Associations as Providing Industries' Human Narrative

### Reasons Washington Insiders Seek Content From Associations, Think Tanks, and Non-Profits

Percentage of Respondents



**“We look at all sides [of an issue] and we rely on [organizations] to synthesize the information for us. From our standpoint, they come in and show us numbers, what’s happening with their cost structure and why. Bringing back information that looks credible is always helpful. But usually more helpful is kind of the individual stories, the anecdotes of the small businesses or the individuals who had their premiums go up this much and why. Those kinds of anecdotes usually are easier for staff to digest unlike a bunch of numbers because we’re not experts on that data.”** - Chief of Staff, Capitol Hill\*

Associations have historically been in the very best position to share the human side of their industries’ work. They have the ability to surface and share stories from within their membership that demonstrate impact, values and purpose. It’s striking, then, that so few respondents look to associations to fill this very purpose.

Only 1 in 10 respondents report that they look to associations, nonprofits or think tanks to put a human face on issues—and this is more likely a function of seeing few examples of this in the marketplace than it is a lack of desire.

\*Obtained from qualitative feedback featured in National Journal Group’s Policy Brands Roundtable.

## **Opportunity**

Injecting more narrative storytelling into an association's content strategy and messaging can create stronger engagement opportunities among members and non-members alike. Storytelling is also a proven tactic in influencing policy decisions, as—when done well—it can succinctly convey the impact and importance of an issue without sacrificing scale.





>> PART IV.

# When and How Washington Insiders Seek Infor- mation

## KEY TRENDS

④ / Professional use of social media as a discovery tool is on the rise, but the platforms' credibility is only as strong as the content being shared.

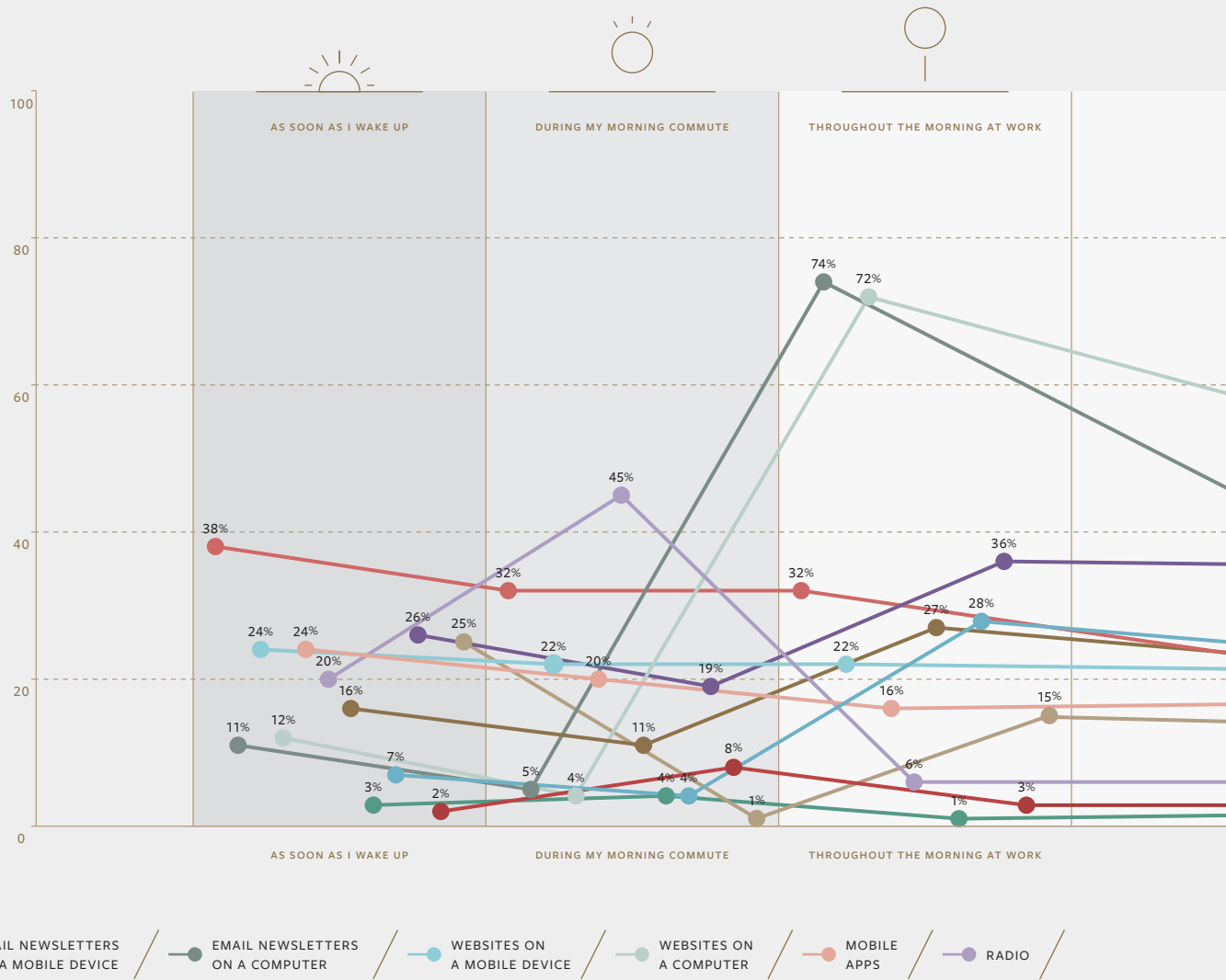
⑤ / Growing concerns about social media use will continue to shape the channels of choice in Washington.

⑥ / True social media influence is only possible when approached with a two-way mindset.

⑦ / If content is the currency of trust, it must be optimized for mobile today.

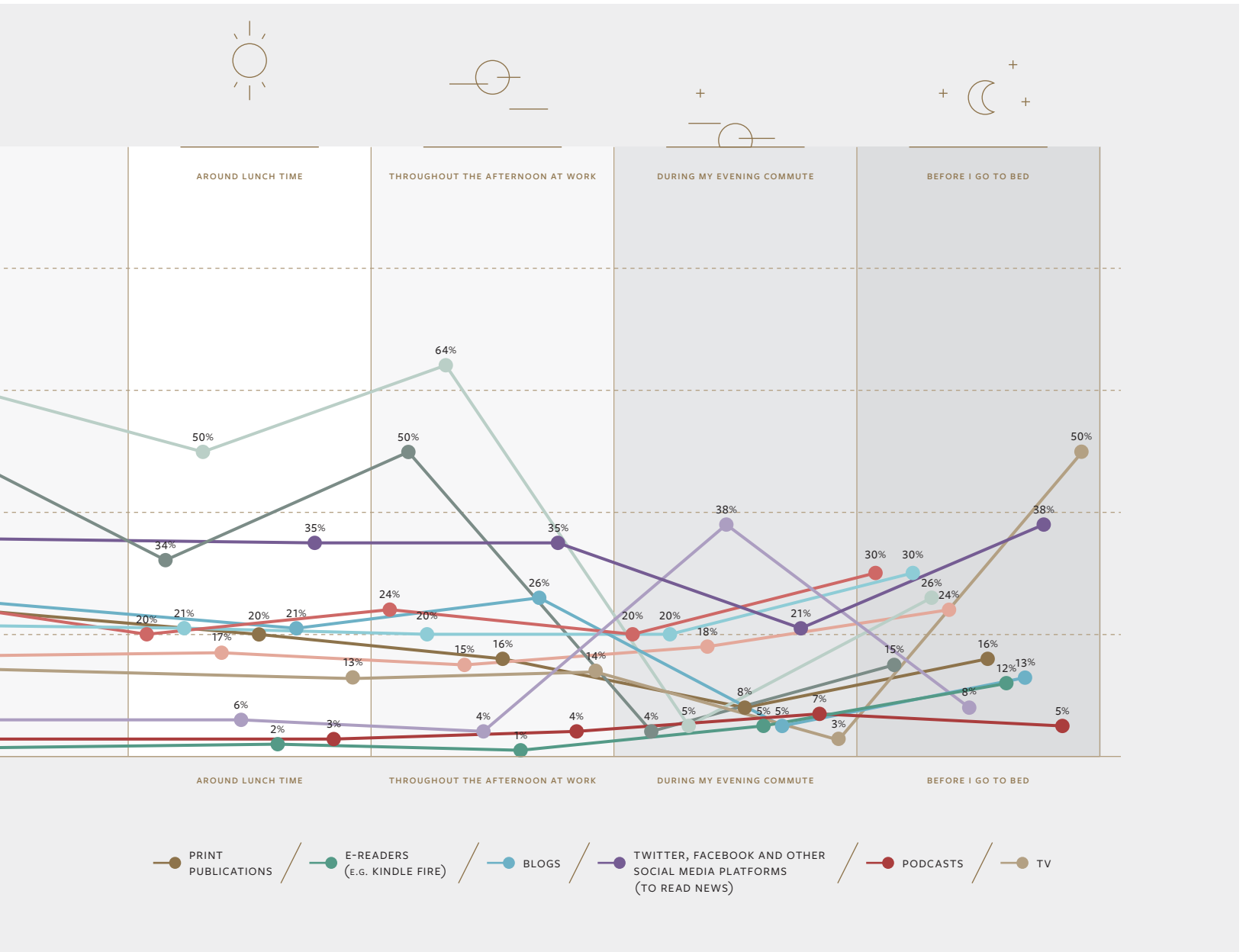
⑧ / As digital delivery of media content continues to improve, print is becoming more experiential—and the respective merits of digital and print can no longer be divorced from the overall media brand.

# 13) A Day in the Life of a Washington Insider



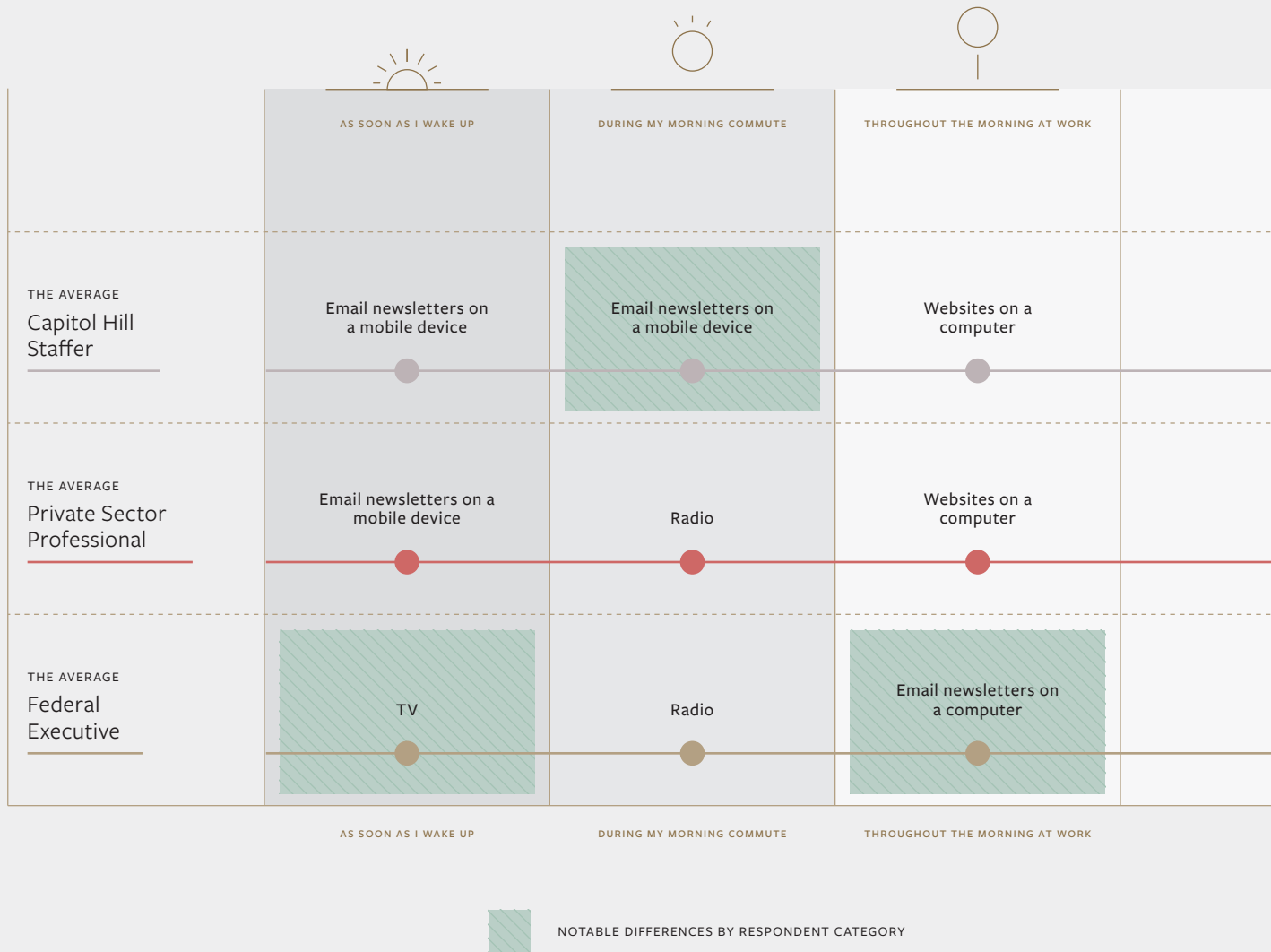
It goes without saying that Washington Insiders are skillful multitaskers. With the exception of morning and evening commutes, there’s not a moment during the day that respondents aren’t actively consuming information on more than one channel at a time, whether that’s checking email newsletters while watching TV in the morning, monitoring social media while reading websites at lunchtime, or engaging on the “second screen” while watching TV before bed.



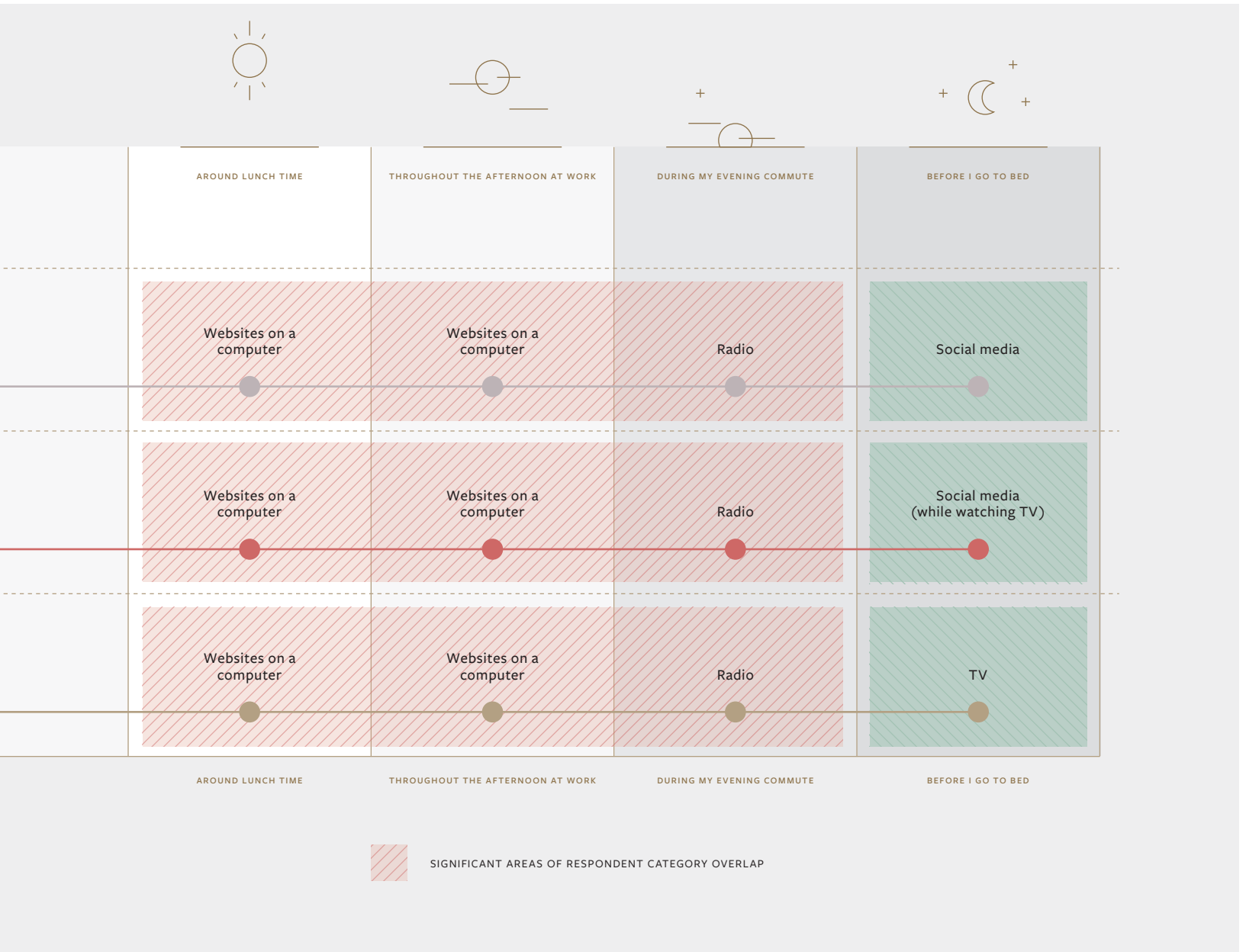


# 14) Channels of Choice Largely Align Throughout the Day

First and Last Activities of the Day Differ, While Afternoon Offers a Targeting Sweet Spot



Across categories of respondents, areas of alignment occur mostly throughout the afternoon and evening, when most consume websites on a computer at their desks, and radio on their way home. Predictably, given generational trends within respondent categories, federal executives are less likely than their private sector and Capitol Hill counterparts to reach for their mobile phones as soon as they wake up and before going to bed.

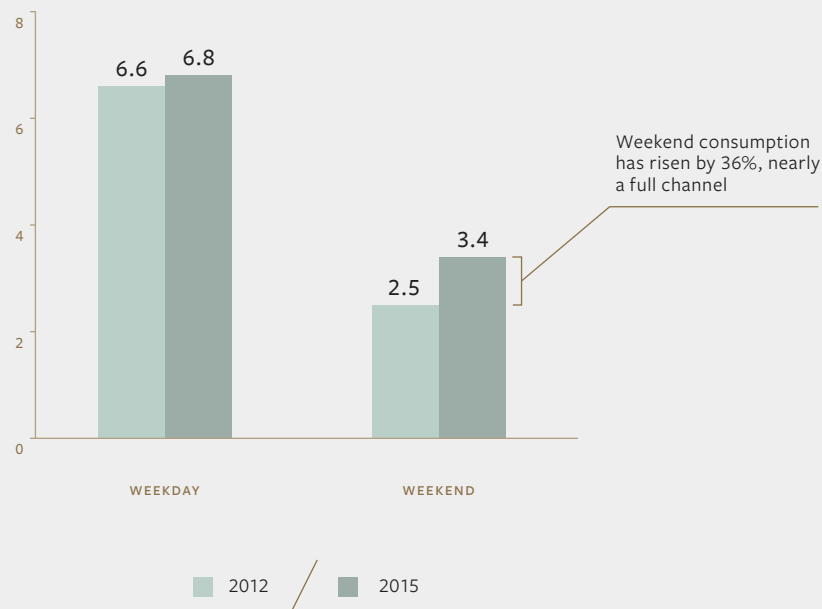


## 15) Catching Up (Or Getting Ahead) During the Weekend

While Weekday Channel Consumption Has Remained Flat, Weekend Has Gained a Full Channel

### Growth in Number of Channels Used to Consume Washington Information, Weekday vs. Weekend

2012-2015: Average Unique Channels Per Respondent



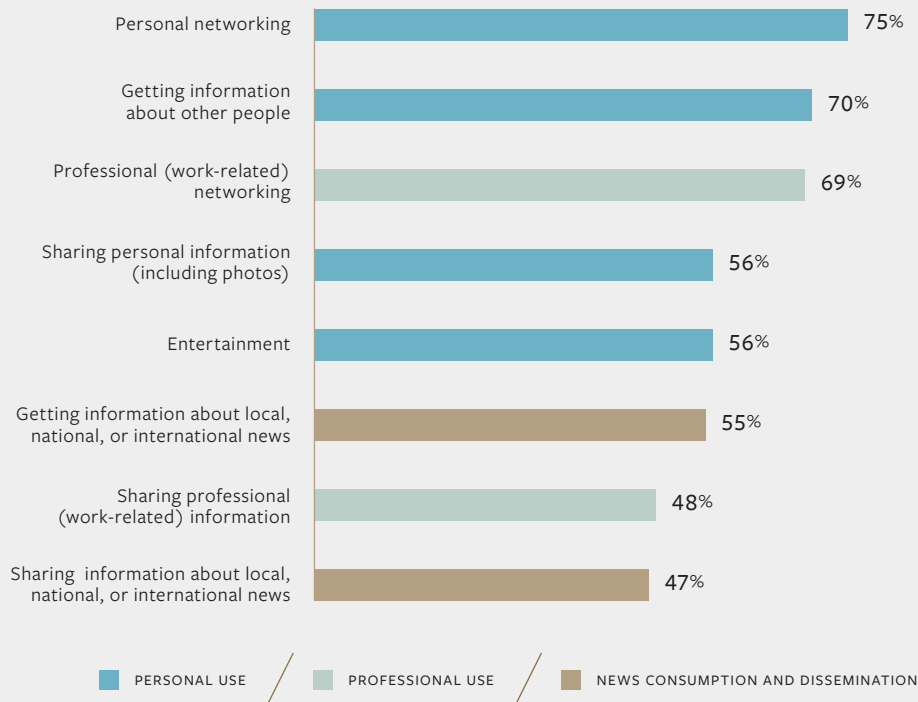
Although Washington Insiders are consuming nearly the same number of channels throughout the week compared to 2012, the weekends are a slightly different story. In 2015, respondents are consuming on average one additional channel more than they were in 2012—indicating that they perhaps use the weekend increasingly as a time to catch up, or perhaps to get ahead.

## 16) Where There's Personal Engagement, Professional Engagement is Likely to Follow

While Personal Motivations on Social Media Still Outpace Professional Motivations, Actual Usage Is Increasingly Hybrid

### Motivations for Using Social Media

Percentage of Respondents



### Social Media

Washington Insiders report primarily using social media for personal pursuits—yet stated motivations perhaps belie the more hidden professional purposes and benefits that have taken hold in recent years.

- While respondents may be actively engaged in personal exchanges of information and networking, social media has quickly become a simultaneous gateway for discovering job-related news and information.
- Professional pursuits are essentially a byproduct of being personally active on social.

### Party Differences in Social Purposes

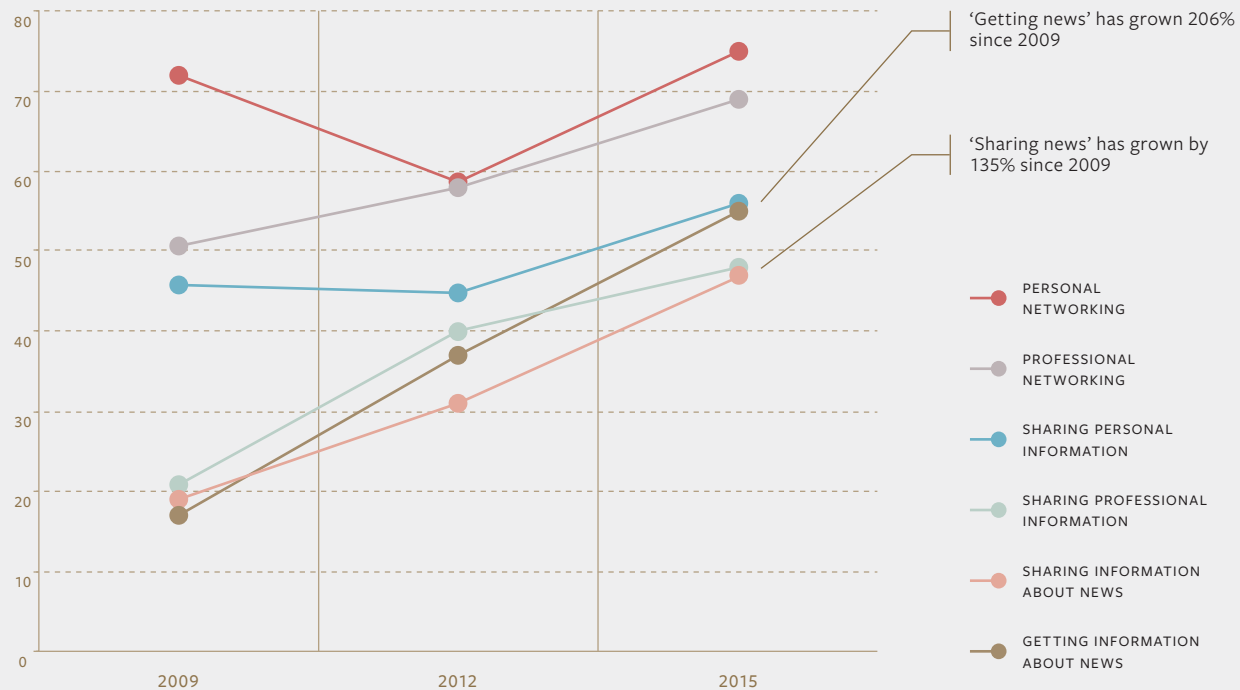
There are several purposes for which Democrats are more likely to be using social media than their Republican colleagues: personal networking (78% vs. 72%), sharing professional/work-related information (52% vs. 43%), sharing personal information (63% vs. 53%), and sharing news (51% vs. 43%).

## 17) Personal and Professional Boundaries Continue to Blur

Getting and Sharing Washington-Focused Information Has Grown Most Quickly, Solidifying Social as a Key Discovery Tool

### Growth in Professional Purposes for Using Social Media

2009 – 2015: Percentage of Respondents



Since the 2009 WIA survey was fielded, professional purposes on social media have grown more quickly than personal ones.

- Most significant gains are seen in the purposes of getting and sharing Washington-related news and information (at 206% and 135% growth, respectively).
- Personal purposes of networking and sharing information have remained relatively flat (at 4% and 20% growth, respectively).

For organizations looking to engage Insiders on social media, this translates into a somewhat tricky balancing act. Knowing that the personal still trumps the professional as the primary reason for being there (at least for the time being), organizations need to adopt a more personal voice on social media, as their competition is not just other brands and organizations—it's people's friends, family and life events.

**“I tend to let Facebook and Twitter curate my content from the organizations I selected (National and Inside-the-Beltway publications, think tanks and advocacy groups).”**

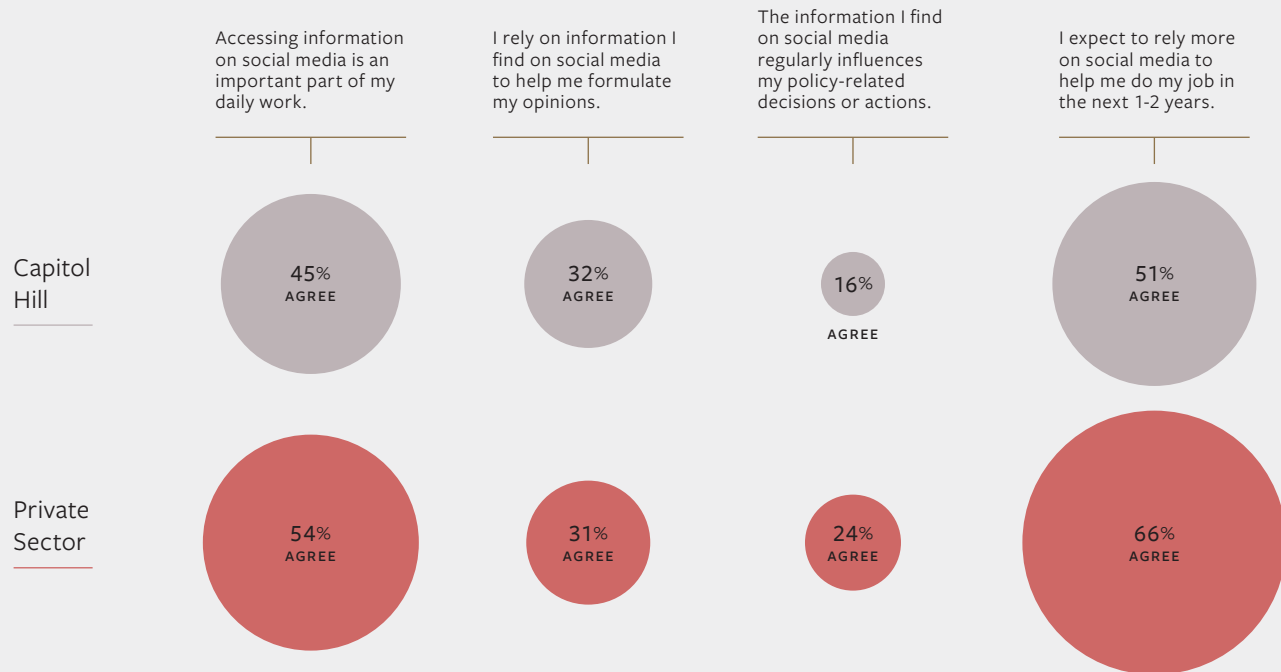
— Millennial, Private Sector

## 18) Social Media's Use as Discovery Tool Expected to Grow

But Perceived Utility Gap Highlights the Assignment of Credibility Not to the Channel (Social) But to the Source of the Content Being Shared

### Perceptions of Social Media's Role in Daily Policy Work

Percentage of Capitol Hill and Private Sector Respondents



It's clear that social media's credibility as a discovery channel is only as strong as the content being discovered and shared.

- While Capitol Hill and private sector respondents tentatively agree that social media is an important part of daily work, fewer rely on information gleaned from social channels to aid in the formulation of opinions and even fewer apply that information to decision-making—indicating that it's the content, and not the social channel, that gets the credit for aiding in these pursuits.
- Yet, there's stronger agreement that social media will be a more important part of working in Washington in the next one to two years.

**\*Note: Federal executives report significantly lower levels of reliance on social media in their day-to-day work; thus, their responses were not included in the analysis above.**

**“My most trusted news source is broadcast and print. I only trust news I see on social media and blogs if it originated [from] one of these sources (broadcast/print journalist).”**

— Gen X-er, Private Sector

**“I generally find information on social media, but will trace the information back to the original, credible news source.”**

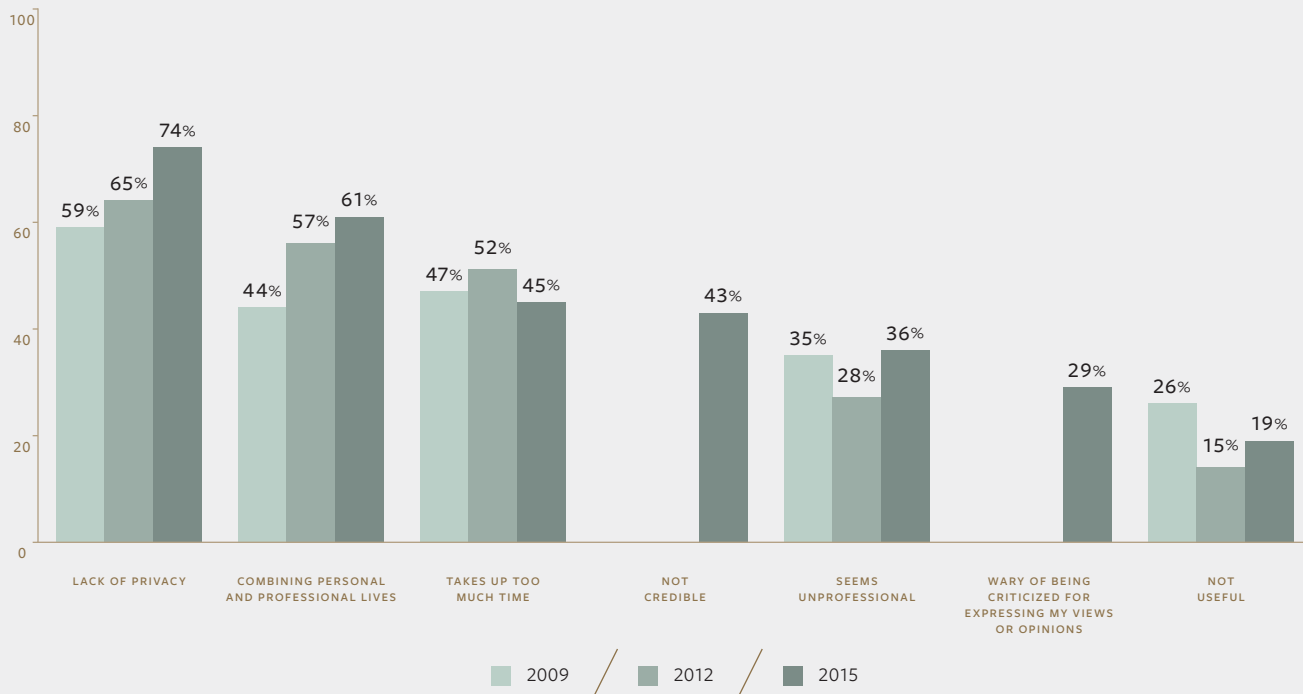
— Millennial, Private Sector

## 19) With Expanded Use Comes Expanded Concerns

Insiders' Low Levels of Trust in Social Media Tools Themselves, Discomfort Over Blending Purposes Manifests in More Widespread Reservations

### Primary Concerns When Using Social Media

Percentage of Respondents Year-Over-Year



\* "Not Credible" and "Wary of Criticism" were not choices in 2009 or 2012

Insiders' general discomfort with blending their personal and professional social personas, as well as the inherent lack of trust in social media channels themselves, lead to a plethora of ongoing concerns about using the channels.

- With the exception of taking up too much time, reservations about the usage of social media have universally increased since the 2012 survey was fielded.
- At the same time, the presence of these concerns doesn't appear to be deterring Washington Insiders from using the platforms—and using them more frequently.

The newest social platforms and apps to emerge (Snapchat, WhatsApp) have leveraged users' desires to remain private and to keep personal and professional lives separate.

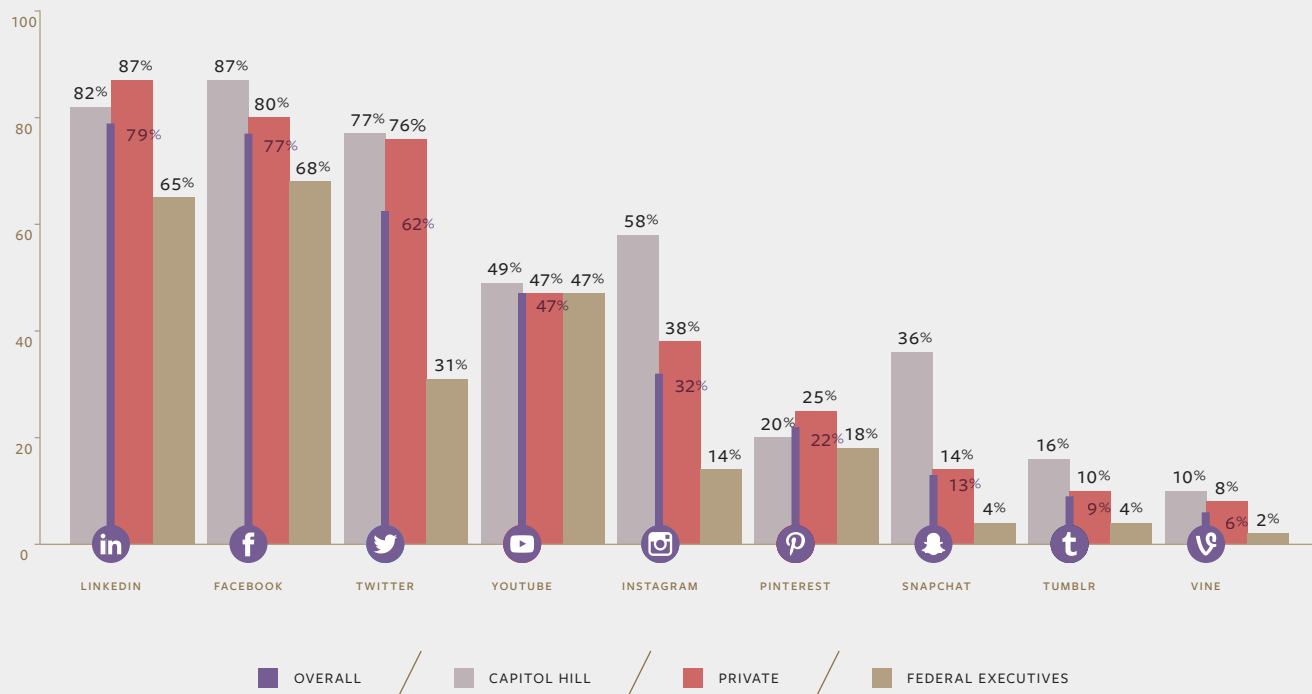
- We may begin to see a migration of usage away from public platforms like Facebook and toward more private ones.
- This poses a potential problem for organizations, since there are currently few opportunities to directly engage with users on private messaging apps.



## 20) Where the Social Activity is Occurring

### Social Media Platform Usage

Percentage of Washington Insiders Who Have Used Platform in Last Six Months by Sector and Aggregate Respondents



Among all of the sections of the 2015 edition of WIA, it is perhaps the social media platforms themselves that have changed the most since the last time the survey was fielded three years ago. Gone are platforms like BBM, GovLoop, Myspace and iChat—and in their place, Instagram, Pinterest, Snapchat, Tumblr, and Vine.

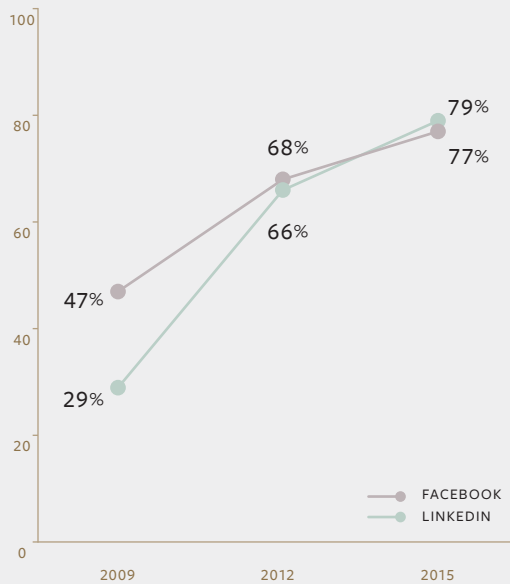
Not surprisingly, Washington Insiders are more active on a greater number of platforms than at any previous point in WIA history. Twitter, once called “pointless babble” in an earlier edition of this survey, is now used by more than three quarters of Capitol Hill and private sector respondents.

## 21) Recent Growth of LinkedIn Outpaces Other Top Platforms, Particularly Among Capitol Hill and Private Sector

Professional Role and Features Allows LinkedIn to Mitigate Insiders' Social Concerns, Making it A Platform of Choice

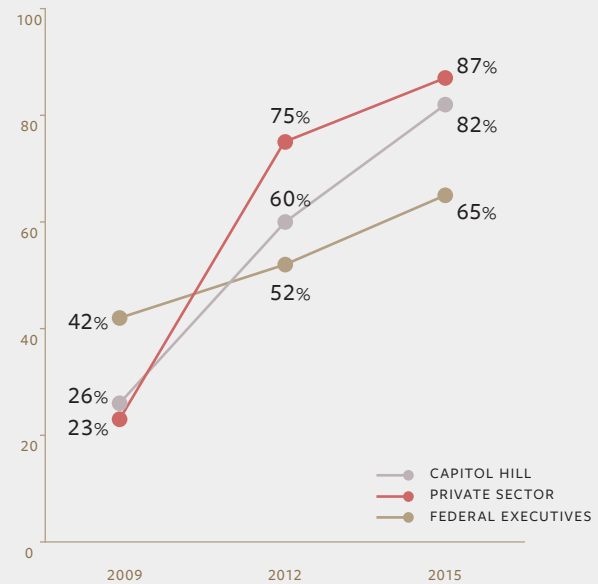
**Growth Rates of Facebook vs. LinkedIn Usage**

2009 – 2015: Percentage of Respondents



**Growth Rates of LinkedIn By Sector**

2009 – 2015: Percentage of Respondents



Since 2012, LinkedIn and Facebook have jockeyed for the top spot in Washington Insiders' social feeds—and the slight edge in 2015 goes to LinkedIn, after experiencing a steeper growth rate during the past six years (in particular among Capitol Hill and private sector respondents).

- The platform's popularity among Washington Insiders is likely a function of its professional reputation and its recent expansion of features. Respondents no doubt use the platform to keep track of the professional movements of their colleagues in the policy community, as well as to hone their own personal brands in preparation for their next job.
- LinkedIn is also buffered from most, if not all, of the social media concerns shared by Washington Insiders, which also may in part explain its ascent as of late.

\_04.1

## Opportunity

Many organizations don't fully utilize the suite of page-level services offered by LinkedIn. Aside from the fact that it's now the most widely adopted platform among Washington Insiders and is viewed as the most credible, it has a built-in, user-friendly mobile design and newer tools for organizations to use in sharing thought leadership and other content.

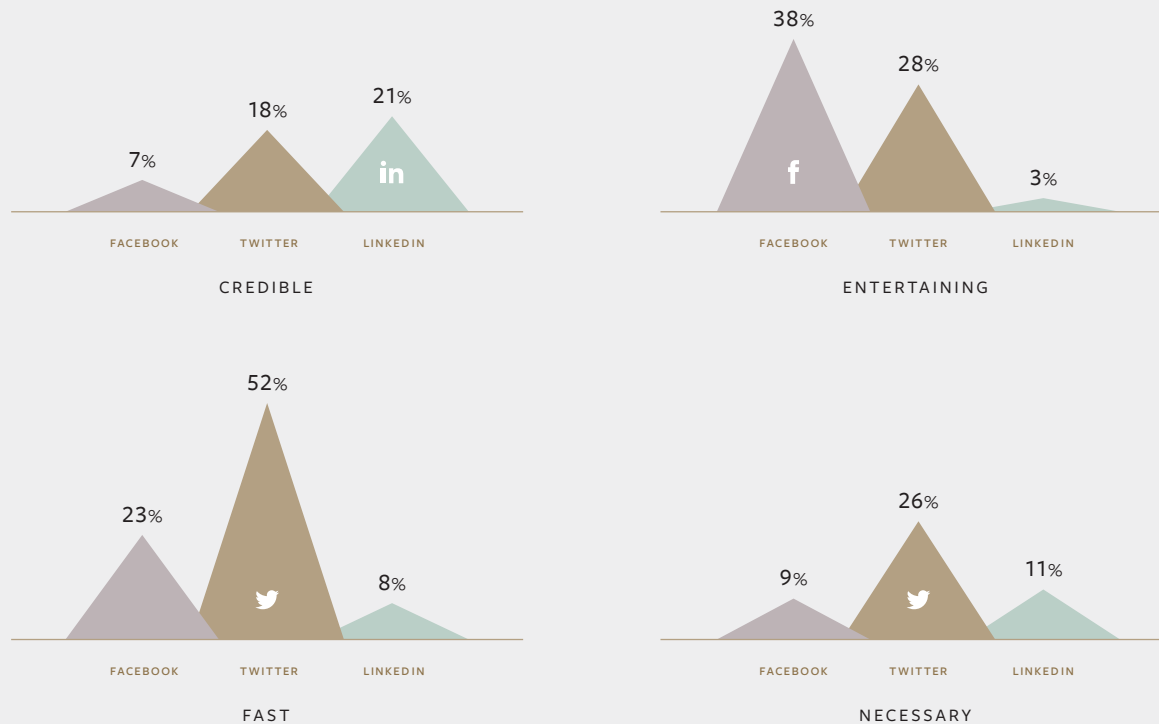


## 22) Within Social Channels, an Unbundling of Use Cases

Rather Than Using One for Everything, Insiders Choose Specific Channels for Specific Purposes

### Washington Insider Perceptions of Primary Social Media Channels

Percentage of Respondents



Washington Insiders have very different perceptions of the social media platforms they use, which leads to very specific use cases. While LinkedIn is viewed as being the most credible by respondents and Facebook the most entertaining, Twitter is both the fastest and the most necessary.

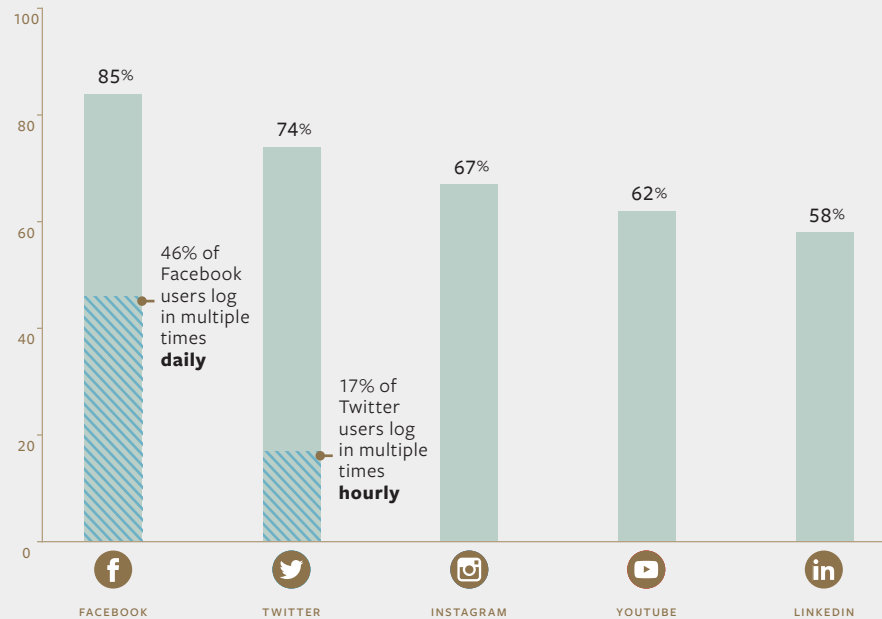
That's quite a remarkable turnaround for the platform associated with "pointless babble" in previous studies; in fact, the percentage of respondents identifying Twitter as necessary has grown more than three times since 2012 (from 8% to 26%). This highlights the need for organizations to more actively monitor the channel, as a growing number of crucial conversations are taking place there.

## 23) Facebook Still Wins the Frequency Game

But All Major Social Platforms Garner More Frequent Activity

### Frequency of Social Media Usage by Channel

Percentage of Respondents Who Use Channel Multiple Times Weekly or More



When evaluating the potential of a social media platform, it's important to consider not just how broad user adoption is, but also how frequently it's used among adoptees.

- Facebook is still the most frequently used platform, with 46 percent of users logging in multiple times daily.
- Twitter claims the highest rate of multiple log-ins per hour, at 17 percent.

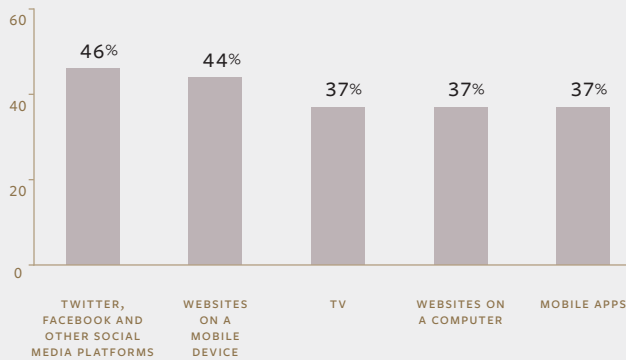
Among Washington Insiders, all five of the most broadly adopted platforms (LinkedIn, Facebook, Twitter, YouTube, and Instagram) boast multiple visits a week from more than 50 percent of their users.

## 24) In Slower Weekend Times, Social's Gateway Role Remains Strong for Most

Social Media is the Top Channel for Weekend Information Consumption Among Capitol Hill and Private Sector Respondents

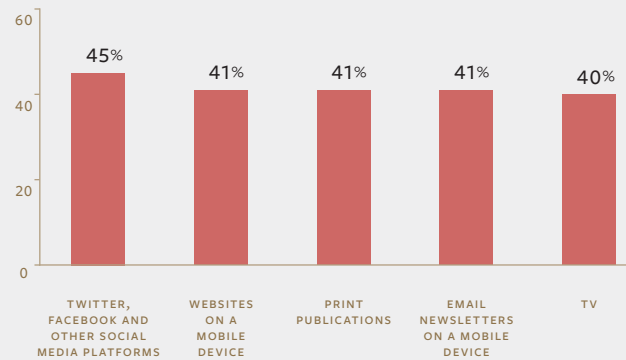
### Top 5 Weekend Channels

Percentage of Capitol Hill Respondents



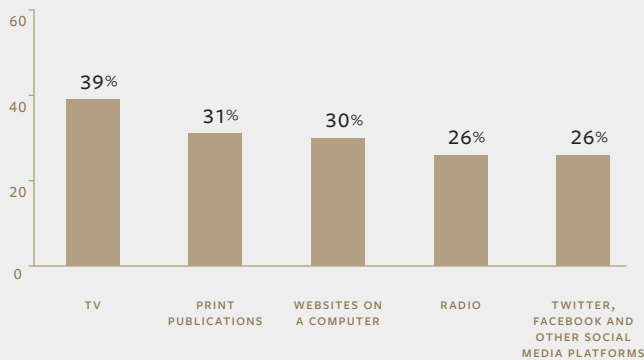
### Top 5 Weekend Channels

Percentage of Private Sector Respondents



### Top 5 Weekend Channels

Percentage of Federal Executive Respondents



For Capitol Hill and private sector respondents, social media vaults to the top spot on weekends, with more using these channels to consume Washington-related information than any other channel. Social media is also among the top five channels during the weekend for federal executives, although it's outpaced by more traditional channels like TV, print and radio.

\_04.2

## Opportunity

Many organizations let their social media accounts go dormant on the weekends, missing the chance to engage professionals at a time when they're not only active on the channels, but when there's also relatively less competition from other channels.

Take advantage of free or paid social media scheduling services (such as Hootsuite, Tweetdeck or Sprout Social) to prepare and share content during these typical organizational down times.

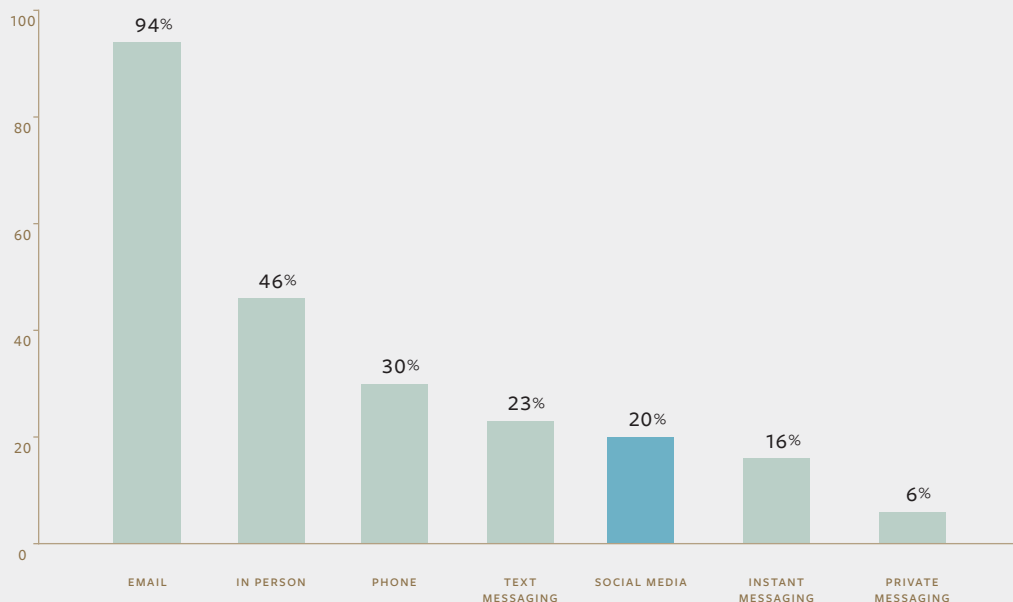


## 25) Sharing is Still Largely a Private, Rather than Public, Activity

Despite Increased Willingness to Use Social Channels for Sharing Information, More Traditional One-to-One Channels Still Take Precedence

### Channels Most Relied Upon to Share Important Washington-Focused News or Information with Colleagues

Percentage of Respondents



Washington Insiders continue to rely on private channels when sharing information with colleagues, often forgoing public sharing on social media. Social media ranks relatively low, despite the strategic attention given to encouraging potential sharing on these channels by organizations. Sharing preferences hold true across generations, workplaces, and political parties as well.

- Of note, Millennials continue to rely on email as their sharing channel of choice, despite more broad adoption of emerging instant messaging and private messaging services among that demographic.



—04.3

## Opportunity

As mobile instant messaging as well as private messaging services and apps are more broadly adopted over time, organizations would be wise to pay attention to these “dark” sources of traffic. All web content should, at a minimum, be made shareable by email and social media, and organizations may want to follow the lead of media brands and consider experimenting with adding the functionality to allow for sharing via private messaging services as well.

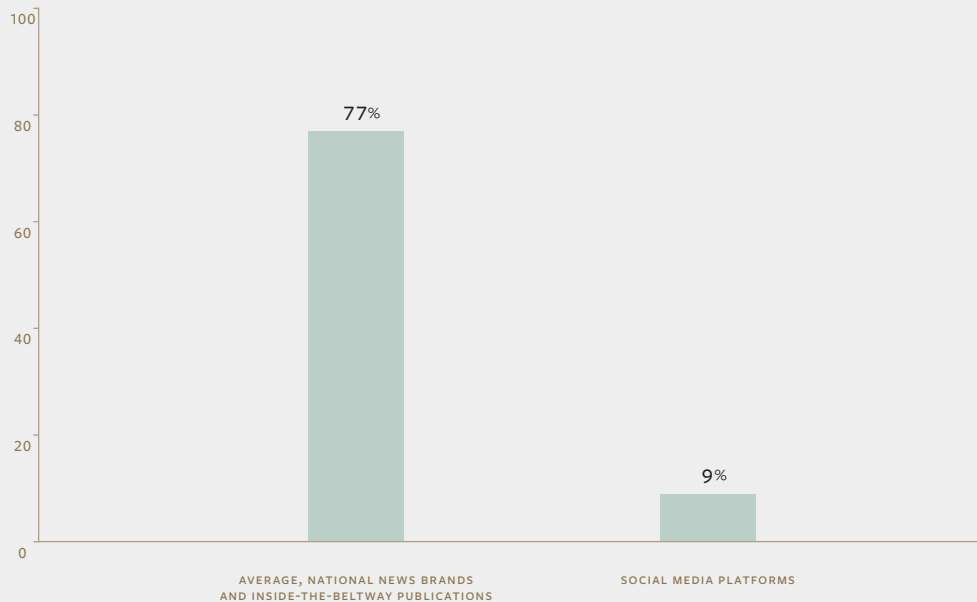


## 26) Social Sharing Efficacy Limited by Trust Appropriation

Trust Gap Between Originator of Content and Platform It's Shared On Highlights Importance of Content, Rather than Channel

### Most Trusted Sources of News and Information

Percentage of Respondents



\*Data reflects only those who work in the Washington, D.C. metro area

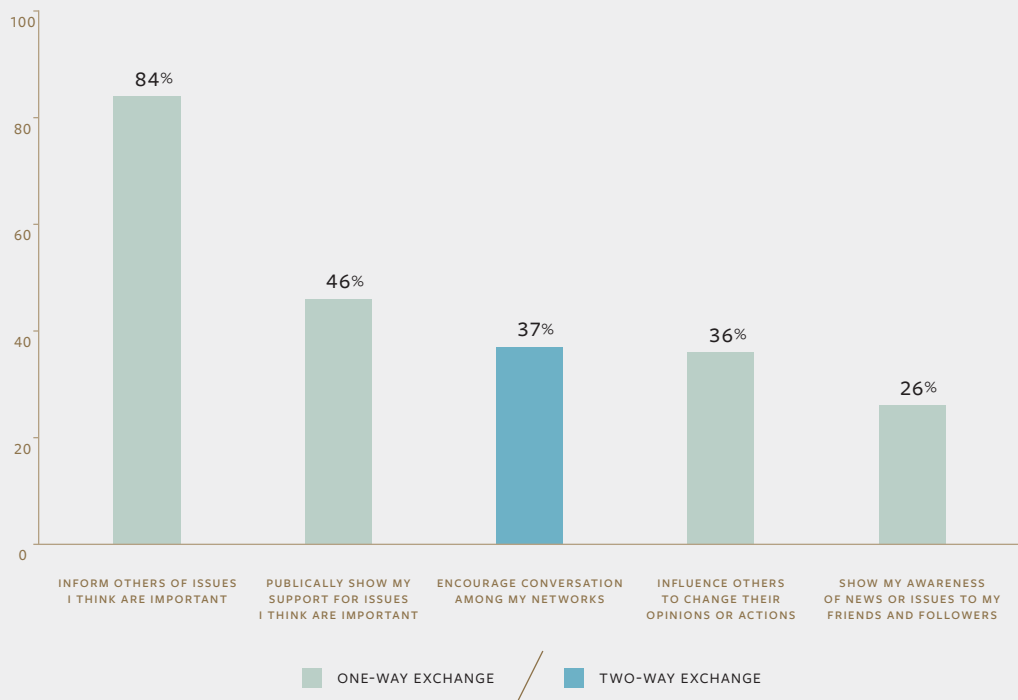
Social sharing persists, though ultimately the influence of the information being shared via social channels is hindered by a few factors—the gap in trust between the original creator of the content and the platform on which it's being shared, and the mindset and motivation of the sharer.

## 27) ...While Also Being Limited by Motivations

Insiders Driven By Desire to Inform, Not to Engage, When Using Two-Way Channels

### Reasons for Sharing Washington Related News and Information with Friends and Followers

Percentage of Respondents



Washington Insiders appear to embrace a one-way mindset when sharing, aiming to inform but not necessarily to engage in a conversation or to hear feedback on the ideas or issues shared. **Respondents seem far more receptive to being the influencer when it comes to social media than being the influenced.**

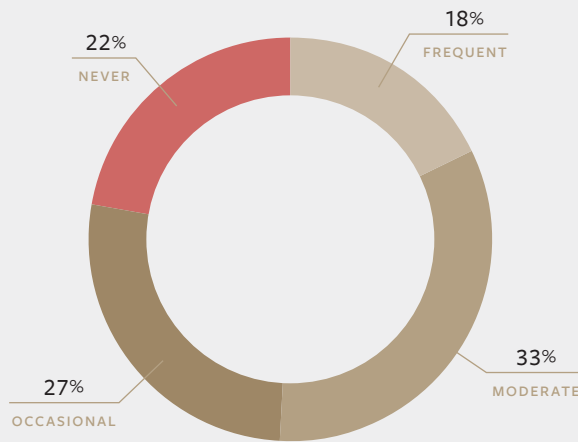
Organizations looking to leverage peer-to-peer influencer strategies must seek out individuals who approach sharing with a more conversational mindset.

## 28) Most Willing Sharers are Often Most Effective

Those Who Share Frequently Driven by Desire to Influence, Prompt Conversation More Than Others

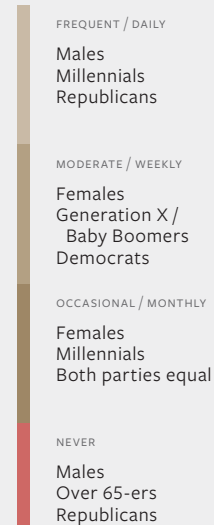
### Frequency of Sharing Washington News and Information Through Social Media

Percentage of Respondents



### Defining the categories of sharers

Select demographic groups more likely to be present in categories of sharers



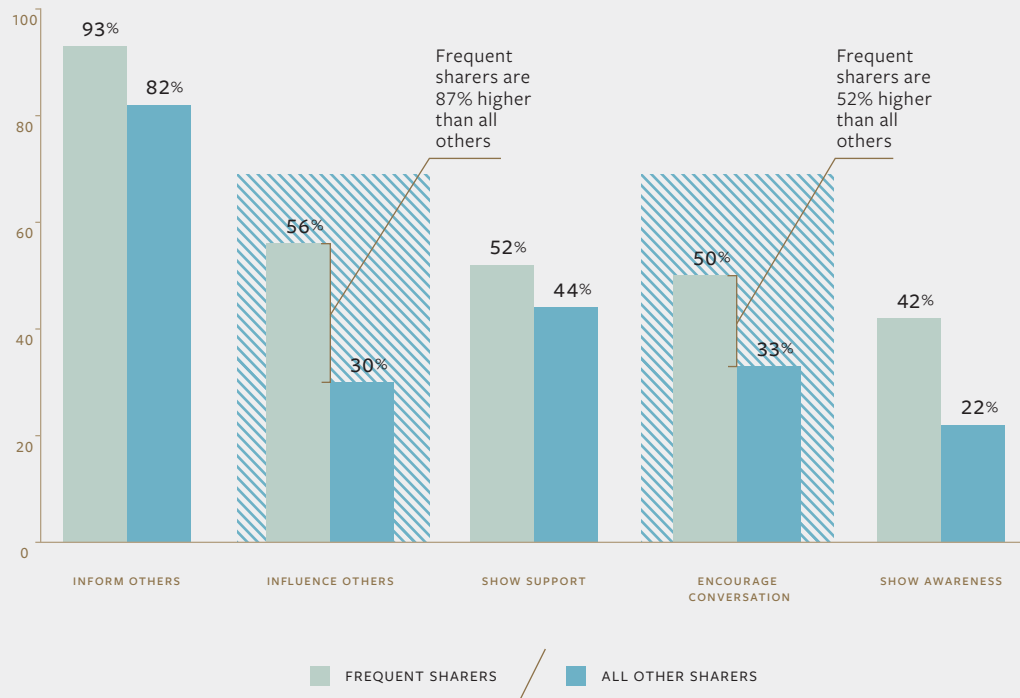
More than three quarters of Washington Insiders share policy-related information with friends and colleagues on social media at least occasionally (as defined by less than once a month or once a month). Half of survey respondents fall into the categories of either frequent sharers (daily) or moderate sharers (weekly). Just over 1 in 5 respondents never share on social media at all.

**“I steer clear of online debate. I see too much hateful, narrow-minded argument, not constructive discussion.”**

— Baby Boomer,  
Federal Executive

### Reasons for Sharing Washington Related News and Information with Friends and Followers

Percentage of Frequent Sharers vs. All Other Sharers



Frequent sharers of Washington information or issues (at least daily) on social media report being much more likely to be motivated by a desire to influence others, and to encourage conversation than their less frequently sharing peers.

- For organizations aiming to make something “go viral” or to encourage peer-to-peer sharing of information, these are the individuals to potentially target
- Calls-to-action should be tailored to appeal to their distinct motivations for sharing.

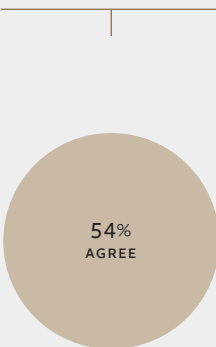
## 29) Mobile a Necessity, Though Currently Not an Enjoyable One

Impatient Insiders Will Rely More on Mobile in the Future as Experience Catches Up to Expectations

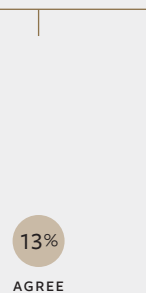
### Perceptions of Smartphone and Tablet Usage in Daily Policy Work

Percentage of Capitol Hill and Private Sector Respondents

I regularly read work-related documents (e.g., reports, white papers) on my smartphone or tablet.



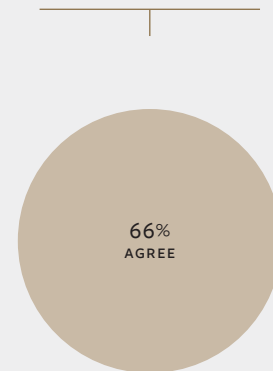
I would rather read information on my smartphone or tablet than on a desktop or laptop.



I am more likely to share information that I read on my smartphone or tablet with colleagues than when I read it on a desktop or laptop.



I expect to rely more on my smartphone or tablet to help me do my job in the next 1-2 years.



### Mobile

We know that trust is placed in content—which spells trouble for organizations without mobile-optimized content today.

- Despite widespread adoption of smartphones and tablets, Insiders still prefer to read and share information with colleagues on a desktop or laptop than a mobile device.
- And Insiders' mixed feelings on the current experience don't preclude them from anticipating increased reliance on smaller screens in the future.

**If the experience of consuming an organization's content is less than ideal on mobile, impatient Washington Insiders will quickly move to another source that provides a better experience.**

—04.4

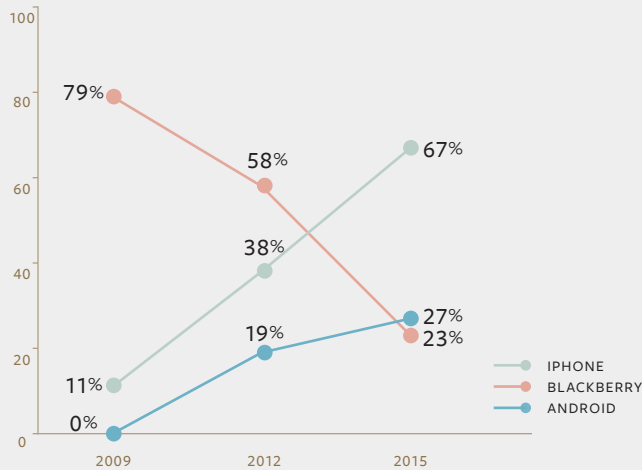
## Opportunity

Organizations that can provide a user friendly, streamlined mobile experience—whether by optimizing their website, in making white papers or other publications easier to read on mobile, or in simplifying an e-newsletter—will have a tremendous advantage among Washington Insiders who rely on their devices but don't particularly enjoy using them right now.

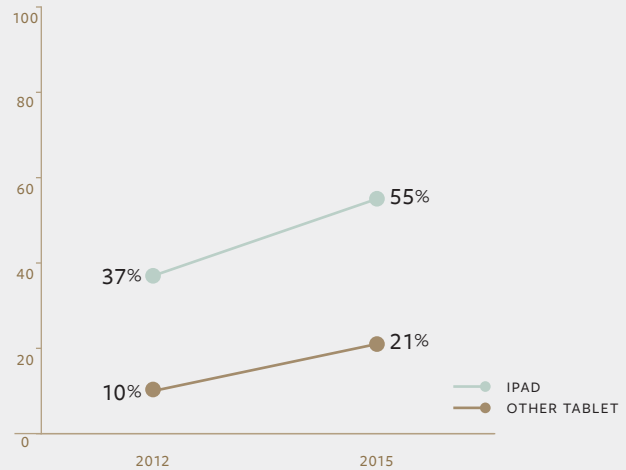


### 30) Apples Up, Berries Down

**Smartphone Adoption by Washington Insiders**  
Percentage of Respondents

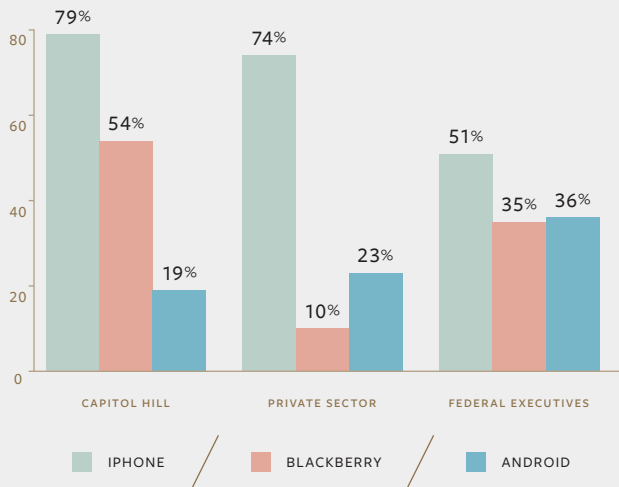


**Tablet Adoption by Washington Insiders**  
Percentage of Respondents

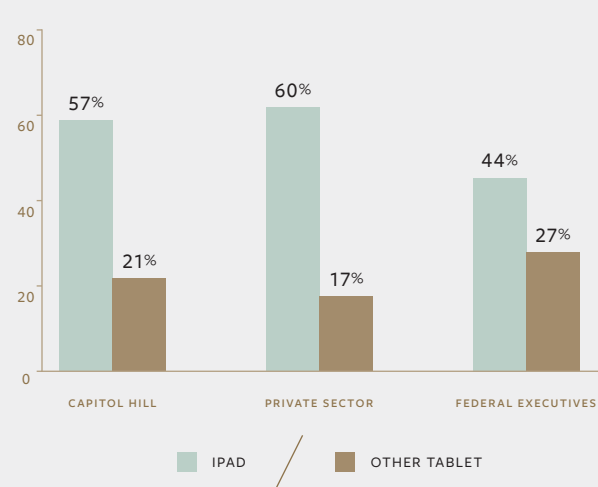


### 31) Reaching a Device Consensus Across the City

**Smartphone Adoption by Washington Insiders**  
Percentage of Respondents by Sector



**Tablet Adoption by Washington Insiders**  
Percentage of Respondents by Sector



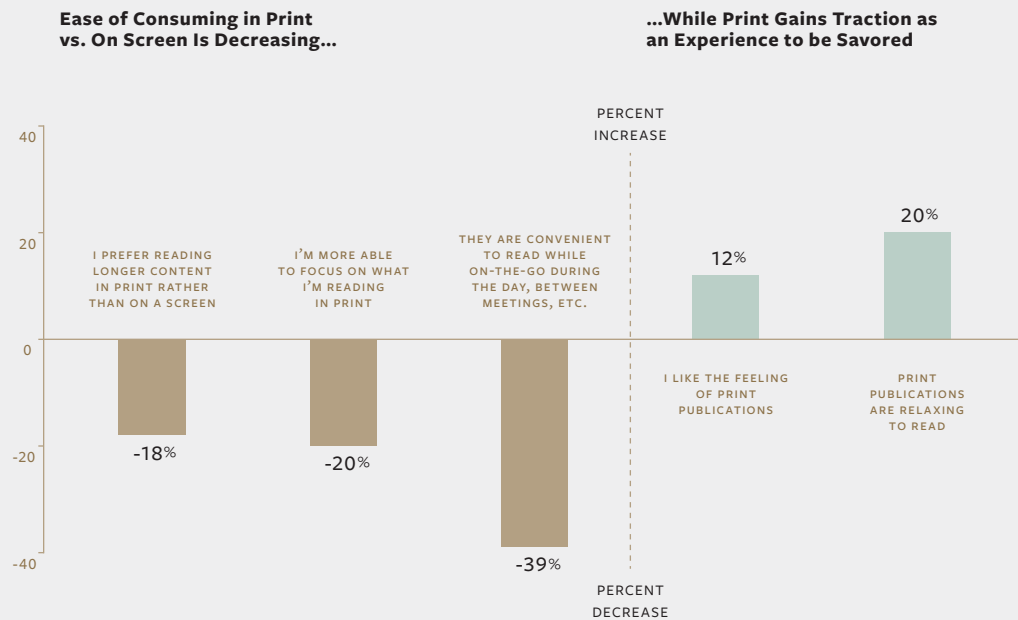
Washington Insiders have crowned a new king of mobile devices, and it's Apple—unseating the BlackBerry's long-held dominance in the policy community. iPhone is now the consistent device of choice across all three categories of respondents, nearly doubling in usage since the last time WIA was fielded in 2012. On the tablet front, Capitol Hill and federal executive respondents have quickly caught up with their early adopter iPad-owning peers in the private sector (whose rate of growth since 2012 was comparably slower).



## 32) Acclimatization to Digital Makes Print Consumption More Experiential

### Reasons for Regularly Using Print Publications for Washington-Focused News and Information

Percentage Change in Responses, 2012 – 2015



### The Role of Print in an Online World

Over time, Washington insiders have become more accustomed to consuming large amounts of information on screens, both big and small.

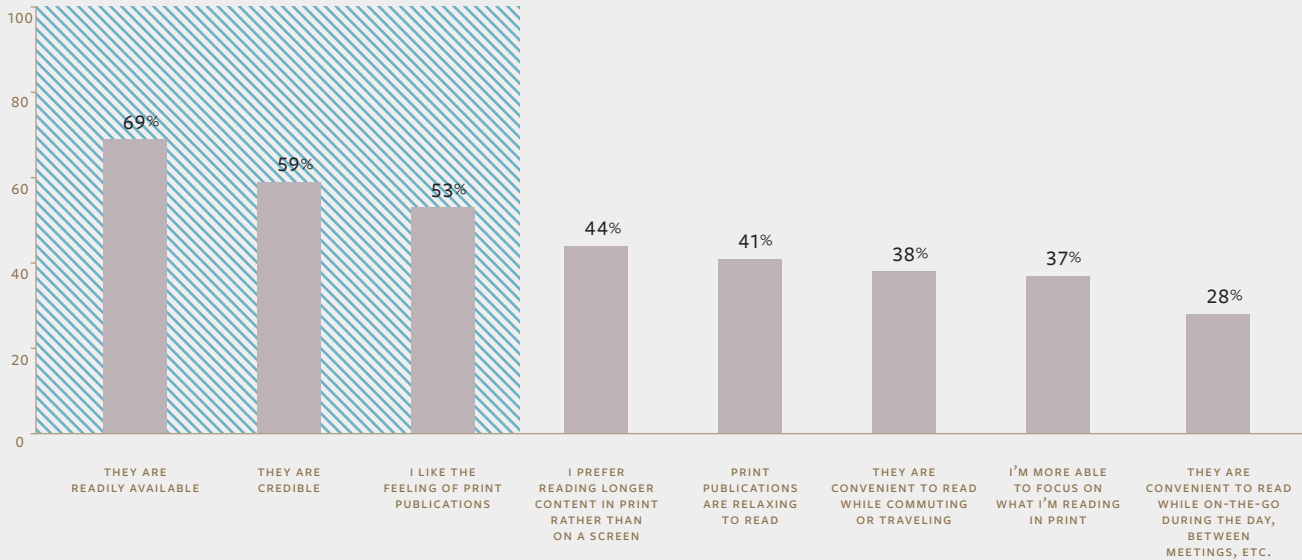
- Preferences for print over digital have diminished in areas related to ease and convenience. As more organizations and content publishers continue to make strides in mobile design, it is anticipated that these situational preferences for print will decline even further.
- At the same time, print is enjoying a bit of a re-birth as a luxury product, with a greater number of respondents appreciating the experience and tactile benefits of reading it.

**“When I read a print publication my mindset is different. I am far more receptive, and relaxed, and able to concentrate. There just aren’t as many distractions.”**

— Baby Boomer, Private Sector

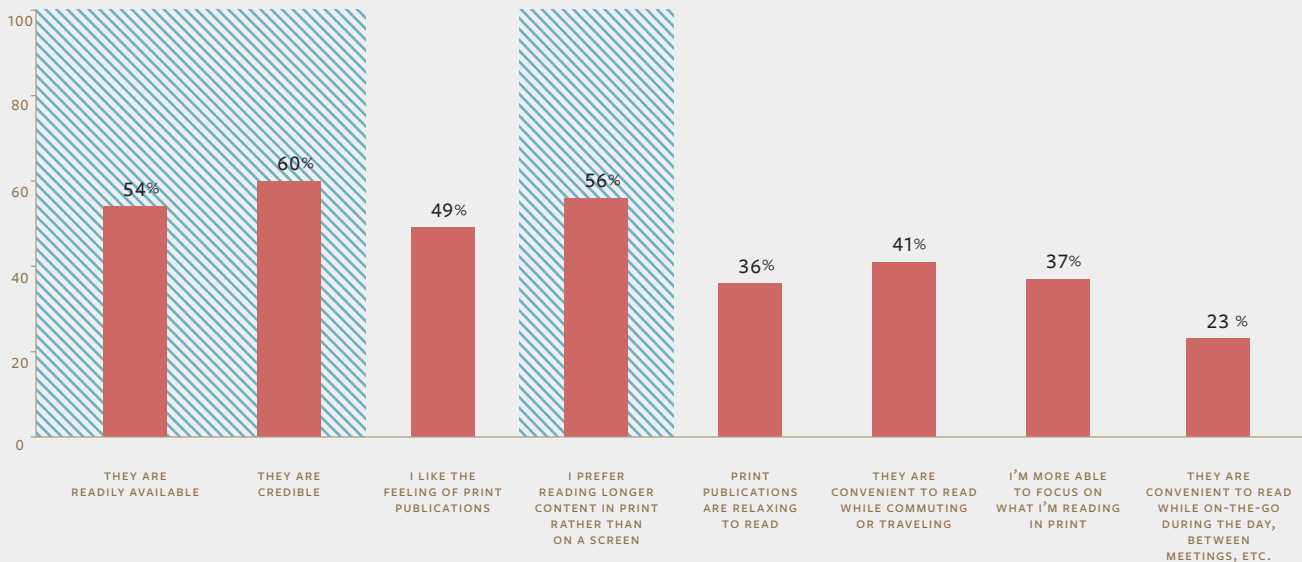
### 33) Capitol Hill Still Values Credibility and Access of Print Publications

**Reasons for Regularly Using Print Publications for Washington-Focused News and Information**  
*Percentage of Respondents, Capitol Hill*



### 34) Private Sector Still Attracted to Credibility and Readability of Print

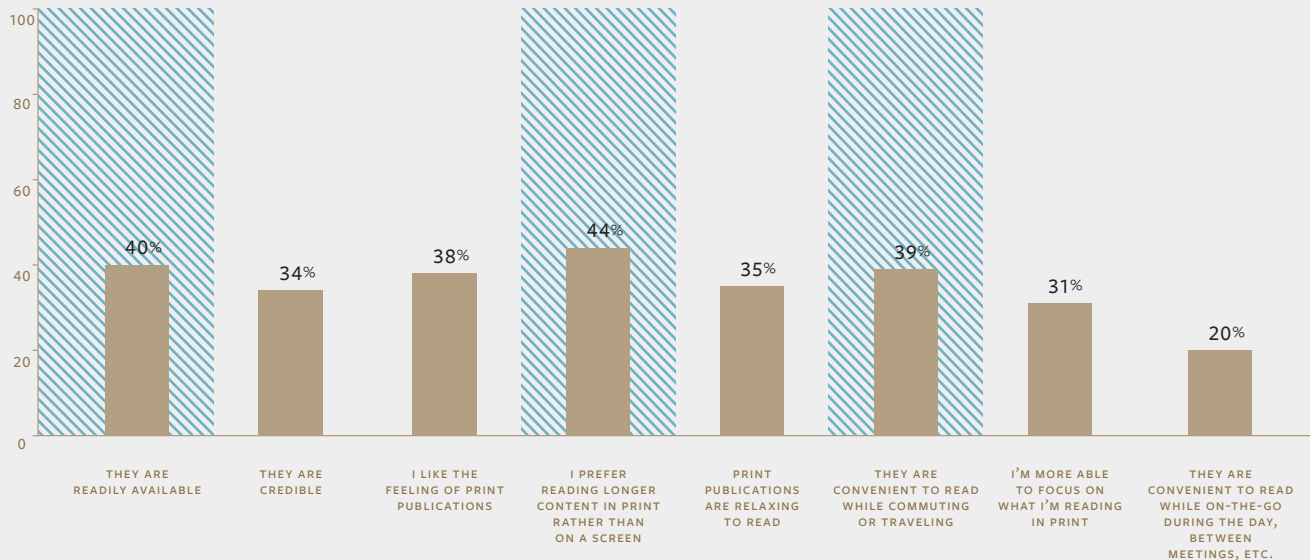
**Reasons for Regularly Using Print Publications for Washington-Focused News and Information**  
*Percentage of Respondents, Private Sector*



## 35) Federal Executives Appreciate Convenience, Ease of Reading in Print

### Reasons for Regularly Using Print Publications for Washington-Focused News and Information

Percentage of Respondents, Federal Executives



The role of print publications in Washington Insiders' media diets has continued to slowly diminish, though it certainly has not yet become obsolete.

- 69 percent of Capitol Hill respondents still consume print editions throughout the workday.
- 64 percent of private sector respondents report consuming print during the workday, as do 53 percent of federal executives.

The primary reasons for one to consume the print edition over an online counterpart vary across respondent categories:

- Capitol Hill respondents are drawn to print's availability and credibility, while private sector respondents cite a preference for consuming longer content in print than on a screen.
- Federal executives seem most willing to embrace online and mobile versions at the expense of print—not a single reason for using print over digital registered with a majority of respondents.

**“If you watch two or more of the evening news broadcasts, one network will include or omit a fact that has a material effect on my complete understanding of the event. Newspapers/print media provide a lot more detail.”**

— Baby Boomer,  
Federal Executive

**“The only time I absolutely trust news is when I get ink on my fingers while reading it in the morning.”**

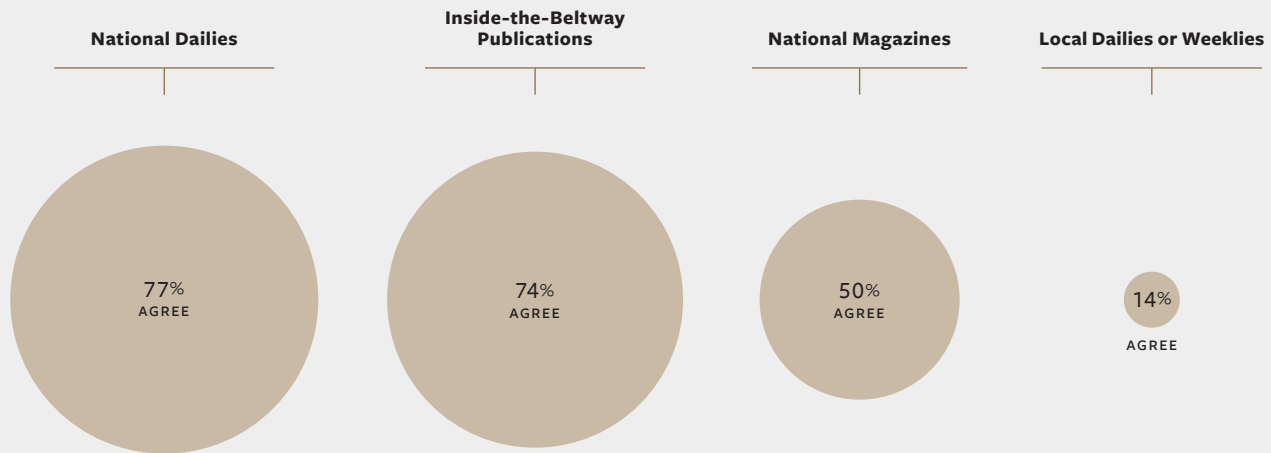
— Millennial, Capitol Hill Staffer

## 36) All Print is Not Created Equal

Within the Highly Trusted ‘Established Media’ Category of Sources, Certain Types of Publications Are More Applicable to Daily Work

### Rating the Importance of Types of Print Publications to Daily Work

Percentage of Respondents Indicating Print Publication was “Very Important” or “Important”



\*National Dailies include publications like *The Wall Street Journal*, *The New York Times*, and *The Washington Post*  
 \*Inside-the-Beltway includes publications like *POLITICO*, *National Journal*, and *The Hill*  
 \*National Magazines include publications like *The Atlantic*, *The Economist*, and *Time*  
 \*Local Dailies or Weeklies include publications like *The Gazette*, *The Virginian-Pilot*, and *Fairfax Times*  
 \*Data reflects only those who work in the Washington, D.C. metro area

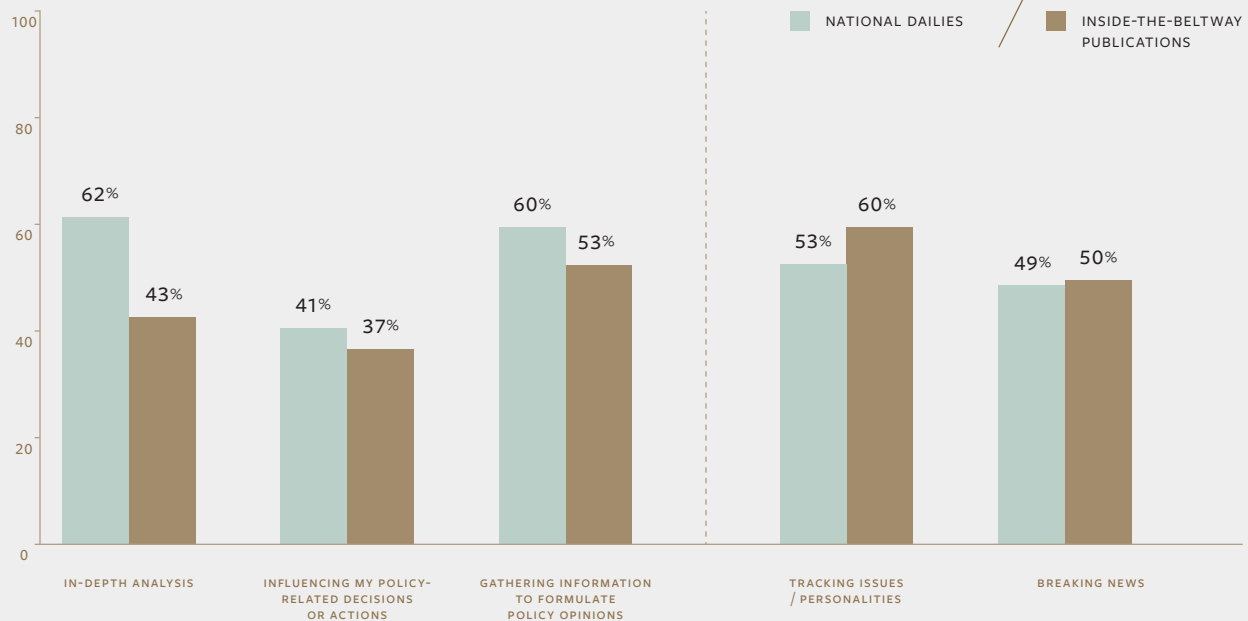
Washington Insiders are largely in agreement that national dailies and Inside-the-Beltway publications are the print publication formats most helpful to their daily work. This is consistent with the higher levels of trust assigned to national and Inside-the-Beltway news brands as a whole.

Generationally, it’s interesting to note that Millennial respondents identify Inside-the-Beltway publications as being important to their work more than any other publication format.

## 37) Applicability of Print Brands a Function of In-the-Moment Purpose

### Relative Strengths of Printed Formats, by Category

Percentage of Respondents



\*National Dailies include publications like *The Wall Street Journal*, *The New York Times*, and *The Washington Post*

\*Inside-the-Beltway includes publications like *POLITICO*, *National Journal*, and *The Hill*

\*Data reflects only those who work in the Washington, D.C. metro area

When it comes to specific purposes for seeking information in various print publication formats, national dailies lead most—but not all—other formats.

- Insiders cite national print publications as being most important for formulating policy opinions, in-depth analysis, and influencing policy-related decisions.
- Inside-the-Beltway publications are preferred when following breaking policy-related news, as well as when tracking issues and personalities.

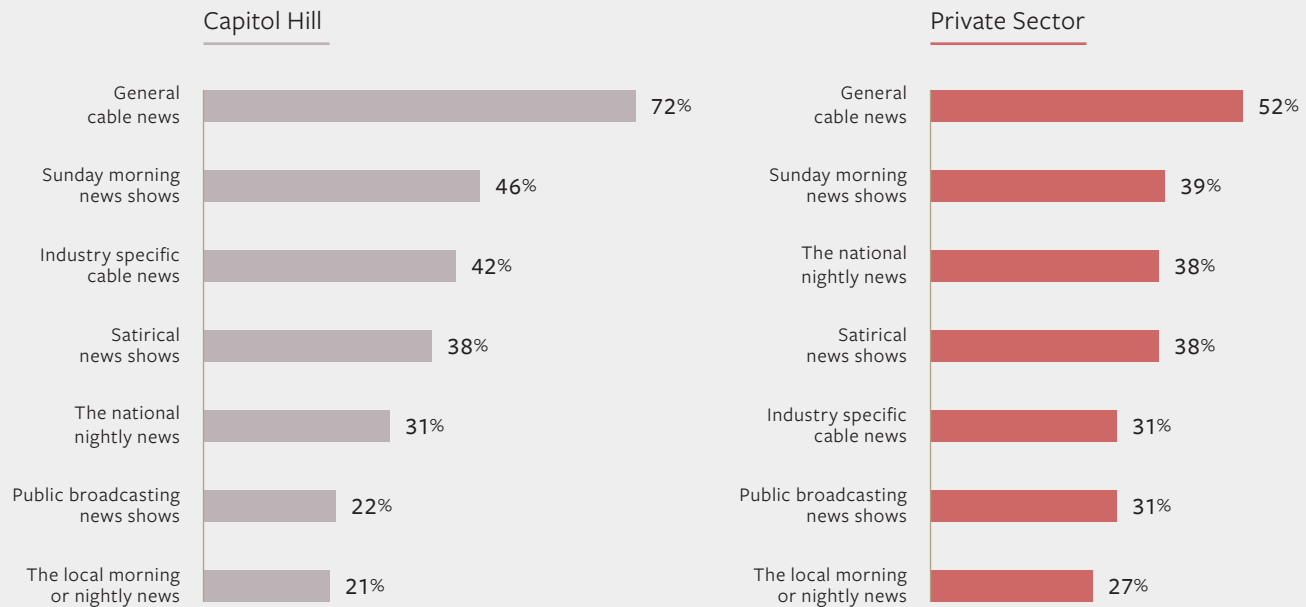
**\*Note: While the original survey question language specified the consumption of the printed publication (as opposed to the overall brand of the publication), many respondents reported an inability to distinguish the overall brand, including online versions, from the print edition(s). As such, the researchers caution that “importance” figures may incorporate responses in which individuals inherently place value on the brand as a whole, while primarily consuming it in formats other than print.**

## 38) General Cable News Most Sought After Format Among Majority of Insiders

Federal Executives Favor National Nightly News

### Preferred Formats for Viewing Important News and Information on Television

Percentage of Respondents by Sector

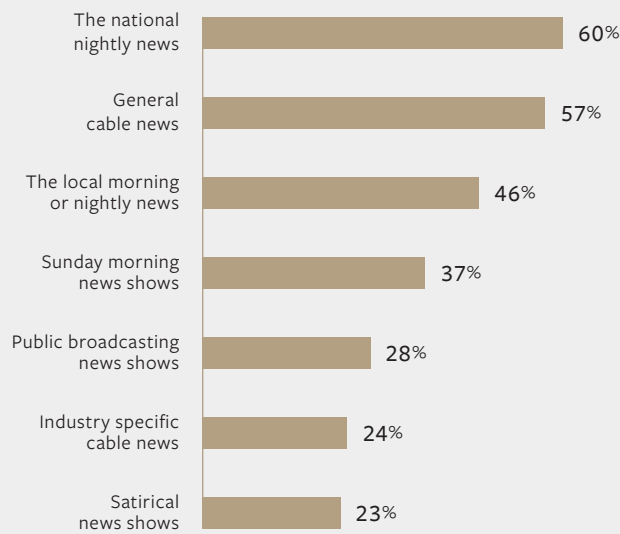


### Television and Radio

During the workday, television is typically among the first and last sources of information Washington Insiders consume.

- 73 percent of Capitol Hill respondents consume TV at some point throughout the day (peaking throughout the afternoon at work).
- 70 percent of federal executives and 63 percent of private sector respondents report watching TV during the workday, with peak consumption occurring generally right before bed.
- Cable news continues to be among the formats most often watched, leading by a large margin among Capitol Hill and private sector respondents, while federal executives give a slight edge to national networks' nightly news broadcasts.
- Sunday morning programming makes a relatively strong showing for both Capitol Hill and private sector respondents, as well—as does satirical news.

### Federal Executives



**General cable news**  
includes Fox News Channel, MSNBC, BBC or CNN

**The national nightly news**  
includes CBS, ABC or NBC

**Sunday morning news shows**  
include Meet the Press, Face the Nation or This Week

**Satirical news shows**  
include The Daily Show with Jon Stewart or Last Week Tonight with John Oliver

**The local morning or nightly news**  
includes CBS, ABC or NBC affiliates

**Industry specific cable news**  
includes C-Span, CNBC or Fox Business

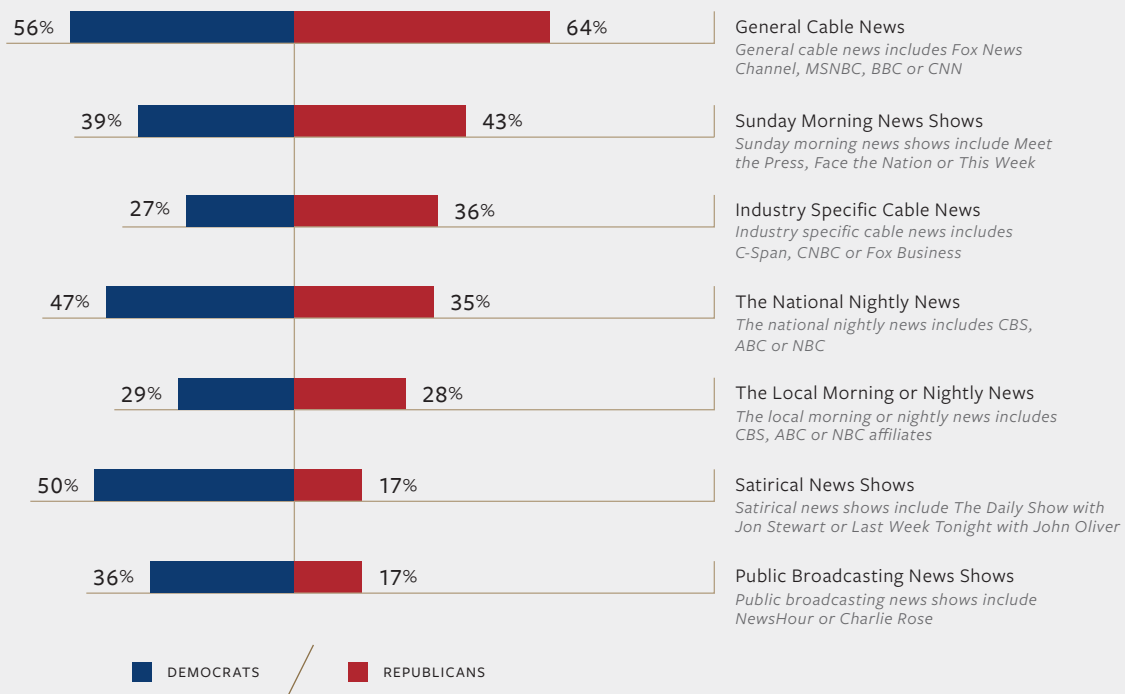
**Public broadcasting news shows**  
include NewsHour or Charlie Rose

## 39) Preferred Television Formats Vary Along Party Lines

Republicans More Likely to Prefer General and Industry Cable, While Democrats Prefer Nightly News and Satirical Programming

### Preferred Formats for Viewing Important News and Information on Television

Percentage of Respondents by Party



Washington Insiders draw some distinct party lines when it comes to the television programming they prefer:

- Republicans prefer cable news, Sunday morning news and industry-specific cable programming in higher percentages than their across-the-aisle counterparts.
- Democrats consume national network nightly broadcasts and public broadcasting at higher rates—as well as satirical news by nearly a 3 to 1 margin.

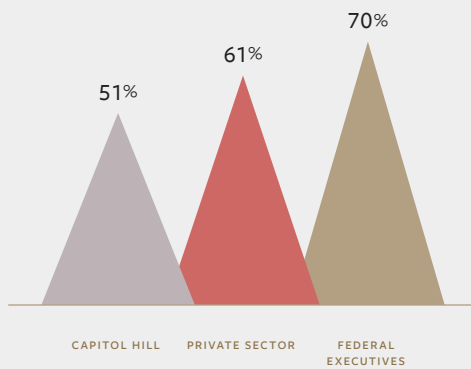


## 40) Digital Hasn't Killed the Radio Star...Yet

Majority of Insiders Still Rely on Radio for News, With Most Concentrated Consumption Found Among Federal Executives, Baby Boomers

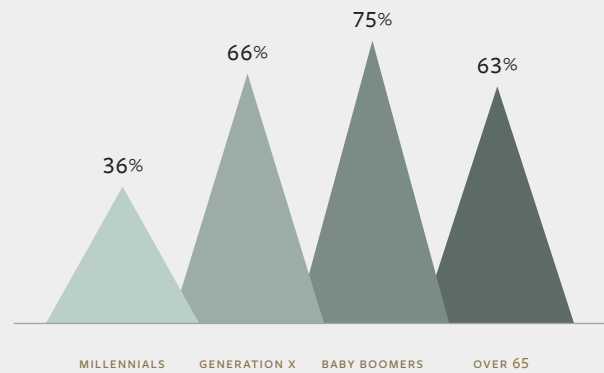
### Use Radio At Least Once Throughout the Workday

Percentage of Respondents by Sector



### Use Radio At Least Once Throughout the Workday

Percentage of Respondents by Generation



Radio remains a key channel for Washington Insiders, despite gains made by alternative audio formats like podcasts and streaming mobile apps. A majority of respondents across all sectors report using radio at least once a day, predictably peaking during the morning and evening commutes.



>> PART V.

# What Content and Formats Washington Insiders Prefer

## KEY TRENDS

9 / Washington watches a lot of online video—just not for policymaking (yet).

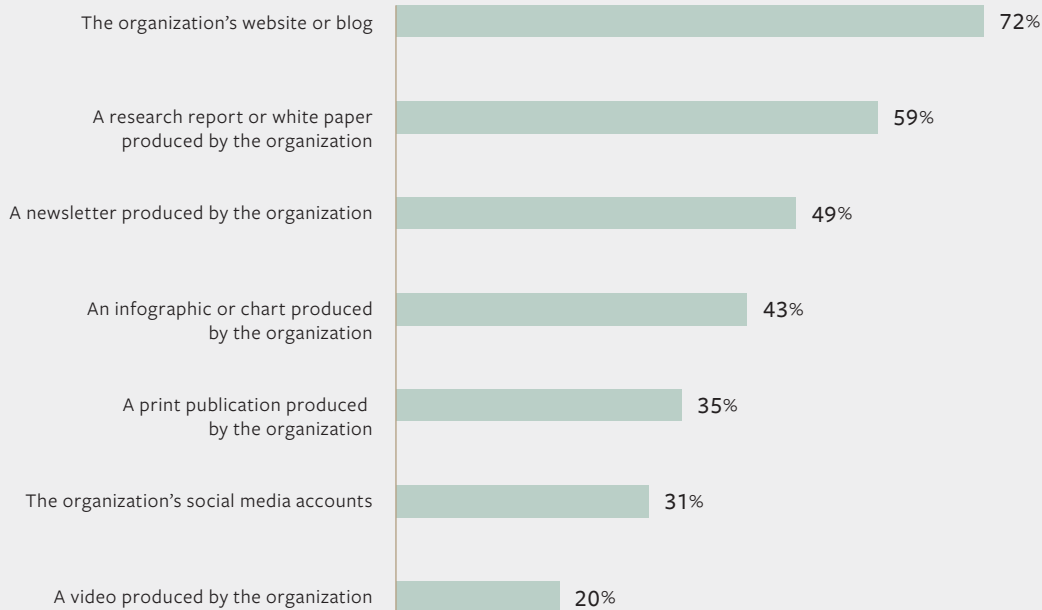
10 / Digital content should be an extension of in-person events.

## 41) Consistent Content Touchpoints Most Sought After

Despite Attention on Standalone, One-Time Content “Moments,” Most Insiders Look to More Regularly Produced Formats

### Forms of Content Sought Over the Past 12 Months from Advocacy Groups

Percentage of Respondents



The emphasis on an organization’s website provides yet more proof of the importance of mobile optimization; it remains the key portal to the rest of an organization’s content—a centralized “hub” within the cluttered media landscape, to which all other sources should point.

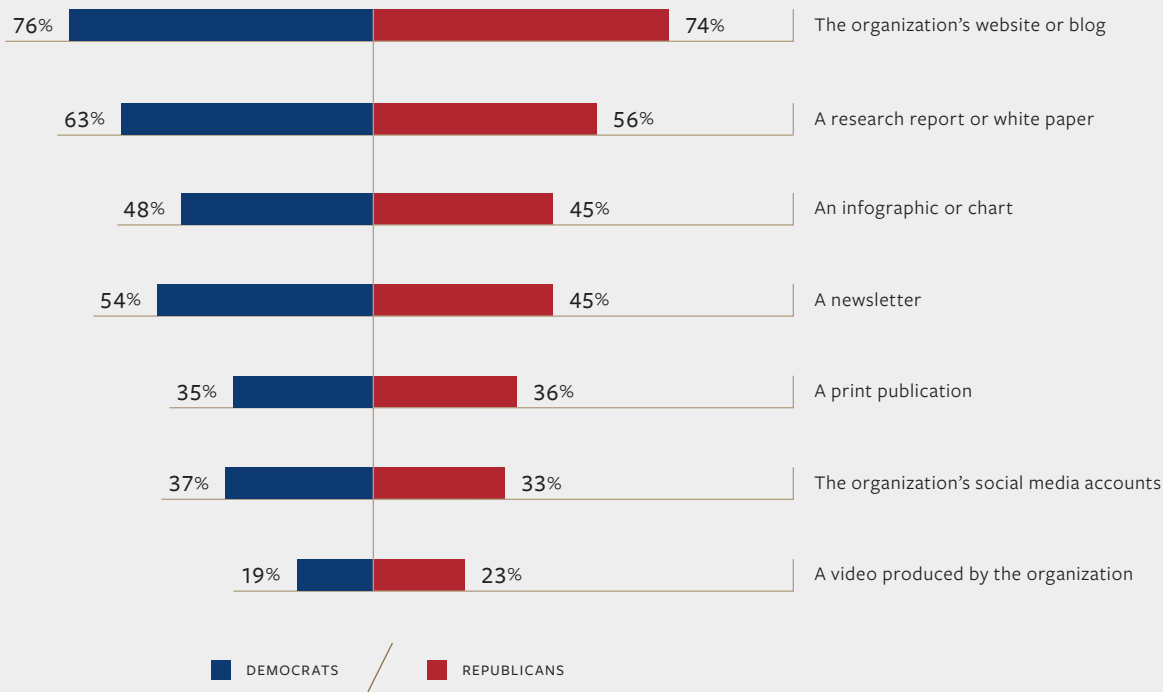
While much attention is given to high profile, singular content “moments”—infographics, podcasts, and videos—Washington Insiders rely more on content that is consistently available and regularly updated.

## 42) Parties Mostly Align in Content Sought from Associations

Democrats More Likely to Consume White Papers and Newsletters, While Republicans Slightly More Likely to Consume Video

### Forms of Content Sought Over the Past 12 Months from Advocacy Groups

Percentage of Respondents by Party



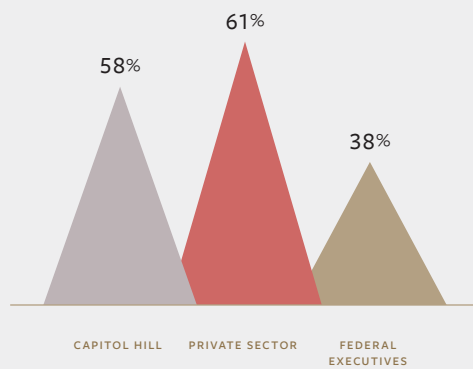
Across party lines, respondents are mostly in agreement about the kinds of content they find most helpful. Democrats are more likely to have utilized a research report or white paper during the past year, as well as an organization's social media accounts, while Republicans are more likely to have watched a video produced by an organization.

## 43) Reports of the White Paper's Demise Greatly Exaggerated

Insiders—Particularly the Youngest Generation—Regularly Seek Out White Papers from Associations and Think Tanks

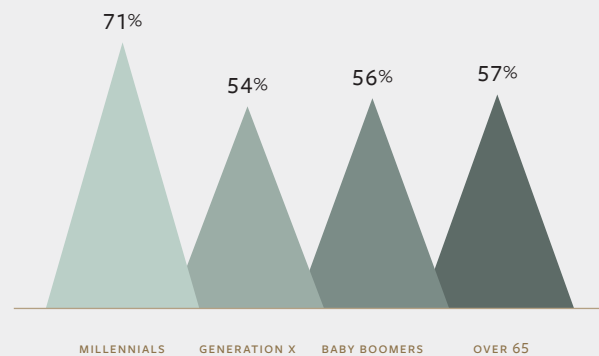
### Sought White Paper Content in Previous 12 Months

Percentage of Respondents by Sector



### Sought White Paper Content in Previous 12 Months

Percentage of Respondents by Generation



### White Papers

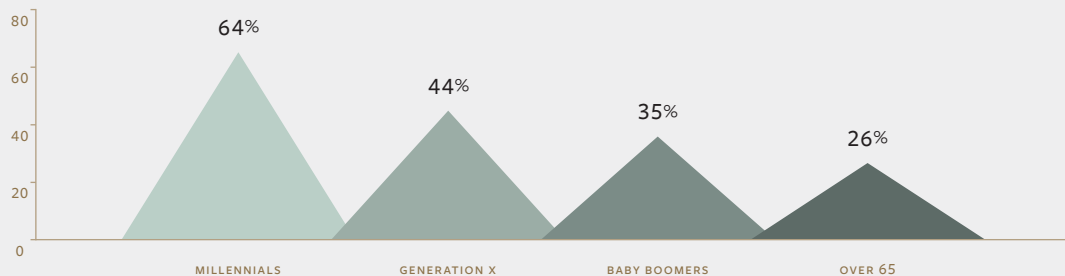
The oft-used white paper remains a viable form of content for Washington Insiders. In fact, Millennial consumption offers proof that it may have staying power for some time to come; more than 7 in 10 Millennials have utilized a white paper in the past 12 months, compared to just over half of all other generational respondents.

## 44) Younger Generations Provide Glimpse of Content Directions to Come

Thirst for Data, Higher Than Average Desire for Simplification Combine to Create Millennial Demand for Data Visualizations

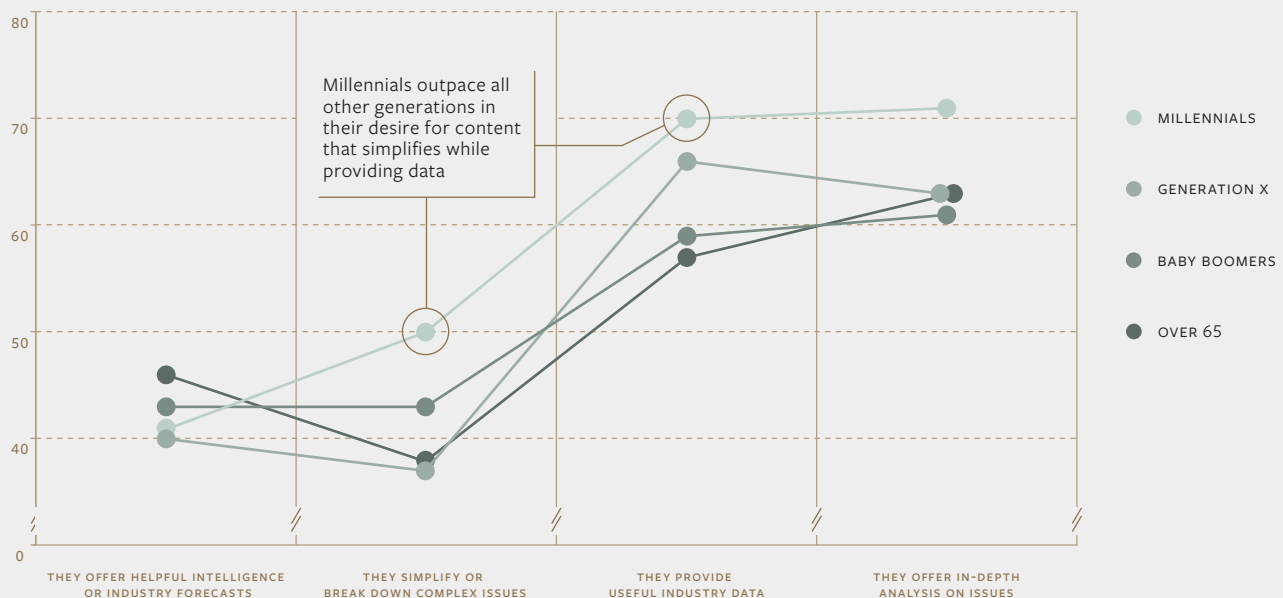
### Washington Insiders Who Seek Out Association Content in Chart or Infographic Form

Percentage of Respondents by Generation



### Generational Differences in Reasons for Seeking Content From Associations, Think Tanks, and Nonprofits

Percentage of Respondents by Generation



## Infographics

Infographics have gained popularity in recent years as a way to quickly convey complex data or information in ways that are visually engaging and shareable on the web.

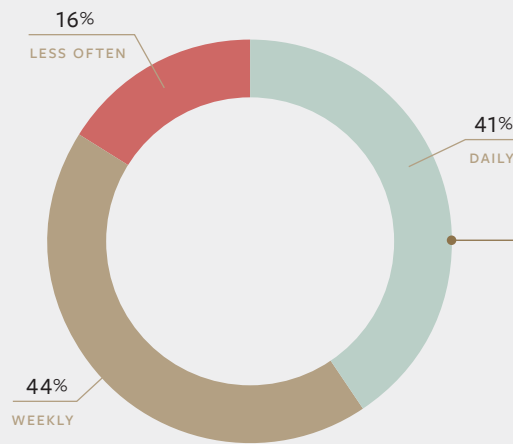
- Among Washington Insiders, the popularity of infographics as a source increases almost linearly with each successively younger generation.
- For Millennials in particular, infographics offer the ideal mix of data and simplification—the latter of which they look for in association content far more frequently than any other generation.

## 45) Video Consumption a Regular Part of Online Life

More than 8 in 10 Insiders Consume Online Video At Least Weekly; 4 in 10 Consume It Daily

### Frequency of Online Video Consumption

Percentage of Respondents



#### A Surprise Among Most Active Consumers

40% of Hill Staffers watch online video several times a day, as do 31% of Federal Executives. Private Sector lags at just 15%.

### Online Video

Outside of the association and think tank space, online video content generally performs well.

- Nearly three quarters of Washington Insiders report consuming online video several times a week or more.
- Respondents from Capitol Hill and federal executives in particular have strong appetites for online video content; 40 percent of Capitol Hill respondents watch online video several times a day, as do nearly a third of federal executives.

#### Republicans consume online video content at a much higher frequency than their outside-the-party peers.

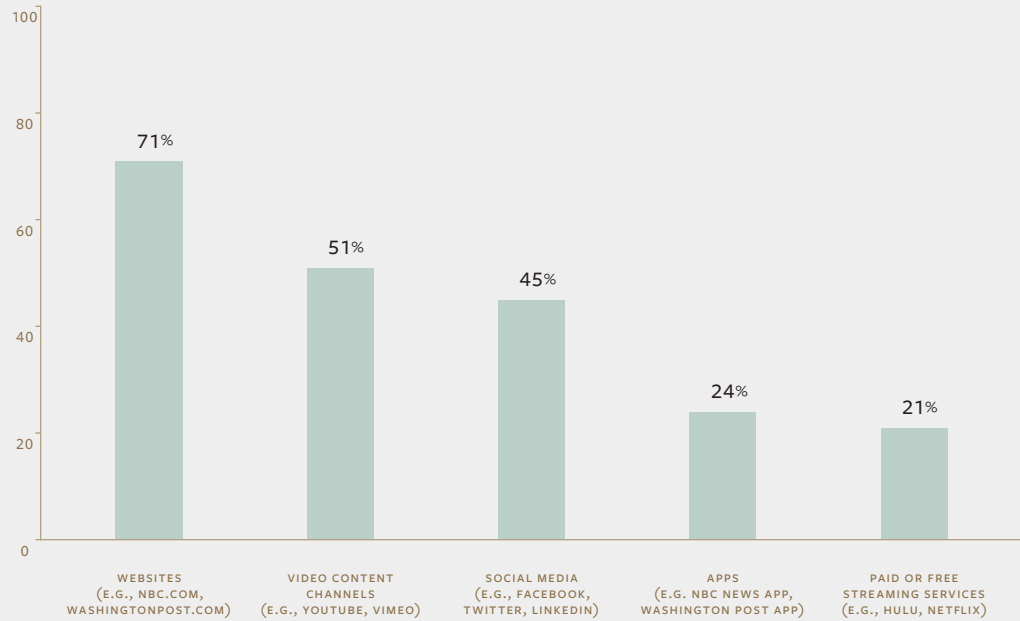
More than a third of Republican respondents report watching online video multiple times a day—vs. just under a quarter of all others.



## 46) Most Online Video Content Consumed On Established Websites

### Frequency of Online Video Consumption

Percentage of Respondents



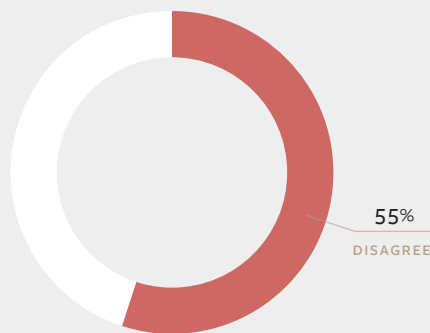
The majority of online video content is accessed on the websites of established content providers like media companies—not surprising, given their status as early adopters in online video and in making their content mobile friendly.

## 47) Online Public Policy-Related Video Fails to Meet User Expectations

While Appetite for Online Video Content is Strong, Policy-Related Supply Falls Short in Delivering Needed Value

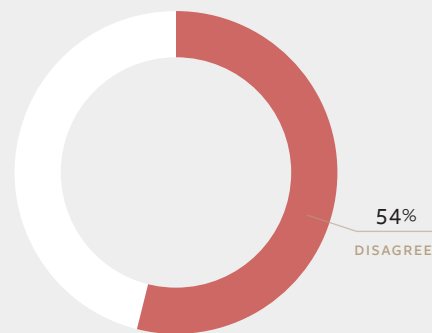
### Watch Video Regularly to Formulate Policy Opinions

Percentage of Respondents



### Prefer Video Over Written Reports to Explain Complex Information

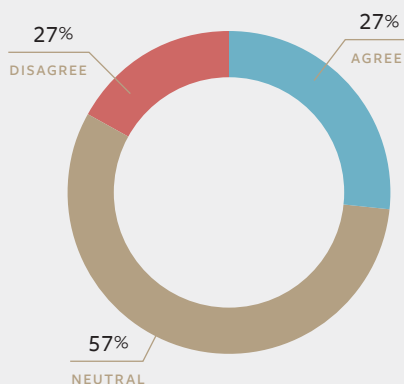
Percentage of Respondents



## 48) Ambivalence Toward Online Video Translates to Future Uncertainty

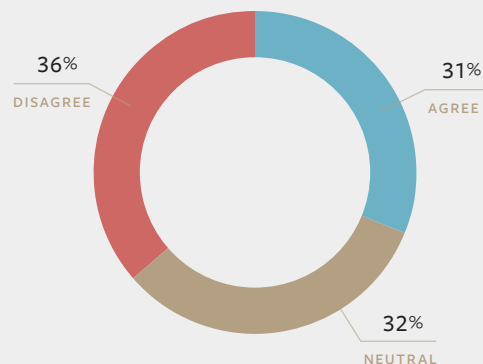
### Believe Video is a Reliable Source for Washington News and Analysis

Percentage of Respondents



### Expect to Rely More on Online Video in the Next One to Two Years

Percentage of Respondents



Similar to current sentiments about mobile and social media, **Washington Insiders consume online video frequently but are skeptical of its applicability to their daily work.** These lukewarm feelings lead Insiders to be largely on the fence when it comes to believing online video is a reliable source of Washington news and analysis, and—unlike with mobile and social media—to a total lack of consensus on its future utility.

However, content creators should not abandon their current or future online video strategies. As with mobile, organizations that can optimize their online video strategy will fill an observable gap in the current marketplace.

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## Opportunity

Association-created videos command a very low share of the market currently. Video works best when it's short, it's story-driven, and there's a human angle—which, as the data shows, is also a potential breakthrough opportunity for associations. It also works best when it's native to the web. Simply placing a television advertisement on a channel like YouTube does not allow for the full advantages of consuming video online, and content creators are encouraged to adopt a web-first—and increasingly, a mobile-first—approach to producing and sharing their videos.

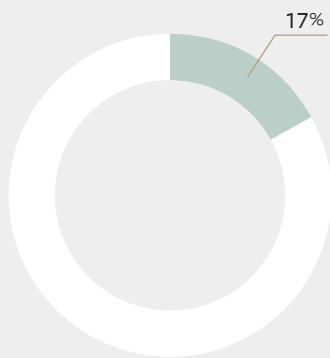


## 49) Podcasts Experiencing Recent Moment in the Sun, But Remain Niche Tool for Most

News and Policy-Related Podcasts Have Long Way to Go to Catch Up With Pop Culture Brethren

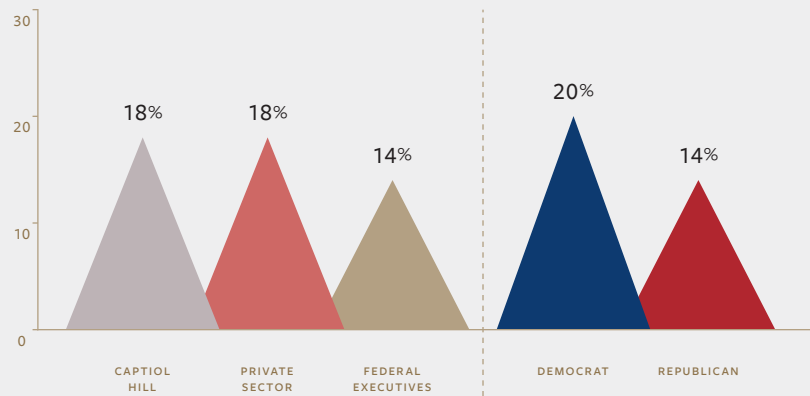
### Insiders Who Report Using Podcasts Throughout the Day to Obtain Washington Focused News or Information

Percentage of All Respondents



### Characteristics of Insiders Who Utilize Podcasts Throughout the Day

Percentage of All Respondents by Sector and Party



### Podcasts

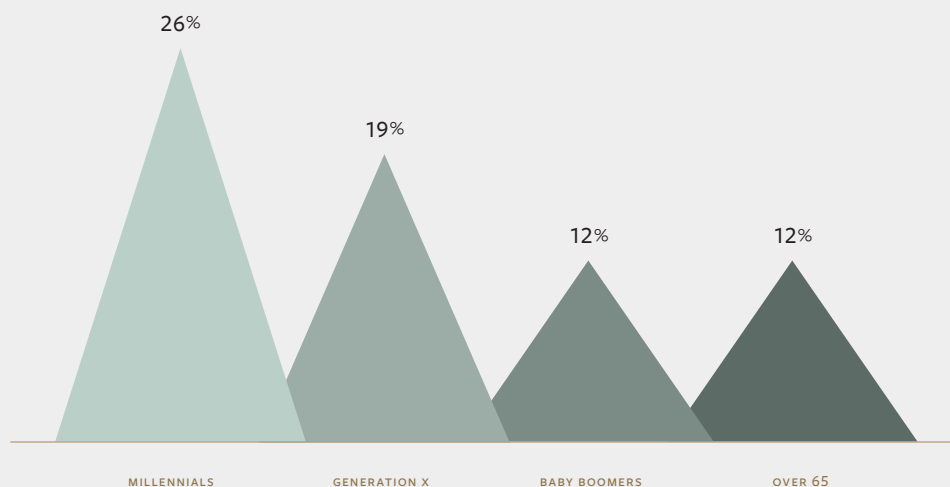
Podcasts remain a relatively niche platform for most Washington Insiders, especially relative to other forms of audio content (e.g., radio and mobile apps). As with infographics, the most frequent consumption of podcast content comes from the youngest generations of Insiders.

## 50) Podcast Demand Rises as Age Drops

But Current Appeal Still Tops Out at Only a Quarter of the Youngest Washington Insiders

### Podcast Usage at Least Once a Day

Percentage of Respondents by Generation



While the scale of a successful podcast like the recent public radio phenomenon “Serial” may be impossible for a policy-focused podcast to duplicate, podcasts are known for engendering high levels of engagement within their targeted audiences, however niche those audiences may be.

Increasingly, organizations are experimenting with offering up audio content in these more portable, bite-sized formats—and finding success when there are clear goals and target audiences defined from the beginning.

#### By the Numbers:

**3.6 million:**

Annual number of downloads for one of the most popular political podcasts, Slate’s *Political Gabfest*

**3.4 million:**

Number of average downloads for each of the 12 episodes of NPR’s hit podcast, *Serial*

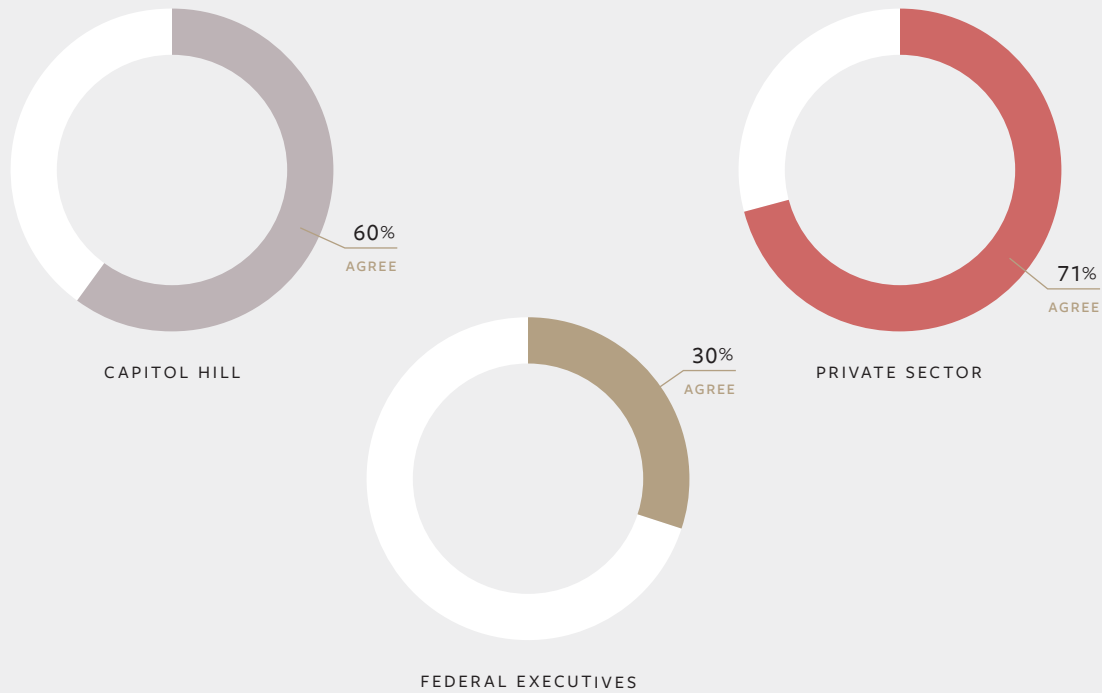
**77 million:**

Total number of *Serial* downloads as of April 2015

## 51) For Hill Staffers and Private Sector, Events Are a Way of Washington Life

### Attending Events is an Important Part of Working in Washington

Percentage of Respondents by Sector



### Events

On any given day, Washington Insiders are convened at events to learn, discuss, and network around issues of importance. Events are often a key strategy for organizations to engage the policy community, and the information exchanged and relationships developed can have lasting effects on their opinions and decisions.

But not all members of the policy community are influenced by events in the same way:

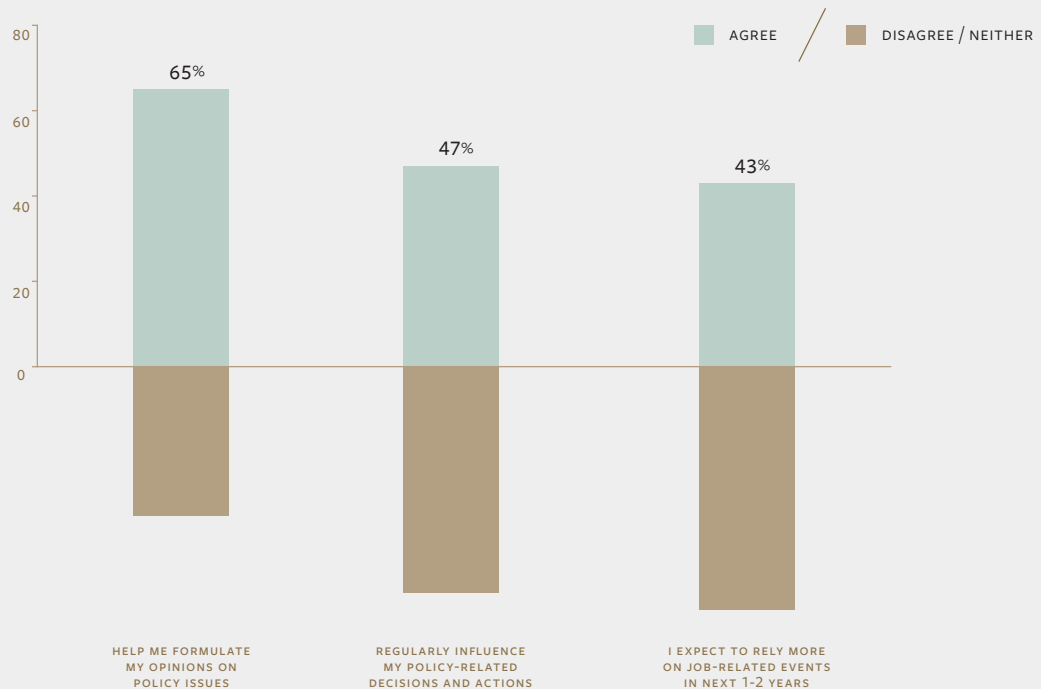
- Respondents from the private sector and Capitol Hill report events being an important part of their daily work in Washington.
- Events are understandably a less important part of daily work for federal executives, due to rules and regulations that exist around attendance.

## 52) Events Shape Opinions, But Mixed Feelings On Application and Future Use

Attendees' Inability to Link Knowledge Gained to Decision-Making Leads to Uncertainty on Future Utility

### The Role of Events in Formulating Opinions and Taking Action

Percentage of Congressional Staff and Private Sector Respondents



While most organizational hosts hope that their events will ultimately move the needle on policy decision-making, fewer respondents report that events actually influence decisions and actions than assist in the formulation of opinions. Because of the relatively lower abilities to immediately apply information learned at events to daily decisions and actions, respondents are mixed on whether events will be more important to their work in the next several years.

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## **Opportunity**

Create follow-up action steps for attendees. The difference between respondents saying that events help them formulate their opinions vs. drive action or decision-making indicates that attendees perhaps leave events not necessarily knowing how to apply the information they are gathering. Giving attendees the motivation and direction to act on their newfound knowledge, connections or relationships can help create stronger links between events and decisions.

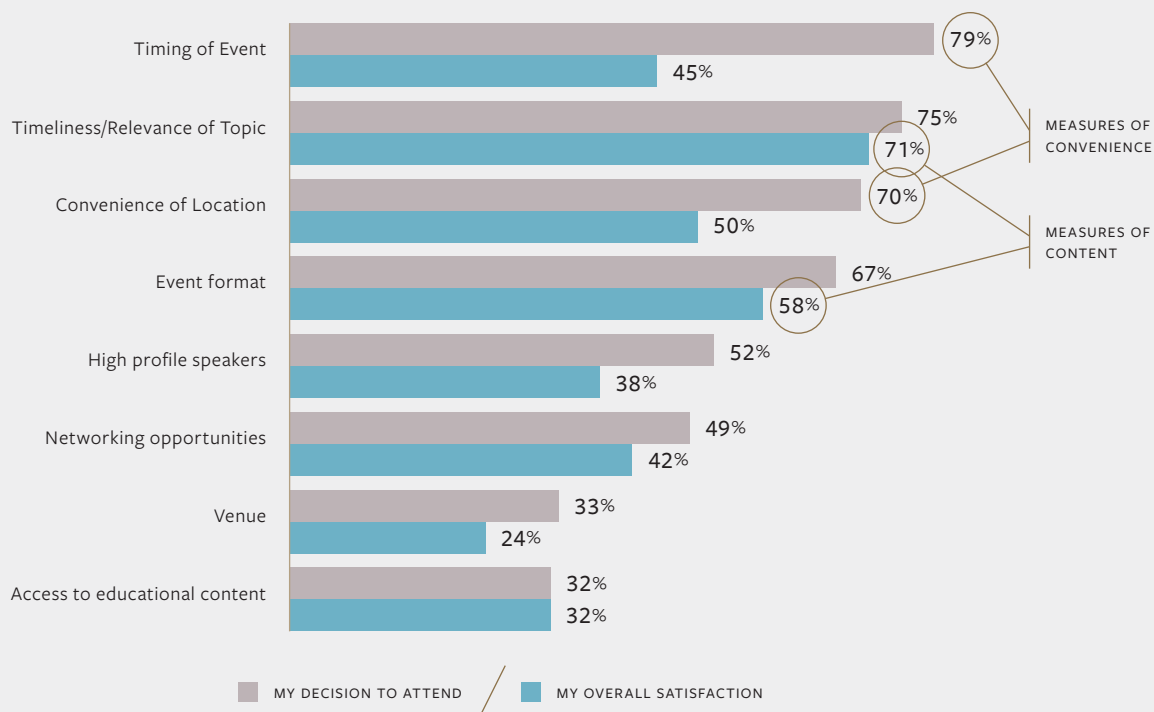




## 53) Event Attendees Come for the Convenience, But Stay for the Content

### Factors that Impact Decision to Attend, Overall Satisfaction with Events

Percentage of Congressional Staff and Private Sector Respondents



Enticing busy Washington Insiders to attend events can be summed up in one word: convenience. Prospective attendees factor the timing of the event and the location when weighing how they allocate their time. However, event satisfaction is more a function of the quality and format of the content provided.

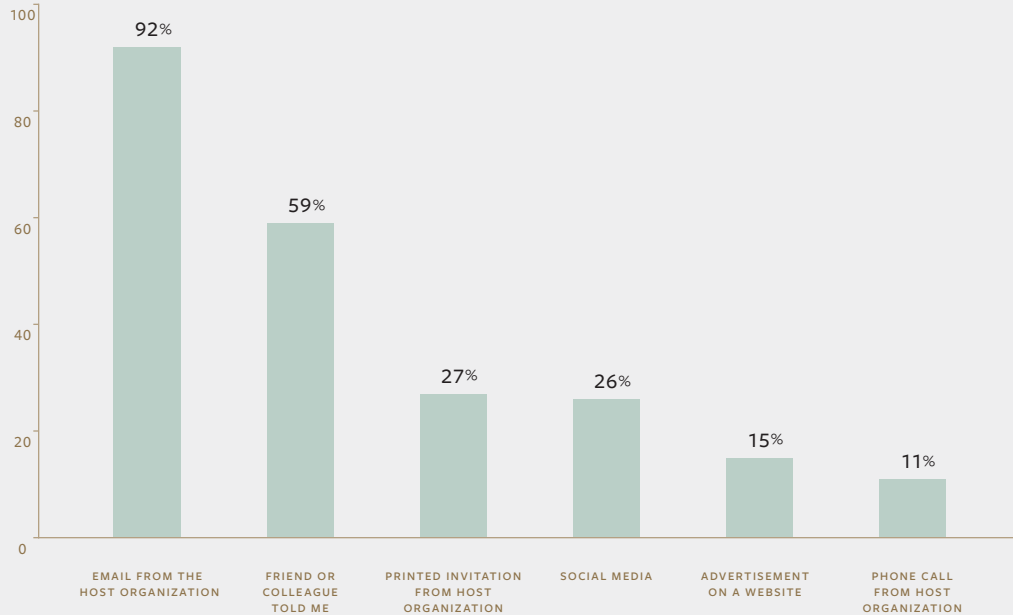
And event planners, take heart: having a big name speaker on the bill ranks relatively low on the list of factors that both entice attendance and induce satisfaction.

## 54) Most Attendees Are Already in the Organizational Orbit

The Organization’s Own Channels and Lists Appear More Successful Than Broader, Less Targeted Outreach

### Most Often Utilized Channels for Learning About Events in Washington

Percentage of Congressional Staff and Private Sector Respondents



An event outreach strategy should be secondary to relationship building; the invitation should not be the first time a potential attendee hears from the organization, but rather the result of a broader engagement effort.

The vast majority of Washington Insiders report receiving email invitations from host organizations as the primary way that they first learn about the events they attend—meaning the pool of attendees comes largely from within an organization’s existing network, rather than from individuals outside of it.

**“Live tweeting events helps me ‘attend’ events I can’t make in person. Better than reading a news article about it after the fact.”**

— Gen X-er, Private Sector

-05.3

## Opportunity

Integrate digital into events. Since word-of-mouth is the second biggest driver of learning about an event, building opportunities for digital enhancement of events (e.g., hashtags, live streams, or branded digital content shared before, during and after) can help create buzz within an individual's networks. If events aren't taking place during a time of day when respondents are most active on social media (e.g., during the weekend), repurpose event-related content and time the sharing of it to align more closely with these peak periods of activity. Events should be used to develop content assets that can be deployed throughout the year.



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In addition to the sources noted below, research findings draw upon National Journal Group's 2009 and 2012 Washington in the Information Age surveys.

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## **About National Journal Communications Council**

The National Journal Communications Council leads communications executives from Washington's most prominent associations, NGOs, unions and corporations in understanding and refining the most progressive and successful strategies for reaching a profoundly busy and deeply distracted city. It provides the professional staff to study, assess, and teach the latest learnings in the communications profession through three primary pillars: Media University, Peer-to-Peer Briefings, and Washington in the Information Age.

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