

>> 2016

Washington in the Information Age

NationalJournal LEADERSHIP COUNCIL RESEARCH

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Reading time

45 minutes: *Full text reading*

20 minutes: *Skim text reading*

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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 that 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 this year's study—as the first to be following up its predecessor after only a year—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, sick of the election—and, moreover, how the media is choosing to cover it—and quickly adjusting to not having to seek information out but to have it delivered 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.

Methodology

National Journal's Communications Council conducted an online survey of Washington Insiders in May 2016, targeting Capitol Hill staff, private sector public affairs professionals and federal government executives primarily based in the Washington, D.C. area.

More than 1,100 Washington Insiders completed the survey over the course of five weeks, including more than 120 Capitol Hill staff, more than 600 respondents from the private sector public policy community and nearly 400 federal executives.

Where possible, results are compared to both the 2015 and 2012 studies, with any adjustments for updated question language noted throughout.

As in previous years, the 2016 survey format encouraged respondents to share qualitative feedback and perspectives through select open-ended questions, in addition to the multiple choice questions. Responses ranged from one word to several paragraphs in length, and were coded to analyze the key themes across respondent groups. 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.

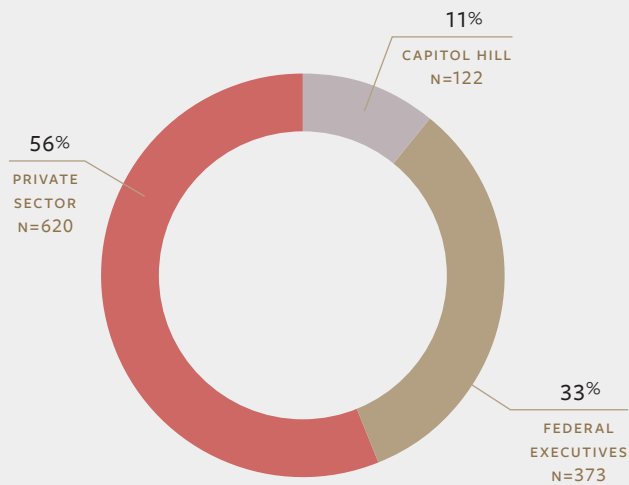
>> PART I.

Overview of 2016 Respondents

A Snapshot of Washington Insiders

Composition of Survey Respondents

Percentage of Respondents, n=1,115

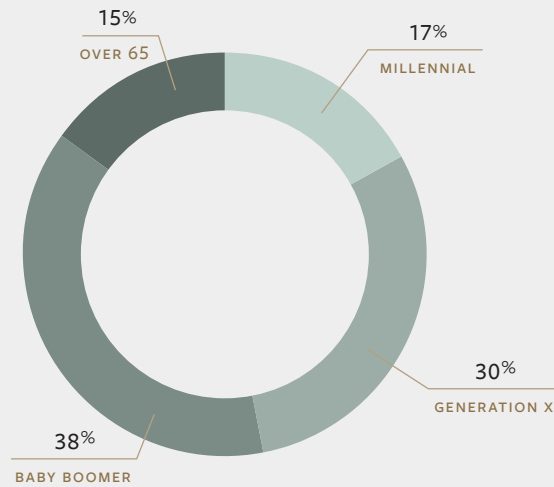


Dating back to the first Washington in the Information Age study in 2002 and continuing today, “Washington Insiders” has been defined broadly to include influential individuals within the policy community from three categories: Capitol Hill staffers, federal executives, and professionals in the private 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.

For more detailed information on each category of respondents, please see the Appendix on page 87.

>> PART II.

Key Trends in 2016

The 2016 Washington in the Information Age data yielded unexpected changes and new insights. In just a year since our last study, Washington Insiders' media consumption habits have proven to be more flexible than what could have been predicted, and seven critical trends have emerged that point the way toward engaging this audience throughout the remainder of 2016 and beyond.

Key Trends in 2016

Sections:

- **III. Trusted and Reliable Sources** | page 13
- **IV. Content Consumption Preferences** | page 33
- **V. Social Media Usage and Perceptions** | page 51
- **VI. Information Consumption by Time of Day, Brand, Channel, and Device** | page 65

● / **The trust vacuum present in 2016 yields great opportunity for organizations to step in as primary sources of rich analysis.**

2016 may have provided a fatal blow to media—at least, media as we know it. Insiders are voicing their strong concerns about Washington-focused media, and are reporting less trust and utilization of national sources, while at the same time increasing their overall consumption and looking more to original sources of data. Organizations can step in to fill this gap by providing niche content that the media doesn't have the time (or incentive) to produce.

●● / **But a one-size-fits-all approach will fit none.**

As the media landscape continues to fragment and trust and utilization is redistributed across channels and sources, the targeting “sweet spot” to reach Washington Insiders in the same place at the same time, continues to shrink. Channel strategies and content must be targeted, tailored and clearly differentiated in order to reach Insiders where they are with exactly what they need.

●● / **And that means relying on a more distributed strategy.**

Media brands have experienced this trend during the past few years, and it seems organizations are now feeling it too. Content is increasingly being consumed by Insiders off the homepage—on social media, in newsletters, and in other formats that find Insiders where they are. Organizations must embrace this, and create content that can exist natively on each platform.

●● / **Content must be unpacked and repackaged to succeed on distributed channels.**

As more Insiders rely on mobile devices, organizational content that used to live in stagnant PDFs must now be broken apart and reconfigured to gain visibility and drive awareness. Content creators will need to walk a line between the rigorous analysis that Insiders need, and the bite-sized formats they want.

● / **A nimble strategy is a winning strategy.**

The downside of distributed content strategies is that someone else—for example, a social media platform like Facebook—can almost entirely control an organization’s ability to reach audiences. One little change to an algorithm, and a channel can go from driving the majority of traffic to driving almost none of it. Insiders’ trust in social media and utilization of the platforms for work in Washington both increased this year, making it more necessary for organizations to figure out a sustainable approach on these platforms regardless of algorithmic changes.

● / **Online video will not be a panacea.**

Despite increasingly overwhelming emphasis on video by both traditional and emerging social media platforms, Washington Insiders have yet to fully embrace the format as a means of consuming important information. There are several barriers that need to be addressed before Insiders’ adoption of video matches the bold predictions of platforms in 2016, including accessibility issues and the ability of the format to offer a truly differentiated experience to text (rather than a duplicative one).

● / **Finally, true influence in Washington comes down to two things: people and data.**

Insiders have tremendous choice in the types of content they consume and how they consume it, but the most influential formats in 2016 continue to be people-driven (face-to-face interactions and events), and data-driven (reports and infographics). These aren’t always the most often consumed, and they often require significant bandwidth to produce or organize. Organizations must be strategic about how and when to deploy these formats and how to incorporate them with lighter content moments that can meet earlier needs along Insiders’ decision-making process.

>> PART III.

Trusted and Reliable Sources

KEY TRENDS

● / The trust vacuum present in 2016 yields great opportunity for organizations to step in as primary sources of rich analysis.

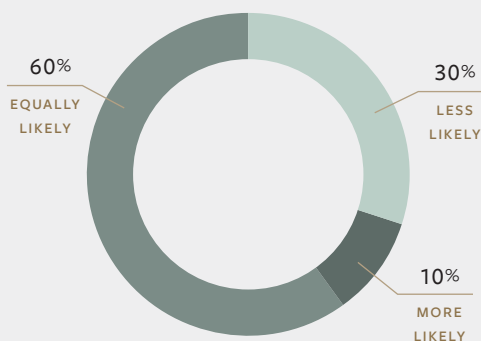
03

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

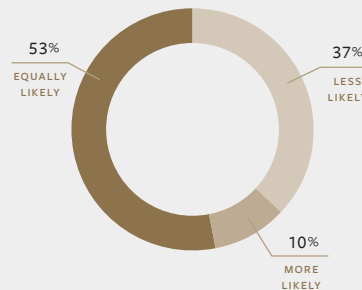
But Federal Respondents Less Trusting Compared to Peers

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

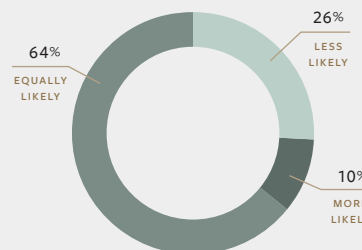
Percentage of Respondents



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.

*For a breakdown of the specific media brands Insiders rely on most for Washington news and information, see pages 72-75.

"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*

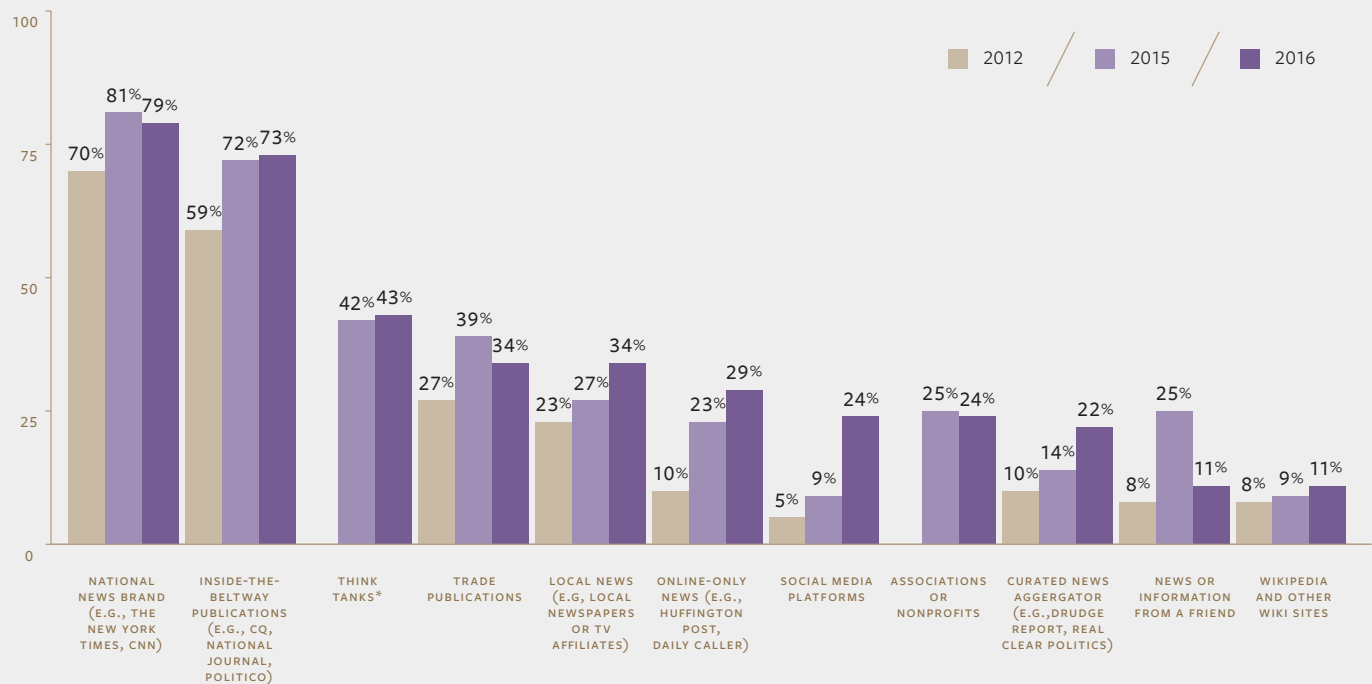
04

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 (confirming respondents' self-reported trust claims seen on page [x]), 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.

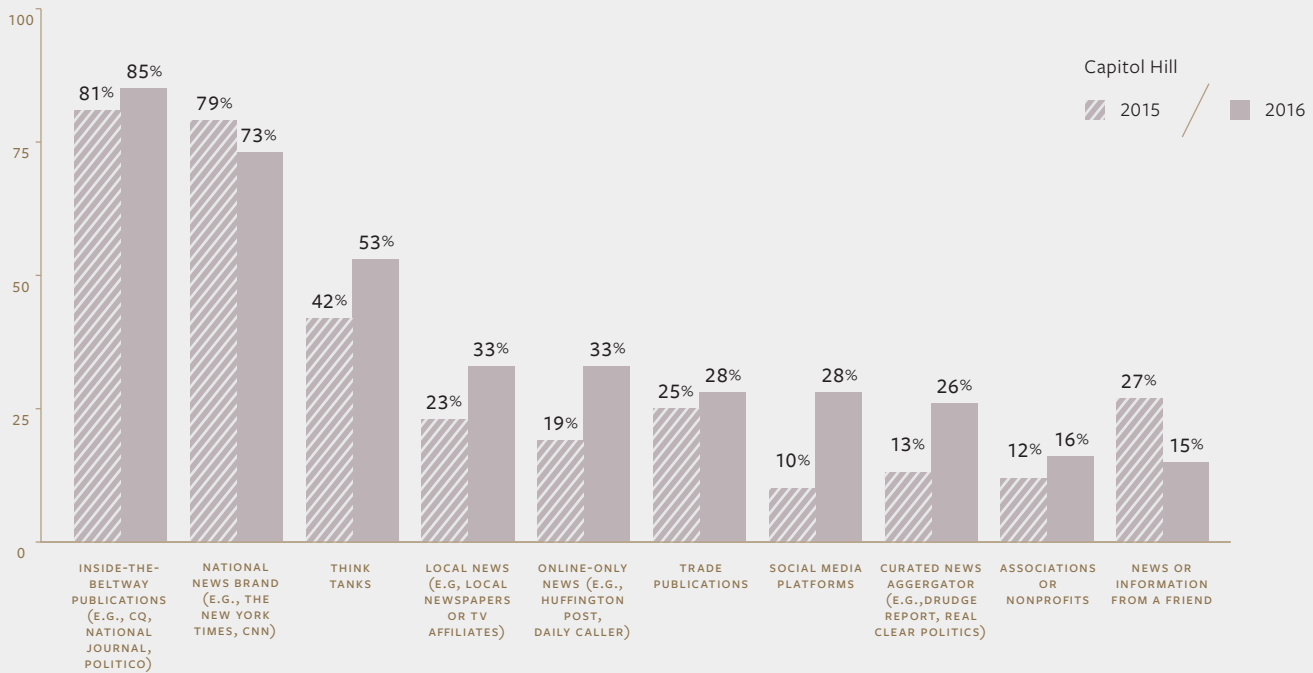
Having a few trusted sources is not the same as trusting all sources. In 2015, Washington Insiders adhered to the adage, "Trust but verify." In 2016, we're seeing the impacts of that statement.

05 Most Volatile Trust Redistribution Occurring Among Hill Staffers

Nearly All Categories of Sources Saw Significant Gains or Losses Compared to 2016

Trusted Sources for Washington News and Information

Percentage of Capitol Hill Respondents, 2015 vs. 2016



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

Capitol Hill staffers most clearly illustrate 2016’s changing media dynamics. Nearly every single category of news or information sources changed significantly—with many increasing or decreasing by double-digit percentage points.

- Digital resources are continuing to become a more a prominent part of the media landscape, and staffers are most willing to see online and social media formats as credible news.
- Think tanks, associations, and nonprofits have also received a boost in trust as Insiders report a greater willingness to go directly to a source to find news and information.

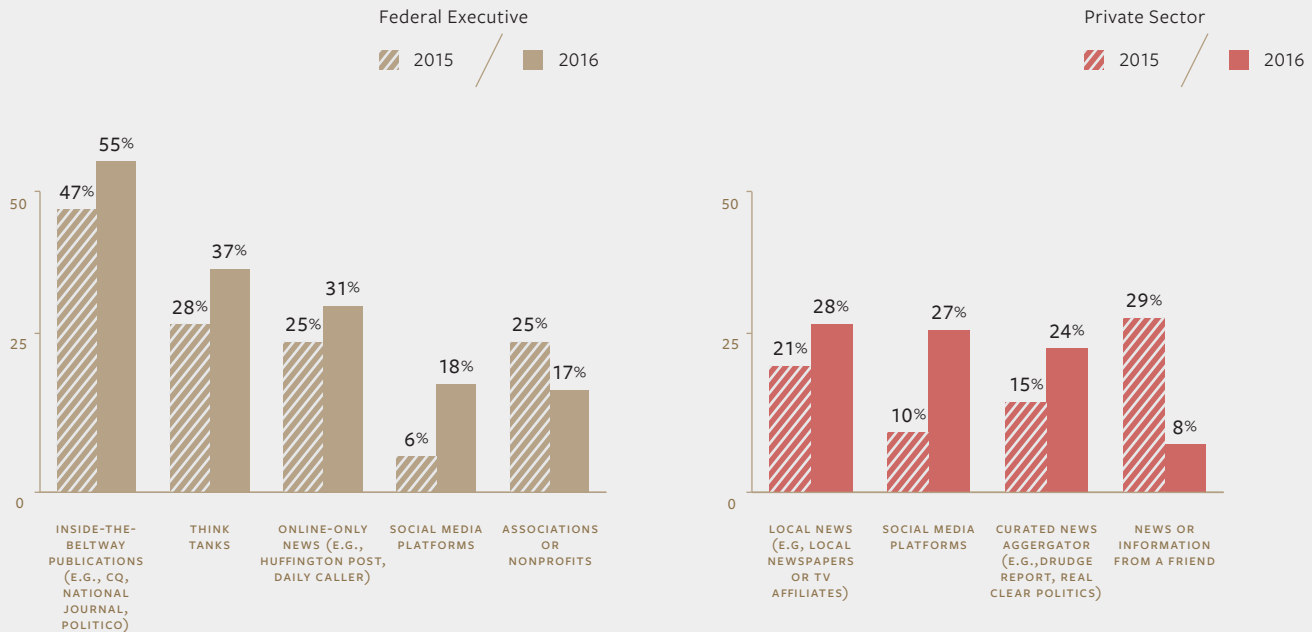
06

Other Workplaces' Trust Changing More Judiciously

Federal Respondents Placing More Trust in Beltway Media and Think Tanks; Private Sector in Local and Digital Sources

Selected Changes in Trusted Sources for Washington News and Information

Percentage of Federal and Private Sector Respondents, 2015 vs. 2016



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

For federal executive and private sector respondents, fewer categories of news sources saw the kinds of dramatic changes Hill staffers experienced. However, there were some noteworthy changes.

- As national news focuses on horserace politics, Federal respondents place more confidence in inside-the-Beltway and special interest resources.
- Private sector respondents reported increased trust in local news, mirroring the growing number of organizations that are focusing their outreach on state legislation as the stalemate on Capitol Hill continues.
- Both groups saw nearly threefold increases in trust in social media.

Insiders Perceive that Journalism is Changing, but Not for the Better

“...Too much focus on personalities and too little focus on substance...”

“...There is so much garbage out there. You must sift and double- or triple-check information that comes in from once-reliable sources more than ever...”

“Journalism is Dead.”

“...The challenge these days is separating useful news/insight from the snow storm of fluff, and serious issues getting discussed ignorantly like daytime TV pop-show topics...”

“...While the quantity of news coverage has increased, the quality of the coverage has decreased...”

“...I know not to accept anything as 100% accurate or objective...”

“...The Congress is apparently less polarized than those that deliver our national ‘news?...”

If Washington Journalism is Indeed Dead, Who's to Blame?



The Speed of the 24-Hour News Cycle...

“...And don’t get me started on most blogs and online sources...most appear to have been written by either green reporters or those forced to post **without time to pay proper attention to detail, attribution and balance—or time to undergo review by a qualified editor.** (This statement is also true of some print newspapers, to be fair.)”

“...Journalists and the news media today are **under such pressure and time and financial constraints** that in-depth investigative journalism is rare and time to fact check and reflect on a piece after writing is increasingly disappearing...”

“The **zeal to be first** has overcome the importance of being accurate.”



...The Rise of Social Media and Clickbait...

“...Accuracy and fact-checking have gone out the window due to **social media influence and the ‘reality TV’ effect on American culture in general.** The traditional sources that used to be credible are no longer either...”

“**Click bait** is ruining voter issue comprehension.”

“...I feel like news sources feel that opinion/analysis is more important than facts and real news; **they’re beholden/competing with social media** and less credible sources and have forfeited their own trustworthiness as a result...”



...Inexperienced Journalists...

“...Quality of reporting has diminished in past 5 years. It seems more biased and news outlets seem to be **relying on less experienced reporters** so you often see mistakes, misunderstandings and not as in-depth reporting.”

“...Continued loss of seasoned journalists is impacting my confidence in the accuracy of news reporting. What I perceived [sic] is a growing use of **young, poorly paid writers covering multiple beats.** There is no incentive for them to develop a rapport with their sources, nor to take time to understand technically complex information...”

Washington Insiders are more likely to trust mainstream media than the average American³, but as avid media consumers, they are also much harsher with their criticism.

Insiders’ savvy makes it easy for them to navigate a divisive media landscape, but there’s strong evidence of growing impatience. D.C.’s relationship with mainstream media (e.g., major cable television and print brands) could further deteriorate if news organizations continue to push biased and inconsequential reporting.



...Too Much Punditry...

“...I’m having a harder time finding ‘news’ in my news—it takes longer to dig through **opinion, punditry, horse-race, news-as-entertainment** to find honest-to-god, what’s-happening-in-the-world news...”

“...Everyone has an agenda these days and you can find a source for whatever you believe (no matter how crazy it is). Sadly, **we seem to live in a ‘post fact’ world** where there is no such thing as objective truth...”



...and, of course, the Election.

“...This election year, in particular, is rife with **caustic innuendo, hateful ‘spin’ and total disregard for civility**. Also, there seems to be many more sources reporting these issues. The public citizenry have apparently lost their trust in ‘all’ of the beltway lobbyists and clearly feel betrayed by elected officials...”

“...Especially this election cycle, there is a **clear slant** to a lot of reporting, even from the sources I trust most...”

“...I follow this presidential campaign less closely than in the past. I am still probably more informed than the average voter, but am **burned out** with this ridiculous 2-year campaign...”



...Or Maybe the Problem is Us?

“**When the only thing that’s consumed is the one-day tweet and the listicle** and the ‘Seven Awesome Slams From the Obergefell Dissent,’ then there really isn’t time to do the piece that we need to do, which is, ‘Hey, I read all 80 pages of the opinion, and here’s what it means, and here’s why it matters, and here’s what the district court has to do going forward’—all of that disappears.”

— Dahlia Lithwick, *Slate*⁶

Journalists largely agree with Washington Insiders’ opinions on why and how the industry has changed. In a 2016 survey of journalists conducted by *New York Magazine*, the biggest problems respondents identified were a broken business model that leads to insufficient funding for good work and causes media brands to pander to their audiences, and pressure to keep readers interested by sensationalizing news. 75% of respondents agreed that they “feel pressure to produce stories that bring in a large audience.”⁵

President Obama Agrees Too:
“And too often, there is enormous pressure on journalists to fill the void and feed the beast with instant commentary and Twitter rumors, and celebrity gossip, and softer stories. And then we fail to understand our world or understand one another as well as we should. That has consequences for our lives and for the life of our country.”⁴

08

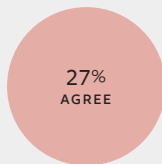
Sentiment is Driving Consumption Changes

Insiders Frequently Cite Concerns Over Accuracy and Bias, and Many are Consuming More Information as a Result

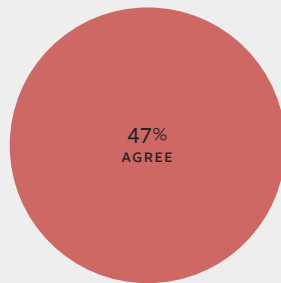
How do Insiders Explain Their Mistrust in Media Sources?

Qualitative Participant Responses, n=176

Accuracy Concerns
(critiques of new business practices, valuing profit over perceived truth)



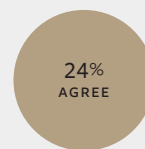
Bias Concerns (critiques of ideology, slant, valuing opinion over perceived truth)



How are Insiders Responding to Trust Issues?

Qualitative Participant Responses, n=176

Corroborating Sources



Using only a Select Few Trusted Sources



Washington Insiders seemed almost eager to vent their frustrations with mainstream media in open-ended survey questions on trust. Coding of qualitative responses revealed several common complaints:

- Increasing bias or partisanship
- Lack of analysis or in-depth reporting
- Emphasis on speed over accuracy, resulting in errors

And as a result, Insiders' comments indicated they are skeptical of only relying on a few sources for trusted news.

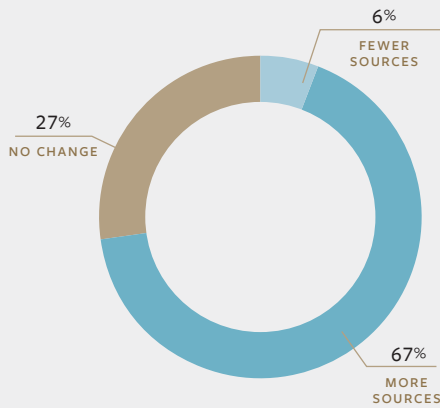
09

Overconsumption as a Coping Mechanism

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

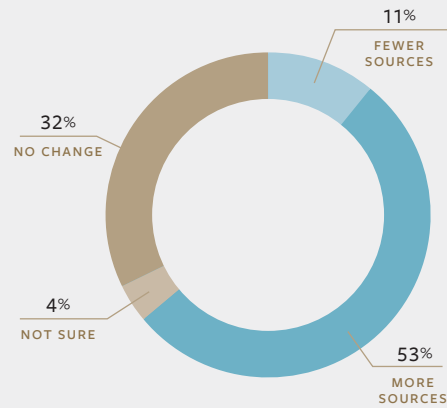
Amount of News and Information Sources Relied Upon, Compared to Previous Years

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.

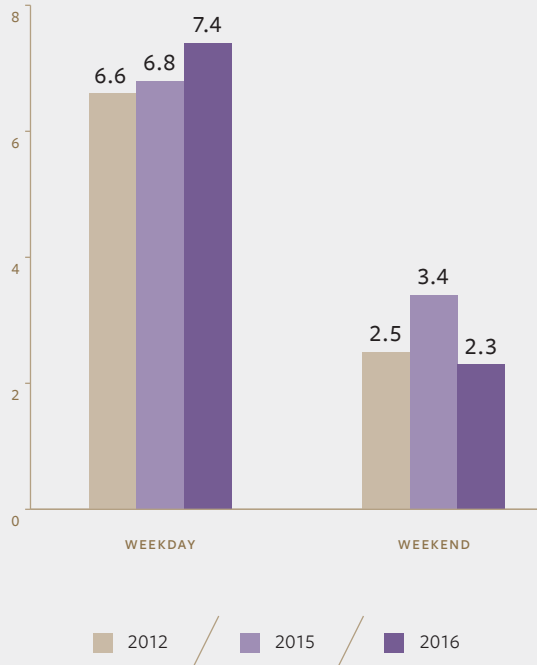
10

Growth in Consumption Focused on Weekdays

Insiders are Consuming Information More Selectively on Weekends, Returning to 2012 Levels

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

Average Unique Channels Per Respondent, 2012-2016



Since 2012, the average number of channels a Washington Insider uses to consume Washington news and information on a given weekday has increased, but the 24/7 news rhythm appears to be lapsing into a 24/5 cycle for consumers in 2016. Insiders reported increasing the number of news channels they consumed on weekends in 2015, but this year they've shifted that extra channel back into the workweek.

“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.”

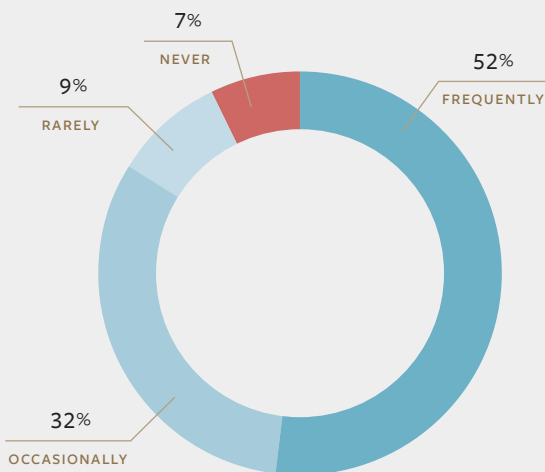
— Private Sector Professional, *Generation X*

11 The Emerging Opportunity to Be a Strong Voice

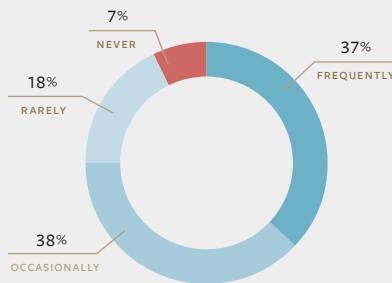
Amidst Media Backlash and Negativity, Frequency of Reliance on Advocacy Content Increases Dramatically

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

Percentage of All Respondents



#2015flashback



There’s a tremendous silver lining for organizations amidst the negativity aimed at the media in 2016. **Insiders reported relying on organizations for information in significantly higher frequencies than in 2015.**

In mainstream media, partisanship is a betrayal of journalistic objectivity, but when Insiders know the policy issues motivating an information source, they feel more confident in their ability to put the facts into context. The combined distrust of national media and the accessibility of organizations’ in-depth reporting and research has likely driven some skeptical Insiders to become more frequent consumers of organizational content.

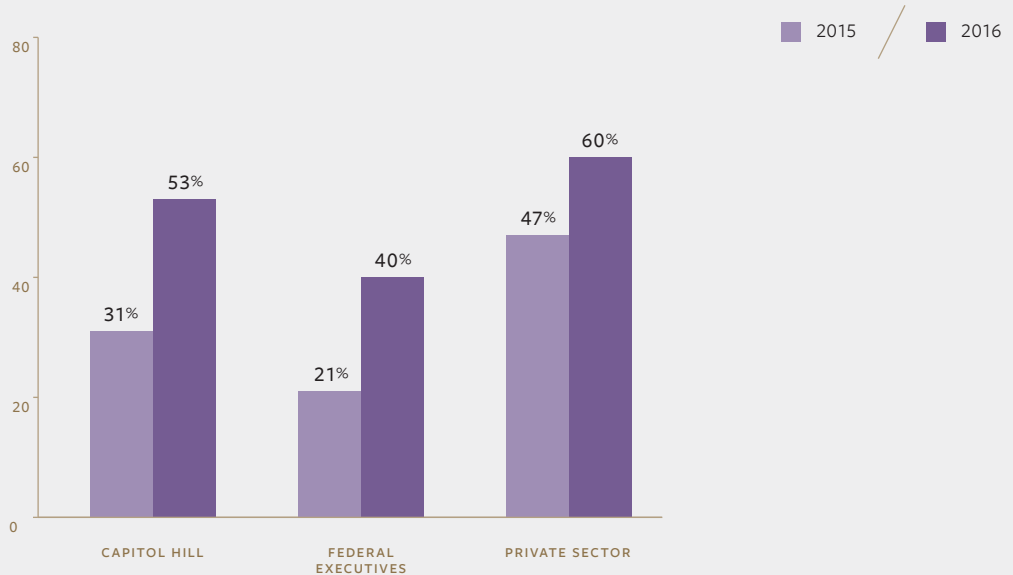
12

Growth in Demand Among Power Consumers Consistent Across D.C.

Each Workplace Experienced Double-Digit Increases in Those Who Report Seeking Content Frequently

Respondents Who Seek Out Content from Associations, Nonprofits, Think Tanks on a Weekly Basis

Percentage of Respondents by Workplace, 2015 vs. 2016



The upward trend in Insiders relying on organizational content is most evident among those respondents who reported seeking content frequently (defined as weekly or more). Between 2015 and 2016, all three workplaces saw significant jumps in the number of respondents frequently engaging with organizations.

2016 may provide the best opportunities for organizations to convert these frequent visitors into power users. As trust in mainstream news sources diminishes, organizations can make inroads with new audiences by being accessible, dependable and thorough.

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Opportunity

Offer frequent users more opportunities for engagement, even if they are not members. Include sign-up forms for e-newsletters and events on well-trafficked portions of the website or recommend related content to visitors. You can also use that space to promote social media accounts.

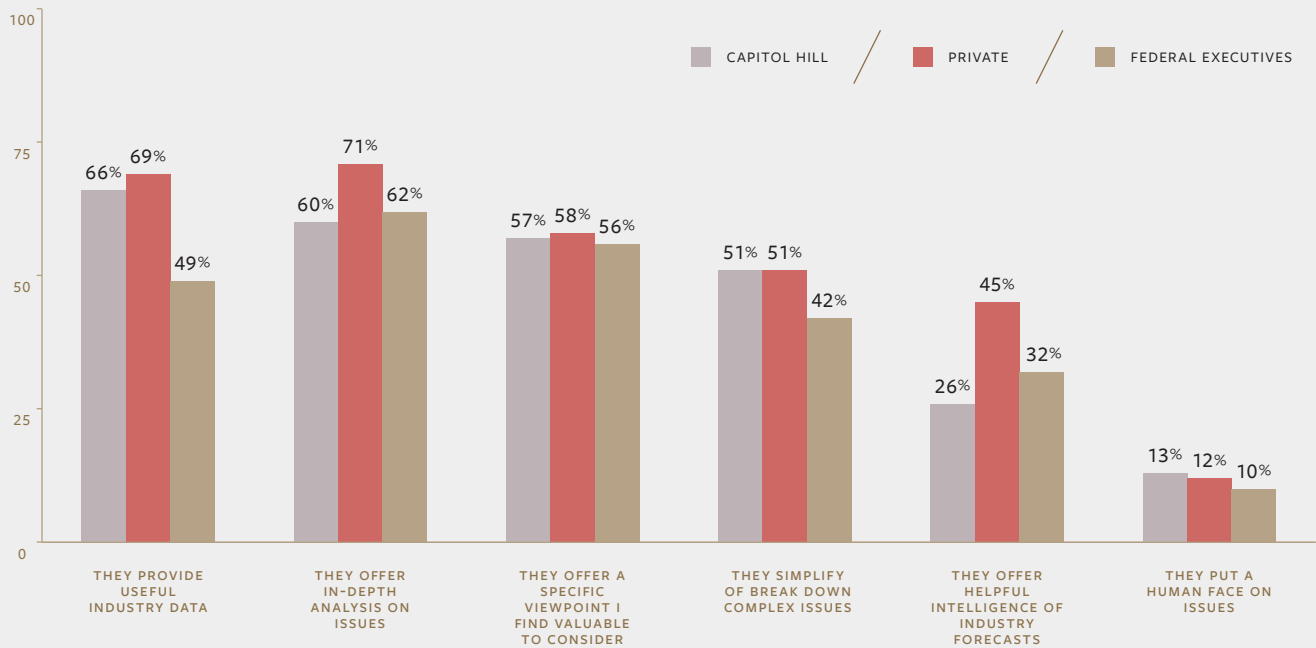


13 Delivering on the Information Value Proposition

Nuanced Use Cases Across Workplaces, but Consensus Around the Value of Organizational Perspective

Reasons Washington Insiders Seek Content From Associations, Think Tanks, and Nonprofits

Percentage of Respondents by Workplace



Organizations are valued for the raw materials they produce in connection with policy issues. Washington Insiders are largely seeking out content that verifies or balances mainstream reporting.

- Data and in-depth analysis are highly regarded for providing concrete details about an issue or policy. Industry data in particular appears to be generally more useful to Insiders on Capitol Hill and in the private sector than it is to federal executives.
- On the other hand, organizational viewpoints and perspectives are uniformly valued for contextualizing or contrasting mainstream narratives.

14

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*

>> PART IV .

Content Consumption Preferences

KEY TRENDS

● / A one-size-fits-all approach fits none.

● / Rely on a more distributed strategy.

● / Content must be unpacked and repackaged to succeed.

● / Online video will not be a panacea.

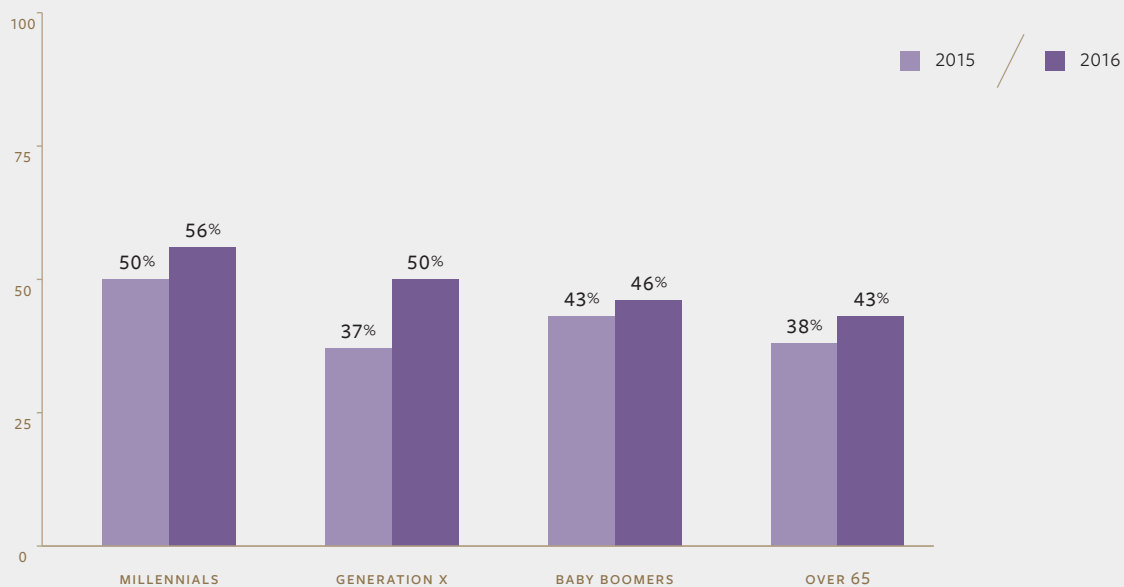
● / True influence comes down to people and data.

15 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?

_04.1

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.

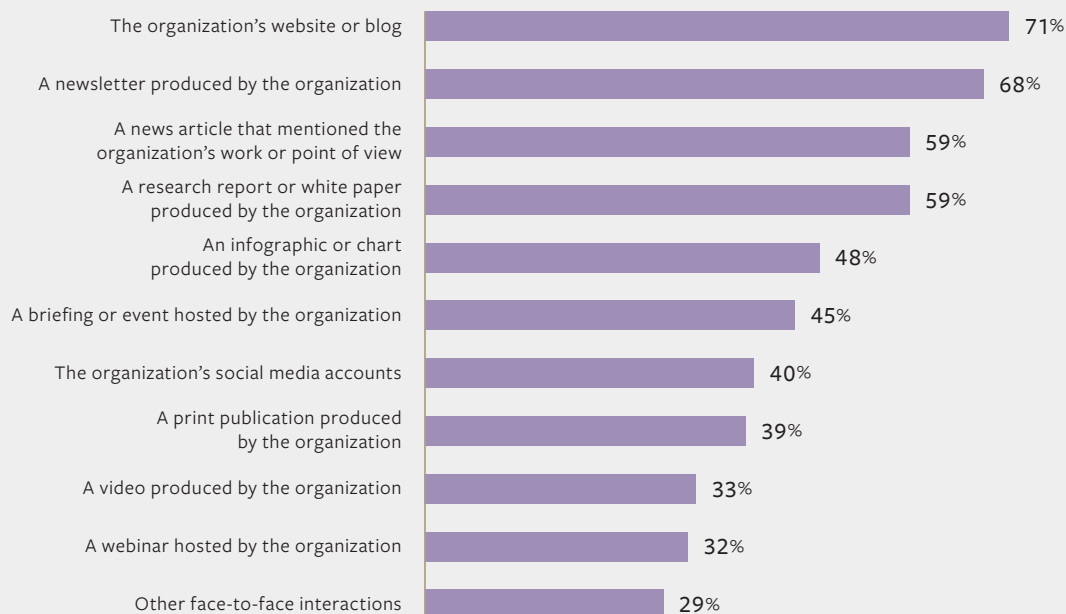


A Snapshot of the 2016 Content Mix

Insiders Consume a Variety of Formats of Information from Organizations

Forms of Association, Nonprofit & Think Tank Content Read or Consumed in Past 12 Months

Percentage of All Respondents



As in 2015, an organization's website remains the top channel or type of content being consumed by Insiders, albeit by a narrower margin. Even when users report engaging with content on other channels, they continue to view the homepage as a hub for news and information—at least for now.

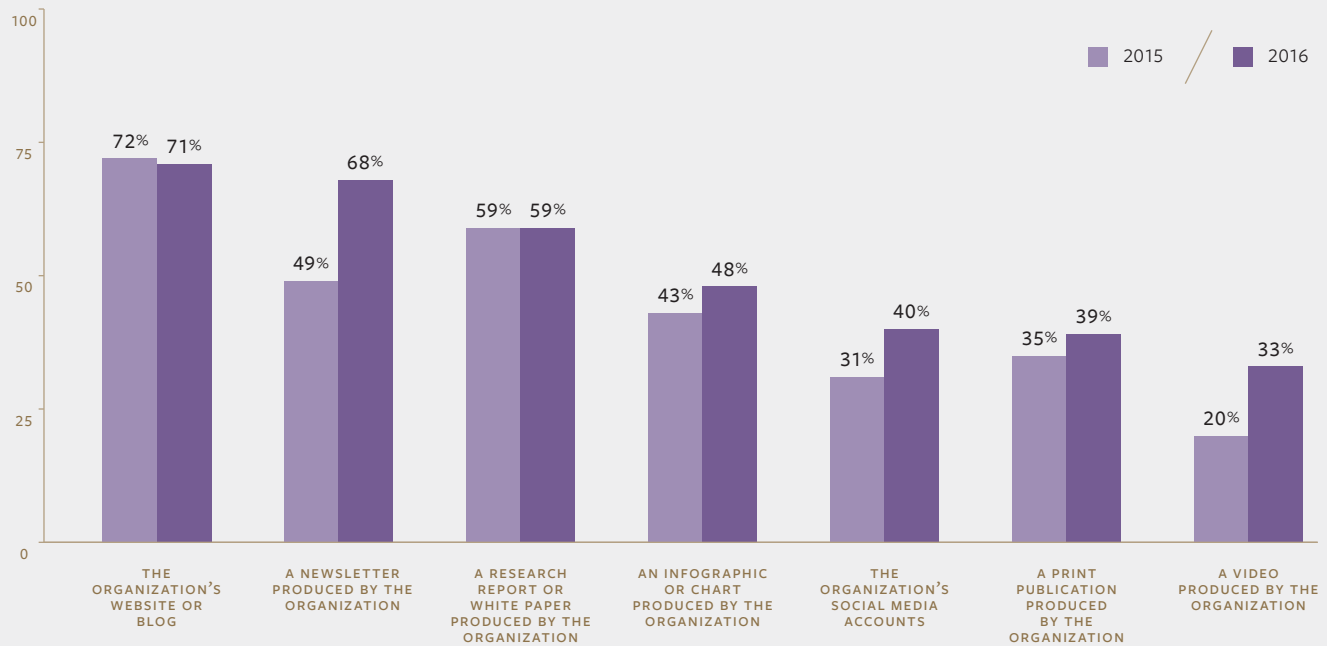
Several options were added in 2016, including news articles (59%), briefings and events (45%), webinars (32%), and other face-to-face interactions (29%).

17 A Rise in Distributed Content

Strongest Growth Among Content that Meets Users Where They Are: Newsletters, Visual Content, Social Media, Videos

Forms of Association, Nonprofit & Think Tank Content Read or Consumed in Past 12 Months

Percentage of Respondents, 2015 vs. 2016



While the website is still in the top slot in 2016, more distributed content formats are quickly catching up—a trend that has already been experienced among media brands.

- Newsletters, social media, and online videos—all formats that meet the user where they are as opposed to being sought out—all saw large gains in 2016.
- At the same time, audiences increasingly want content they can consume when they have a few minutes between meetings or during their morning commute. Content packages that promise high value with a low-demand for time or focus, such as infographics and videos, are valuable.
- However, sharable content shouldn't replace the website, where users still seek out in-depth coverage for the issues they care most about.

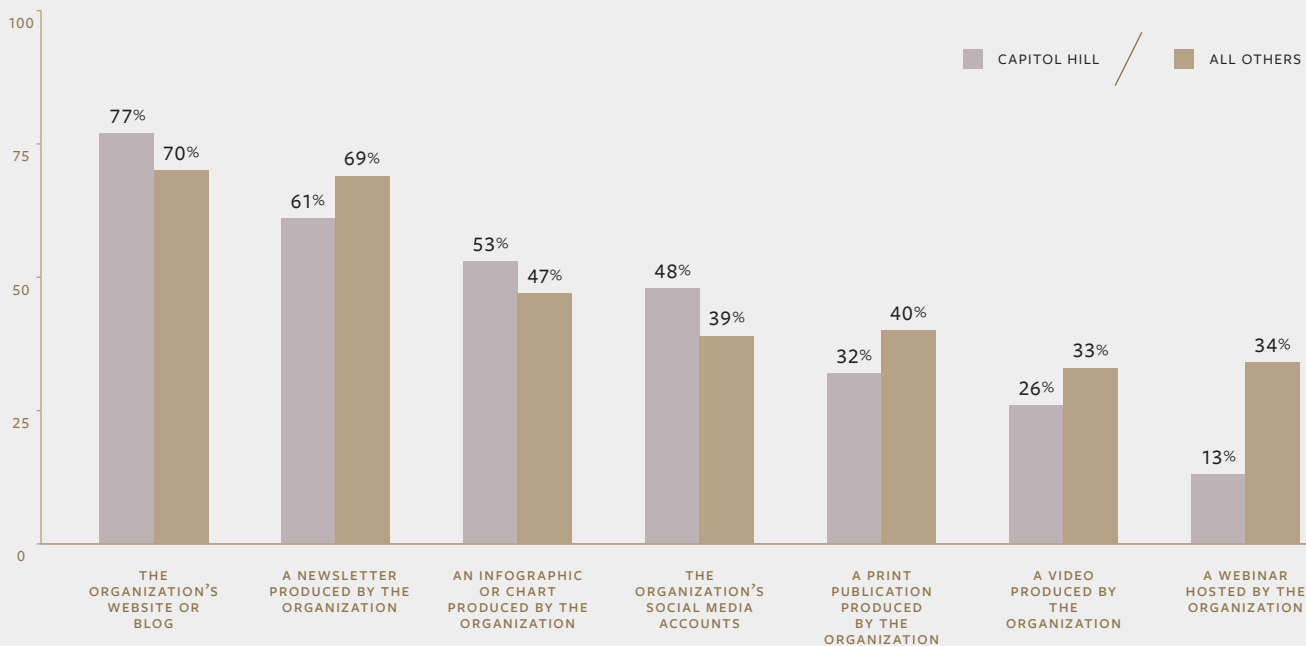
18

What Hill Staffers Consume, and What They Don't

Newsletters, Social Media & Video are Among Noteworthy Gaps in Capitol Hill Staffer Consumption vs. Other D.C. Insiders

Forms of Association, Nonprofit & Think Tank Content Read or Consumed in Past 12 Months

Percentage of Capitol Hill Respondents vs. All Others



Capitol Hill staffers' differences in consumption preferences are worth highlighting, because they tend to buck the broader trends observed among the Insider community. For example:

Staffers report stronger reliance on websites, infographics, and social media than respondents from other workplaces surveyed.

But they also report lower reliance on newsletters (confirming anecdotal evidence that they strongly dislike being added to organizational list serves), and videos.

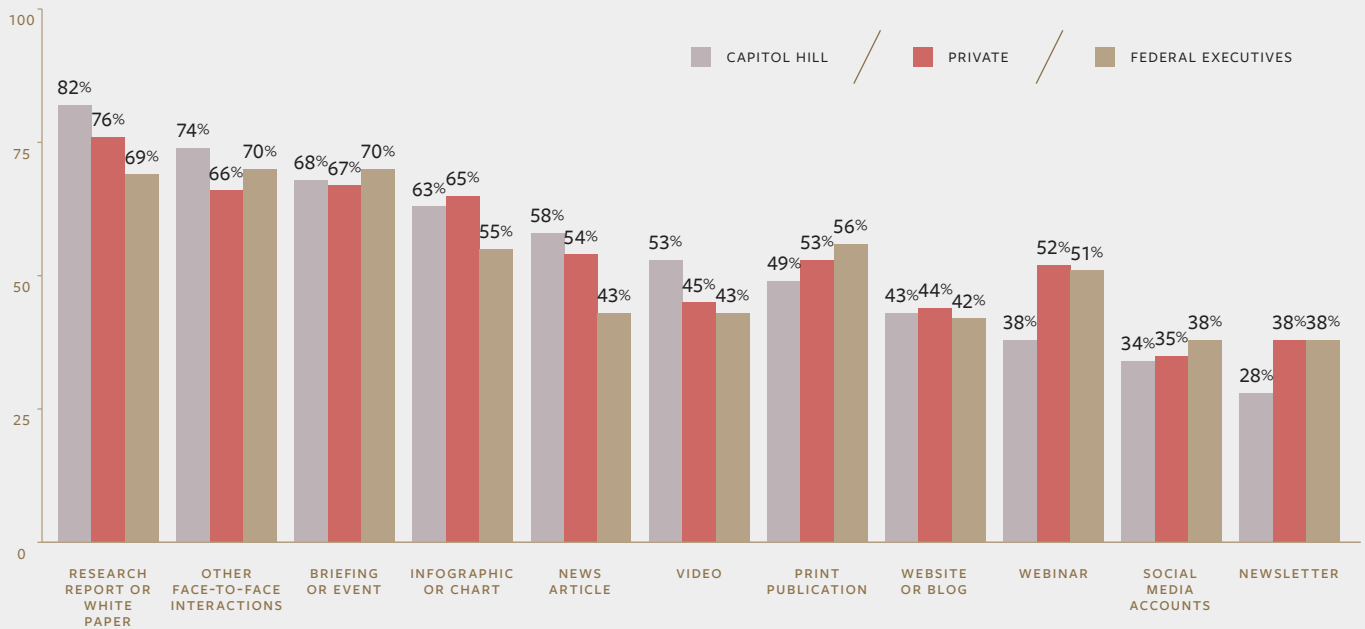
Staffers' preferences likely reflect the nature of their policy priorities. Many may drop in for content only when an issue is top-of-mind; thus quick, of-the-moment pieces such as infographics and social media posts are prioritized over content built to foster relationships, such as newsletters and webinars.

But Don't Mistake Consumption for Influence

The Most Influential Content Formats Include Personal Interactions, Data

Content Formats Deemed to Have Had an Influence on Opinions

Percentage of Respondents that Reported Consuming Each Format, by Workplace



There's an important conclusion to be drawn from the 2016 data—the formats that are most often consumed are not always the most influential.

- While only 29% of Insiders report having a face-to-face interaction with an organization in the past 12 months, the overwhelming majority of those who did reported that it had an influence on their opinions.
- **Not surprisingly, the sweet spot between high consumption and high influence appears to be in data-driven formats like research reports and infographics.** Both had relatively high rates of consumption (59% and 48%, respectively) and are among the formats reported to have been influential.
- Events, which were detailed extensively in the 2015 study, also appear to be a sound strategic choice. They are the sixth highest channel consumed (perhaps limited not by demand, but by supply), and are also among the most influential.

_04.2

Opportunity

What's the utility in producing content in formats deemed to have less influence, like social media and newsletters? Are they worth producing at all? Organizations shouldn't shy away from these formats, but should instead understand their role in the decision-making process and tailor content accordingly. Insiders likely use these channels for important functions of discovery and awareness-building, before moving onto other formats like reading white papers or attending events. So consider providing social-friendly event recaps or video content to entice Insiders to attend (and be influenced by) future events, or—again—break in-depth reports into social content that can direct audiences back to the more influential source material.



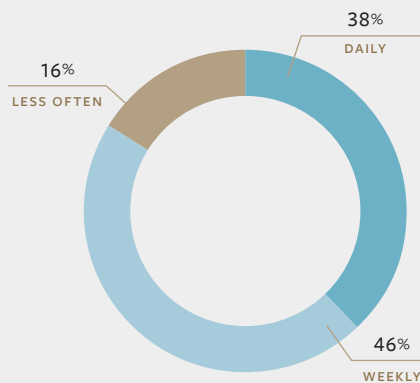
20

Majority of Insiders Watch Washington-Focused Online Video at Least Once a Week

Daily Use of Online Video for Washington-Focused Content Suggests Most Viewing Isn't Policy-Focused

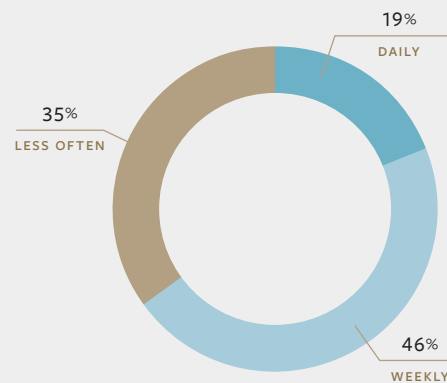
Frequency of Online Video Consumption

Percentage of All Respondents



Frequency of Washington-focused Online Video Consumption

Percentage of All Respondents



Between 2015 and 2016 there was almost no change in online video viewing habits

While online video remains a format in which Washington Insiders are consuming information regularly (84% watch online video at least once a week, virtually unchanged from 2015), they don't necessarily rely on the format for Washington focused information—yet. Just 19% of Insiders report consuming Washington focused online video at least once a day.

As expected, Millennials reported the highest rates of daily video consumption for their work in Washington, at 28%.

Republicans also paced ahead of their peers, with 25% reporting Washington focused video consumption at least once a day.

Online video may still lack the convenience of other formats. The Reuters Institute's Digital News Report 2016 found that 41% of news consumers they surveyed reported reading text was still quicker and more convenient than viewing online video.⁷

“...When I click through something expecting an article and get video content only, it's enraging. My office doesn't have a door and I can't watch video as efficiently on a train, etc. as I can read that information. Also, I can't skim video, whereas I can skim an article. Also, a video does not leave me with links to click for further information...”

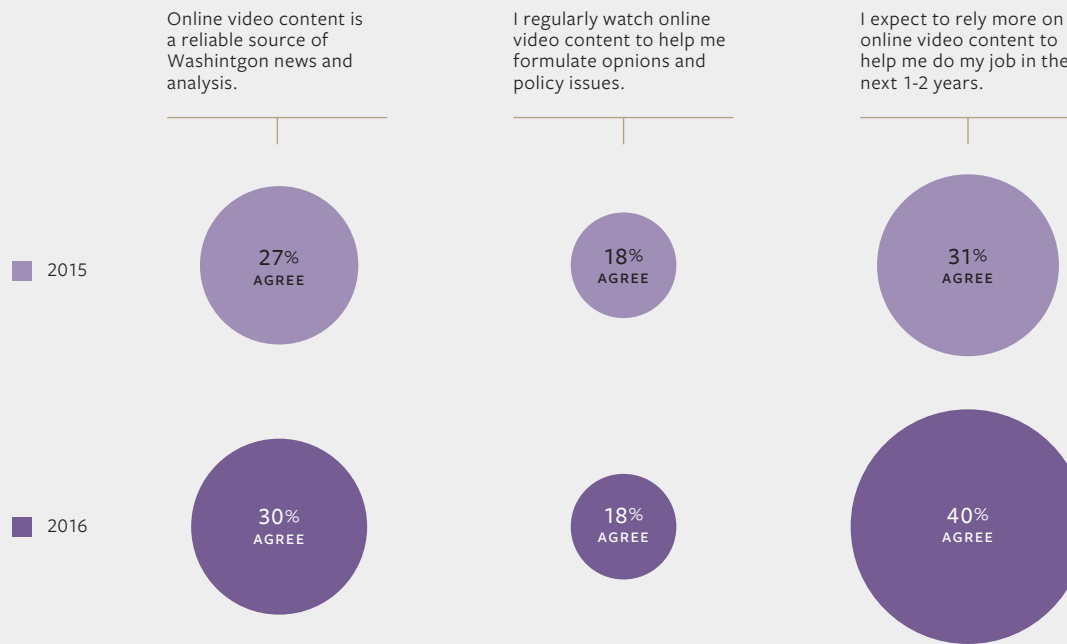
— Private Sector Professional, Generation X

21 If We Build It...Will They Come?

Increasing Platform Emphasis May Impact Optimism Around Online Video, But Actual Use Continues to Lag

Perceptions of Online Video's Role in Daily Policy Work

Percentage of All Respondents



During the past several years, there has been a dramatic shift in the amount of video content being produced. Emerging social media platforms like Periscope or Snapchat are largely focused on the format, and at the same time, traditional social media platforms like Facebook, Twitter and LinkedIn are adding features and adjusting algorithms to surface video more frequently and to reward video content producers.

Facebook has predicted that by 2021, most of their news feed content will be video.⁸ Some have scoffed at the prediction, but Washington Insiders may be starting to buy into the hype. 40% of Insiders expect to rely more on video to do their jobs in the next one to two years, an increase of nine percentage points over 2015.

At the moment, those predictions seem optimistic. Between 2015 and 2016, there has been very little movement in the number of Insiders who regularly use online video or who believe it is a reliable source.

“...Whenever a news site makes me watch a video rather than read about [an issue], in nearly all cases I switch away. No time for useless time-consuming formulaic videos that don’t provide much information. Rather get it in a couple paragraphs I can read. A non-optional video is a no-go just about every time...”

— Private Sector Professional, Baby Boomer

—04.3

Opportunity

There is a gap between Insiders' expectations for online video and their trust in existing video sources. This gap is waiting to be filled by organizations that can provide extremely lean and highly valuable content. The key is to offer terse insights in clips users can view in email or on social media, for example, policy summaries that take 60 seconds or less. For inspiration, consider Instagram ads, Snapchat stories or BuzzFeed's "Tasty" videos.



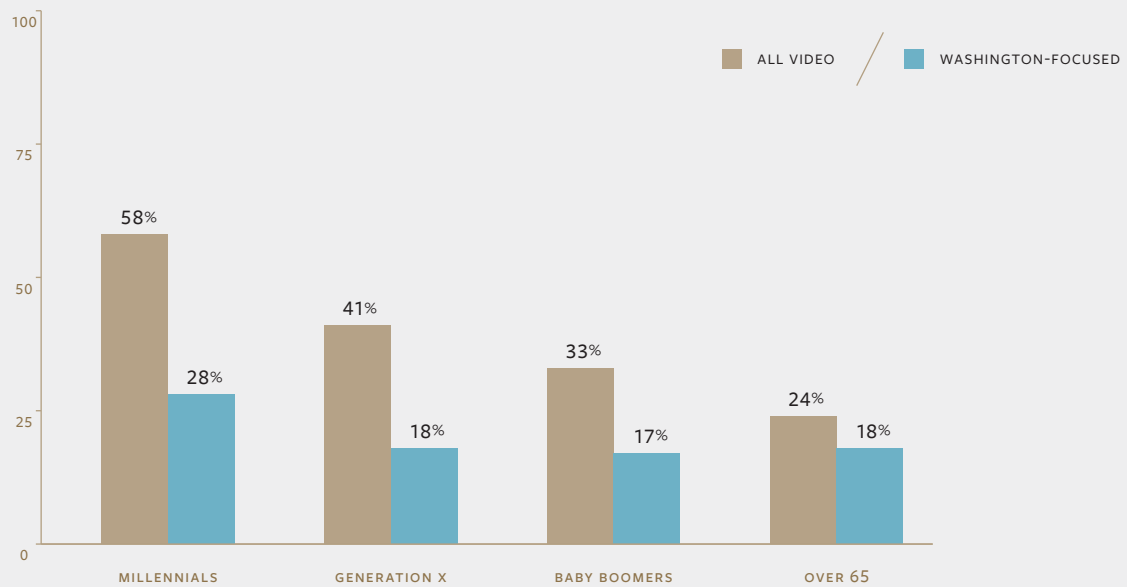
22

Younger Generations Have Higher Consumption of Video Content

More Than a Quarter of Millennial Insiders Watch Washington Content Daily

Report Watching Online Video Daily

Percentage of All Respondents by Generation



Source: National Journal Communications Council research and analysis.

Millennials have helped to bring Instagram and Snapchat into Washington offices, so it's no surprise that this generation appreciates video content. Older generations of Insiders are more hesitant to trust online video and social media, and there is evidence that even those who view video do so with the audio on mute.⁹ Because of this, organizations producing online videos should try to supplement that content by repurposing it in other user-friendly formats.

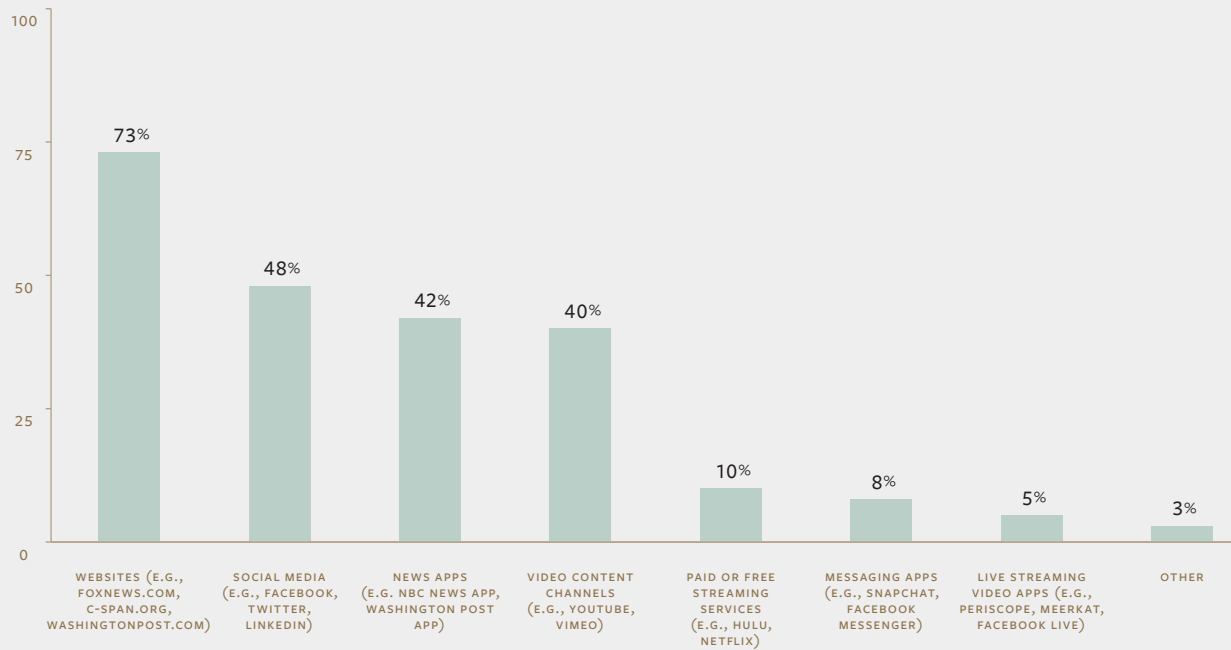
23

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.

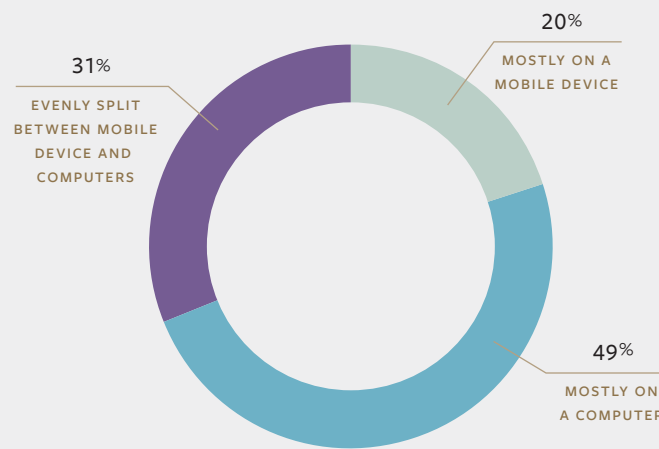
24

Insiders Prefer Washington-Focused Video on Desktop

Contrary to Perceptions of On-the-Go Viewing, Policy Content Watched Mostly on Larger Screens

Preferred Device for Consuming Washington-Focused Online Video

Percentage of All Respondents



Another area in which Washington Insiders run counter to prevailing online video trends is the device most used to consume it. Unlike national trends in online news video consumption, in which 55% of video views occur on mobile devices,¹⁰ most Washington Insiders still report accessing video content via a desktop or laptop computer.

- Even mobile-focused Millennial Insiders indicate desktop is their preferred format for online video consumption.
- Insiders could be motivated by a fear of exhausting data plans, but it seems more likely that big screens are superior to mobile screens when users want to focus on content.

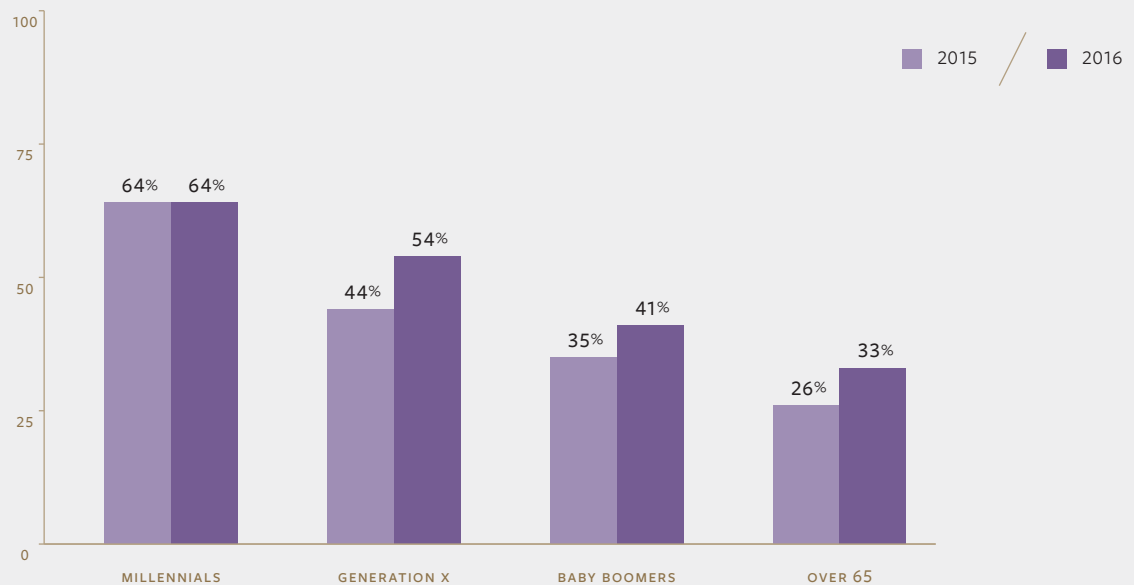
25

A Canary in the Coal Mine for Visuals

Millennials Foretell Growth of Visual Content, Spurred on by Demand for Simplicity and Influential Power of Data

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

Percentage of Respondents by Generation, 2015 vs. 2016



Millennial Insiders were the only generation not to see a sharp increase in the demand for infographics in 2016. As early adopters of the format, they have seen the benefits of visualizations in conveying complex information quickly, and their peers among older generations are now catching up.

It's no surprise given trends seen elsewhere in the 2016 data. Insiders are increasingly seeking content that simplifies, and visuals can transmit an enormous amount of information in a short time frame and are more memorable than text alone.¹¹

At the same time, data-driven content, as seen previously, is also among the most influential formats for Washington Insiders.

04.4

Opportunity

Organizations are creating pre-formatted visual templates to share content (like data and statistics) on social media using online services such as Pablo or Canva. These templates make it easier for anyone within the organization to create visual content for social media, regardless of their design skills. Common versions share quotations, facts, testimonials, or other text-based content that would otherwise be difficult to share.



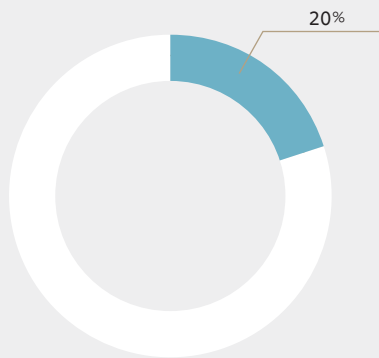
26

Podcast Growth Slow, Driven by Millennial Demand

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 Workplace and Generation, 2015 vs. 2016



For a moment in 2015, all ears were tuned to podcasts as President Obama visited famed podcast *WTF* for a one-on-one interview, but the trend hasn't caught on inside the Beltway, even as news media like *The Washington Post* and reporters like David Gregory have ventured into podcasting. While there could still be potential for change, at the moment the medium is beloved by only a small percentage of Washington Insiders.

>> PART V.

Social Media Usage and Perceptions

KEY TRENDS

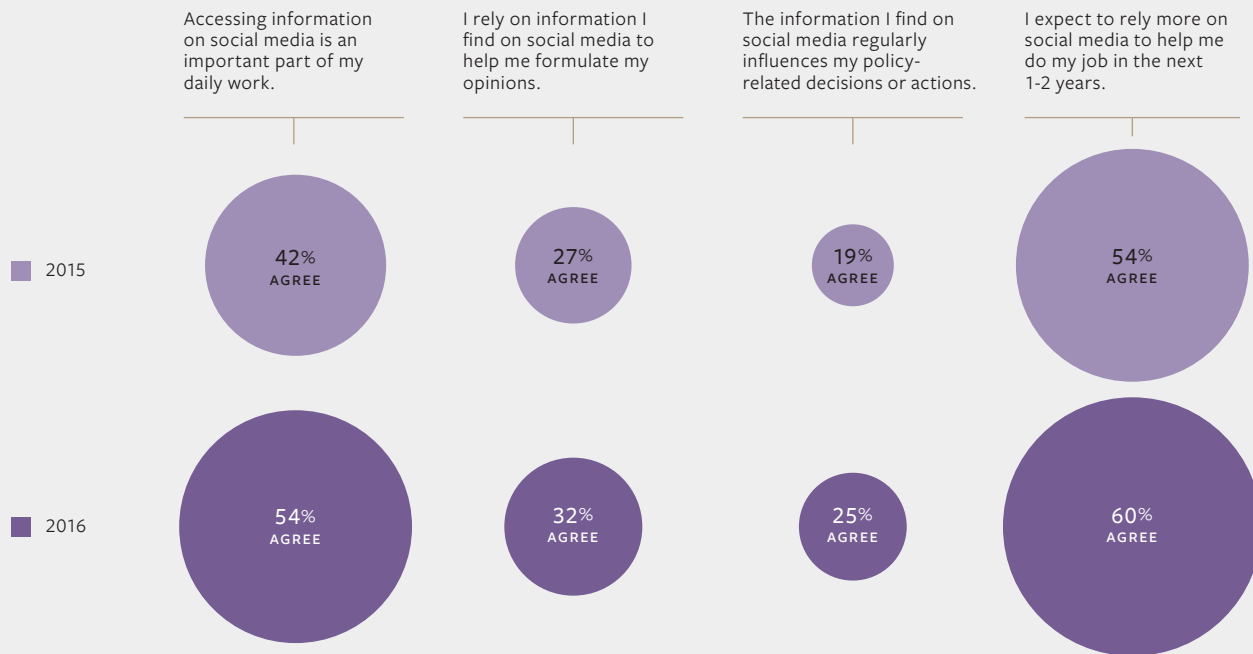
- / A one-size-fits-all approach will fit none.
- / Rely on a more distributed strategy.
- / A nimble strategy is a winning strategy.

27 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.

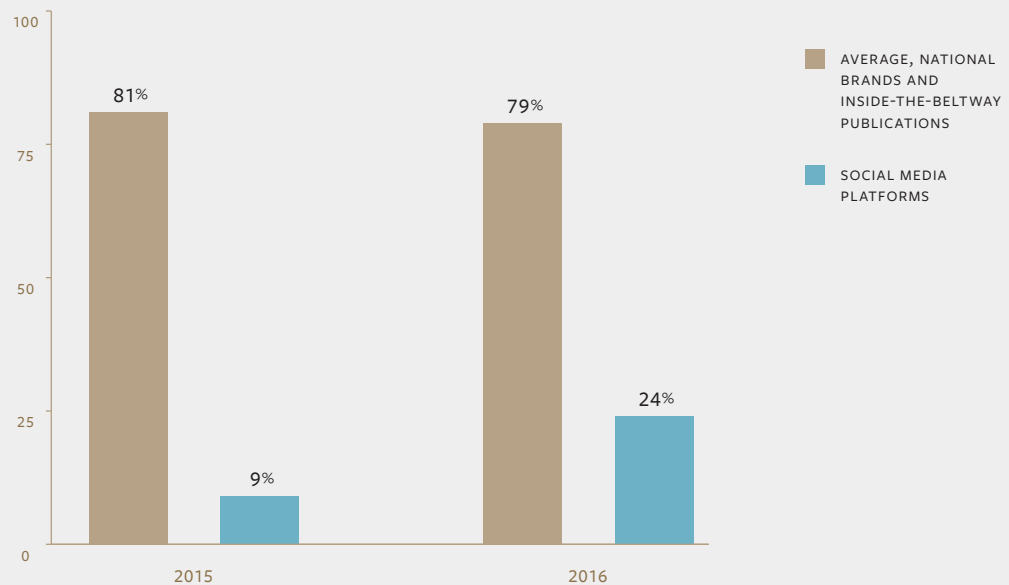
And, the role of social media is predicted to continue to grow, perhaps because of the growing acceptance of its utility in offices across Washington.

A Signal of Algorithmic Reliance?

Shrinking Trust Gap Between Content Creators and Social Channels Signals Potential Win for Distributed Content Models

Trusted Sources of News and Information

Percentage of Respondents, 2015 vs. 2016



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

In 2015, Insiders seemed reluctant to attribute trust in content found on social media to the platforms themselves; instead, they attributed it to the creators of the content. **As content becomes increasingly distributed (thus limiting exposure to original sources of news), the gap between content creators and secondary distribution platforms like social media is shrinking.**

It's interesting to note that one of the major complaints against social media—that its reliance on algorithms tends to surface content that agrees with one's worldview, thus limiting exposure to broader dialogues—could also be key to Insiders' willingness to trust and use the platforms more, especially in 2016. Information being discovered on the platforms is increasingly targeted and likely more useful to work (especially if this work is in searching for like-minded opinions).

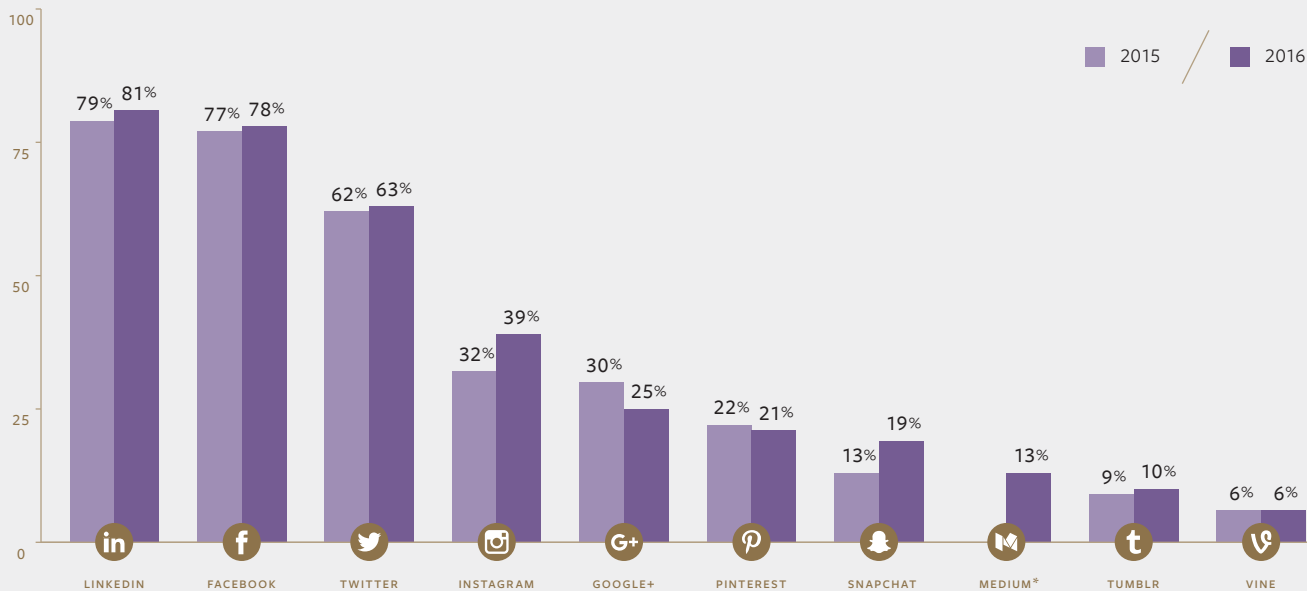
Despite this, hurdles still remain. Lingering issues with platforms' policies on privacy, free speech, and harassment will likely keep trust levels below those of mainstream media for some time.

29 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.

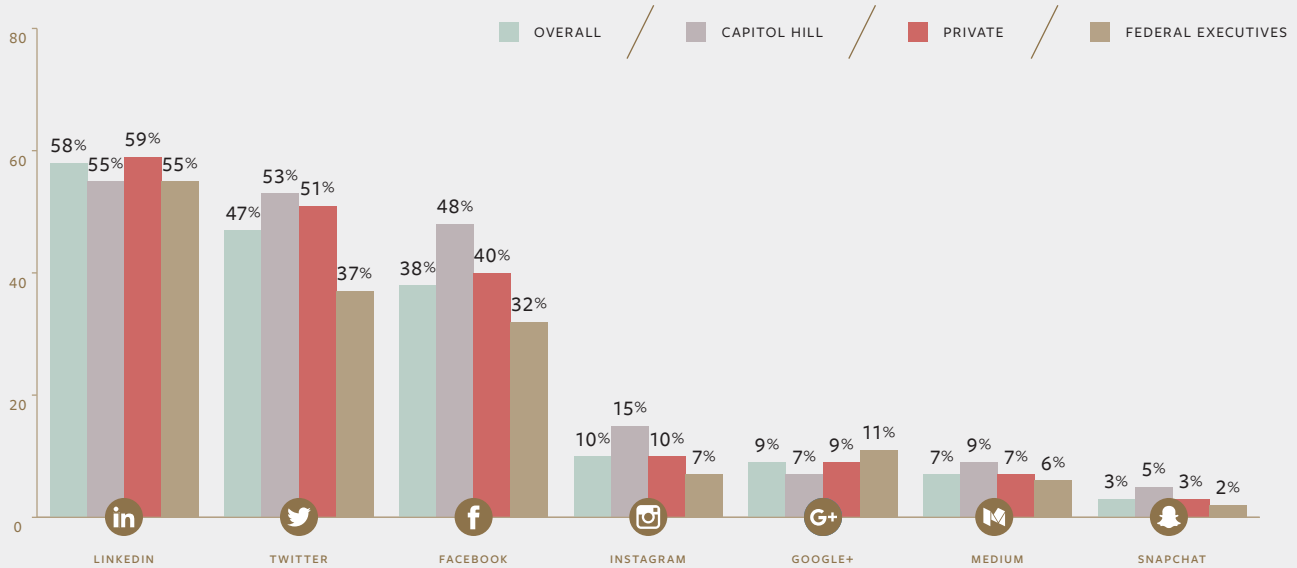
30

But for Work Purposes, Insiders Rely on Tried and True Platforms

LinkedIn Used Most Widely for Work in Washington; Twitter Also Strong Among Staffers and Private Sector

Social Media Platform Usage

Percentage of Respondents Who Have Used Platform in Last 6 Months as Part of Their Work in Washington by Workplace



When it comes to using social media platforms specifically for work in Washington, the preferred channel lineup for Insiders changes a bit. LinkedIn is still the most widely adopted platform for professional purposes, but Twitter usurps Facebook as the second most adopted professional platform.

Historically, social media only becomes professionally acceptable once it reaches a critical mass. Organizations that become early adopters on channels like Instagram and Snapchat now can use this time to experiment on the platform and to develop an approach that engages audiences and aligns with overall strategy.

31 Social Use Cases are Nuanced Across Platform Stalwarts

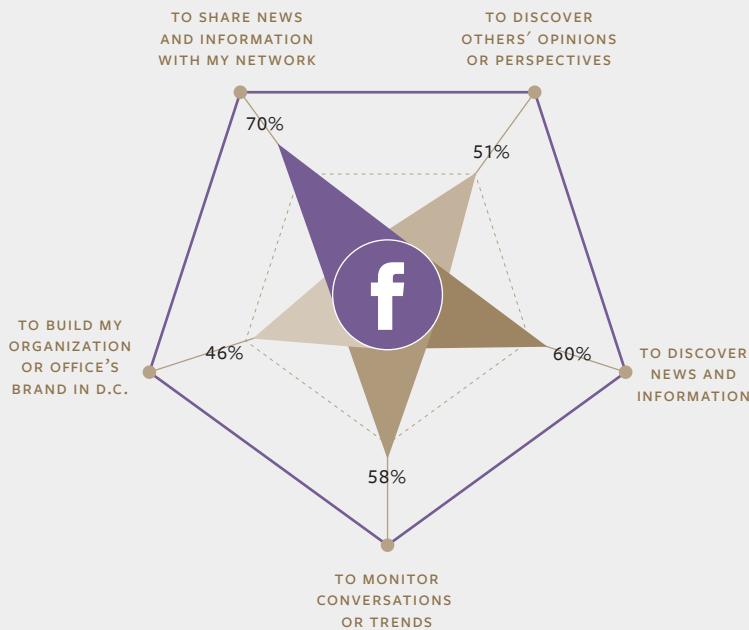
Primary Purposes for Using Social Media Platforms for Work in Washington

Percentage of Washington Insiders Who Have Used Platform in Last 6 Months as Part of Their Work in Washington

Washington Insiders rely on different social media platforms to accomplish different tasks as they relate to their work in Washington. It's important to take these use cases into consideration as organizations share content and calls-to-action on the platforms.

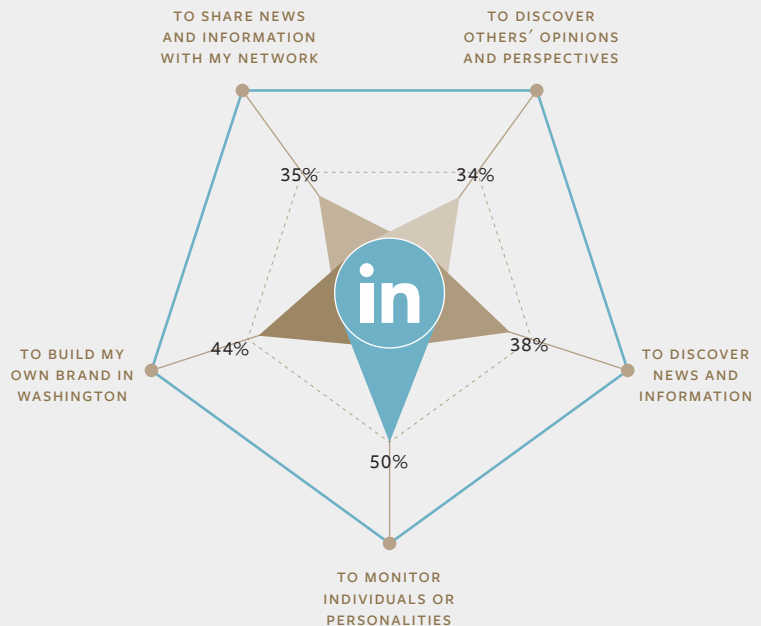
Facebook

Sharing & Discovery

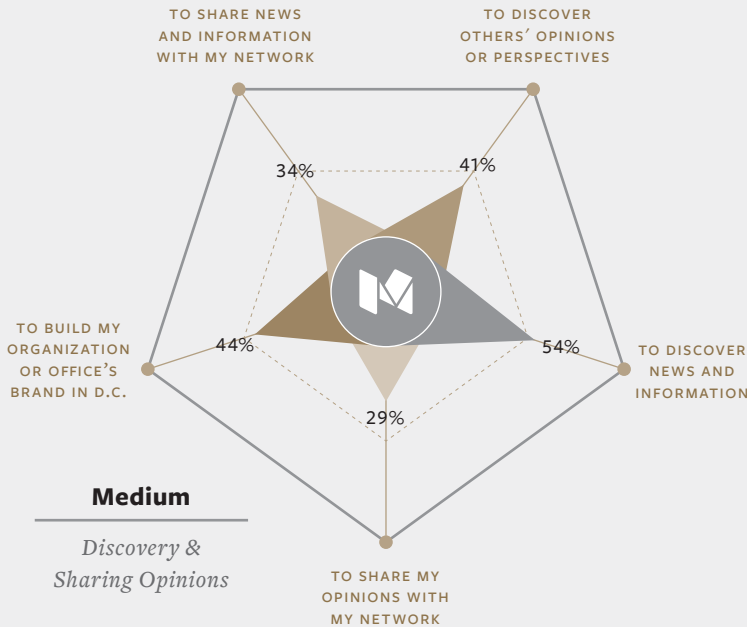
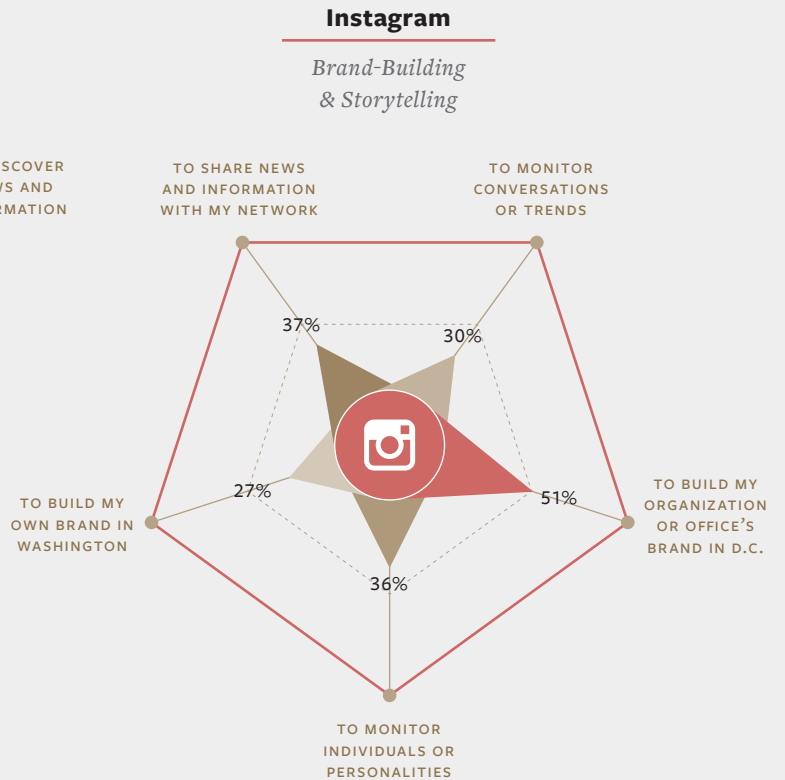
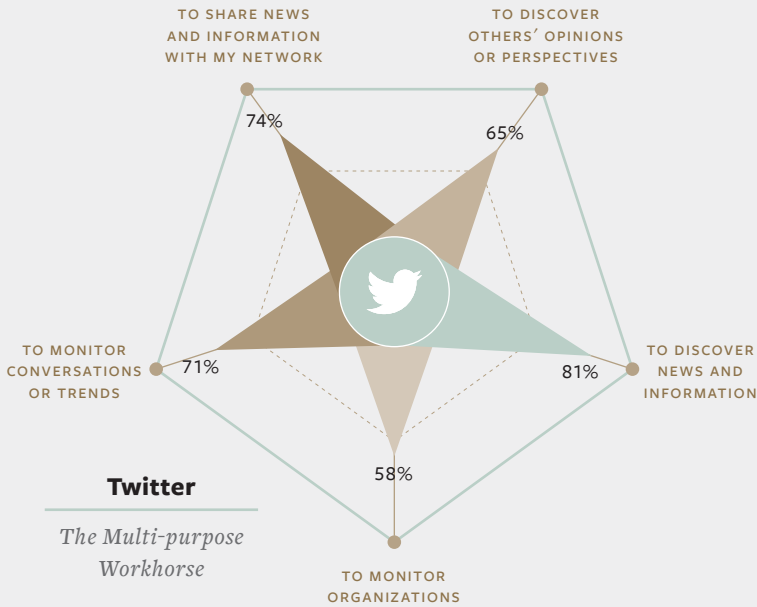


LinkedIn

Monitoring & Personal Branding



- **LinkedIn** is largely used for its flagship features of following individuals' movements within Washington workplaces, and building one's own brand. However, it's gaining ground as a platform for discovering news and information—when that news and information is shared by credible personal connections.
- Though **Facebook** usage is lower for professional purposes in Washington, those Insiders who do use the platform primarily consider it a place to start conversations or to discover news, conversations and perspectives.



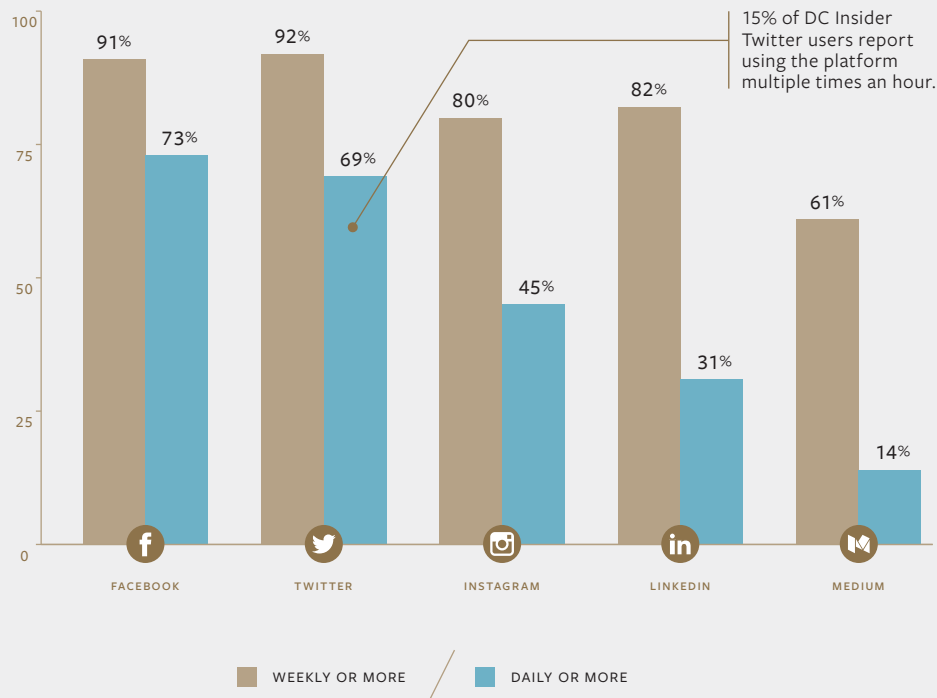
- Insiders who use **Twitter** consider it to be a one-stop shop for a multitude of purposes, largely around keeping a pulse on news and conversations as they occur in real time.
- **Instagram** and **Medium**, though currently used by fewer Washington Insiders for professional purposes than the “Big Three,” still offer up distinct opportunities for engagement. Instagram is currently used primarily for external brand-building of offices or organizations, while Medium—true to its positioning as a thought leadership platform—is used for uncovering news and, perhaps more importantly, for perspectives on the news.

32 Most Frequent Work-Related Usage on Facebook and Twitter

But a Healthy Majority of Insiders Also Use Instagram, LinkedIn, and Medium Weekly

Frequency of Social Media Platform Usage

Percentage of Respondents Who Use Platform



A third component to any channel strategy—in addition to what Washington Insiders are using and why—is to examine the frequency of usage.

- While fewer Insiders use Facebook for professional purposes in Washington, those who do report the most frequent daily check-ins, with 73% logging in daily or more.
- Twitter—arguably a more real-time platform than Facebook—has a slightly lower percentage of users who report logging in daily. One reason could be that Twitter has only recently begun experimenting with an algorithmic-based timeline, and users have long lamented feeling overwhelmed by the “fire hose” of Tweets on the platform. For many Insiders who are already fatigued by information overload, the solution may be to only check in to Twitter a few times a week—perhaps when critical news is already trending or at dedicated monitoring intervals.
- Regardless, within the daily users is a subset of “power user” Insiders who use Twitter multiple times an hour (at 15%, compared to 11% of Facebook users).

_05.1

Opportunity

Now, more than ever, organizations need to tailor content specifically to a social media platform when posting, rather than relying on the old adage of “create once, publish everywhere.” 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.



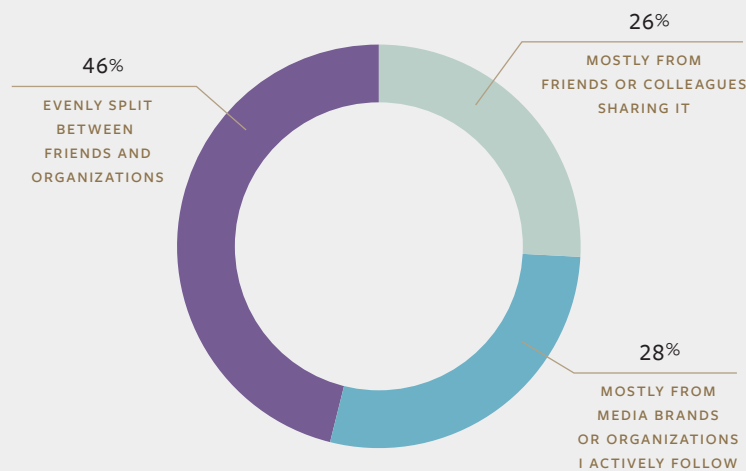
33

Content Discovery on Social is Largely Democratic

Neither Friends nor Organizations Have a Distinct Advantage for Insiders Seeking Washington-Related Content

When Respondents Discover Washington-Focused Content on Social Media, it is...

Percentage of All Respondents



Every week there seems to be an alteration to a social media algorithm that promises to change the way content is prioritized in the news feed. At the moment, nearly half of all Washington Insiders say the content they discover is evenly split between friends and organizations—which is good news for content creators, but this may change in the future. Facebook recently announced changes to its algorithm that promise to surface more content from friends, and less from publishers and other organizations.¹² The organizational impacts of this change, as well as those from introducing an algorithm to Instagram earlier in 2016, have yet to be seen.

“Obviously one must be selective on social media, but I find that friends often post local or otherwise-unread articles which offer excellent insights (e.g. from state or local media where they live, or The New Yorker, Economist, or their personal experiences of events).”

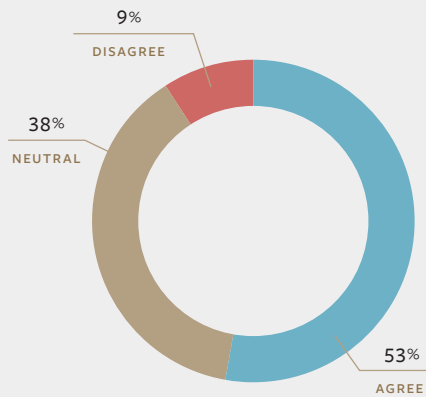
— Federal Executive, Over 65

34 But Greater Trust in Content Shared by Reliable Media Sources

Content Accrues Trust Benefits When Shared by Both Friends and Media

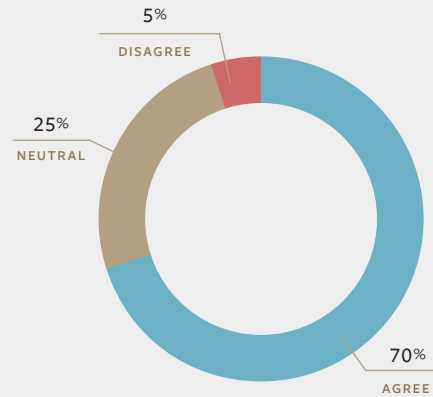
I am More Likely to Trust a Piece of Content When a Friend of Colleague Refers it to Me

Percentage of All Respondents



I am More Likely to Trust a Piece of Content When a Reliable Media Source Shares it

Percentage of All Respondents



Journalists have a favorite saying about the importance of objectivity: “If your mother says she loves you, check it out.” It seems Washington Insiders have also adopted this mindset. Despite many saying they discover content through friends, few appear to accept that content as the final word. 70% of Insiders trust content shared by media compared to 53% saying the same of friends and colleagues.

_05.2

Opportunity

How should organizations approach their content strategies for social media in light of all the recent algorithmic changes and introductions? The best approach may be to follow the principles of Quartz and The Atlantic, whose journalists and audience development teams believe that your content should appeal to “the audience of your audience.” Organic content visibility on social media will continue to be determined (or limited) by the extent to which individual users—and not organizations—share it. By tailoring content for the individual platform use case, and also tailoring calls-to-action (relying on a brand ambassador strategy, for example), organizations can succeed in remaining visible in the increasingly crowded (and unpredictable) newsfeeds.




“I don’t do [sic] digging for think tank stuff. But I do have a bunch of orgs on my Twitter feed, and if something’s interesting, I’ll click.”

— Private Sector, *Generation X*

>> PART VI.

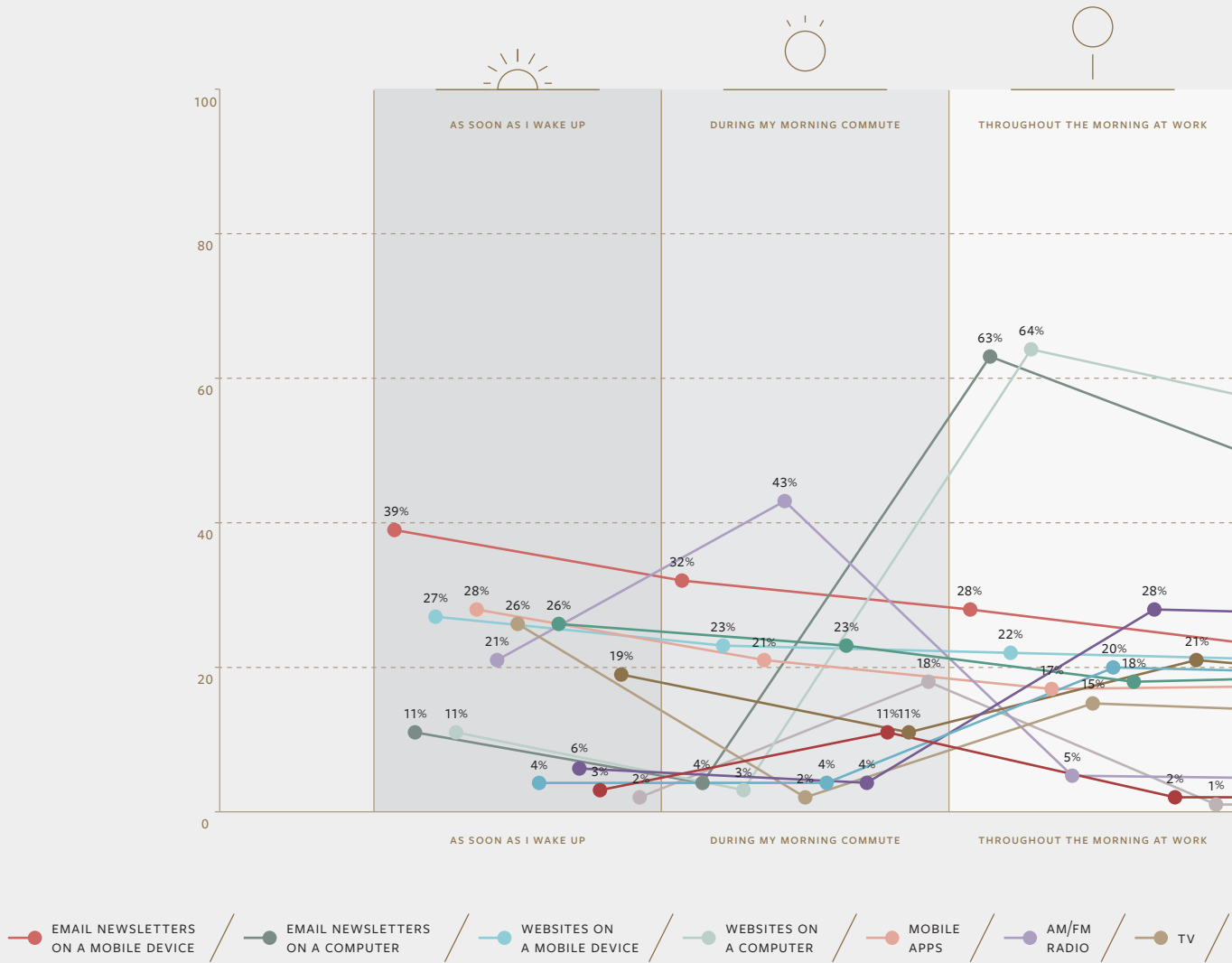
Information Consumption by Time of Day, Brand, Channel, and Device

KEY TRENDS

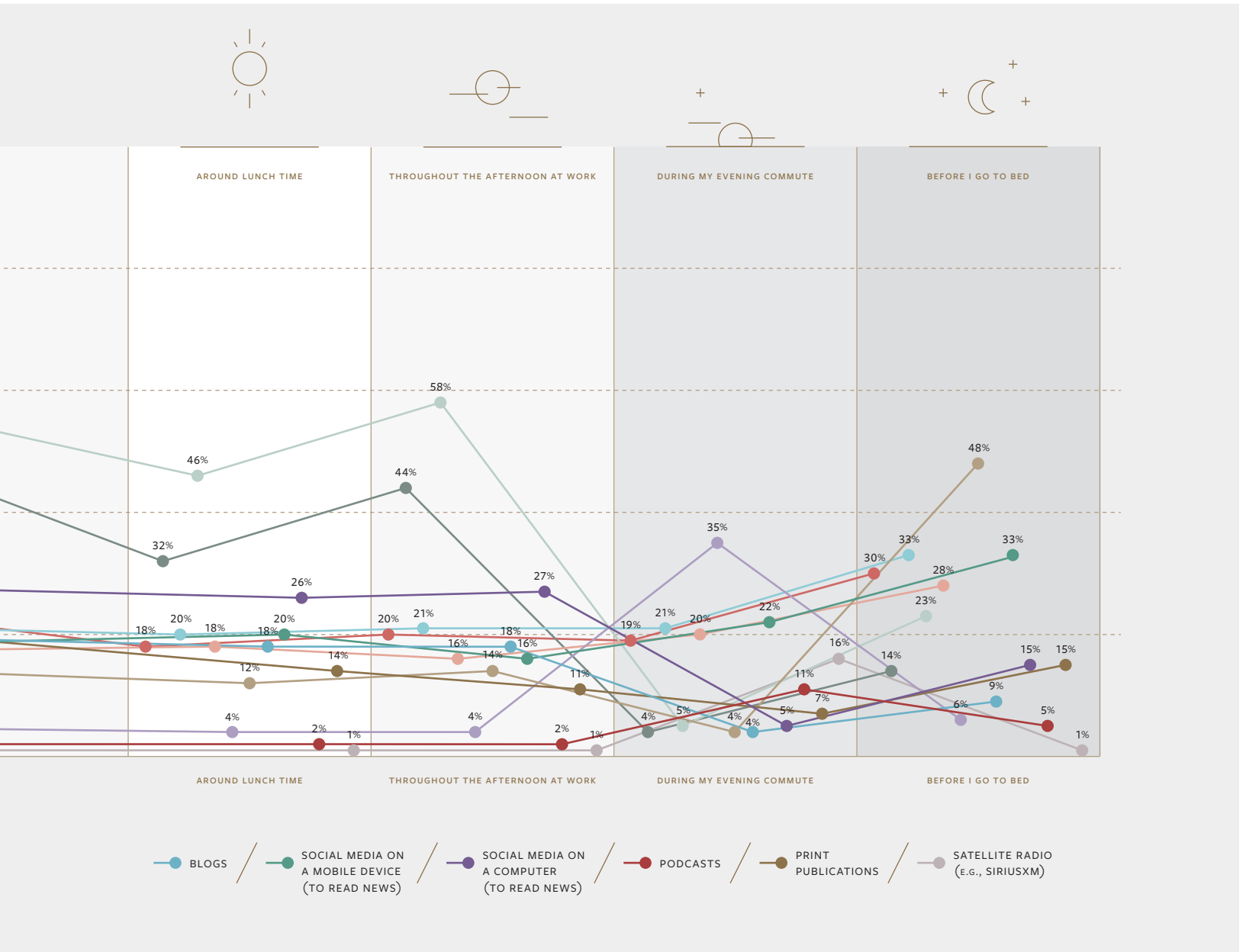
 / A one-size-fits-all approach will fit none.

A Day in the Life of a Washington Insider in 2016

Channels Used for Washington News and Information Throughout the Weekday



The mix of channels Washington Insiders use to consume work-related news and information throughout a given workday remained largely the same between 2015 and 2016. The beginnings and ends of the workday are dominated by mobile formats (newsletters, social media) and traditional media (TV, radio), while in-office time is spent predominantly on larger screens, consuming news websites and newsletters on computers. Several changes in the 2016 questionnaire yielded more granular targeting abilities within categories:

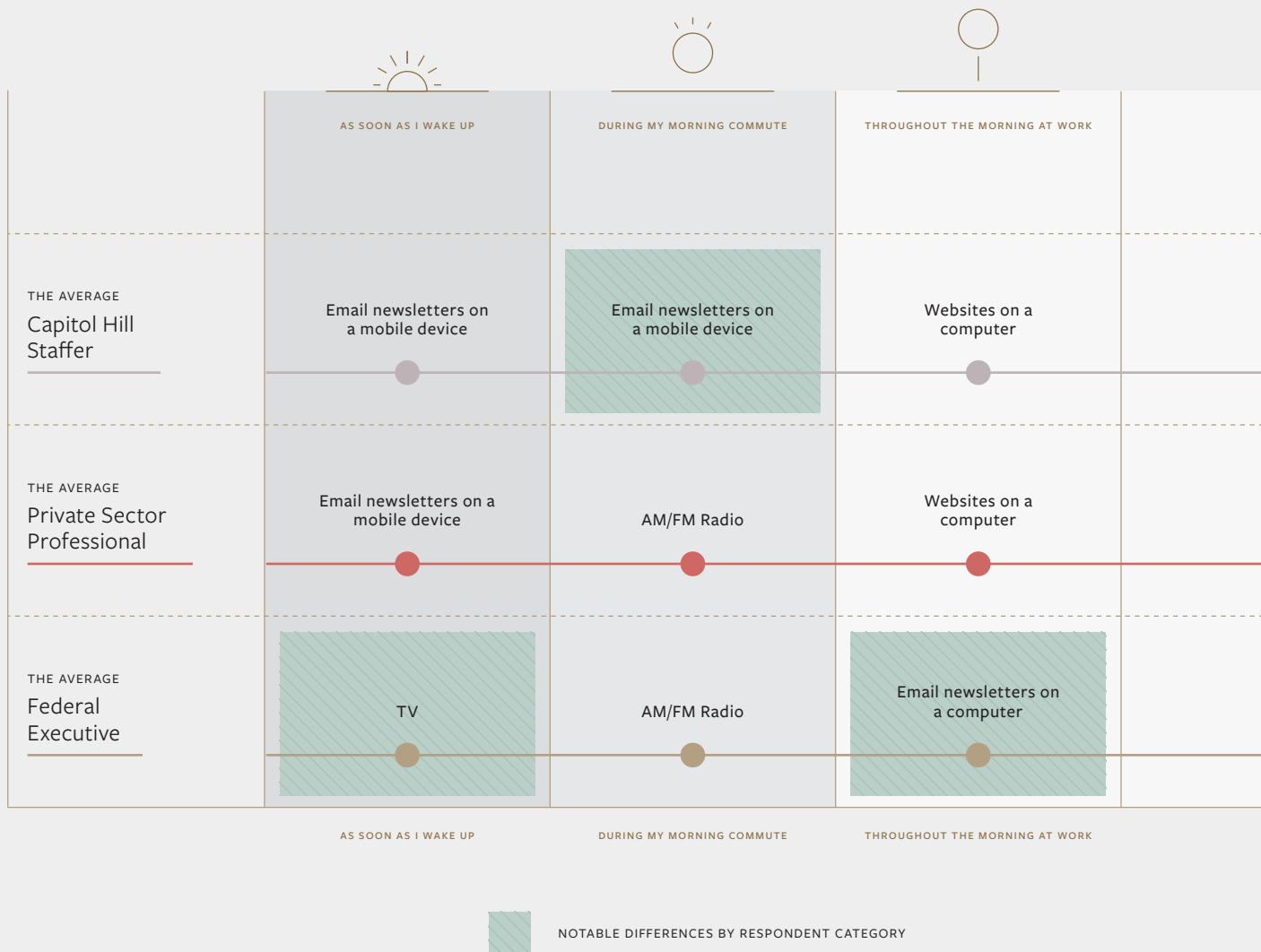


- Radio is split into two categories in 2016: AM/FM radio, and satellite radio.
- Social media is split across devices (mobile, and desktop/laptop), to allow for greater pinpointing of specific formats and screen sizes Insiders are using to engage with social media throughout the day.

36

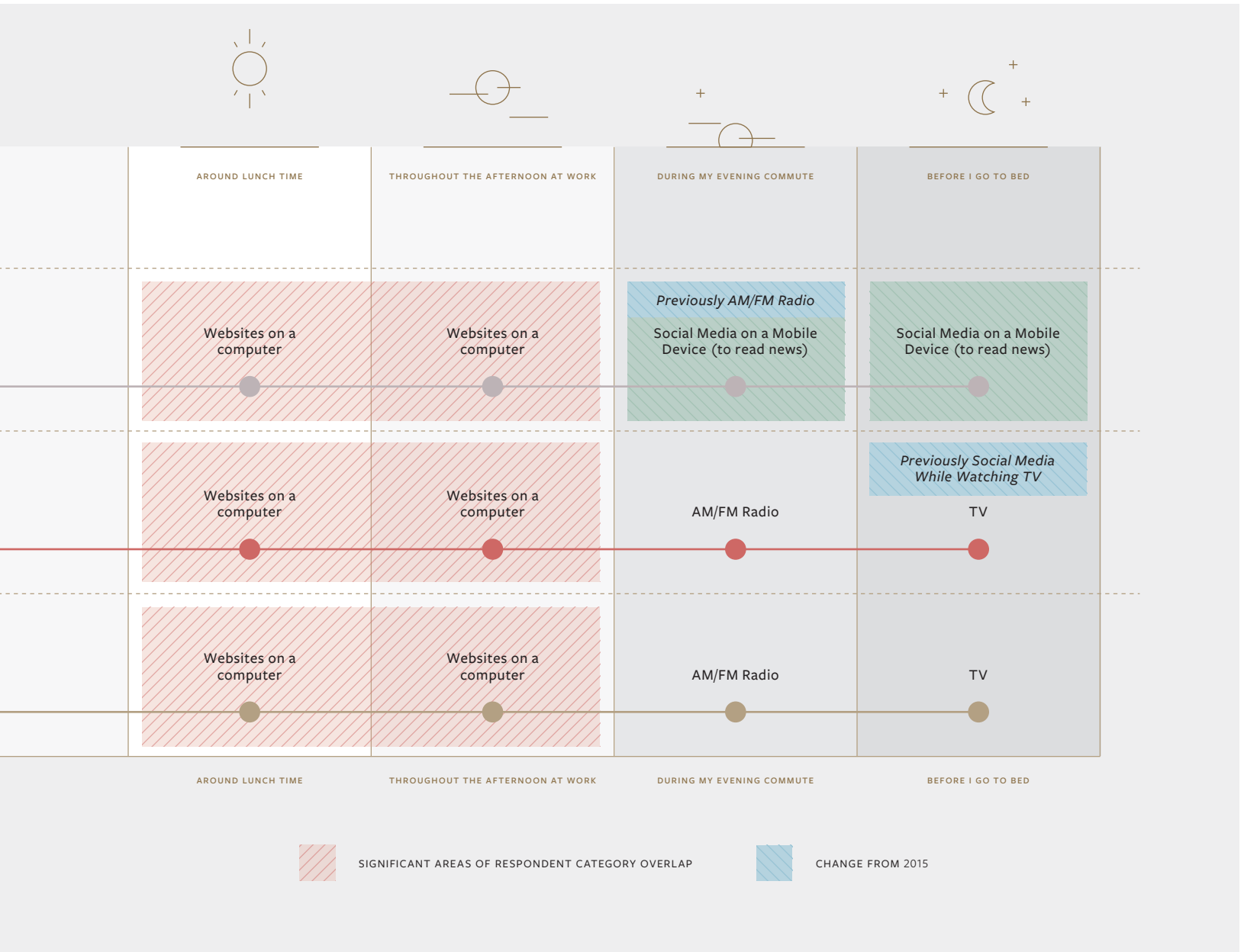
Harder Than Ever to Reach Everyone at the Same Time, in the Same Place

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.

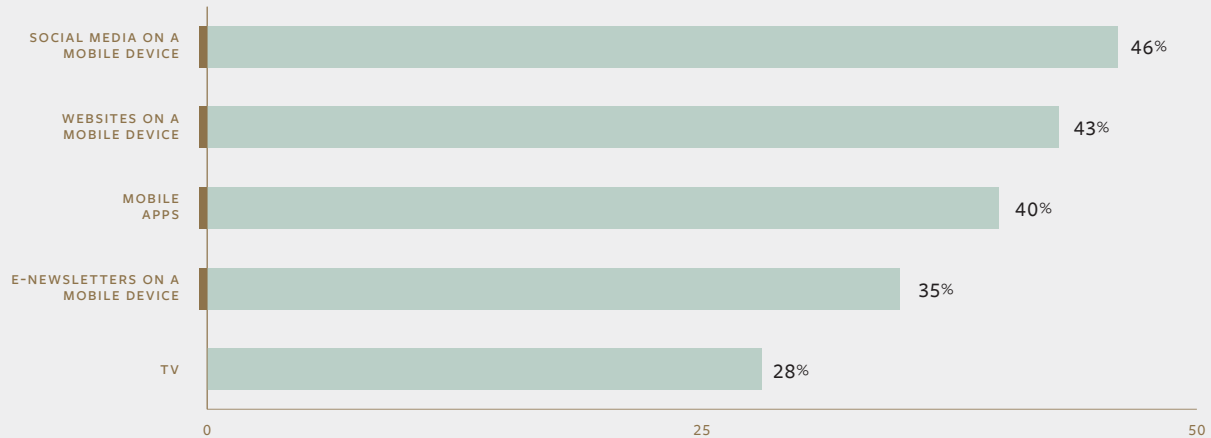
37

Weekend Consumption Dominated by Traditional Formats, Mobile

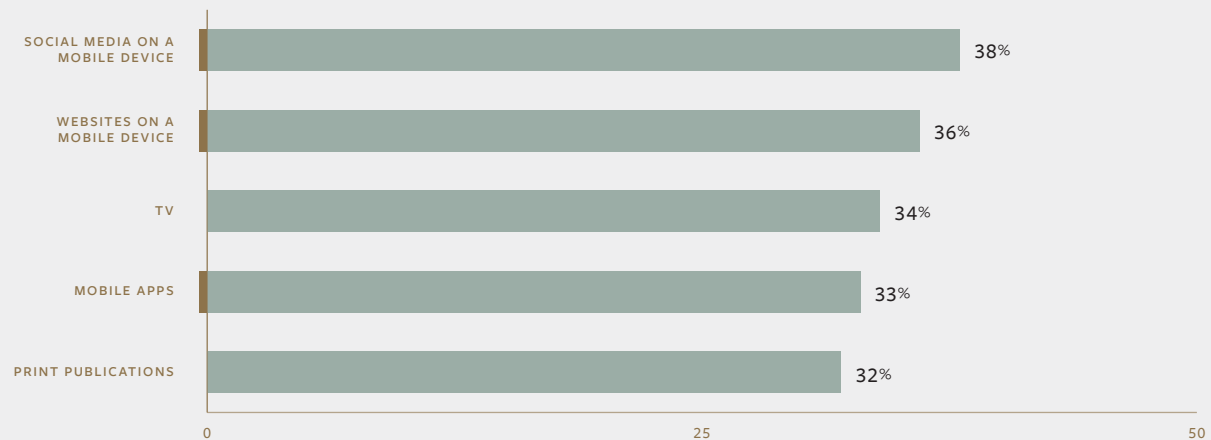
Consumption Patterns Strongly Linked to Generation: The Younger the Insider, the More Mobile

Top 5 Weekend Channels by Generation

Millennials: 4/5 Mobile



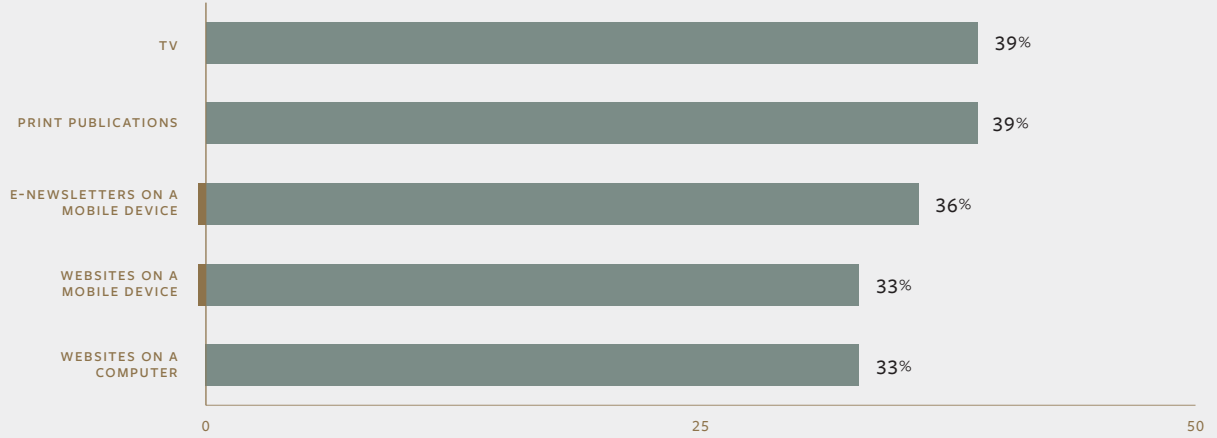
Generation X: 3/5 Mobile



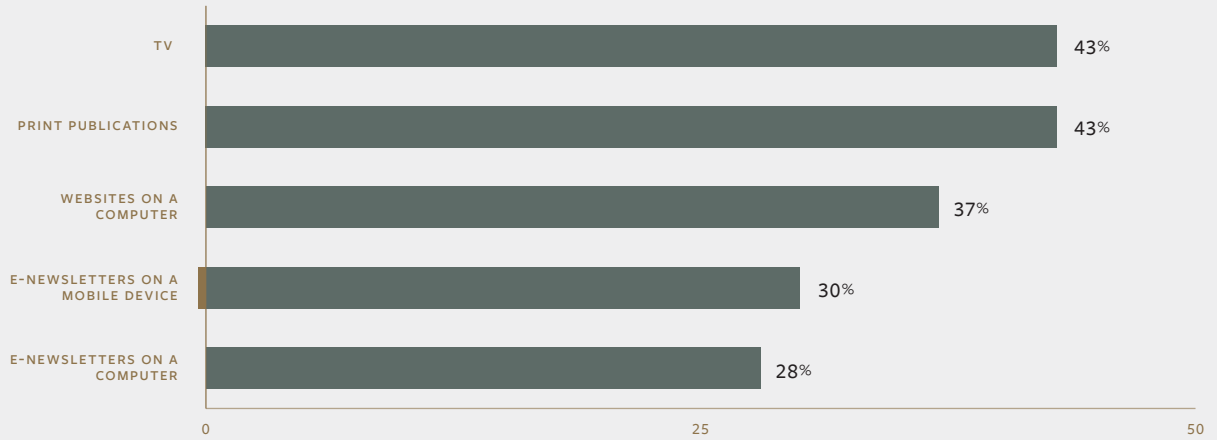
Reaching all Insiders at once on the weekend is perhaps even more difficult than reaching them on weekdays—not only because overall consumption is more selective (as seen on page 24), but also because channel preferences are strongly aligned with generations.

- Younger generations appear to be largely on the go on weekends, and thus, rely on mobile channels for most Washington focused information. Social media and websites on mobile are the top two channels for both Millennials and Generation X.

Baby Boomers: 2/5 Mobile



Over 65: 1/5 Mobile



- For older generations, traditional media formats still perform well. TV and print publications hold the top two spots for Baby Boomers and respondents over the age of 65.

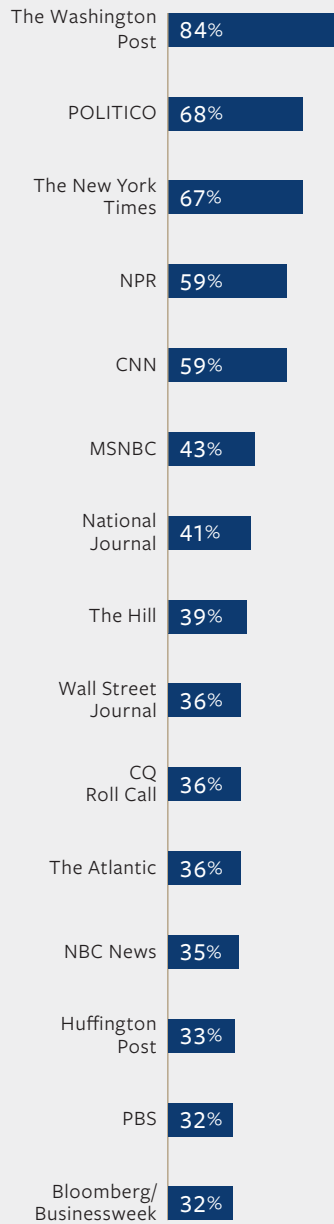
TV is a unifying channel on weekends, appearing in the top five for all four age groups.

38
39

With Some Exceptions, Media Brands of Choice Driven by Party Lines

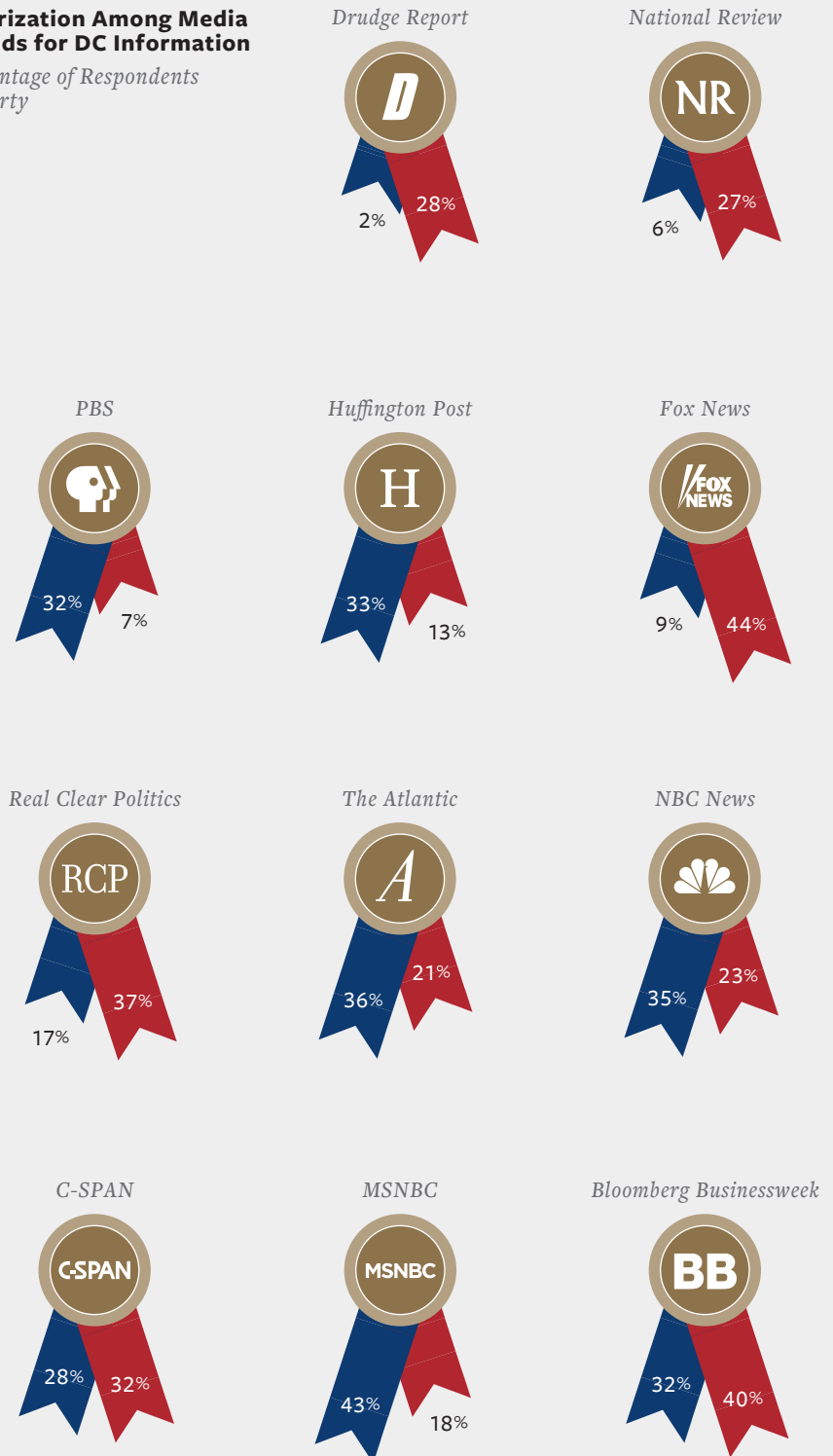
The Washington Post, Politico Least Polarizing Among Top Brands

Democrats' Top 15 Media Brands



Polarization Among Media Brands for DC Information

Percentage of Respondents by Party





Republicans' Top 15 Media Brands



Insiders' media brand preferences largely—but not entirely—reflect the disdain for partisanship that they shared in qualitative responses across the study. Nine out of the top 15 preferred media brands overlap between Republican and Democratic respondents.

- Beltway media brands that focus on in-depth reporting have boosted their bipartisan reputations, but other sources split in predictable ways.
- Democrats are more likely to rely on left-leaning sources, such as *MSNBC* and *Huffington Post*. Republicans are more likely to rely on *Drudge Report* and *Fox News*.

40

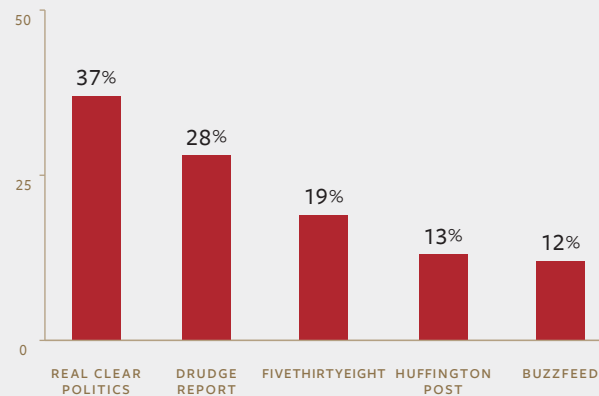
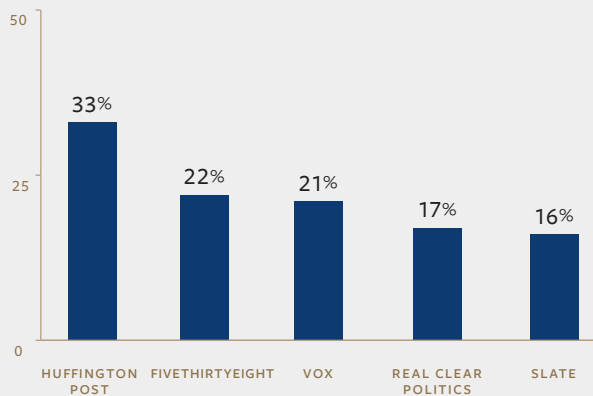
Measuring the Digital Divide

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*.

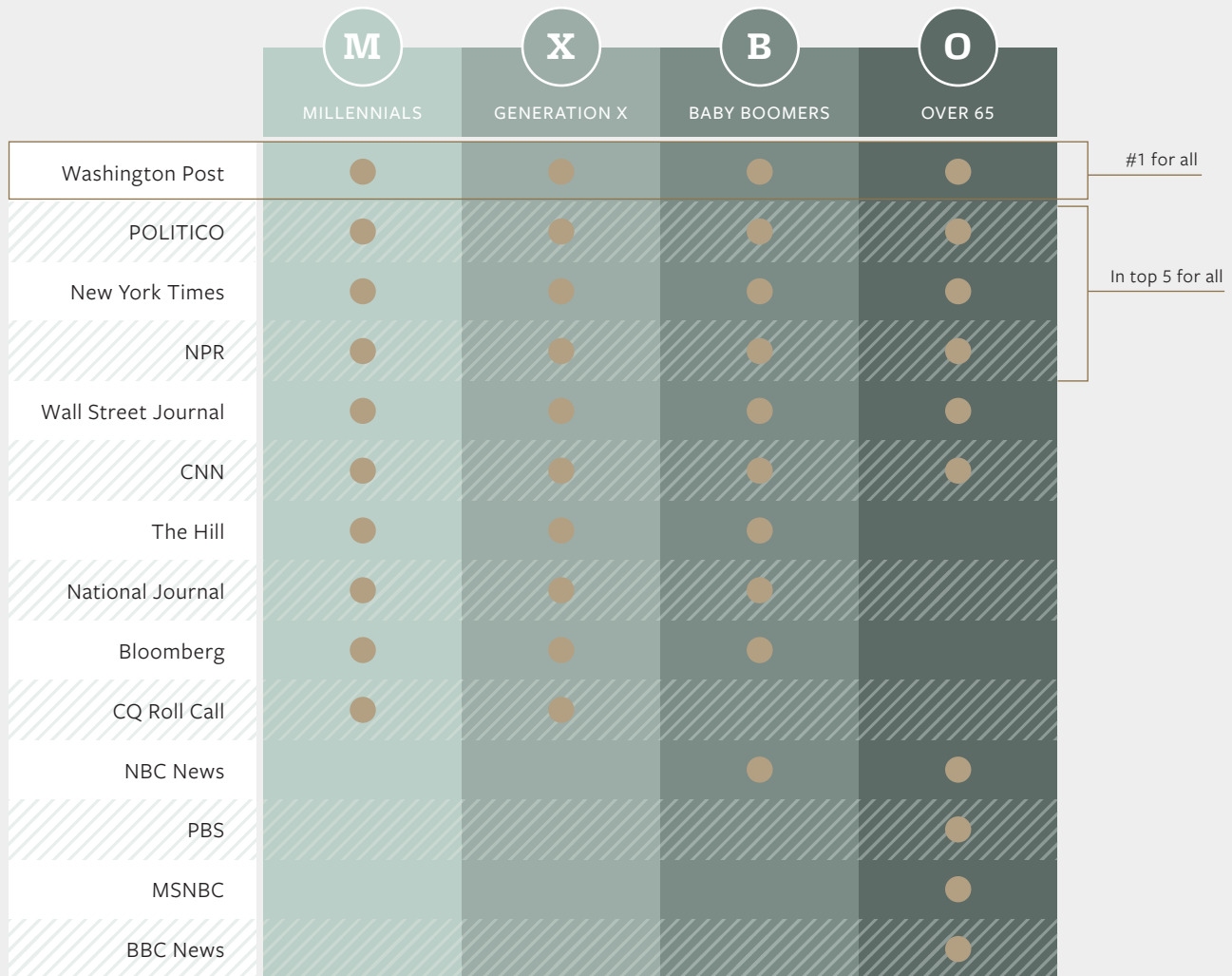
Our data shows that reported digital-only consumption is down from 2012. Social media consumption of content has overtaken home page consumption for some digital-only outlets, and in the process, it may be hurting brand recognition.”

41

Top Media Brands Largely Undifferentiated by Age – Except in the Oldest Insiders

Media Brands Present in the Top Ten

All Respondents by Generation



There was a surprising amount of consistency for top media brands across generations. There are four brands in D.C. that landed in the top five most relied upon across all age groups surveyed (including the consensus #1 pick, *The Washington Post*), and many of the other brands found in the top ten are shared as well.

Over 65 respondents are the only outlier, preferring national and international media to inside-the-Beltway brands.

Cable TV Bears the Brunt of Media Negativity

Insiders Say Entertainment is Overtaking Substance

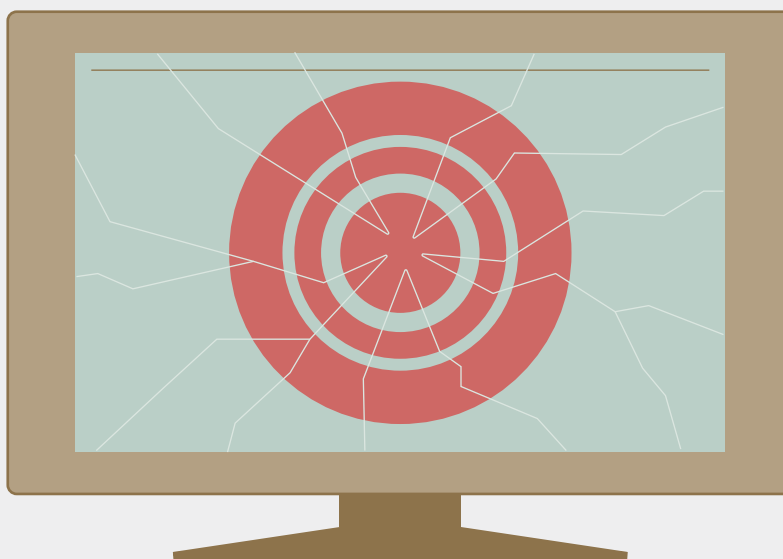
“Most news programs are like reality TV. There’s no in-depth analysis, and the most entertaining get the majority of air time.”

“...I have seen a general decline in the quality of national television news over the past decade. It has become more tabloid and ‘shock and awe,’ and has distorted the concept of ‘breaking news’ (CNN broke in 2014 that the ‘Titanic sunk 102 years ago tonight’). National television news has dumbed itself down to appeal to the least intelligent viewers instead of attempting to make us all smarter...”

“Major networks constantly go for headline grabbers so everything is viewed through the lens of drama, not facts and important updates.”

“I’ve completely stopped watching cable news channels because of their inability to present factual information.”

“Media seems much more biased (on both sides) in this election cycle. I’ve given up watching network news and cable channels.”



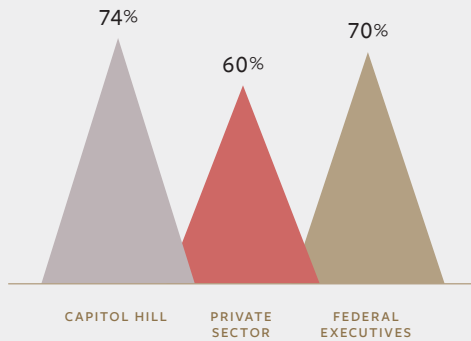
42

But TV Consumption Remains Relatively Unchanged

Majority of Insiders of All Ages Still Watching TV Once a Day for Washington-Focused Information

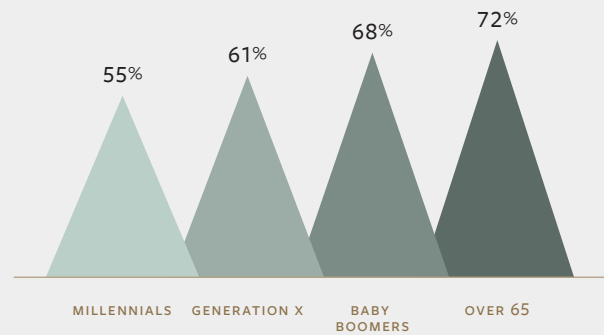
Watch TV At Least Once Throughout the Workday

Percentage of Respondents by Workplace



Watch TV At Least Once Throughout the Workday

Percentage of Respondents by Generation



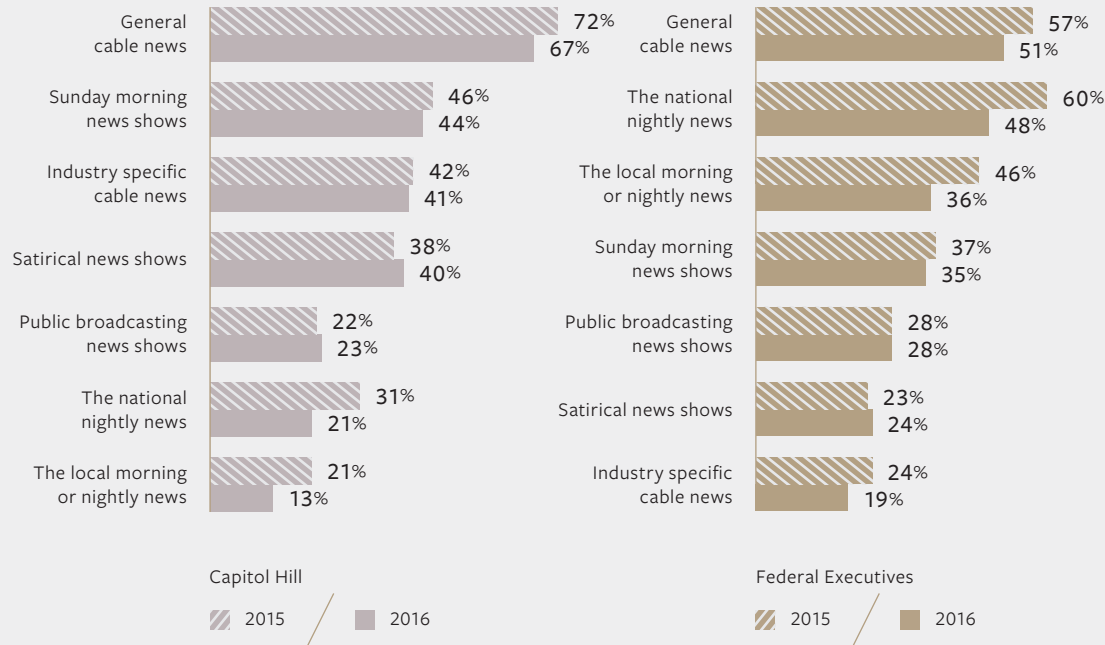
Despite strong feelings of negativity aimed at television media, Washington Insiders still feel a strong need to consume information on that format each day. Television consumption has held steady between 2015 and 2016 across both sectors and generations.

Instead, Shifts in the Type of TV Programming Being Consumed

Decline in Insiders Reporting Reliance on Cable News, National and Local Network Broadcasts

Formats Relied on for Important News and Information on Television

Percentage of Capitol Hill and Federal Respondents, 2015 vs. 2016



Rather than turning off the television completely, Insiders report making some adjustments to the types of programming they’re consuming to get critical work-related information.

- The steepest decline in viewership in 2016 among Capitol Hill staffers and federal executives is found in cable news, which is no surprise given the sentiments shared in open-ended survey questions.
- National and local news broadcasts also appear to have lost viewers among these two categories of respondents in 2016. **Insiders reported trusting local news (including broadcast, print and digital) more in 2016 (see page 16), so it’s somewhat contradictory that demand for local broadcast coverage is down.** The trust figure could be bolstered by the presence of non-broadcast media formats, especially as more Insiders look to local coverage for expertise on state issues. Or, it’s possible that local broadcasts suffer from essentially being “bundled” (either immediately preceding or immediately following) national broadcasts—which did experience a decline in trust in 2016.

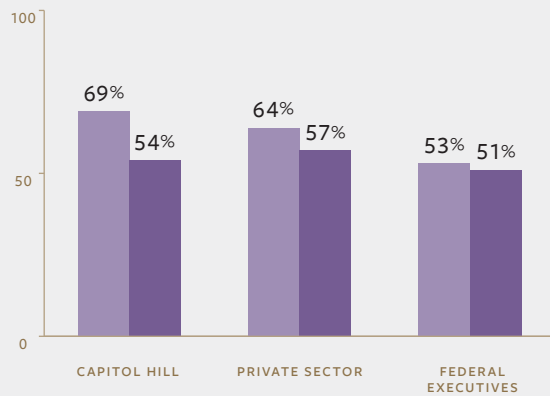
44

Daily Print Usage Continues to Decline, Though Still Strong in Certain Workplaces and Age Groups

For the First Time, Majority of Younger Insiders Don't Touch Print Daily

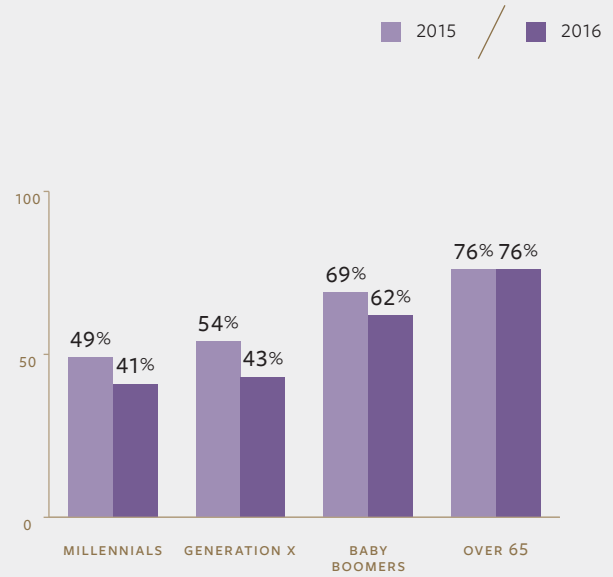
Read Print At Least Once Throughout the Workday

Percentage of Respondents by Workplace



Read Print At Least Once Throughout the Workday

Percentage of Respondents by Generation



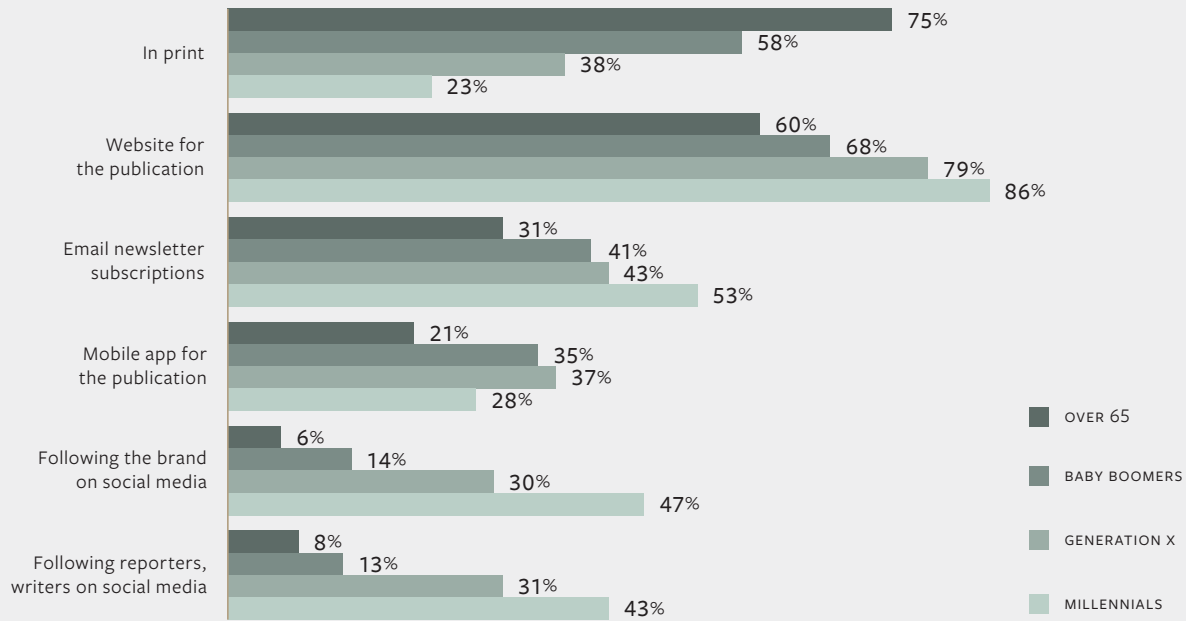
Workday reliance on print publications has dropped for all age groups except for those respondents over the age of 65.

For organizations seeking opportunities to reach Insiders through print, consider focusing on weekends when print publications are among the top channels consumed for three out of the four age groups. This, combined with the lower volume of channels consumed on weekends, may increase the chances that information is absorbed without interruption.

Younger Generations Replacing Print with Pixels

Primary Methods of Consuming Legacy Print Publications

Percentage of Respondents by Age



Print may be declining, particularly among Millennials and Gen X, but legacy print brands aren't going away. Younger Insiders are just as likely to read *The Washington Post* or *The New York Times*, but they are more likely to do so online, from their inbox, or on social media.

It's also interesting to note that social media consumption of content from legacy print brands is split so evenly between content that brands share, and content that individual journalists share. This speaks to the increasing importance of journalists developing a strong digital brand in Washington, and in organizations encouraging this behavior (especially as social media algorithms prioritize personal—rather than organizational—content).

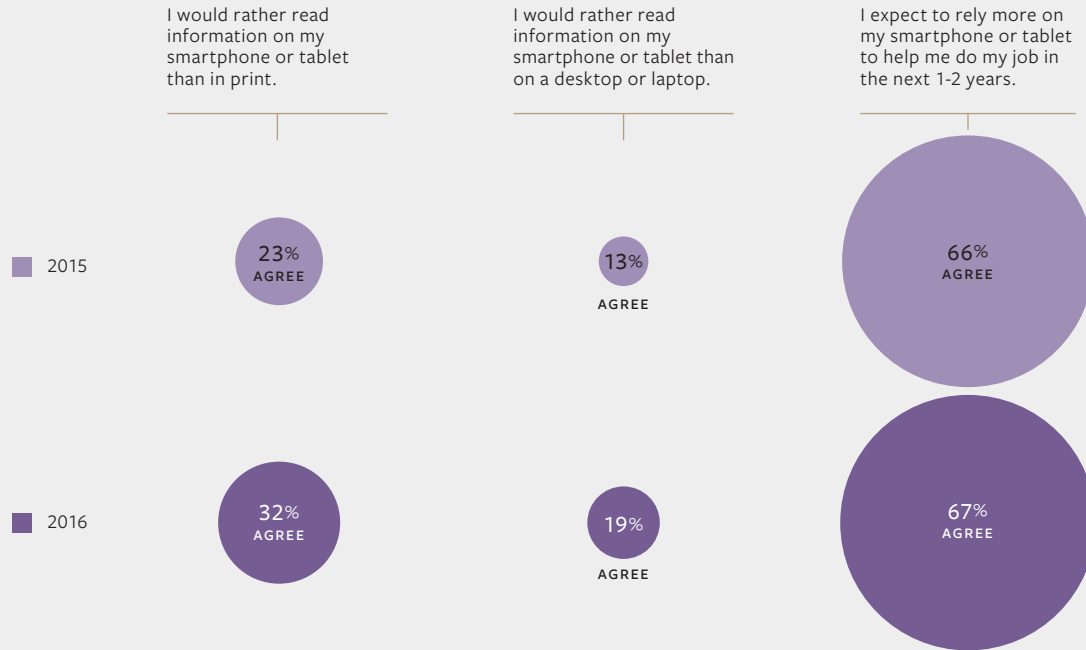
46

A Warming Trend Toward Mobile

Growing Number of Insiders Starting to Prefer Mobile Consumption of Information, though Tipping Point Remains Distant

Perceptions of Smartphone and Tablet Usage in Daily Policy Work

Percentage of All Respondents, 2015 vs. 2016



Washington Insiders are more willing to use their mobile devices as part of their daily media consumption in 2016, though it remains to be seen whether this is because of more mobile optimized content and better experiences—or because Insiders have grown accustomed to the current limitations of mobile sites and apps.

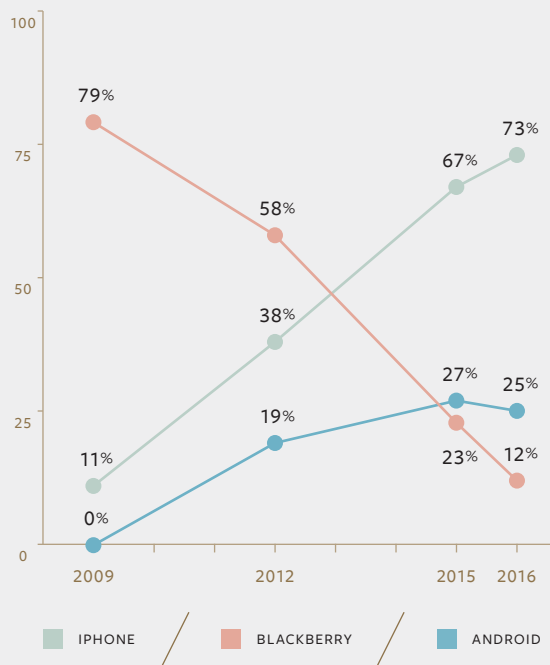
Optimism around the future of utility of mobile stayed flat in 2016, indicating that perhaps it's the latter, and it will take major improvements to the experience to bring along the remaining skeptical Insiders.

Apple Dominance Continues, Though Growth Rate Slows

Decline in Tablet Usage Consistent with Nationwide Mobile User Trends

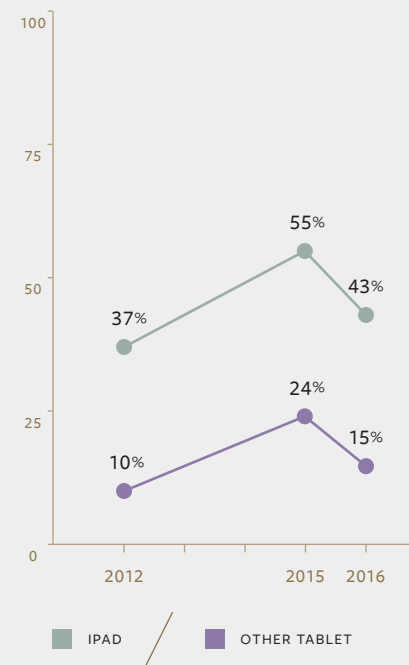
Smartphone Adoption by Washington Insiders

Percentage of All Respondents



Tablet Adoption by Washington Insiders

Percentage of All Respondents



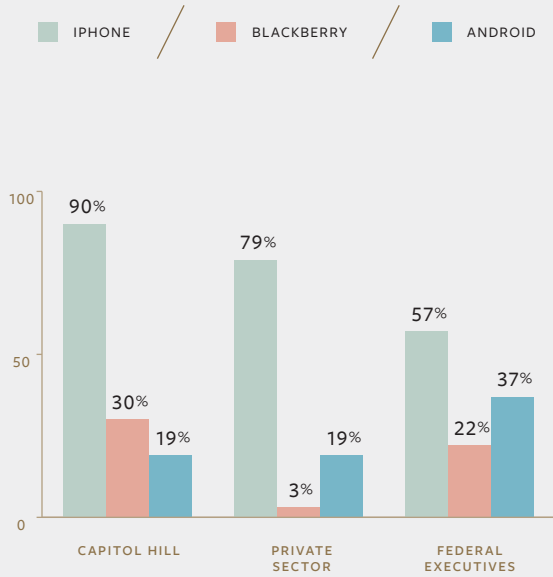
iPhones and iPads continue to dominate the device landscape in D.C. in 2016, though their growth rates have leveled off. BlackBerry usage continues to decline, with just 12% of Washington Insiders reporting using the device—and 82% of these individuals also own another type of smartphone.

Tablets may be struggling to find their place amongst Insiders’ devices as Apple, Windows and other brands have tried to promote more laptop-like tablets at the same time that they’ve enlarged smartphone screens to “phablet” (phone + tablet) sizes. This is consistent with nationwide trends, which have seen tablet sales taper off in recent years.¹³

Apple Also Dominates Across Workplaces

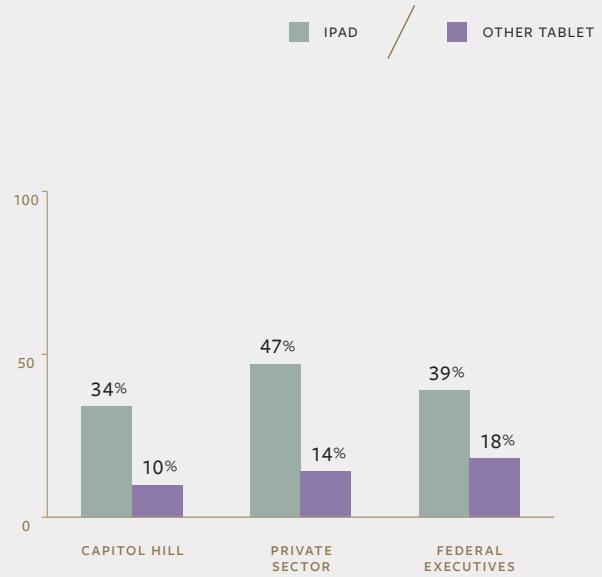
Smartphone Adoption by Washington Insiders

Percentage of Respondents by Workplace



Tablet Adoption by Washington Insiders

Percentage of Respondents by Workplace



This year, the Senate announced that it is officially phasing out their remaining operational BlackBerrys.¹⁴ Only 2% of Insiders say that remains their sole device, but expect those hold outs to switch to Apple or Android in the coming years.

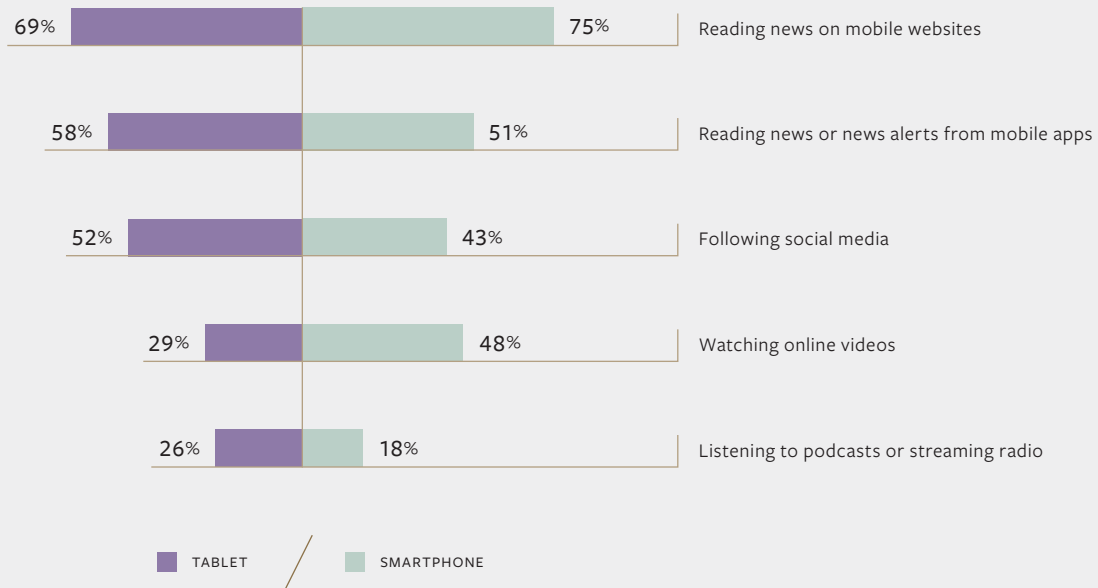
49

Mobile Consumption Habits Vary by Screen Size

Larger Screens Better for Video, Smaller Screens for Real-Time Updates

Primary Information Consumption-Related Functions Performed on Mobile Devices

Percentage of Respondents, Smartphone vs. Tablet



Despite dwindling appreciation among Insiders for tablets and their slightly larger screens, there are certain work-related functions for which they prefer to use these devices—most notably, viewing online video.

_06.1

Opportunity

An increasing amount of content consumption is happening off the website on platforms (like social media) that are inherently mobile-friendly. However, that doesn't mean that an organization can skip out on optimizing their site today. Instead, they should take the opportunity to think strategically about the role of their website—and the homepage in particular—and find ways to creatively bring this vision to life for Insiders who are increasingly using smaller screens and arriving to the website through pages other than the homepage.



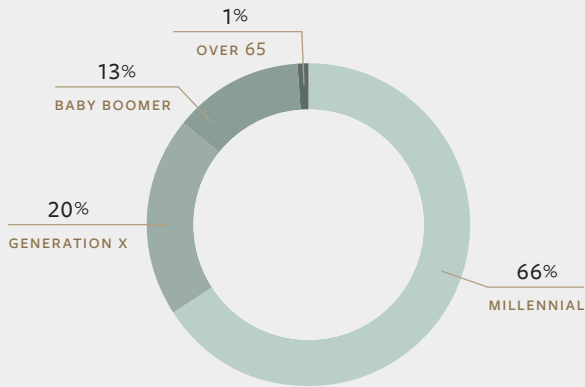
>> PART VII.

Appendix: Respondent Demo- graphics

2016 Capitol Hill Respondents: Demographics

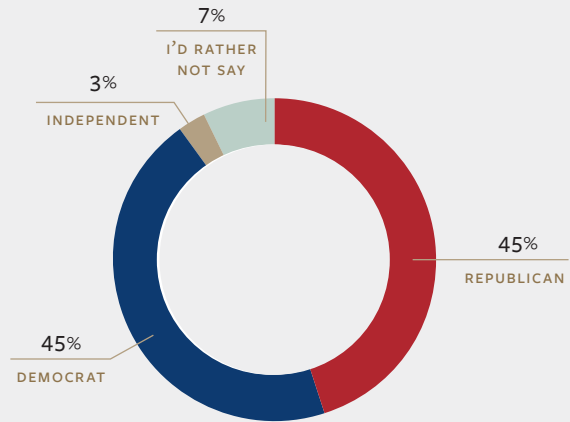
Generational Breakdown

Percentage of Respondents, Capitol Hill



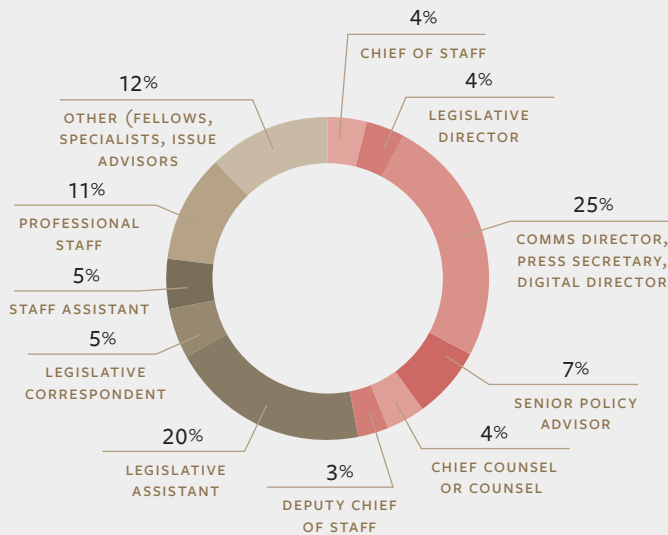
Party Affiliation

Percentage of Respondents, Capitol Hill



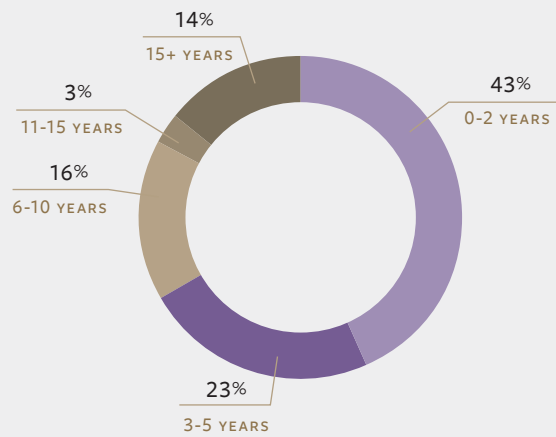
Job Title

Percentage of Respondents, Capitol Hill



Tenure

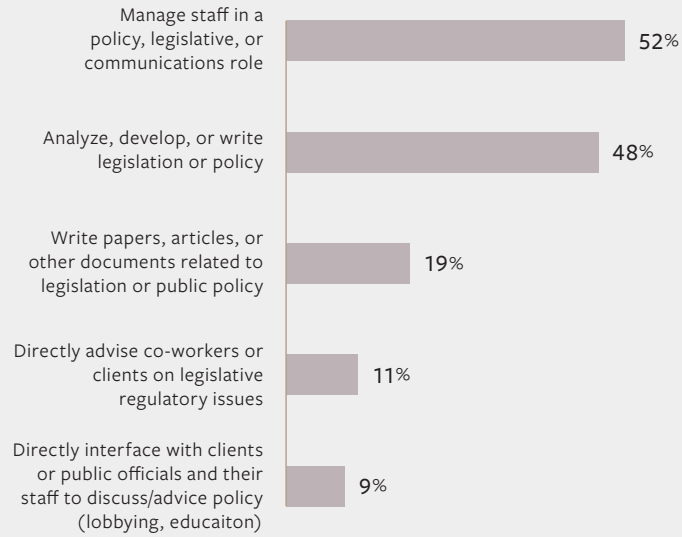
Percentage of Respondents, Capitol Hill



2016 Capitol Hill Respondents: Roles & Issue Areas

Top 5 Policy-Related Job Functions

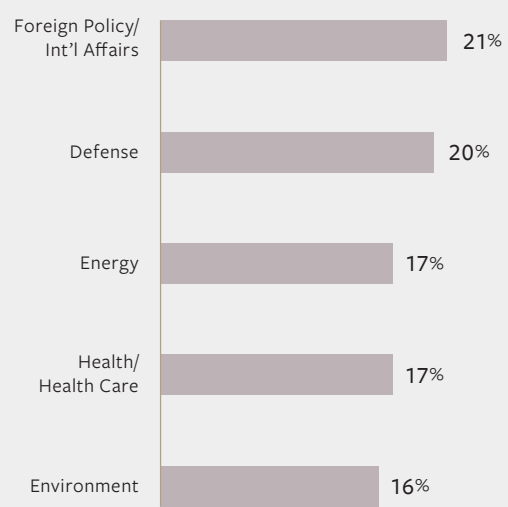
Percentage of Respondents, Capitol Hill



Note: Respondents could select up to 2 roles.

Top 5 Policy Issue Areas

Percentage of Respondents, Capitol Hill

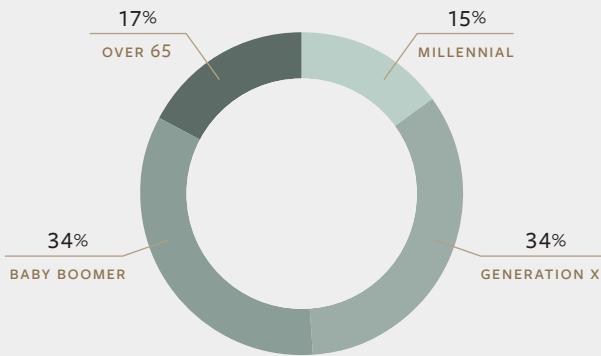


Note: Respondents could select up to 3 issue areas of professional interest.

2016 Private Sector Respondents: Demographics

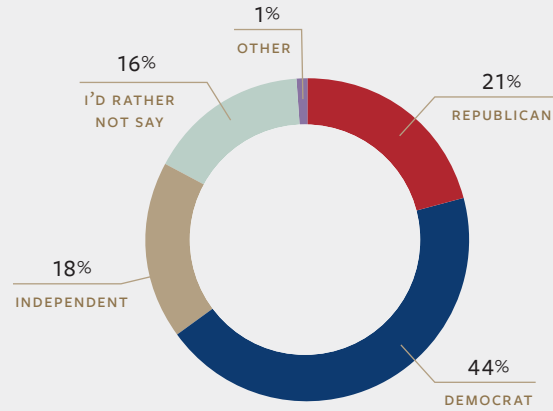
Generational Breakdown

Percentage of Respondents, Private Sector



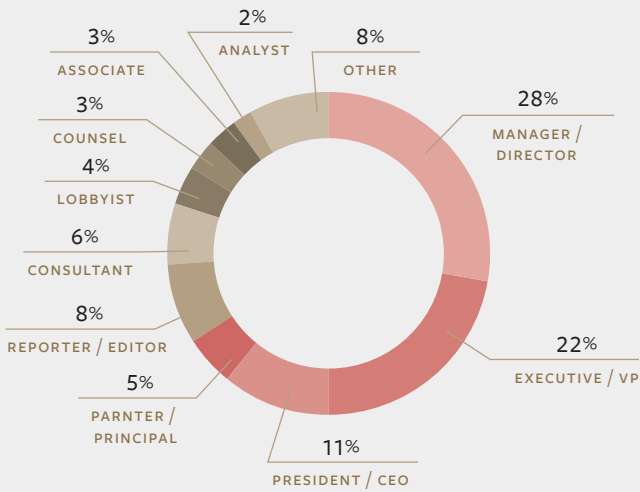
Party Affiliation

Percentage of Respondents, Private Sector



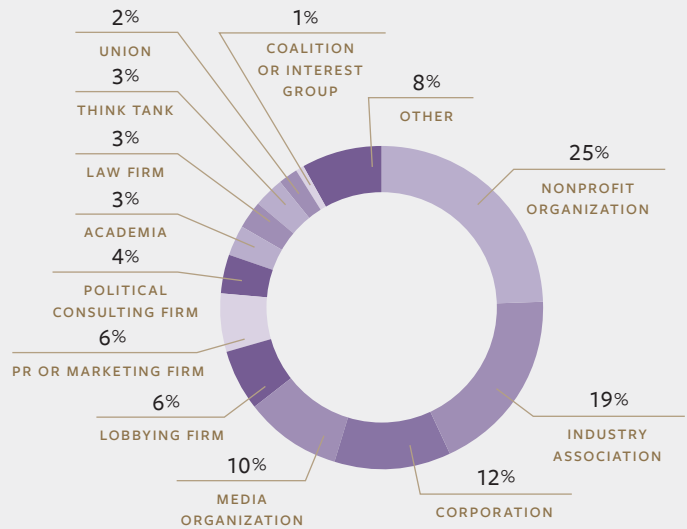
Job Title

Percentage of Respondents, Private Sector



Professional Affiliation

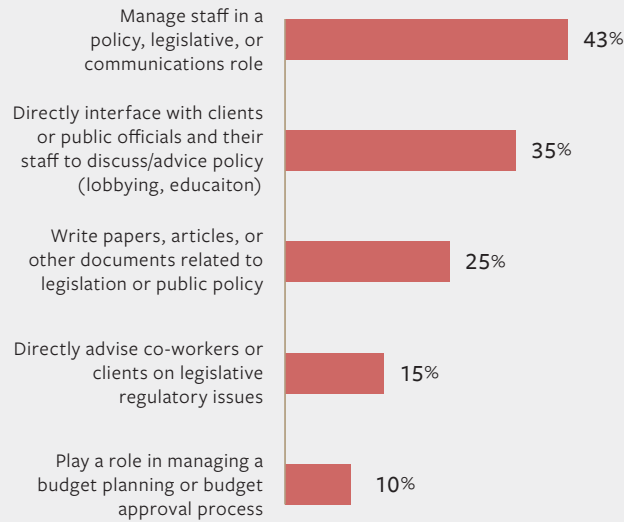
Percentage of Respondents, Private Sector



2016 Private Sector Respondents: Roles & Issue Areas

Top 5 Policy-Related Job Functions

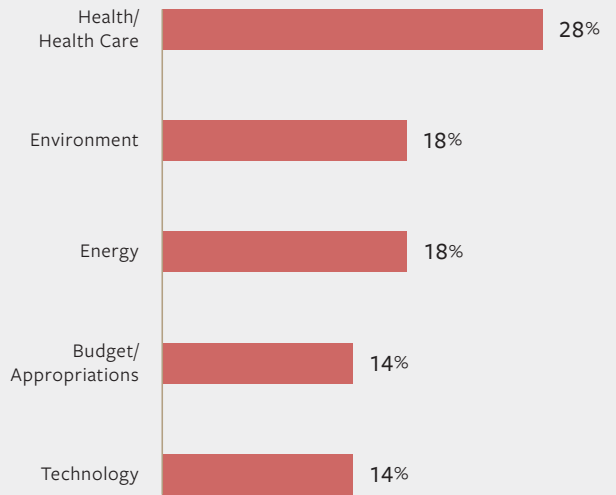
Percentage of Respondents, Private Sector



Note: Respondents could select up to 2 roles.

Top 5 Policy Issue Areas

Percentage of Respondents, Private Sector

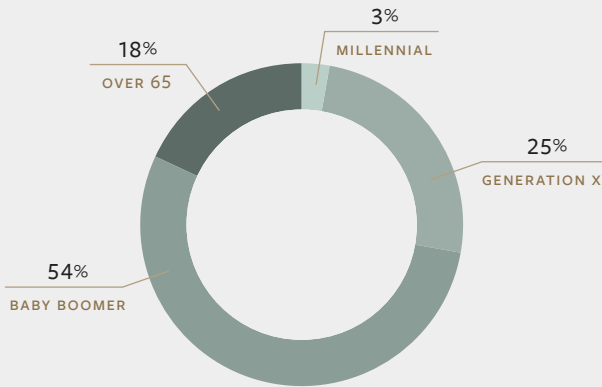


Note: Respondents could select up to 3 issue areas of professional interest.

2016 Federal Executives Respondents: Demographics

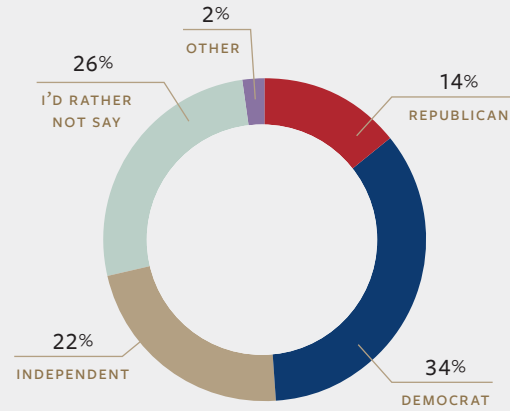
Generational Breakdown

Percentage of Respondents, Federal Executive



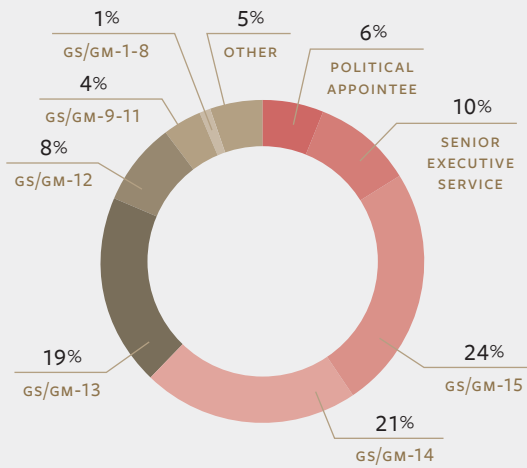
Party Affiliation

Percentage of Respondents, Federal Executive



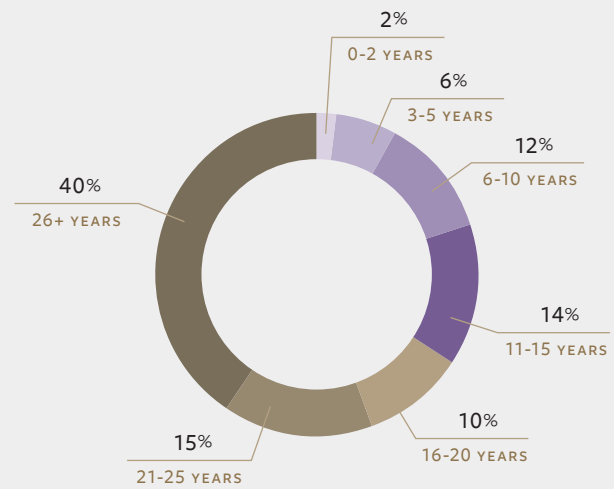
Civil Service GS Level

Percentage of Respondents, Federal Executive



Tenure

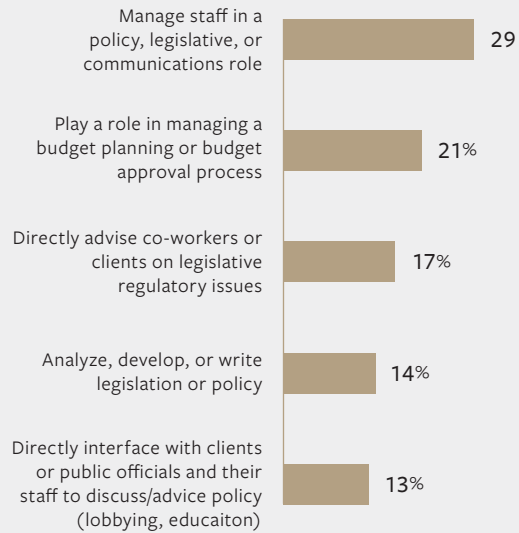
Percentage of Respondents, Federal Executive



2016 Federal Executive Respondents: Roles & Issue Areas

Top 5 Policy-Related Job Functions

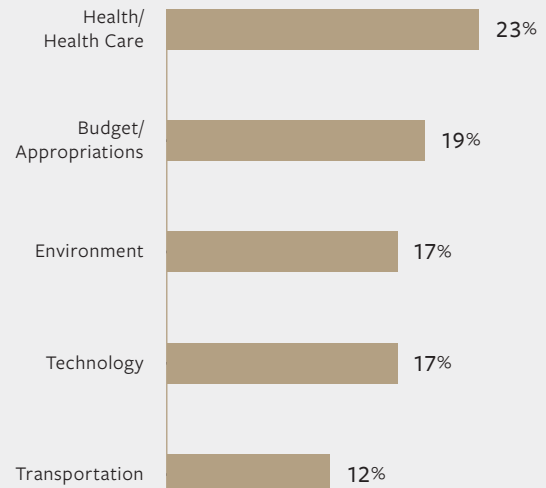
Percentage of Respondents, Federal Executive



Note: Respondents could select up to 2 roles.

Top 5 Policy Issue Areas

Percentage of Respondents, Federal Executive



Note: Respondents could select up to 3 issue areas of professional interest.

2016 federal executive respondents represent every Cabinet-level executive department, in addition to a number of independent agencies (e.g., SSA, USAID, EPA, FTC) and the White House Executive Office of the President. Departments and agencies with the highest representation include:

- Department of Health and Human Services (17%)
- Department of the Interior (13%)
- Department of Transportation (12%)
- Department of Homeland Security (8%)
- Department of Commerce (6%)

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