

>> 2016

Washington in the Information Age

NationalJournal LEADERSHIP COUNCIL RESEARCH

Executive Summary

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Introduction

In the fourteen years since the first Washington in the Information Age (WIA) study was completed, we have diligently tracked the growth and decline of the many sources, channels, platforms, brands and devices Washington Insiders use to get the information they need for their policy work. Traditionally, WIA has been fielded and released every few years, giving us broad perspectives on how the landscape is changing and how we should respond to those changes.

We approached the 2016 study—as the first year over year analysis—with great curiosity. How much could the information landscape in Washington really change in just a year? It typically takes new social media platforms a few years, for example, to gain enough traction to be used professionally. Would this year really be any different than 2015?

It turns out 2016 was disruptive enough all on its own, without the introduction of new platforms, devices, or technological innovations.

What you'll see throughout the data and insights in this year's study is a rich portrait of the modern D.C. media consumer in 2016: overwhelmed with the need to keep up with the rapid flow of information and quickly adjusting to not having to seek information out but to have it de-livered in increasingly smaller packages, tailored to exactly when and how they need it. And emerging in this landscape, as you'll see, is a tremendous opportunity for organizations to provide real value.

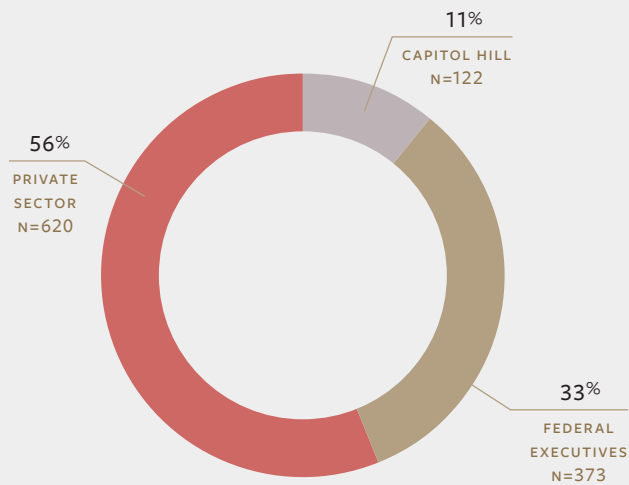
In addition to the trends, insights and data, we've also highlighted opportunities throughout the 2016 study—in essence, these are instructions for organizations on how to make sense of this year's findings and the implications for communications teams on how to make adjustments and what to prioritize. We've also put this year's results into context, by highlighting where Washington Insiders diverge or converge from broader national media consumption and platform trends.

We hope that you and your team will find immense value in this work, and look forward to continuing the conversation as this fascinating media landscape continues to evolve. Numerous individuals generously offered their time and perspectives in service to this work, and for their kind support, we extend our sincere thanks.

A Snapshot of Washington Insiders

Composition of Survey Respondents

Percentage of Respondents, n=1,115

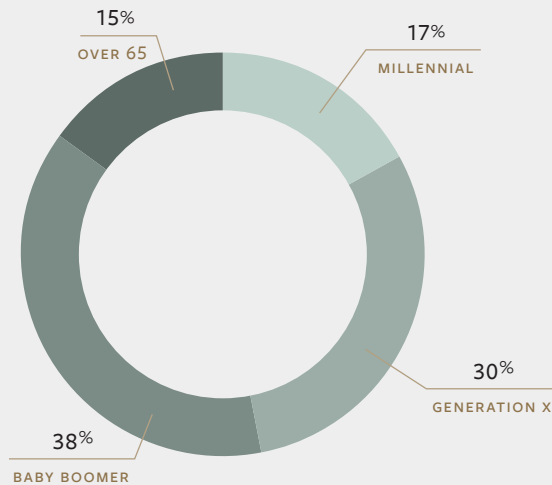


Dating back to the first Washington in the Information Age study in 2002 and continuing today, “Washington Insiders” has been defined broadly to include influential individuals within the policy community from three categories: Capitol Hill staffers, federal executives, and professionals in the private sector. This year’s composition of respondents mirrors last year’s exactly, with 11% of respondents coming from Capitol Hill, 33% from federal agencies and departments, and 56% from the private sector.

Generational Breakdown of Washington Insiders

Generational Breakdown of Survey Respondents

Percentage of Respondents



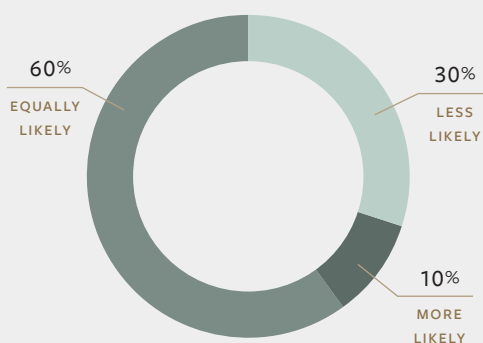
As can be expected, many of the key trends in how information is being consumed vary quite significantly with respondents' ages. Generational comparisons contained in this year's study rely on generally accepted age cutoffs: ages 18-34 are categorized as Millennials; ages 35-50 as Generation X; and ages 51-64 as Baby Boomers, with an additional category to capture those over 65 years of age.

2016 Trust in Go-To Sources is Reportedly Equal to Previous Years

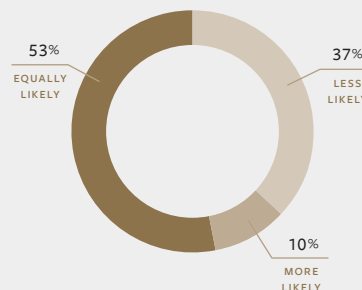
However Federal Respondents Less Trusting Compared to Peers

Compared to Previous Years, How Likely Respondents Are to Trust Normal, Go-To Sources of News and Information in 2016

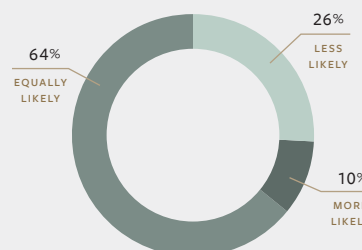
Percentage of Respondents



Percentage of Federal Respondents



Percentage of All Other Respondents



A majority of Washington Insiders report having equal trust in their normal, go-to sources of news and information in 2016 compared to previous years. **But federal executives report being less likely to trust their go-to sources in 2016 in higher numbers than their peers in other Washington workplaces.**

Their experience isn't isolated. In 2016, 38 percent of the general public could, "recall a specific recent incident that caused them to lose trust in a news source." Biased and inaccurate reporting were the two most common causes of lost trust.¹

People who cite high levels of trust in a news source are more likely to share its content, subscribe to its newsletter, and pay for its services.² For advocacy organizations, becoming a trusted resource can be an opportunity for better engagement, participation, and renewal rates. Preserving that trust isn't easy, though.

"I've noted the news sources to which I typically reach out are going increasingly to the far extremities of political discourse from an editorial perspective, and I believe that to be a great disservice. I have to increasingly make myself read sources I typically wouldn't because too much news that happens to feel custom made for my point of view seems dangerous."

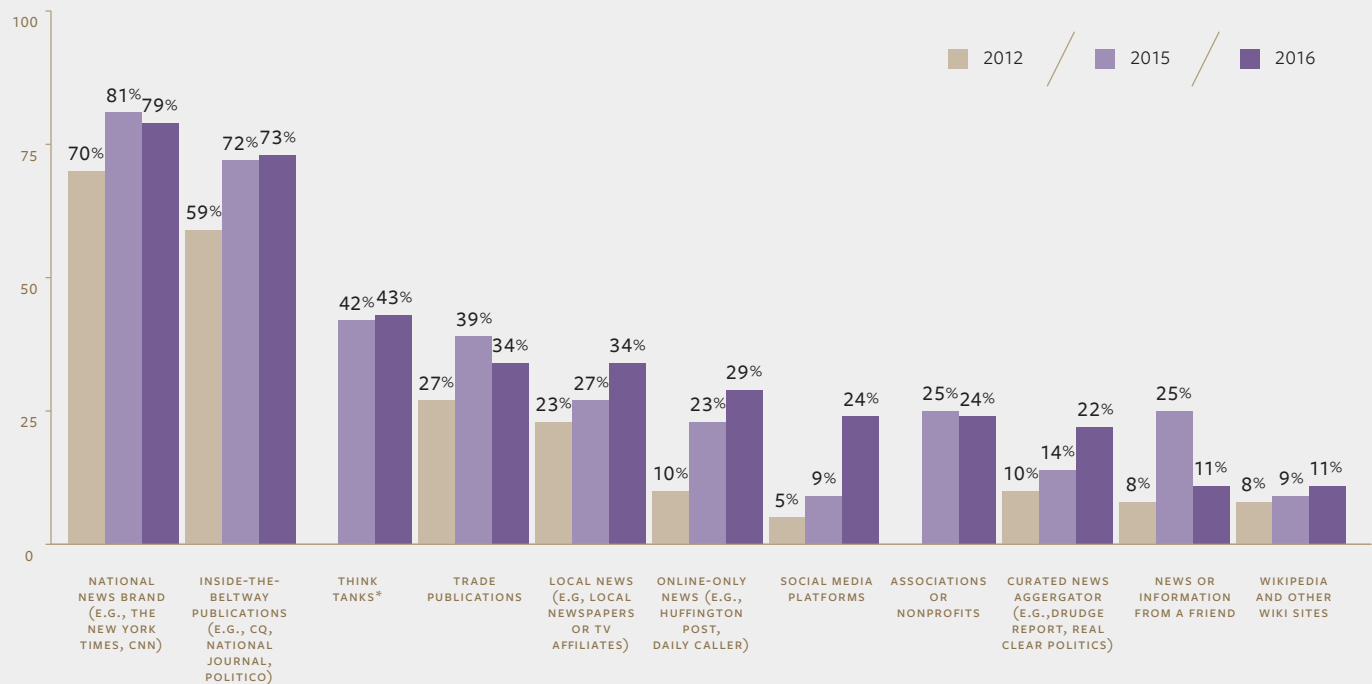
— Federal Executive, Generation X

But Relatively Flat Trust Growth Belies Noteworthy Tradeoffs

Online-Only, Social Media, Curated Aggregators Gain Traction in 2016, While News from Friends Plummets

Trusted Sources for Washington News and Information

Percentage of Respondents, 2012-2016



Note: Data reflects only those respondents located in the greater Washington, DC area.

*Think Tanks were added as a choice in 2015; no 2012 data available.

While average trust reported across all sources stayed nearly the same between 2015 and 2016, there were several significant redistributions that occurred in 2016.

- As Insiders rely on multiple sources of information to confirm the accuracy of reporting, sources like news aggregators, Wiki pages, and social media are perceived as more trustworthy than they were in 2015.
- At the same time, trust in news and information from friends has dropped significantly, nearly back to 2012 levels. As election year rhetoric heats up, Insiders may prefer to avoid partisan divisions among friends.

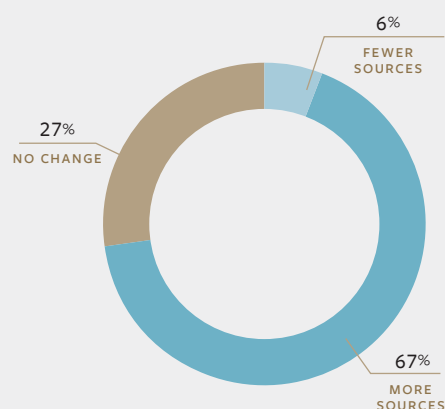
Having a few trusted sources is not the same as trusting all sources. In 2015, Washington Insiders adhered to the adage, “Trust but verify.” In 2016, we’re seeing the impacts of that statement.

Overconsumption as a Coping Mechanism

Compared to Previous Election and Non-Election Years, Most Insiders are Consuming More Information

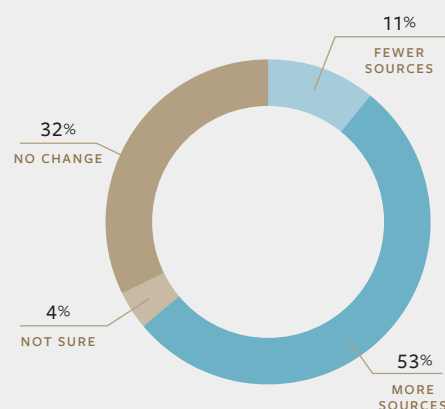
Amount of News and Information Sources Relied Upon, Compared to Previous Years

Percentage of All Respondents



Amount of News and Information Sources Relied Upon, Compared to Previous Election Year

Percentage of All Respondents



Consistent with Insiders' assertions that they look to corroborate and verify, the majority report consuming more sources of news and information in 2016 when compared both to previous years and to previous general election years.

Even Insiders who said they felt equally trusting or more trusting in their usual news sources report accessing more avenues than they have in the past. With more news events breaking in real time across Periscope, Twitter and other platforms, Insiders feel the need to be plugged in wherever and whenever news is happening.

“I just wish I didn’t feel compelled to know so much and follow so many people...everything is not news, everything is not important.

That is the struggle: to stay current, relevant, and sane while being fire-hosed with information.”

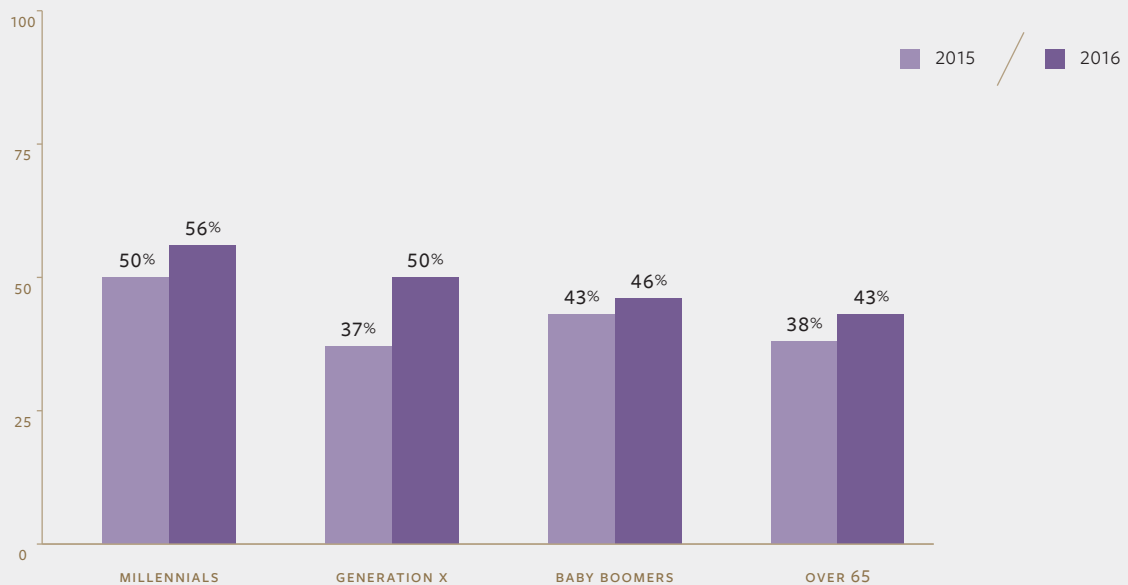
— Private Sector Professional, *Generation X*

06 Longing for Content Simplicity

Insiders Across all Generations Report a Growing Desire for Simplification When Seeking Content from Organizations

Washington Insiders Who Seek Out Association Content Because it Simplifies Complex Information

Percentage of Respondents by Generation, 2015 vs. 2016



Among the reasons for seeking out content from organizations, the desire for content that simplifies the complex grew significantly across generations—not just Millennials, who are often personified as only seeking out simple, easy fixes. While they may still lead in the desire for simplicity, other generations are catching up.

Insiders are consuming more channels of information than they were in 2016. It's not surprising that many wish more organizations would make content faster and easier to consume.

However, simplified doesn't mean dumbed-down. There is a growing need for at-a-glance content: can a user tell whether content will answer top-of-mind questions simply by looking at its title or caption?

Appreciation for Depth and Reliability of Organizational Coverage

Insiders Emphasize Need for Coverage that is Thorough and Easy-to-Consume



Filling a Gap in Media Coverage

“...Analysis from think tanks offers the depth that news media often do not...”

“...Enviro nonprofits and their allies have largely picked up the investigative role that mainstream news organizations formerly performed...”

“...Sometimes these sources will start at the beginning, where as newspapers take the story from the last story...”



Hearing it Directly from the Source

“...More often than not, when it’s possible I try to get as close to the source of the news rather than rely on reports...”

“...If I care enough about the topic, I’ll go find data sources to the charts and statistics people use as their examples...”



The Right Info in the Right Format

“...They save me time by highlighting in an easy-to-read fashion (typically) what are the most important policy/current issues in a particular industry/arena—with concise, relevant information...”

“...As long as you understand the source, I find that nonprofits often are the best at packaging and presenting information and perspectives in compelling and innovative ways. News outlets rarely invest the time and value speed over depth...”

“These organizations provide not only benefit for the points of view that I agree with, but also offer insight to counterpoints of views that I don’t agree with and need to consider.”

— Hill Staffer, *Generation X*

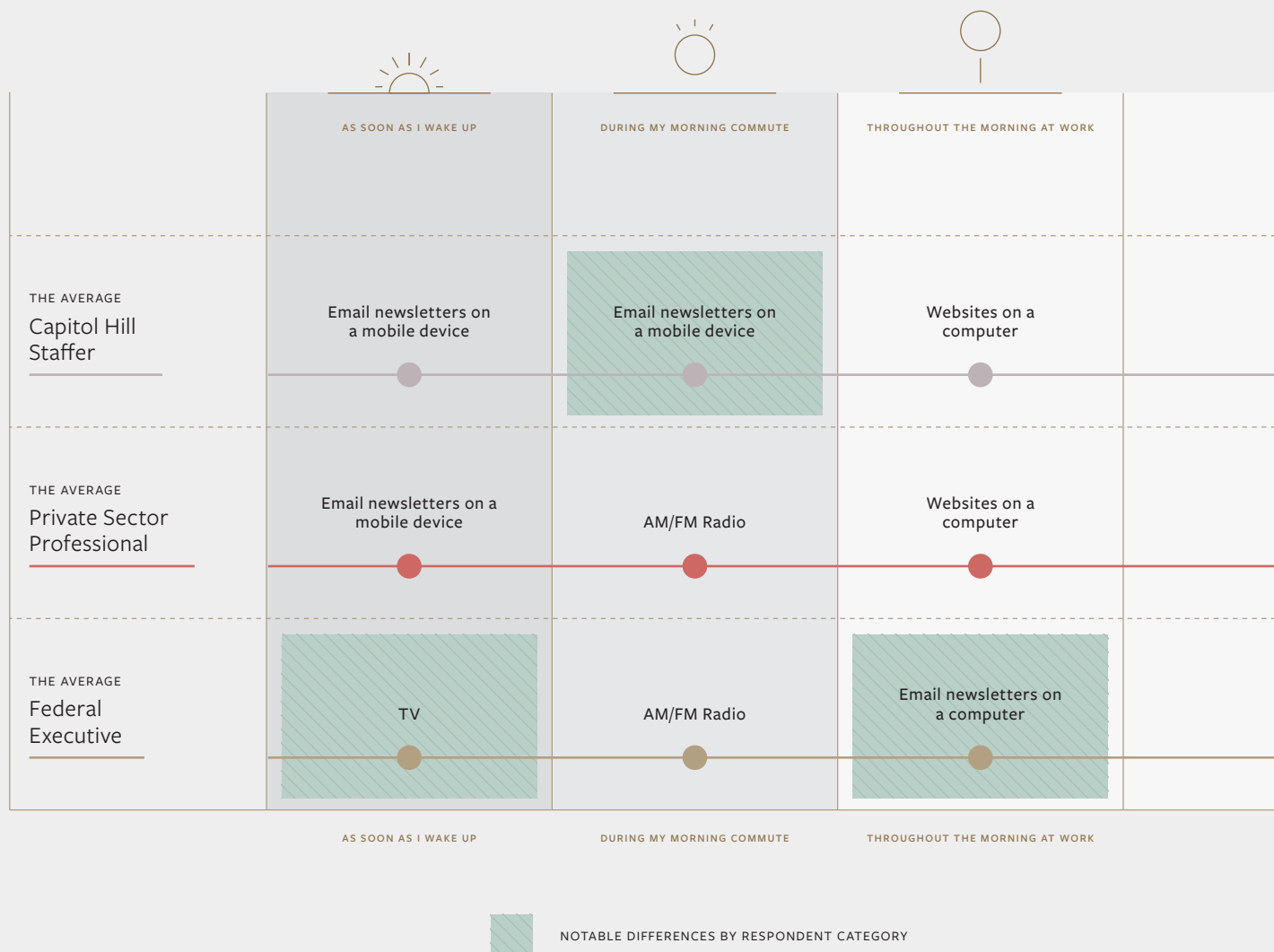
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Opportunity

Make a good first impression on busy Insiders seeking in-depth information and data by providing it in an easy-to-read format. Break traditional PDF reports (which Insiders called out as being frustrating formats) into many smaller, bite-sized assets that can be more easily distributed via social media and newsletters—like simple graphics that convey topline statistics or provocative quotes, or a Medium post that gives bulleted takeaways. When done right, these social-friendly assets can deliver crucial information in a succinct package, while also providing gateway access to the longer report for those who need the additional context.

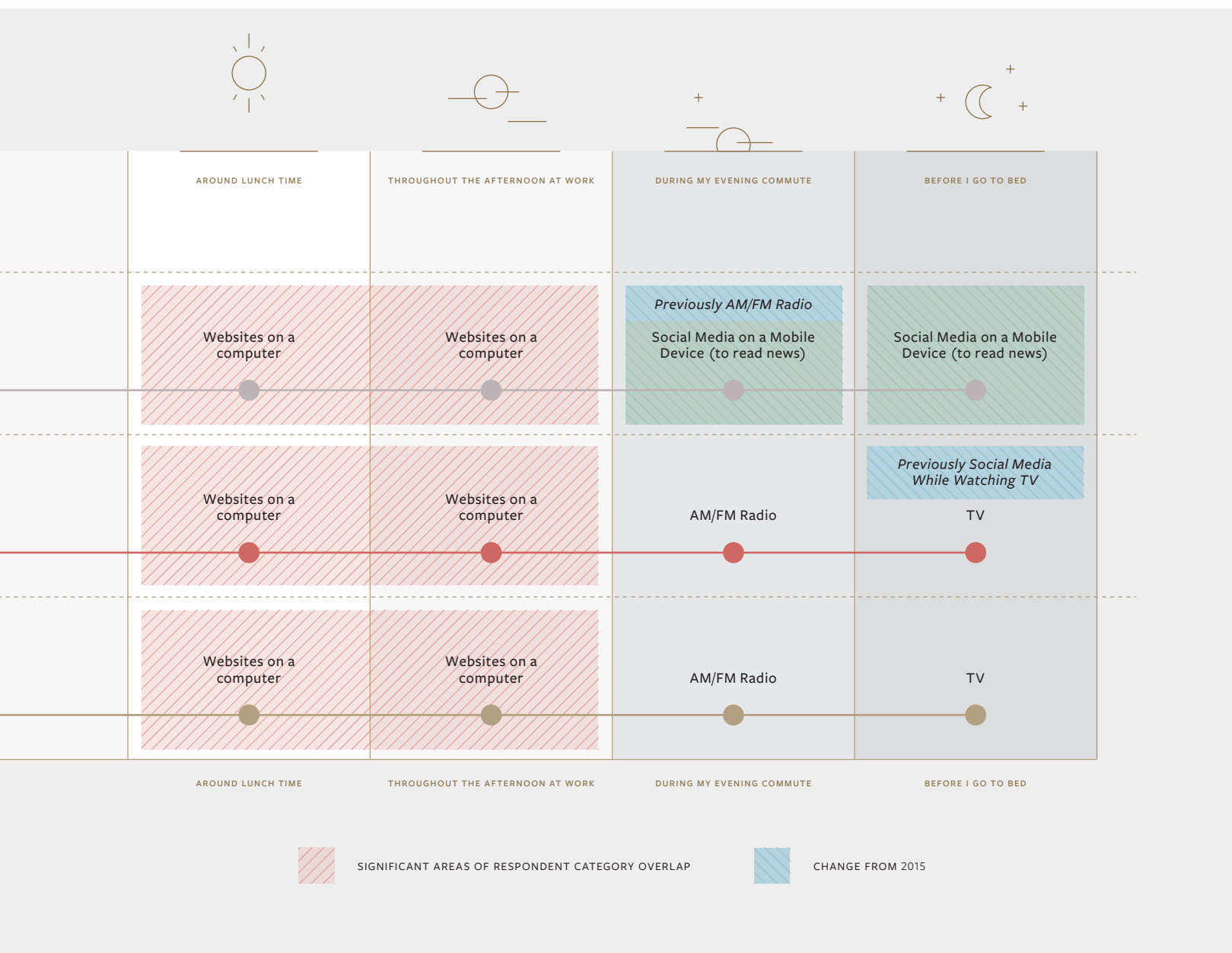
Harder Than Ever to Reach Everyone at the Same Time, in the Same Place

The Targeting Sweet Spot Shrinks, But Key Consumption Channels Remain Largely Unchanged Across All Workplaces



As in 2015, the average respondents across each of the three workplaces displayed some variations in their primary channel preferences throughout the workday, largely attributable to their generations. Usage for the average Capitol Hill, private sector, and federal executive respondent in 2016 remained largely unchanged, with several exceptions:

- The average private sector respondent is now more aligned with the average federal executive, relying more strongly on TV as the primary information source before going to bed on workdays.



- The average Capitol Hill staffer further differentiated himself from fellow Washington Insiders this year, relying less on radio and more on social media during the evening commute.

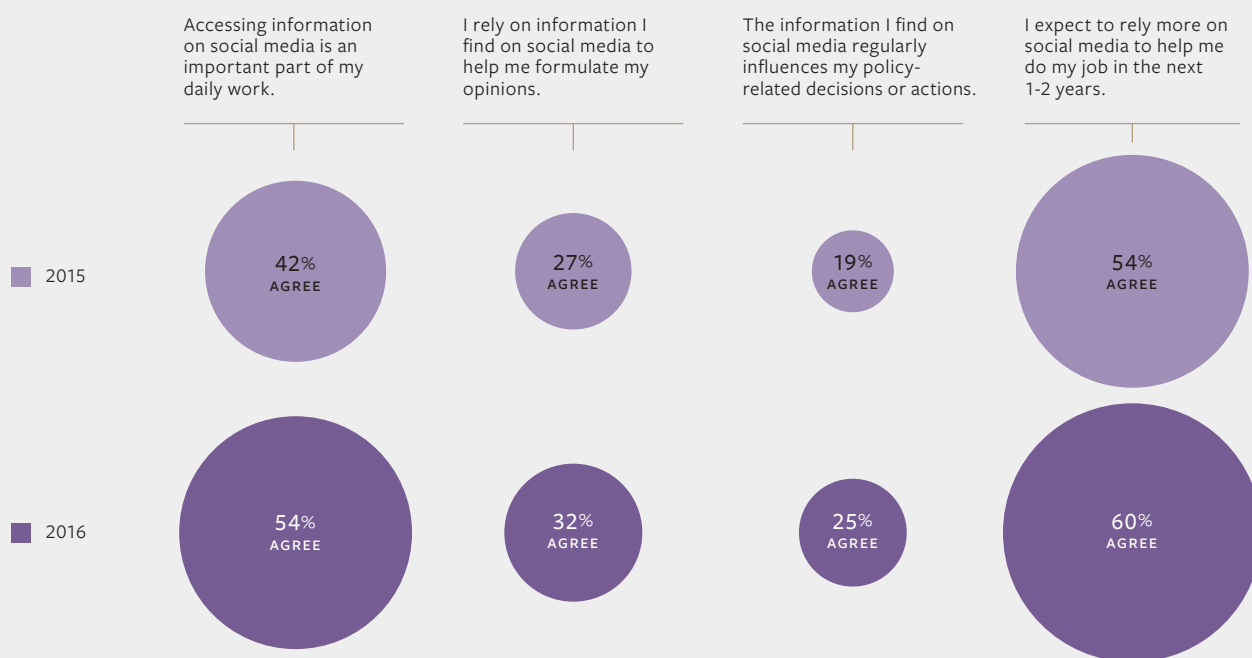
The adjustments in channel preferences throughout the workday mean that the opportunity to reach all categories of Washington Insiders at once—already a difficult task in previous years—has gotten even more difficult.

Begrudging Acceptance of the Utility of Social Media

Nearly Uniform Increases in Acknowledgement of Social's Role in Opinion Formulation, Decision-Making

Perceptions of Social Media's Role in Daily Policy Work

Percentage of All Respondents, 2015 vs. 2016



Consistent with earlier trends in the growing trust placed in social media, in 2016 Washington Insiders acknowledged relying more on the format to help formulate opinions and to aid in decision-making. And, for the first time, the majority of Insiders reported that accessing social media is an important part of daily work.

It has come a long way since just last year, when 36% of Washington Insiders felt that social media seemed “unprofessional” and 45% felt that it took up too much of their time.

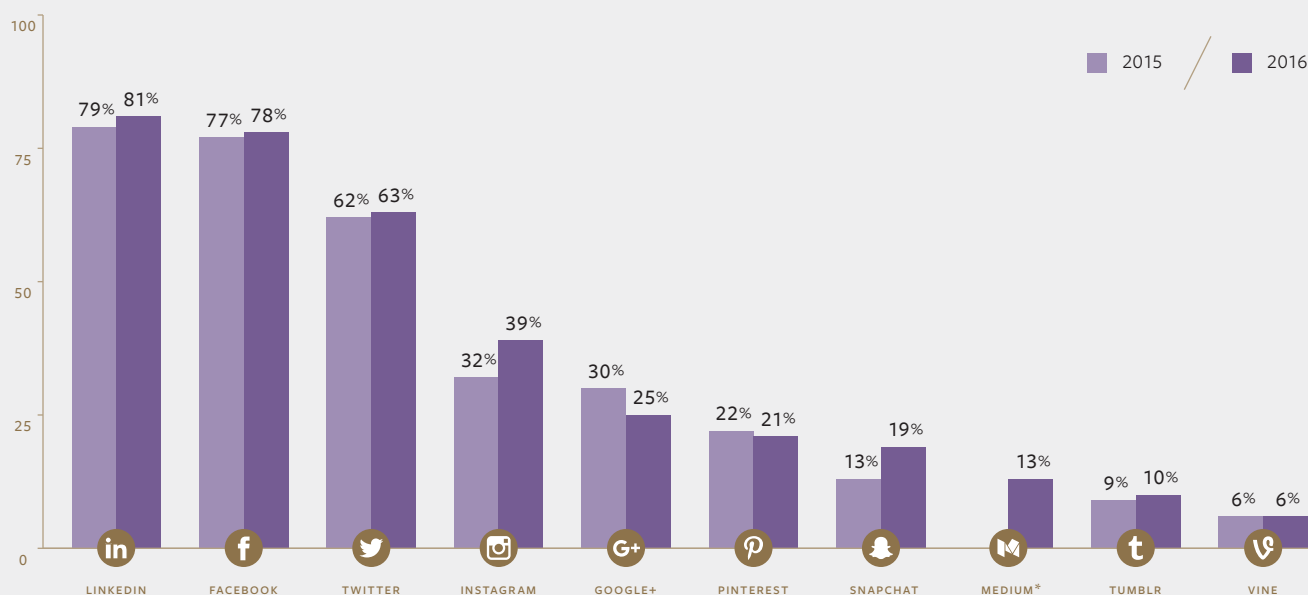
And, the role of social media is predicted to continue to grow, perhaps because of the growing acceptance of its utility in offices across Washington.

Visual Platforms Gaining Most Ground for General Social Media Usage

Instagram, Snapchat See Strongest Adoption in Past Year, Driven Largely by Youngest Generations

Social Media Platform Usage

Percentage of Respondents Who Have Used Platform in Last 6 Months, 2015 vs. 2016



*Medium was added as a choice in 2016; no 2015 data available

Adoption of most social media platforms for general use among Washington Insiders is stable or slightly higher than in 2015. The three biggest platforms (LinkedIn, Facebook, and Twitter) saw very little growth in the percentage of Washington Insiders using them for all (i.e., not limited to work-related) purposes.

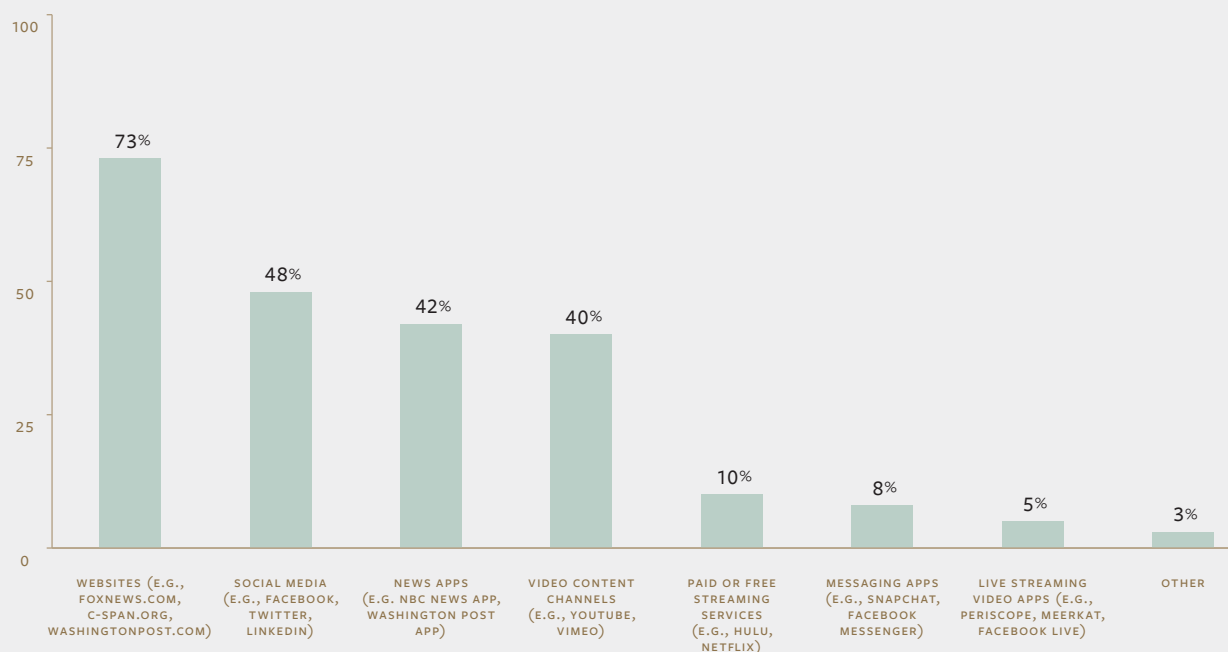
- The standout platforms, Instagram and Snapchat, are rising opportunities for organizations, particularly as the demographics for each platform expand to include older generations.
- Both platforms also highlight the importance of another trend: strong visuals must now be a part of any organization's content strategy.

Social is Overtaking YouTube and Other Streaming Services for Viewing Washington-Focused Content

Nearly Half of Insiders Who Consume Washington-Focused Video Discover it on Social Media

Primary Channels of Online Video Consumption

Percentage of All Respondents



Prior to 2016, YouTube and other video-specific channels were second to websites for all video content consumption, but given recent media events, it's likely social media will continue its upward trend.

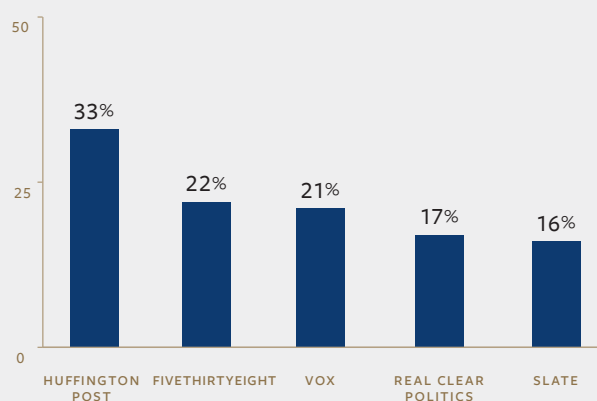
Just in the months between when the 2016 survey was fielded and when data analysis was completed, there were several significant policy and breaking news applications of social video: House Democrats broadcast a sit-in from the Capitol floor with Periscope, FLOTUS joined Snapchat, and streaming video played a critical role in reporting on shootings in Dallas, Texas and Baton Rouge, Louisiana.

Measuring the Digital Divide

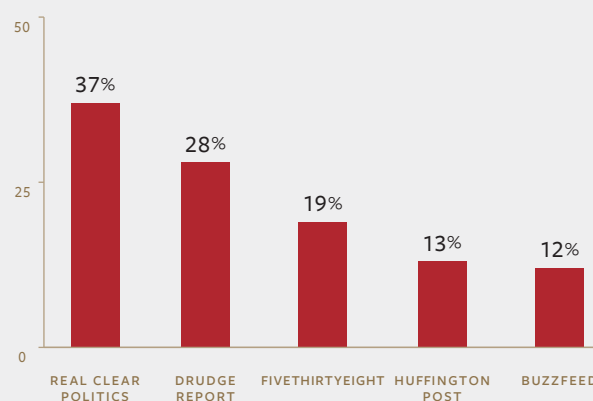
As Expected, Party Preferences Split for Digital News Brands

Digital-Only Media Brands Relied Upon for Washington News and Information

Democrats' Top 5 Digital-Only Brands



Republicans' Top 5 Digital-Only Brands



Surprisingly, three brands make it into the top digital news preferences for both Republicans and Democrats, but levels of reliance vary by party. Democrats prefer *Huffington Post*, while Republicans rely on *Real Clear Politics*. Republicans round out their top five with *Drudge Report* and *Buzzfeed* (which unexpectedly surpassed more traditional conservative online brands like *Daily Caller* and *Breitbart*) while Democrats prefer *Slate* and *Vox*.

Our data shows that reported digital-only consumption is down from 2012. Social media consumption of content has overtaken home page consumption for some digital-only outlets, and in the process, it may be hurting brand recognition.”

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Opportunity

Now, more than ever, organizations need to tailor and customize content specifically to a social media platform when posting, a twist on the old adage of “create once, publish everywhere.” While the core message may remain the same, it’s clear that Insiders use different platforms for different purposes, and content works best when it takes into consideration the functional limits, user preferences and conversational quirks of each platform. Try experimenting with a platform-native campaign, in which content is created and uploaded to one platform, allowing for total customization. Organizations are increasingly adopting this approach with video content in particular, to account for the differences in how videos are consumed and engaged with on Facebook, Twitter, Instagram and YouTube.

About National Journal Group Research Team

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Research Team

RESEARCH DIRECTOR

Julie Dixon

PRINCIPAL RESEARCHERS

Sarah Harkins

Alec Latimer

For further information on topics covered in this research, findings, methodology and/or materials, please contact any member of our staff at 202-266-7900.

PRODUCTION TEAM

Laura Sobrado

DESIGN TEAM

Polygraph

References

1. *“About 4 in 10 Americans (38 percent) can recall a specific recent incident that caused them to lose trust in a news source. The two most common problems were either instances of perceived bias or inaccuracies.”* Media Insight Project. *A New Understanding: What Makes People Trust and Rely on News.* AMERICAN PRESS INSTITUTE & ASSOCIATED PRESS-NORC CENTER FOR PUBLIC AFFAIRS RESEARCH
<https://www.americanpressinstitute.org/publications/reports/survey-research/trust-news/>

2. *“People who put a higher premium on trust related factors are more engaged with news, are more likely to pay for it, install news apps, or share and promote news with their friends.”* Media Insight Project. *A New Understanding: What Makes People Trust and Rely on News.* AMERICAN PRESS INSTITUTE & ASSOCIATED PRESS-NORC CENTER FOR PUBLIC AFFAIRS RESEARCH
<https://www.americanpressinstitute.org/publications/reports/survey-research/trust-news/>

For More Information

Thank you for previewing National Journal Group's *Washington in the Information Age* 2016. This volume represents a subset of the insights developed from our data, which also covers:

Who Washington Insiders Trust and Rely on Most

News and information sources

Media outlets and brands

When and How Washington Insiders Seek Information

Social media

Mobile

Print

Television and radio

What Content and Formats Washington Insiders Prefer

White papers

Infographics

Online video

Podcasts

Events

Media Habits According to Demographics

Generation

Political party

Work sector

Media Habits According to Policy Interests

Health/health care

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