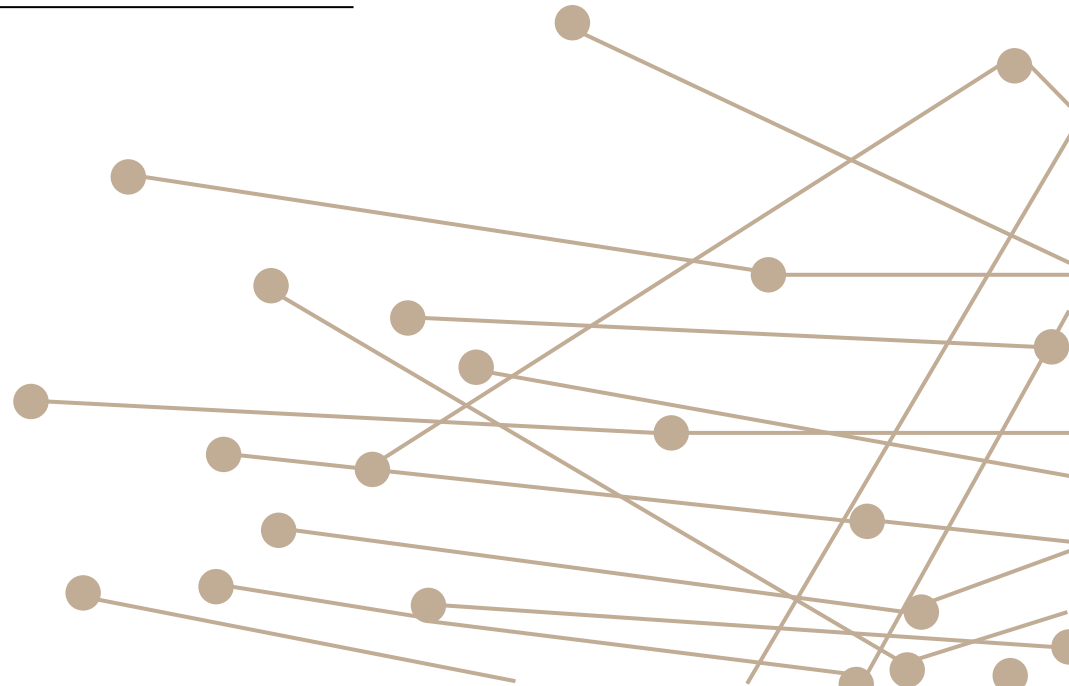


>> 2017

Washington in the Information Age

NationalJournal LEADERSHIP COUNCIL



Message from National Journal

Occasion for the Research

First conducted in 2002, *Washington in the Information Age* explores the media consumption habits of policy professionals inside the Beltway. This latest edition reveals a much more tech-savvy respondent group, more fragmented, skeptical and discerning than ever before. Past studies have focused on new information channels and formats, and Washington insiders' ability to keep pace with such innovations and sift through the (ever-increasing) volume of content available to them.

While much has changed over the past 15 years, when we fielded our research last spring, we could not have imagined the energetic debate that would emerge around the role of media in Washington and the fundamental question about whom we trust. To that end, our 2017 work incorporates new questions to capture DC insiders' shifting attitudes around news and information, and the subsequent impact on their consumption behavior.

Influential Washington Voices

Over 1,000 senior-level policy professionals participated in this year's study, including congressional staff members, federal executives and private sector professionals. Our private sector respondents reflect leaders within government affairs and communications, representing corporations, associations, nonprofits, think tanks, lobbying and public affairs firms, media and others. Without the candid feedback from all these research partners, this study simply would not exist.

A Note of Thanks

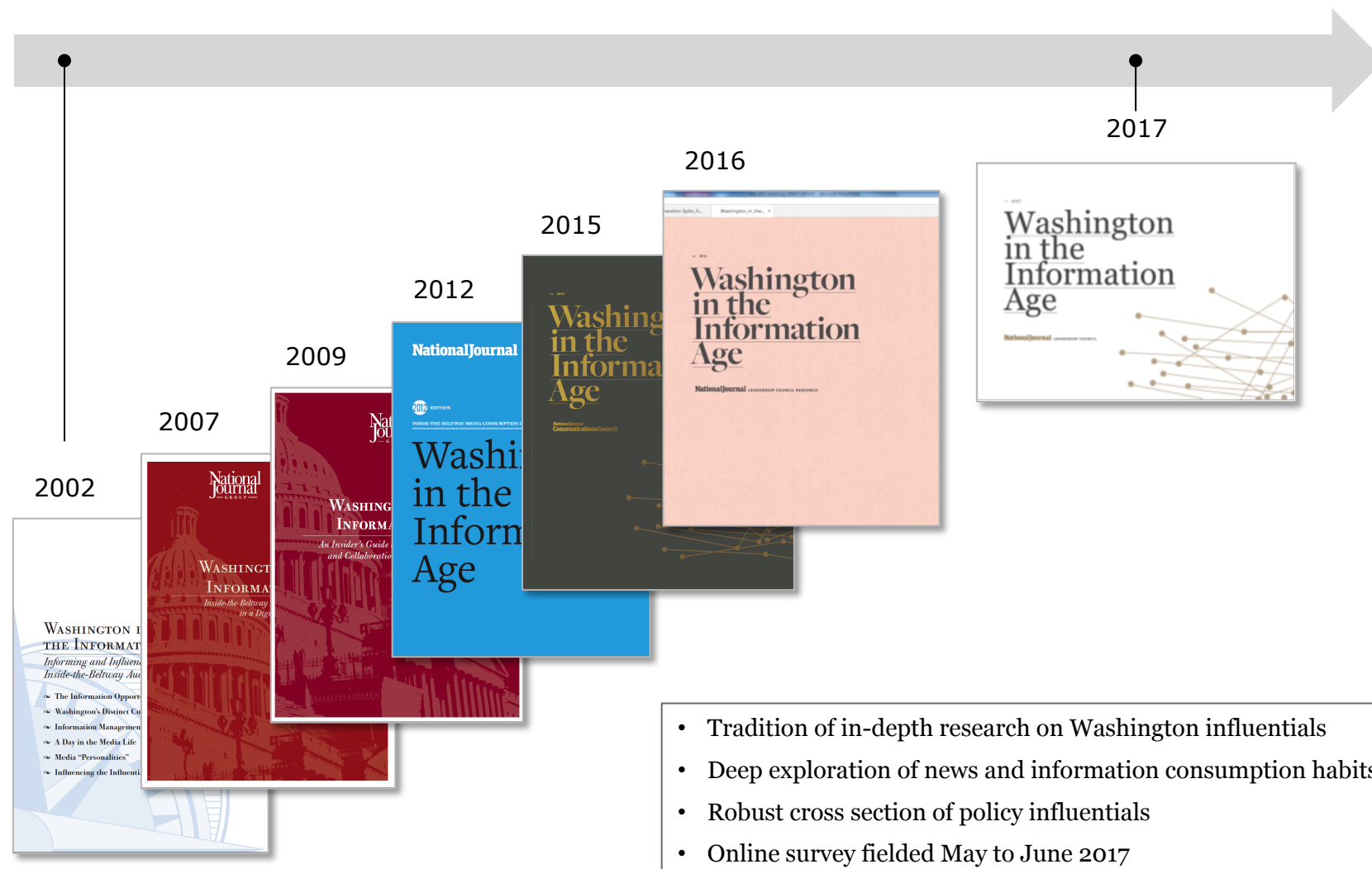
We are grateful for the participation of numerous individuals within National Journal, Atlantic Media and The Congressional Management Foundation who generously offered us their insights, support and opinions throughout this process. For their kind support, we extend our sincere thanks.

These findings offer insight and context for what's changing in the Washington media landscape. Whether you are formulating a communications plan, producing content for a policy audience, or targeting a specific demographic with a particular message, we hope that this research offers you helpful guidance and we look forward to serving you further.

With our continuing appreciation,

Gina Kim
Chief Analytics Officer, National Journal
Washington, DC
2017

Changing behaviors, changing landscape



Roadmap

Key takeaways in 2017

● Trusted and reliable sources

- What is the state of trust in media today?
- Which sources do insiders trust the most?
- How does trust impact what's consumed?

● Resources and decision-making

- How do information resources help shape insiders' opinions on policy issues?
- Where and how can one influence policy decisions?
- How are preferences for different resources changing over time?

● Social media

- Which social media platforms are used in DC?
- What motivates insiders' use of social media?
- How do congressional staff use social media?

● Media brands

- Which media outlets are most relied on for Washington news and information?
- Which journalists are most widely followed by DC insiders?

● Channel and format preferences

- How do DC insiders access news and information today?
- What channels are insiders gravitating towards?

● Information consumption by time of day

- Which channels do DC insiders rely on for news and information across the day?
- How do patterns differ across workplaces?

Overview of 2017 respondents

A few words on methodology

Combining past approaches with forward-looking perspectives

1

Narrowing the Field



- Online survey conducted in May and June 2017
- Target audiences include Capitol Hill staff, federal government executives and private sector public affairs professionals
- Focused on professionals within the Washington, D.C. metropolitan area

2

Compiling Key Data



- Over 1,100 Washington insiders, including more than 150 Capitol Hill staff, 400 federal executives and over 600 private sector public affairs professionals
- Leveraged questions from earlier *Washington in the Information Age* surveys, added/updated others to reflect rapidly changing media consumption habits
- Comparisons to past research (2012, 2015, 2016) available for select 2017 data points

3

Reflecting Respondent Voices



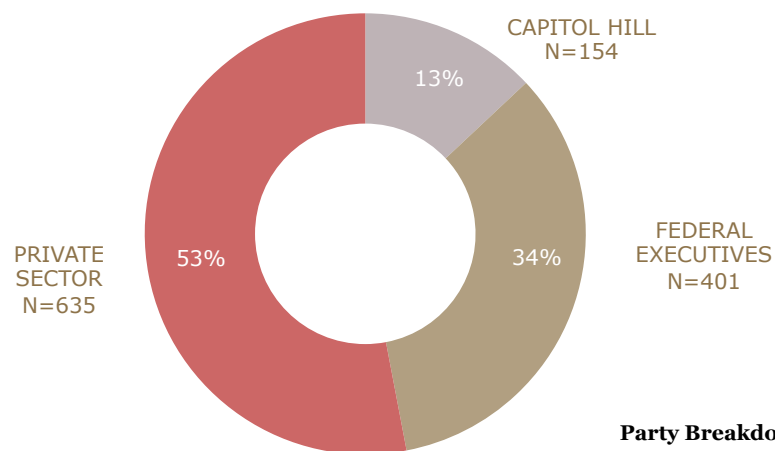
- Respondents encouraged to share more directed written feedback and perspectives on select multiple choice questions
- Questions generated compelling elaborations on key issues and themes presented, with responses ranging from one word to several paragraphs in length
- Feedback provided helpful insight into answer choices and uncovered broader trends embedded within research observations/quantitative data analysis

A snapshot of Washington insiders

2017 respondents consistent with earlier WIA data

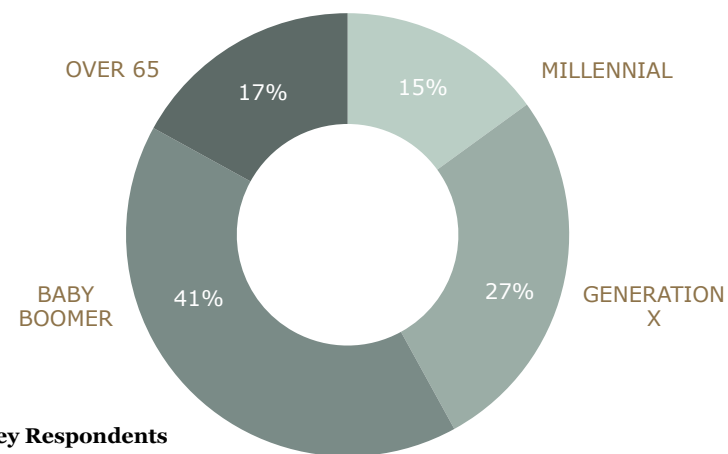
Composition of Survey Respondents

PERCENTAGE OF RESPONDENTS, N=1,190

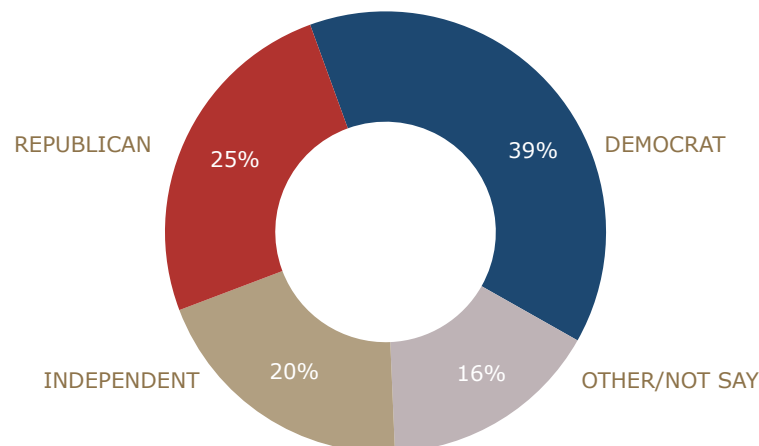


Generational Breakdown of Survey Respondents

PERCENTAGE OF RESPONDENTS



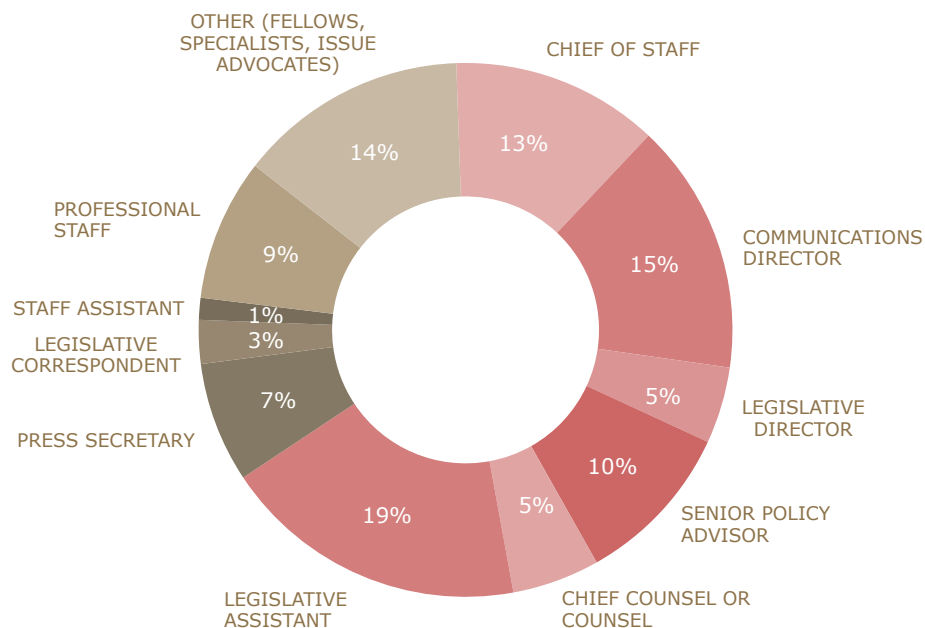
Party Breakdown of Survey Respondents



In focus: Capitol Hill

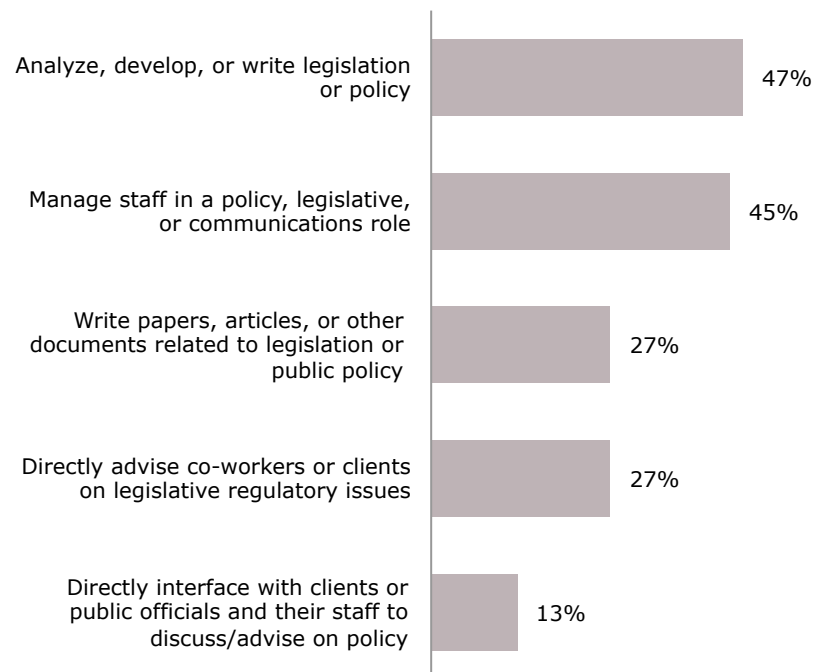
Job Title

PERCENTAGE OF CAPITOL HILL RESPONDENTS



Top 5 Policy-Related Functions

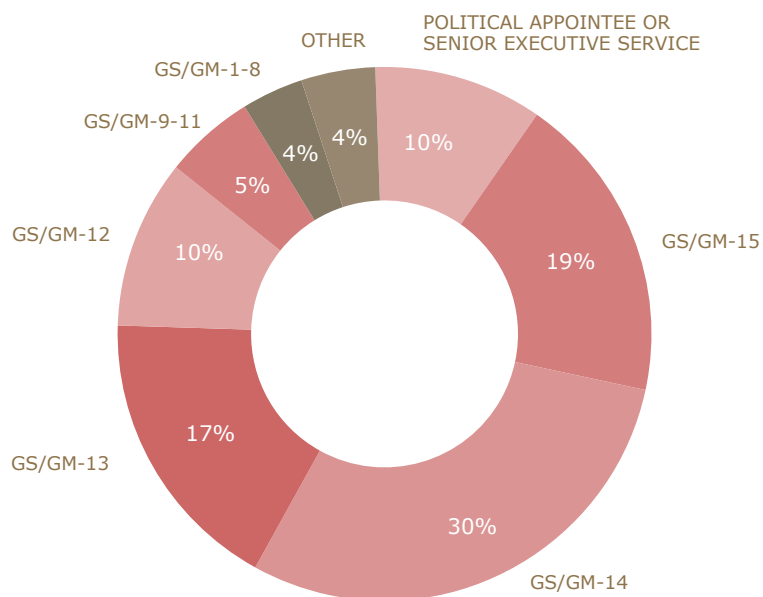
PERCENTAGE OF CAPITOL HILL RESPONDENTS



In focus: Federal Executives

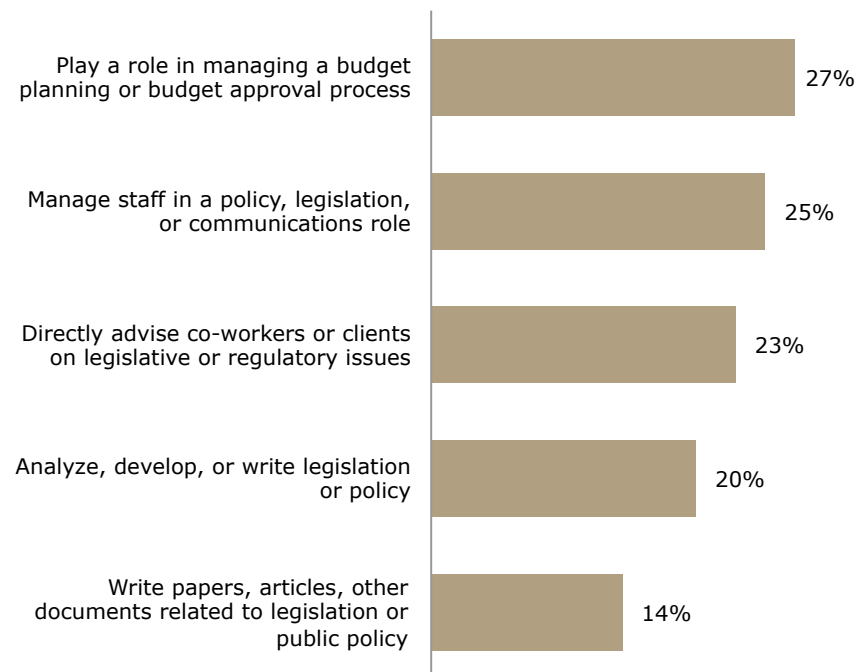
Civil Service GS Level

PERCENTAGE OF FEDERAL EXECUTIVE RESPONDENTS



Top 5 Policy-Related Functions

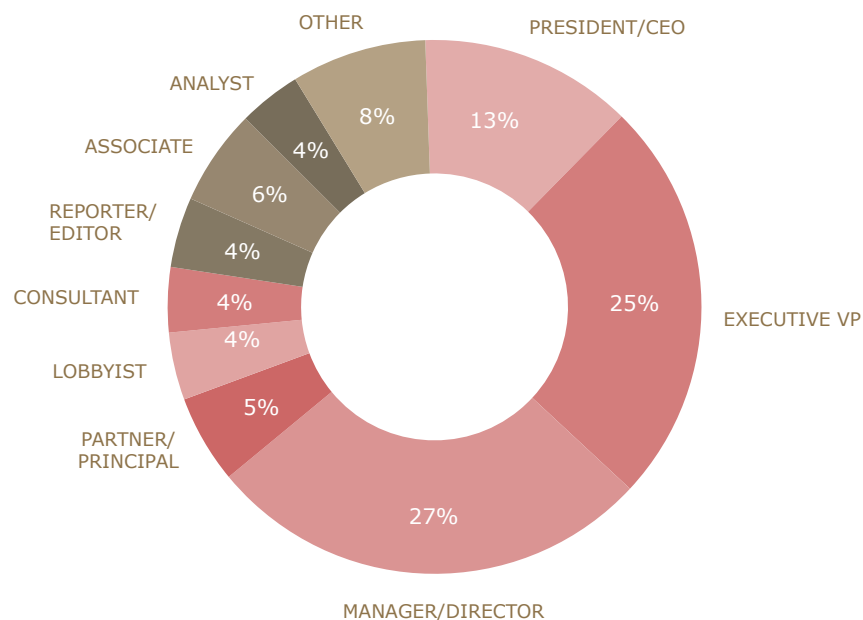
PERCENTAGE OF FEDERAL EXECUTIVE RESPONDENTS



In focus: Private Sector

Job Title

PERCENTAGE OF PRIVATE SECTOR RESPONDENTS



Top 5 Policy-Related Functions






PERCENTAGE OF PRIVATE SECTOR RESPONDENTS



Key takeaways in 2017






Key takeaways in 2017



-  **1. Norms in Washington have changed from the top down since 2016, disrupting the media landscape.** The 2016 election exposed instabilities in the media environment and many trends observed in 2017 are directly related to the new Administration. From the President's affinity for social media, to the widening partisan gap in media brand trust and how news is consumed, leadership's information consumption habits heavily influence habits inside the Beltway.
-  **2. "Trust but verify" is back in vogue, with many insiders responding to media instability and partisan bias by reevaluating their media use and exposure.** Insiders have historically consumed media brands across the political spectrum, but mistrust in media became a campaign issue in 2016, impacting insiders' reliance on go-to sources in 2017.
-  **3. Washington insiders believe their media savviness serves them well and positions them as better informed than those outside the Beltway.** In the face of the fake news phenomenon, insiders are highly confident in their ability to detect attempts at misinformation. With more time devoted to news consumption, access to multiple resources and often, first-hand experience with the spin room, this group prizes their ability to tell fact from fiction. They seek facts, not talking points, and remain open to nuanced arguments and policy details.
-  **4. While trust remains highest in mainstream sources, we begin to see a major divide by party.** Republicans' trust in their go-to sources declined in 2017, with trust in national and inside-the-Beltway brands dropping by double digits, while Democrats rallied around a number of major media brands, their confidence in mainstream media is on the rise. With media brands of choice increasingly divided along party lines, driving a consensus view on an issue may be more difficult, and taking a tailored approach to policy communications becomes an even greater imperative.
-  **5. Social media is at a crossroads; for the first time since 2012, insiders express lower confidence in social platforms as a source for Washington news and information.** Despite its declining reputation for accuracy, insiders continue to recognize social media's power as an organizing tool for action and peer-to-peer influence. In 2017, federal executives in particular relied less on social tools for work, whereas Capitol Hill and private sector insiders increased their usage of specific platforms.

Key takeaways in 2017



-  **6. Top social media platforms actively imitate each other to build market share and credibility, yet insiders' utilization patterns suggest they believe clear differences exist.** As Twitter reinforces its role as a channel for unfiltered breaking news, LinkedIn offers opportunities for individual brand building. As a whole, insiders are shying away from social media's news discovery capabilities, on Facebook in particular.
-  **7. Content producers must balance insiders' evolving needs across the decision-making cycle.** Compared to 2015, more insiders sought resources that help distill an issue (infographics), as well as offer history and context (lobbyists), but objective, fact-based content (research reports) remains fundamental. As insiders rely on more sources to triangulate facts, their trust in primary sources (think tanks, trade publications, associations and nonprofits) remained flat in 2017, signaling a continued opportunity for the private sector to act as a critical resource in policy formulation.
-  **8. In-person interactions are still critical in Washington.** Despite the prevalence of digital tools, half of all insiders rely on in-person communications to share important news and information, and events and briefings continue to play a key role in policy formulation. Face-to-face interactions are perhaps more important in Washington during the current period of retrenchment, with insiders turning to known (trusted) quantities to support decision-making.
-  **9. Insiders disdain online video while podcasts are on the rise.** With online video perceived as being more prone to bias, focused more on emotion and less on facts, many insiders find reading faster and preferable to video for Washington news and information. Meanwhile, podcasts are earning an increasing share of insiders across all generations (and particularly among Millennials) as a useful format for absorbing different and new perspectives on politics and policy.
-  **10. There is no one-size-fits-all strategy.** Insiders' media habits are highly diverse, and they enjoy enormous choice in when, how and what they consume. As the media landscape continues to fragment and trust is redistributed across channels, content must be differentiated across platforms in line with user needs, and distribution strategies updated to reach insiders where they are, both within the decision-making cycle and across a given day. Adaptability and specificity are critical for landing a message in the right place. Accordingly, communications and outreach strategies must be revisited frequently, to examine what's working to influence outcomes and what tactics need to be discarded.

Trusted and reliable sources

- *What is the state of trust in media today?*
- *Which sources do insiders trust the most?*
- *How does trust impact what's consumed?*

Respondent view: “fake news”

You can assume that **congressional staff won't get duped by “fake news,”** so for us it's more about wading through talking points and getting data and facts—on whoever's “side” those may come down.

Capitol Hill, Republican, Generation X

I do not just read one source. I read lots of sources. I fear others do not have the time to do that.

Private Sector, Independent, Over 65

I trust myself but don't trust others to recognize fake news.

Federal Executive, Democrat, Baby Boomer

I'm a **news and policy junkie** and **spend ~3 hours a day reading “news.”** I'm very confident and find it easy to spot bias or “fake” news.

Federal Executive, Independent, Generation X

Hill staff **know the talking points and watch the news all day, we have resources to fact-check a story.** The average person may not have the time or the resources to do the same.

Capitol Hill, Democrat, Generation X

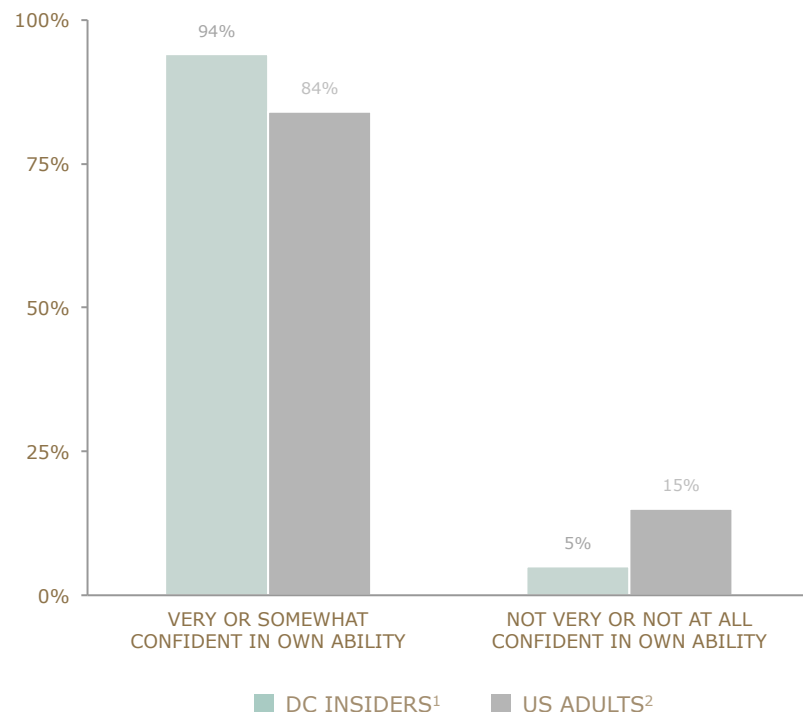
Know news is good news

DC insiders are more confident than average Americans in their ability to separate truth from fiction...

...and much more confident in their own judgment than others' ability to detect "fake news"

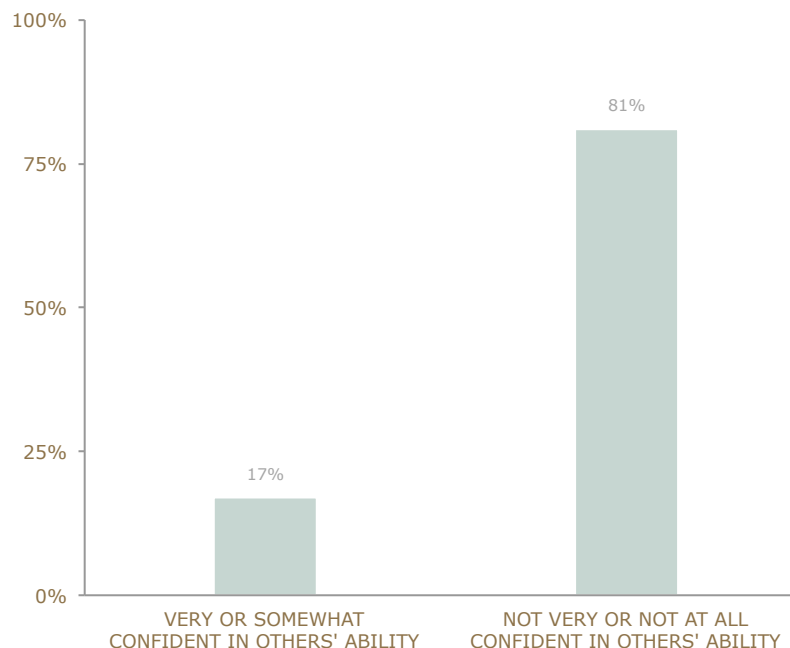
Confidence in Your Own Ability to Recognize News That Has Been Fabricated

PERCENTAGE OF RESPONDENTS, DC INSIDERS VS US ADULTS



Confidence in Other People's Ability to Recognize News That Has Been Fabricated

PERCENTAGE OF RESPONDENTS, DC INSIDERS ONLY



¹ Washington in the Information Age, N=1,190; ²Pew Research Center, N=1,002.

Respondent view: trusted sources

I read more news now, and more across the spectrum (e.g., Fox to CNN/MSNBC) to put together my own sense of truth.

Federal Executive, Democrat, Baby Boomer

A lot of news feels like gossip. I am more interested in finding researched news stories.

Private Sector, Democrat, Baby Boomer

Media sources have moved/been allowed to inject a point of view more than they have historically, [making] it important to **be aware that sources once viewed as neutral may be biased** and consider the news with that in mind.

Private Sector, Republican, Baby Boomer

The old axiom of **trust but verify** has become even more important.

Capitol Hill, Republican, Generation X

The **political bias** in the news (on all sides) has never been more palpable. You have to read both sides to get any semblance of what the facts likely are.

Private Sector, Independent, Generation X

It's very hard to find objective, non-anecdotal data anymore —other than the Congressional Research Service.

Capitol Hill, Republican, Generation X

No one source provides an accurate picture. **Multiple sources with corroboration** must be used to filter agenda-driven reporting.

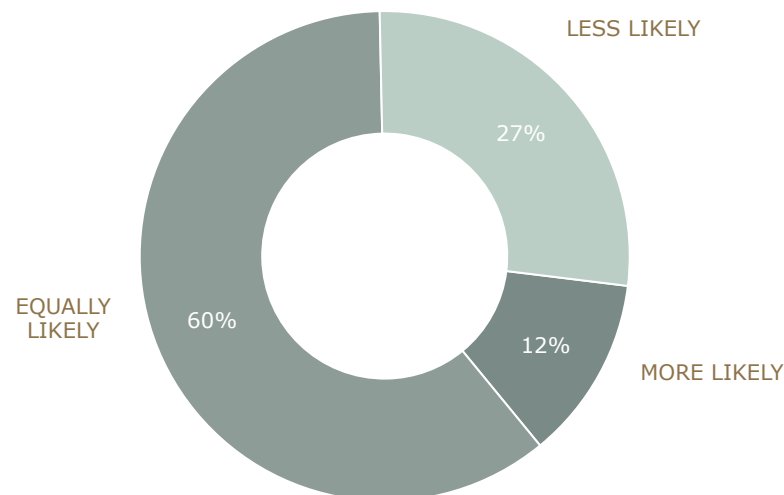
Capitol Hill, Independent, Generation X

Go-to sources: good to go in 2017

Within a fraught media environment, trust in go-to sources is reportedly equal to prior years, but some remain more trusting than others

Compared to Previous Years, How Likely Respondents are to Trust Go-To Sources of News and Information in 2017

PERCENTAGE OF RESPONDENTS



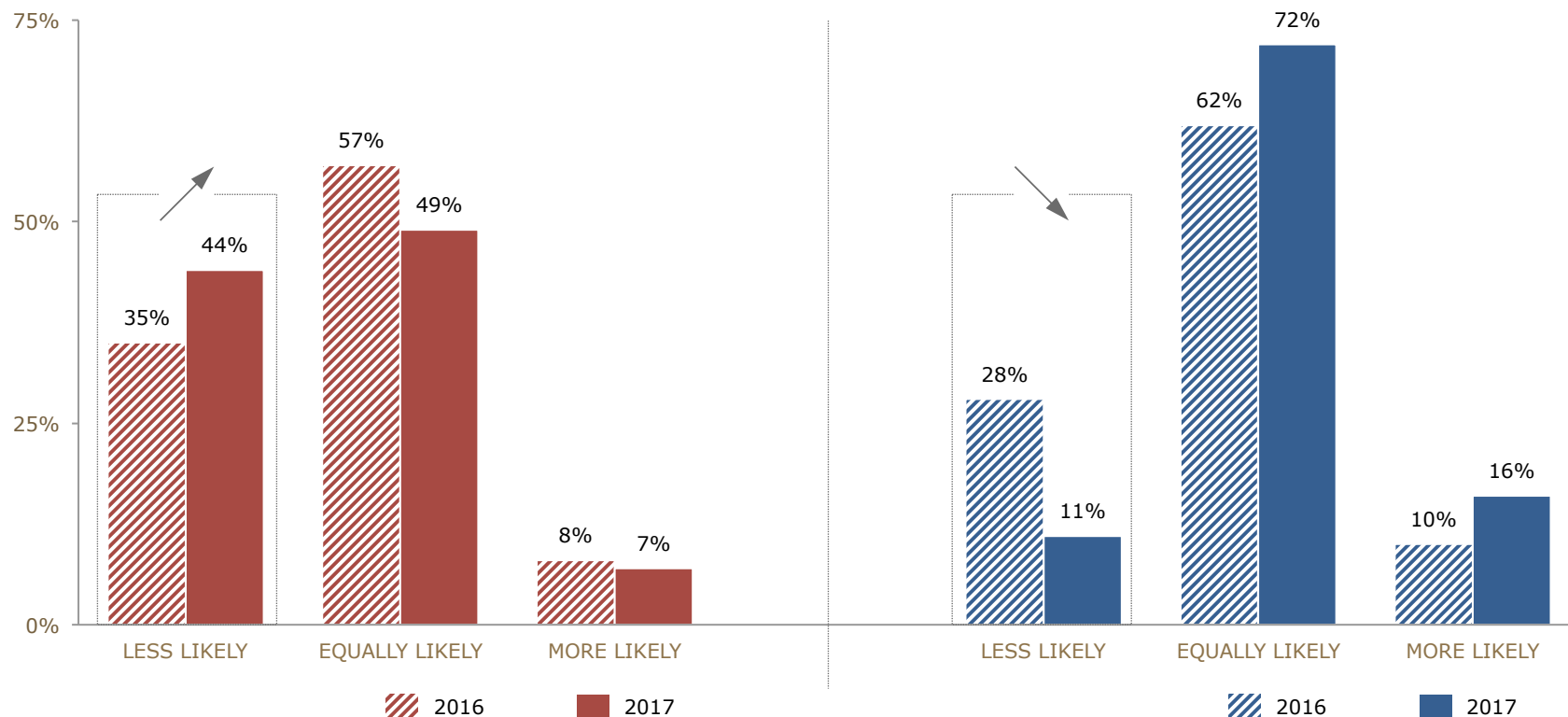
Trust divide by party lines

More Republicans doubt their go-to sources, while Democrats are equally or more trusting in 2017

Compared to Previous Years, How Likely Respondents Are to Trust Go-To Sources of News and Information in 2017

PERCENTAGE OF REPUBLICANS, 2016 vs 2017

PERCENTAGE OF DEMOCRATS, 2016 vs 2017

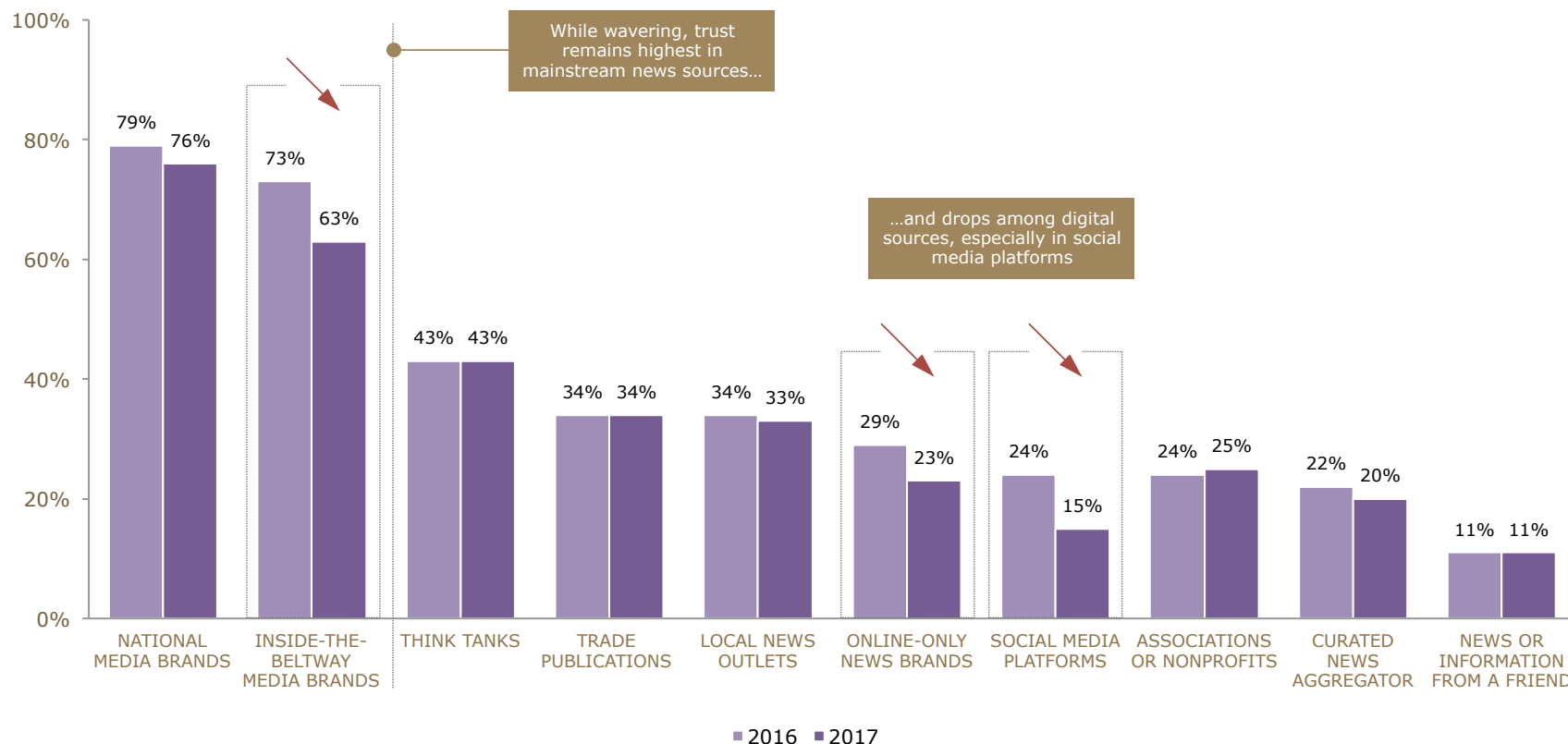


High marks for mainstream sources

Insiders' trust remains highest in national and inside-the-Beltway brands; greatest declines in digital media sources

Trusted Sources for Washington News and Information

PERCENTAGE OF RESPONDENTS, 2016 VS 2017



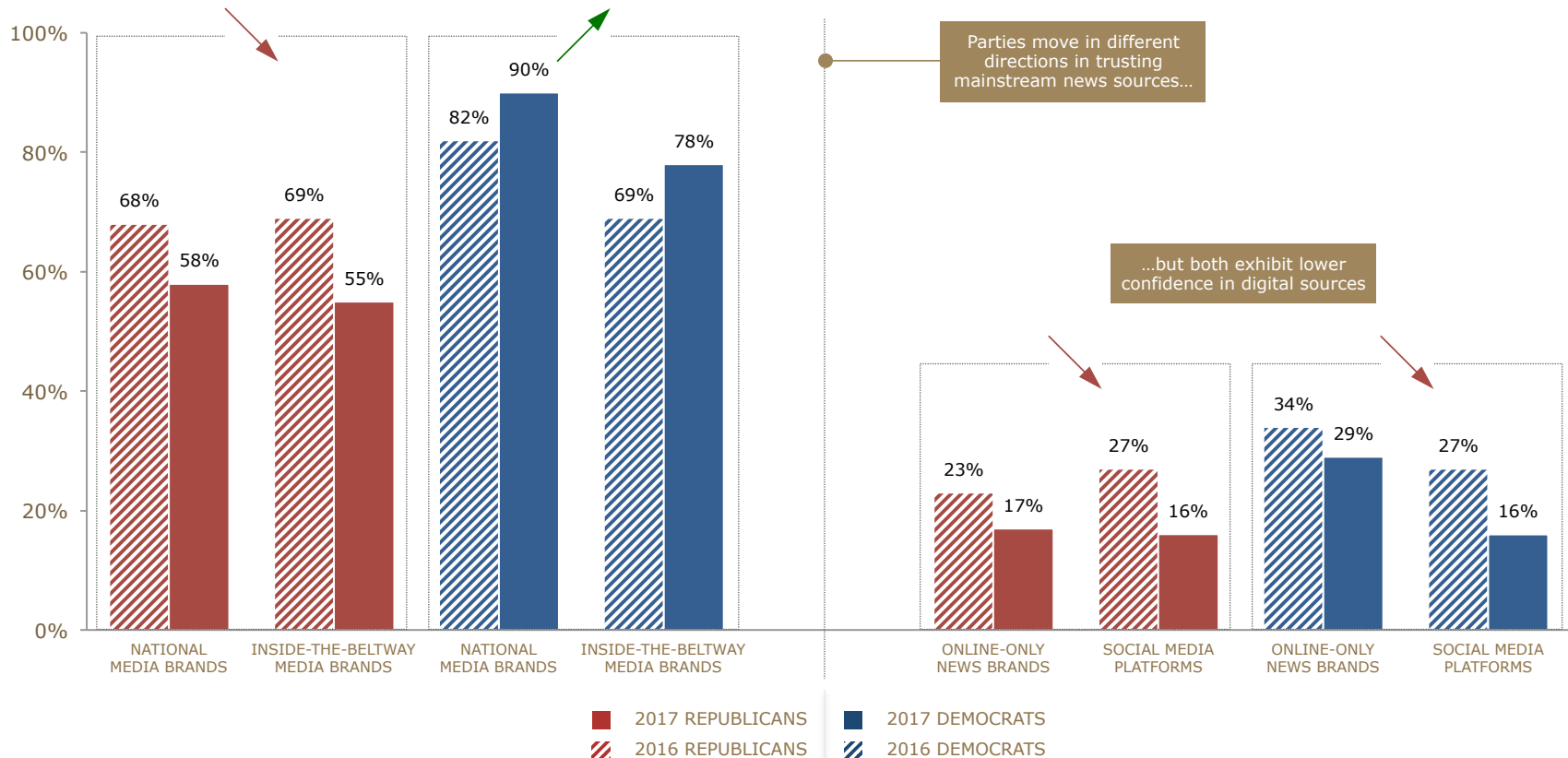
Below the radar: stealth shifts in trust

Republicans' trust in mainstream sources declines, as Democrats' trust increases...

...while confidence in online-only news sources and social media drops among respondents from both parties

Trusted Sources for Washington News and Information

PERCENTAGE OF RESPONDENTS, 2016 VS 2017

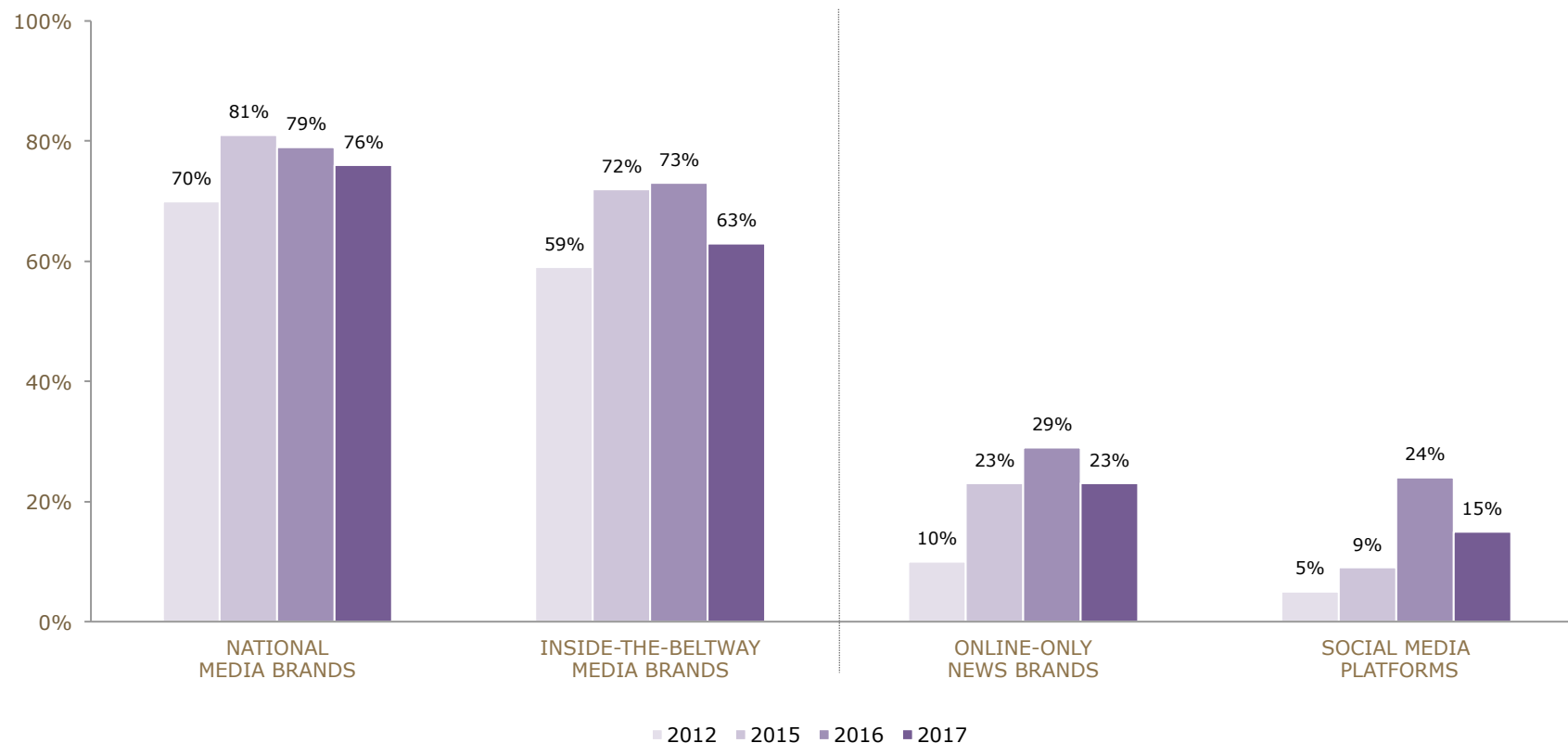


New era? Or back to the beginning?

Despite declines in trust in mainstream and new (digital) media, levels remain higher than five years ago

Trusted Sources for Washington News and Information

PERCENTAGE OF RESPONDENTS, 2012-2017

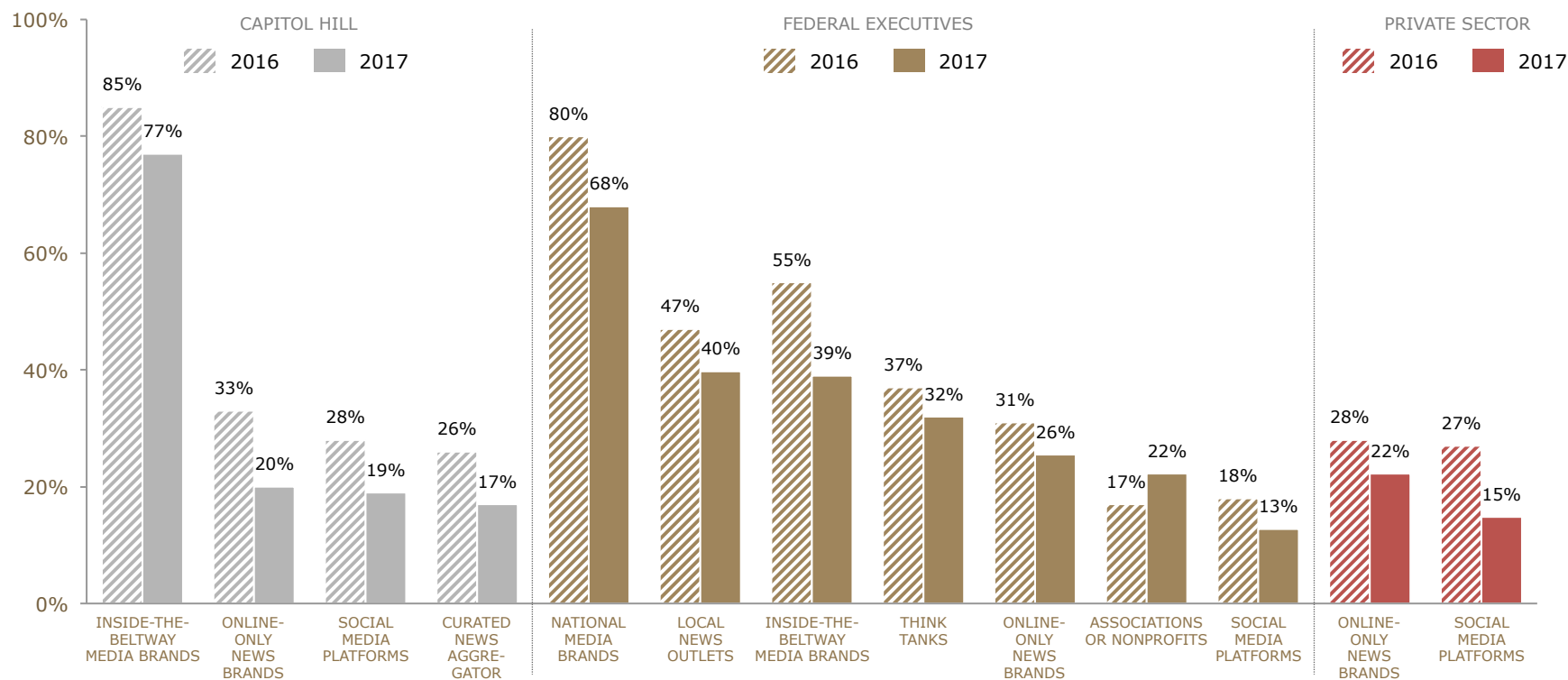


Confidence lost: online and social media

Federal executives exhibit greatest loss of trust across all sources of Washington news and information

Trusted Sources for Washington News and Information

PERCENTAGE OF RESPONDENTS, 2016 VS 2017



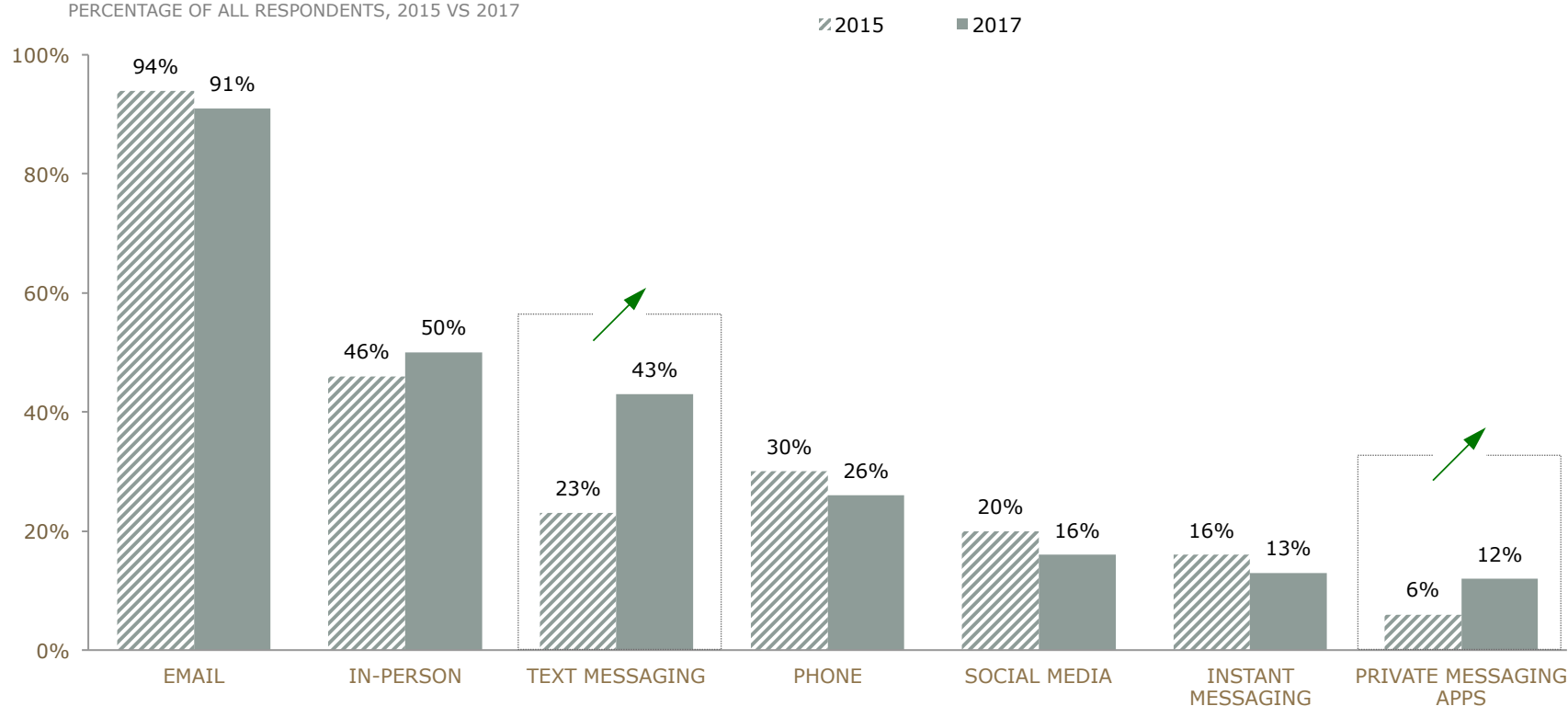
Source: Washington in the Information Age 2017; National Journal research and analysis.

Retreat from public communications

Fewer respondents opt to share via social media, but a near doubling in those communicating via text message and private messaging

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

PERCENTAGE OF ALL RESPONDENTS, 2015 VS 2017

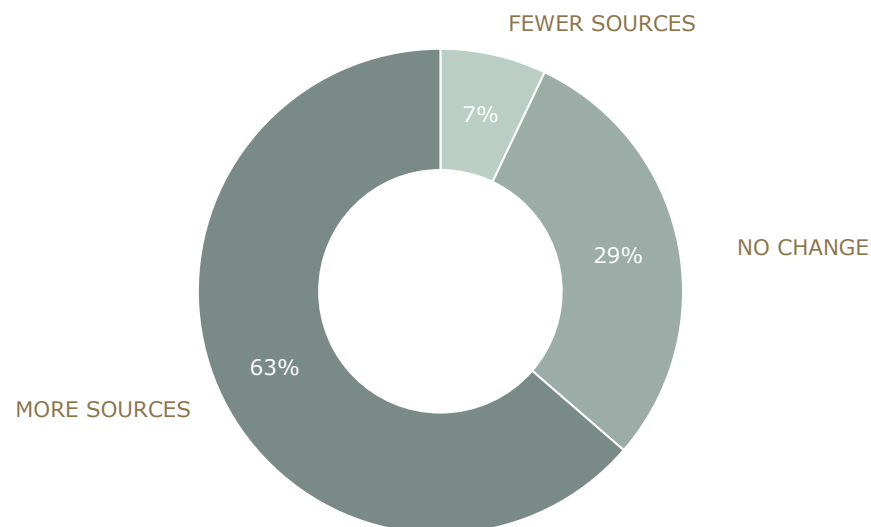


Can't kick their media habit

Amid shifting levels of confidence in 2017, majority of insiders report consuming more information compared to previous years

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

PERCENTAGE OF RESPONDENTS



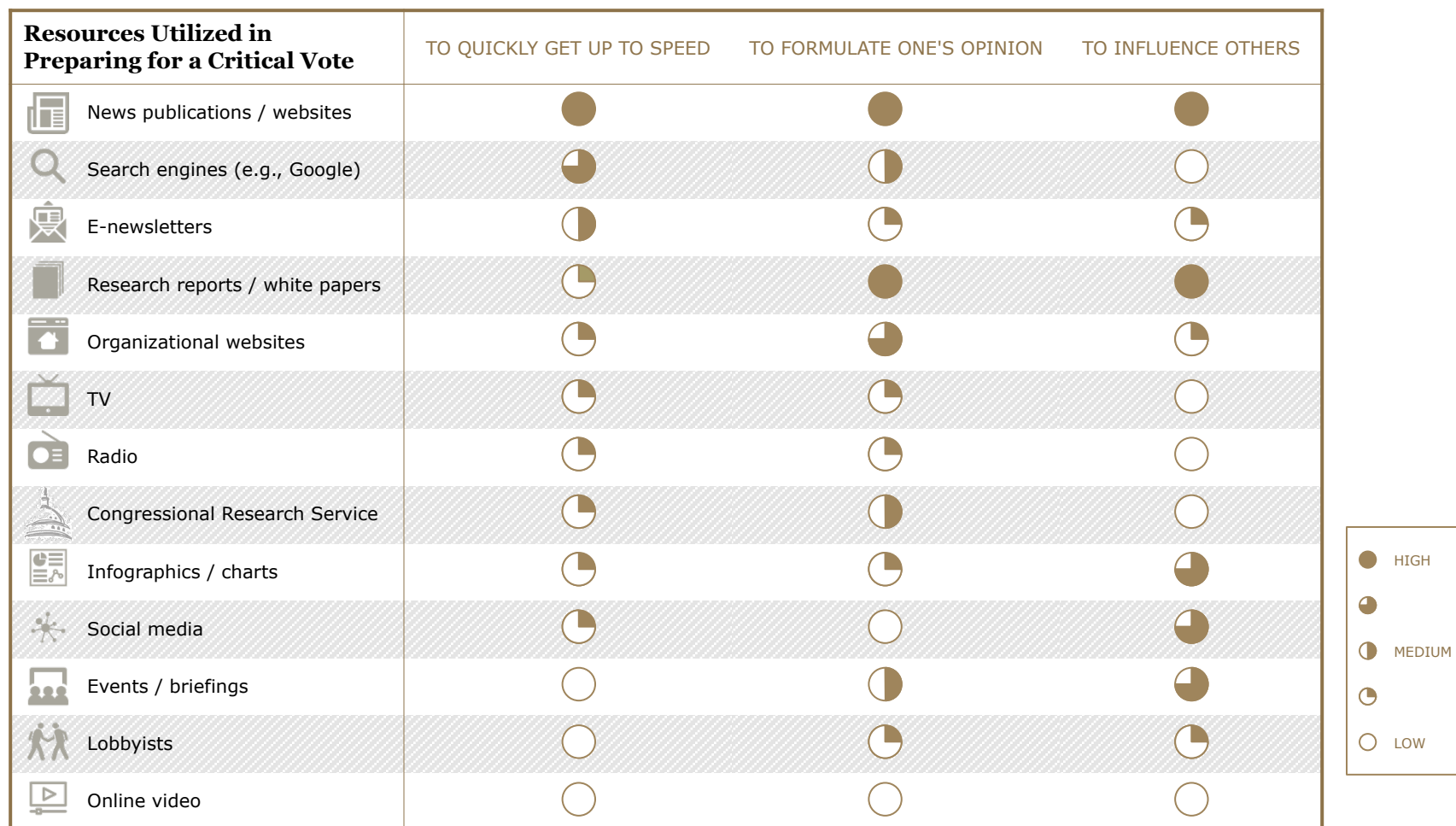
Resources and decision-making

- *How do information resources help shape insiders' opinions on policy issues?*
- *Where and how can one influence policy decisions?*
- *How are preferences for different resources changing over time?*

Valuing depth and perspective

Resources Utilized During Three Phases of Preparing for a Critical Vote

PERCENTAGE OF RESPONDENTS

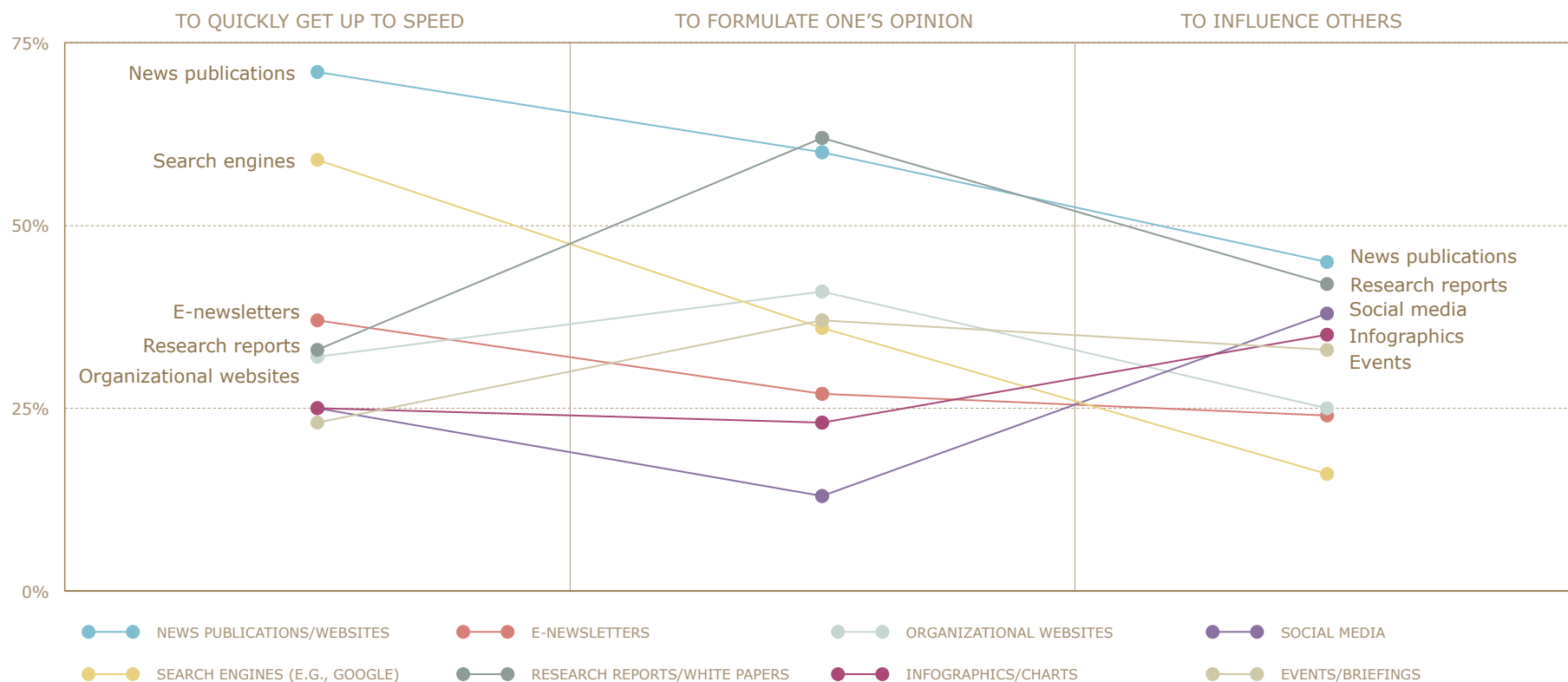


Different resources, different needs

Distinct resources have differential impact along the policy and decision-making spectrum, but in general, news publications and research reports/white papers most critical to policy formulation

Top 5 Resources Utilized During Three Phases of Preparing for a Critical Vote

PERCENTAGE OF RESPONDENTS

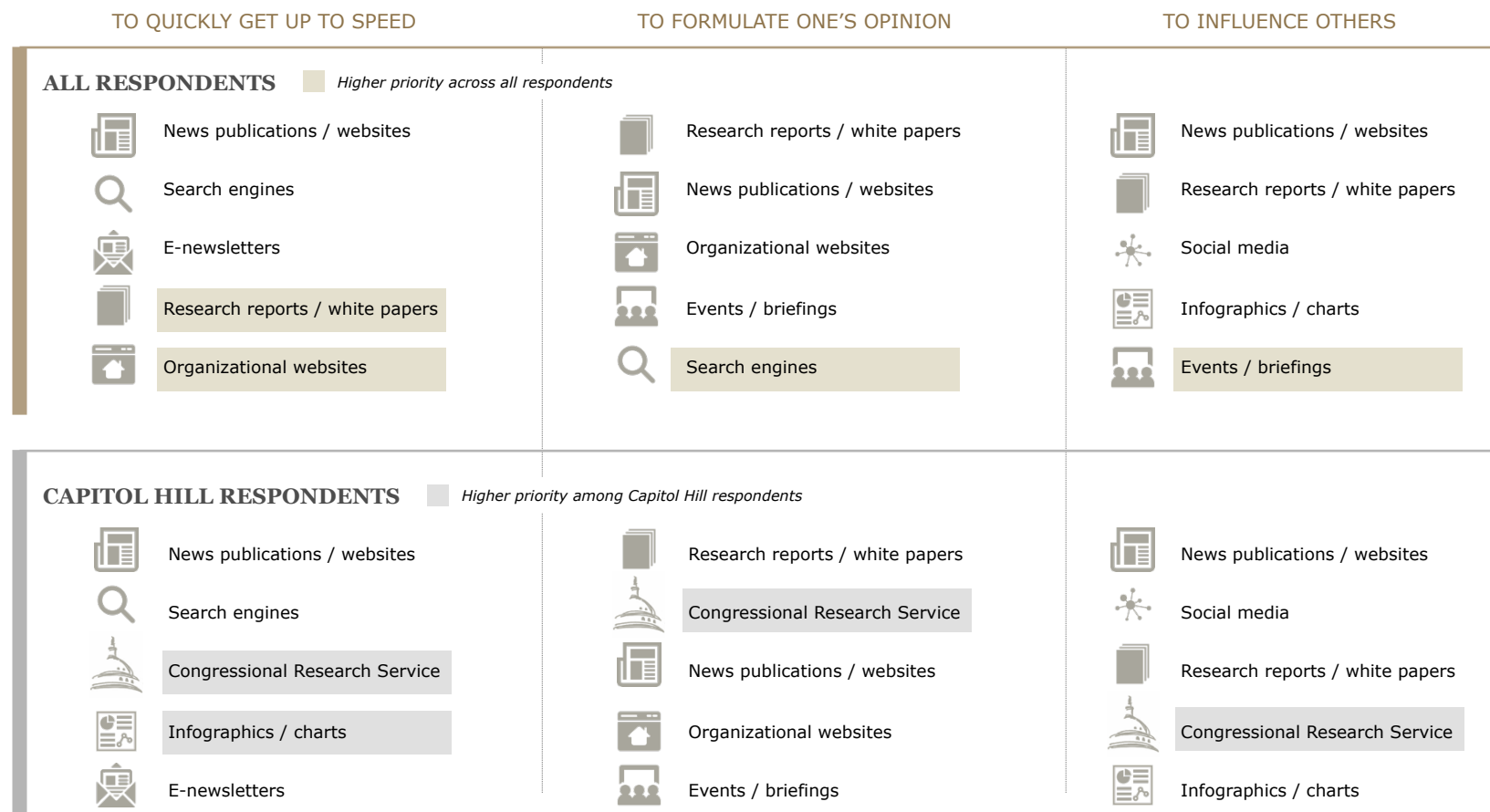


What the Hill pays attention to (and when)

Compared to all insiders, Capitol Hill staffers put more emphasis on Congressional Research Service and infographics

Top 5 Resources Utilized During Three Phases of Preparing for a Critical Vote

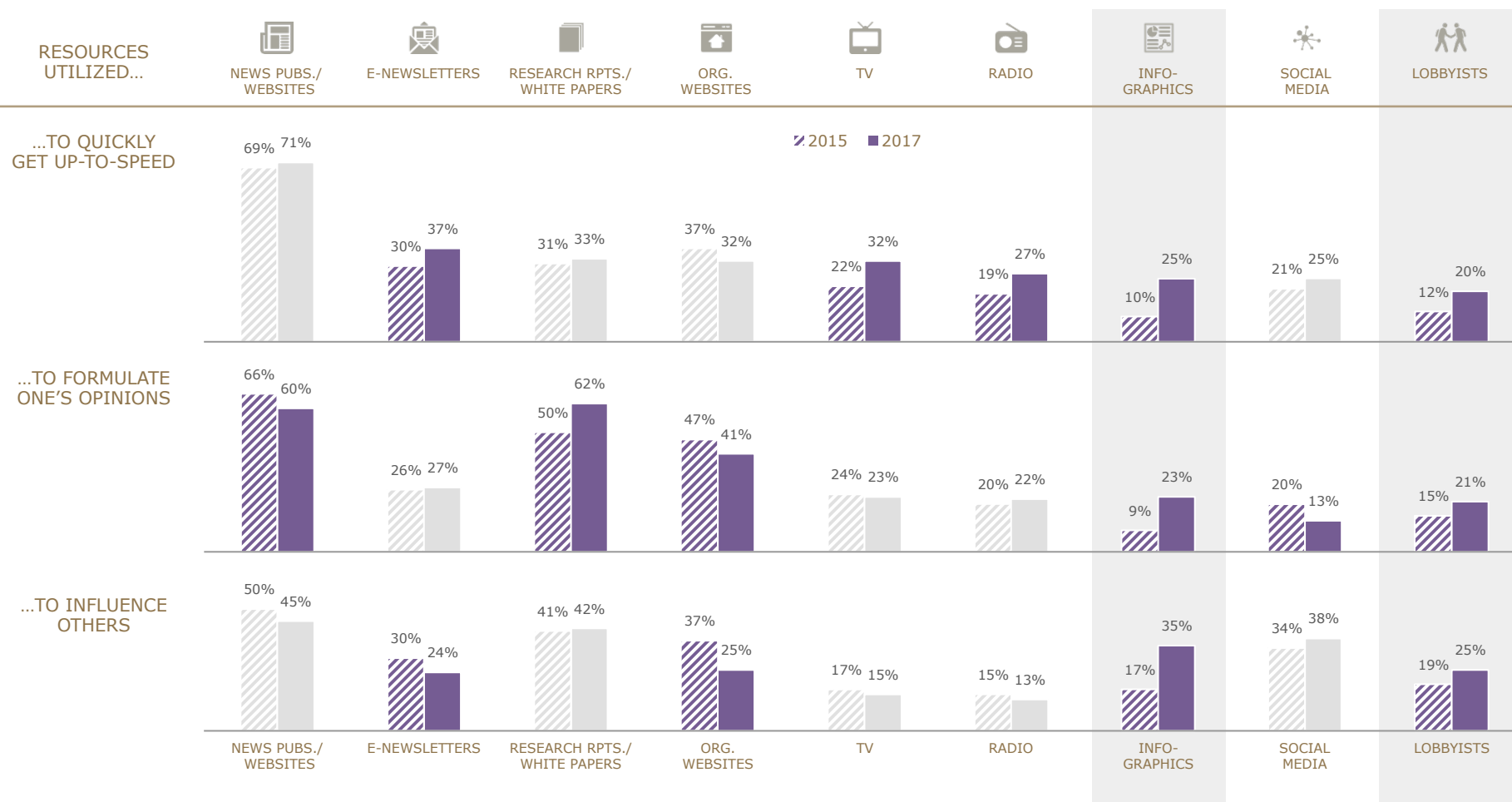
PERCENTAGE OF RESPONDENTS



Infographics and lobbyists on the rise

Since 2015, infographics and lobbyists increasingly relied upon across all three phases of preparing for a critical vote

PERCENTAGE OF ALL RESPONDENTS, 2015 VS 2017¹



¹ Changes greater than 5 percentage points highlighted

Social media

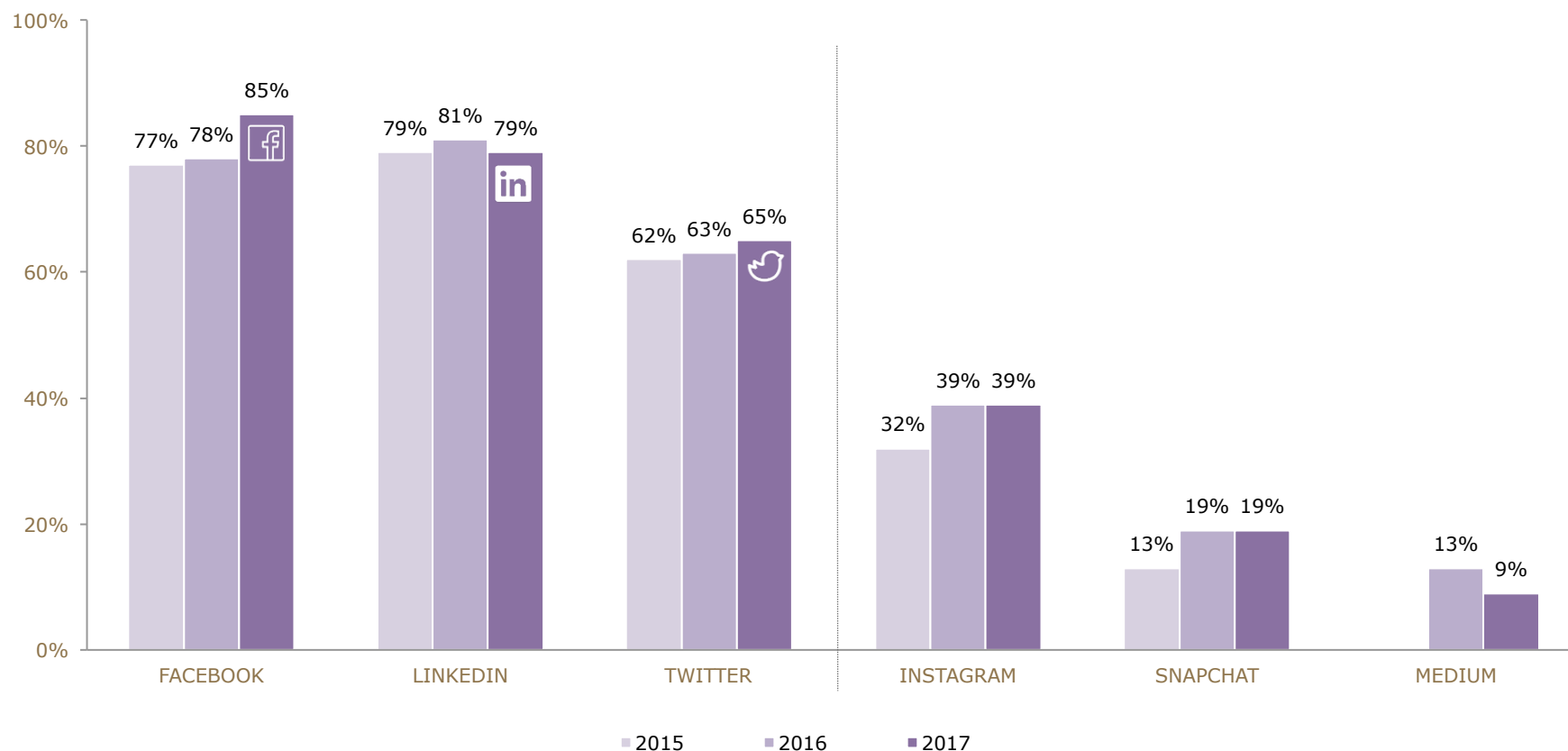
- *Which social media platforms are used in DC?*
- *What motivates insiders' use of social media?*
- *How do congressional staff use social media?*

Big 3 social platforms remain big

Facebook, LinkedIn and Twitter remain insiders' most popular platforms for work and non-work purposes

Social Media Platform Usage

PERCENTAGE OF RESPONDENTS WHO HAVE USED PLATFORM IN LAST SIX MONTHS, 2015- 2017

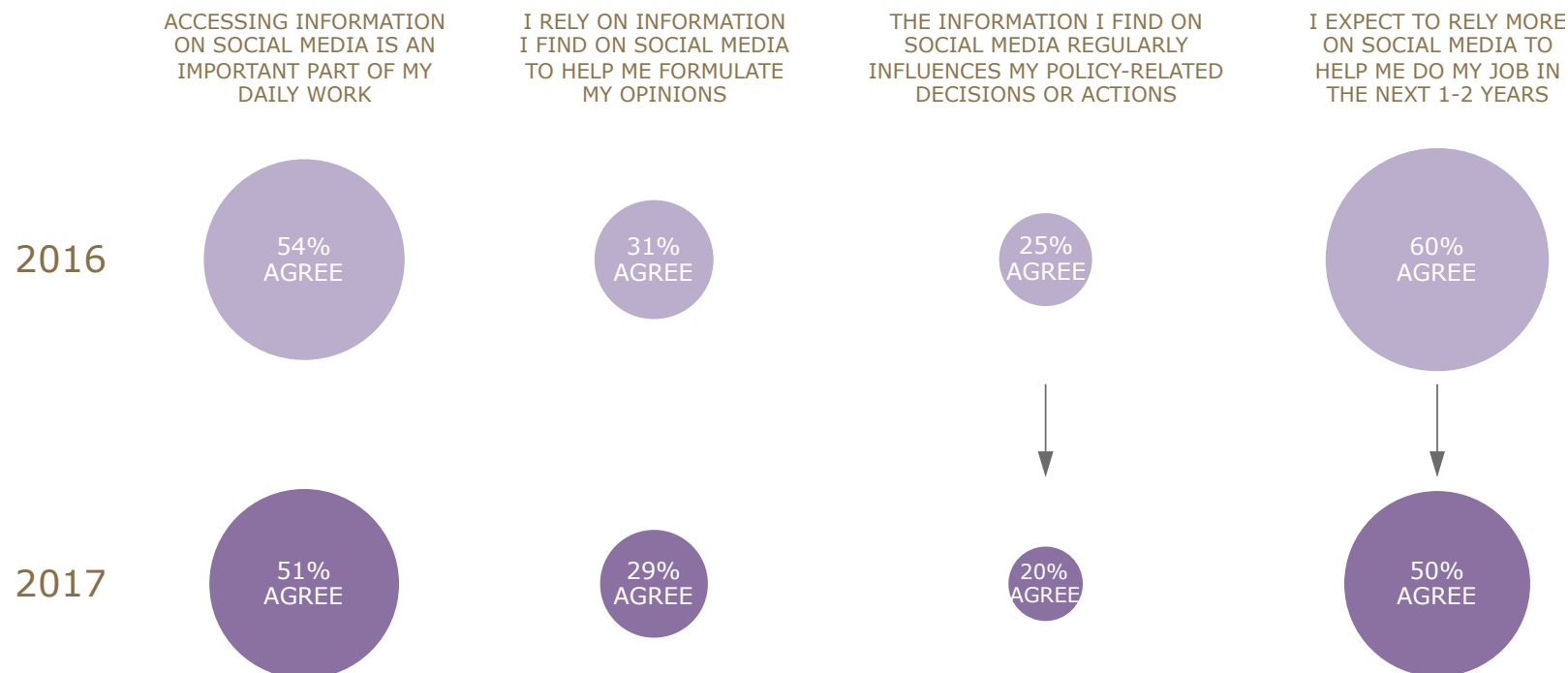


Social media at a turning point (maybe)

Respondents have an overall lower opinion of social media in 2017 than in 2016; fewer insiders acknowledge its impact on their own policy activity

Perceptions of Social Media's Role in Daily Policy Work

PERCENTAGE OF RESPONDENTS, 2016 VS 2017

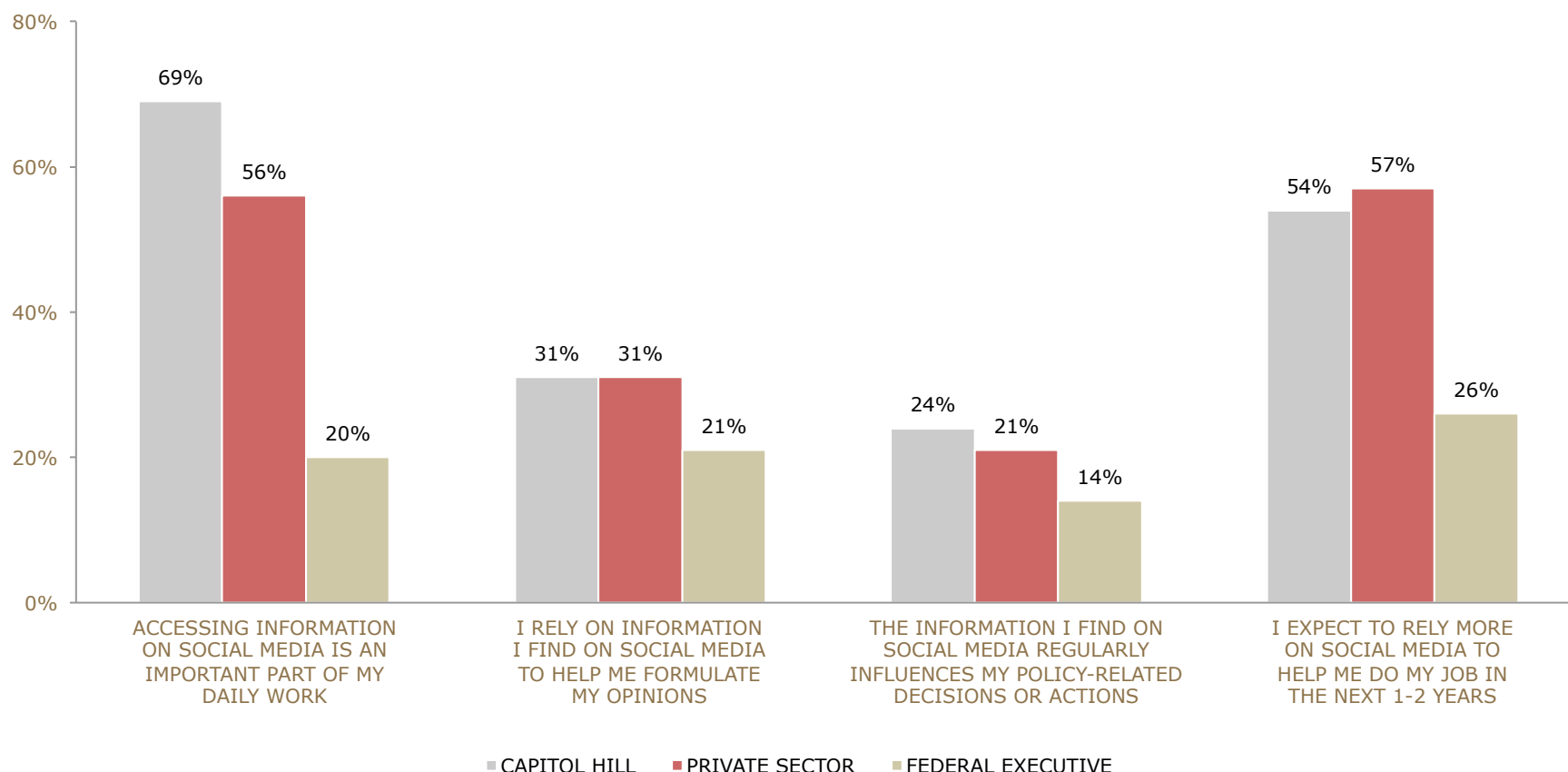


Perceptions of social media's utility differ by workplace

In 2017, federal executives consistently down on social media compared to peers on Capitol Hill and in the private sector

Perceptions of Social Media's Role in Daily Policy Work

PERCENTAGE OF RESPONDENTS, BY WORKPLACE

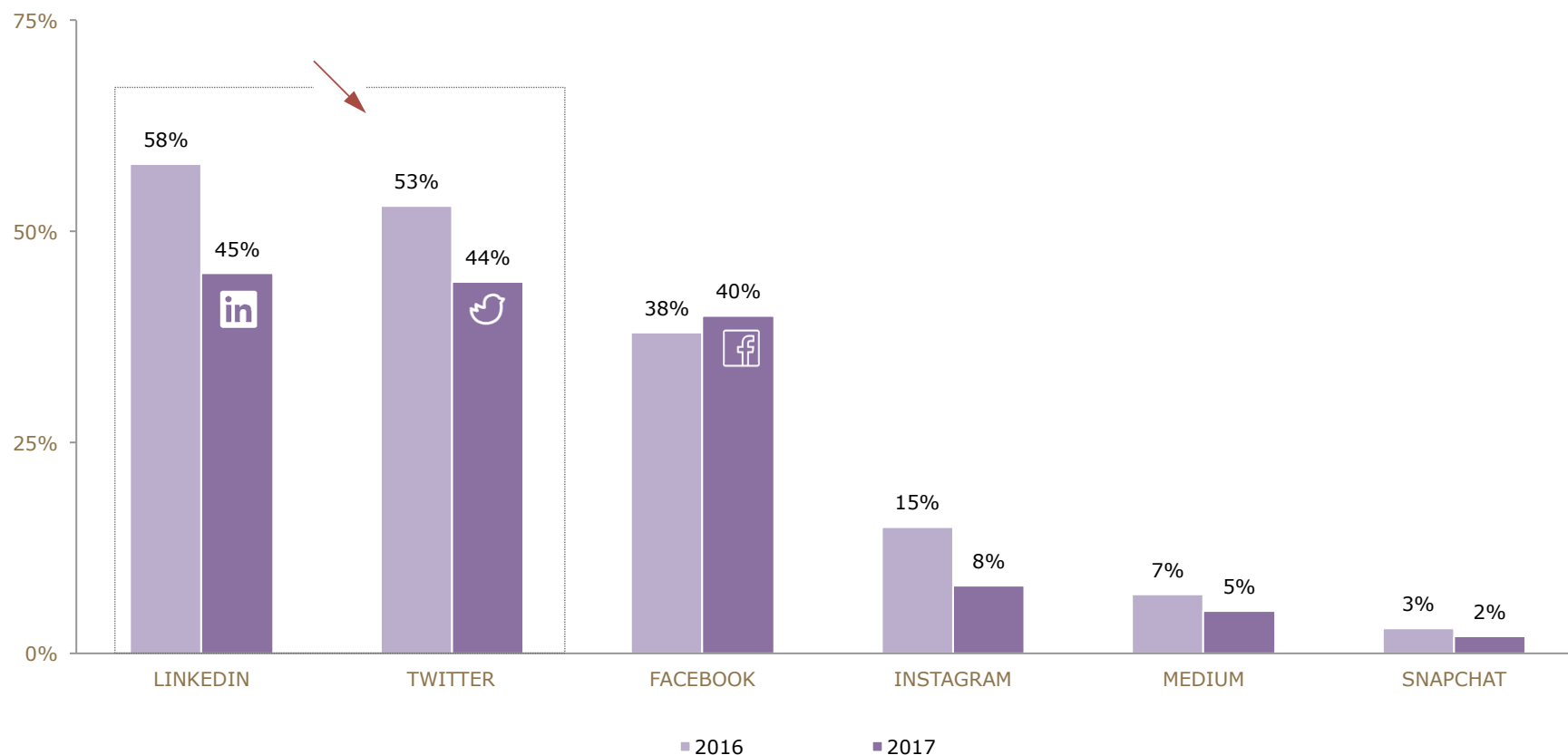


Leveling the playing ground

LinkedIn and Twitter now roughly even in terms of professional usage by DC insiders; steepest decline in LinkedIn usage

Social Media Platform Usage for Work in Washington

PERCENTAGE OF RESPONDENTS USING PLATFORM IN LAST SIX MONTHS, 2016 VS 2017



Distinct platform shifts by workplace

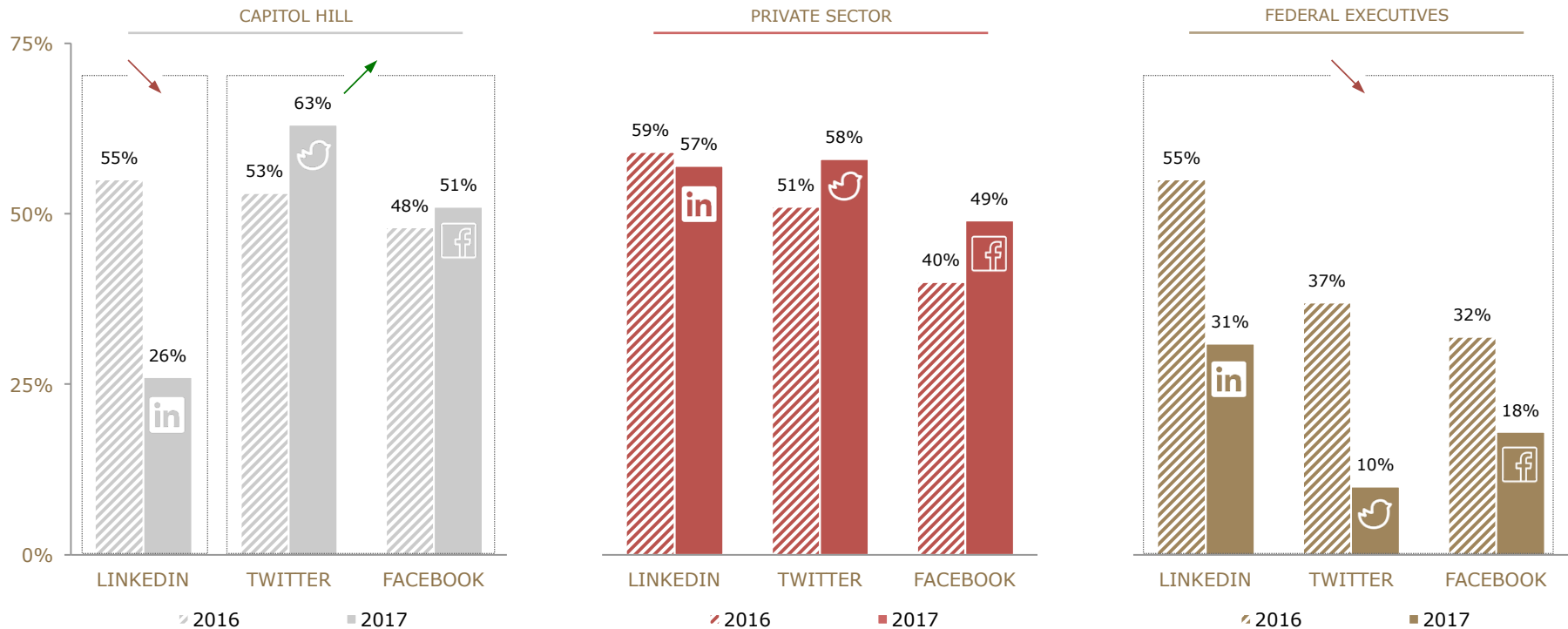
Congressional staff LinkedIn usage drops by one-half, but Twitter use rises...

...while private sector peers maintain or increase professional use of social tools...

...and federal executives withdraw from using all social platforms in the workplace

Social Media Platform Usage for Work in Washington

PERCENTAGE OF RESPONDENTS USING PLATFORM IN LAST SIX MONTHS, 2016 VS 2017

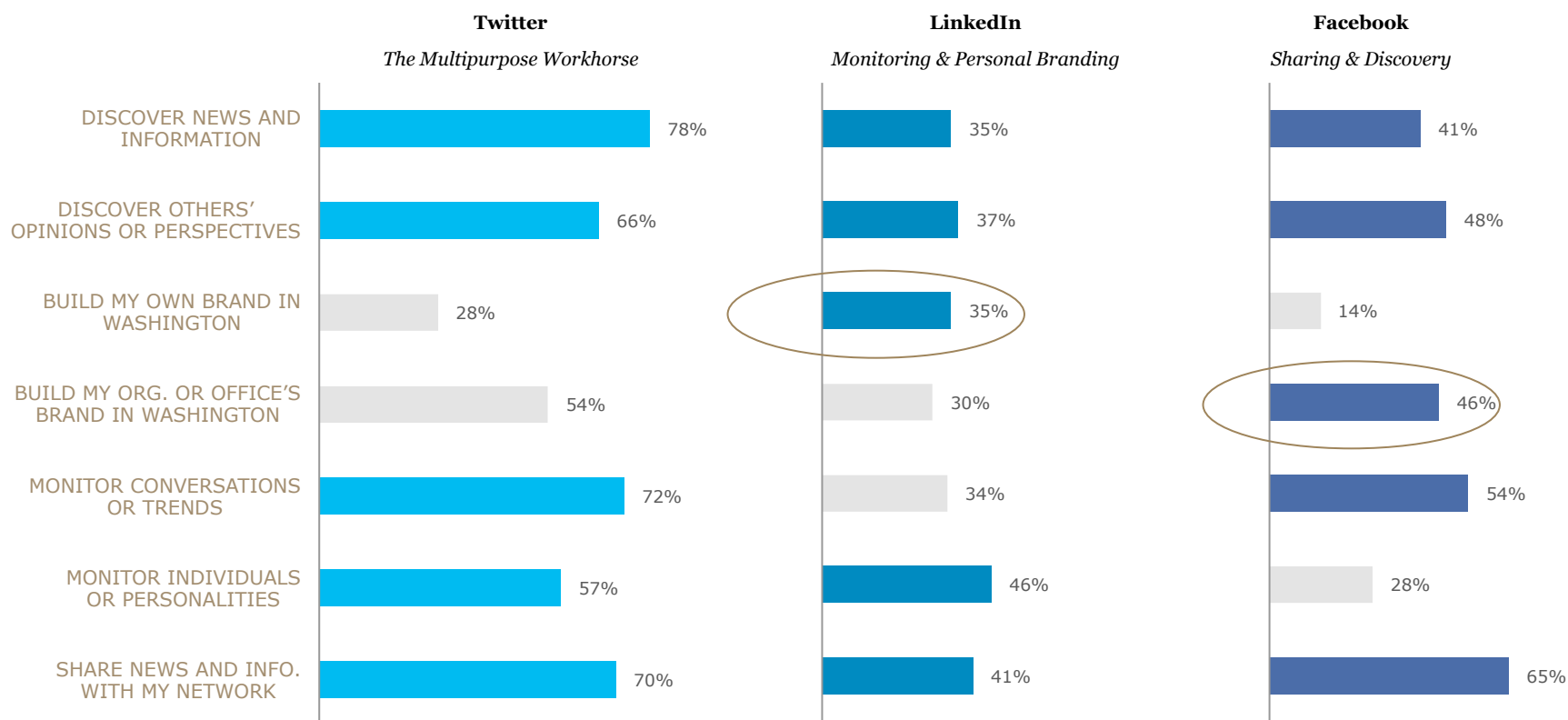


Platform preferences

Platform-specific changes likely driven by shifts in use case; main motivations differ by platform, with LinkedIn valued for personal brand building, Facebook for organizational brand building

Primary Purposes for Using Social Media Platforms for Work in Washington¹

PERCENTAGE OF RESPONDENTS USING PLATFORM IN LAST SIX MONTHS



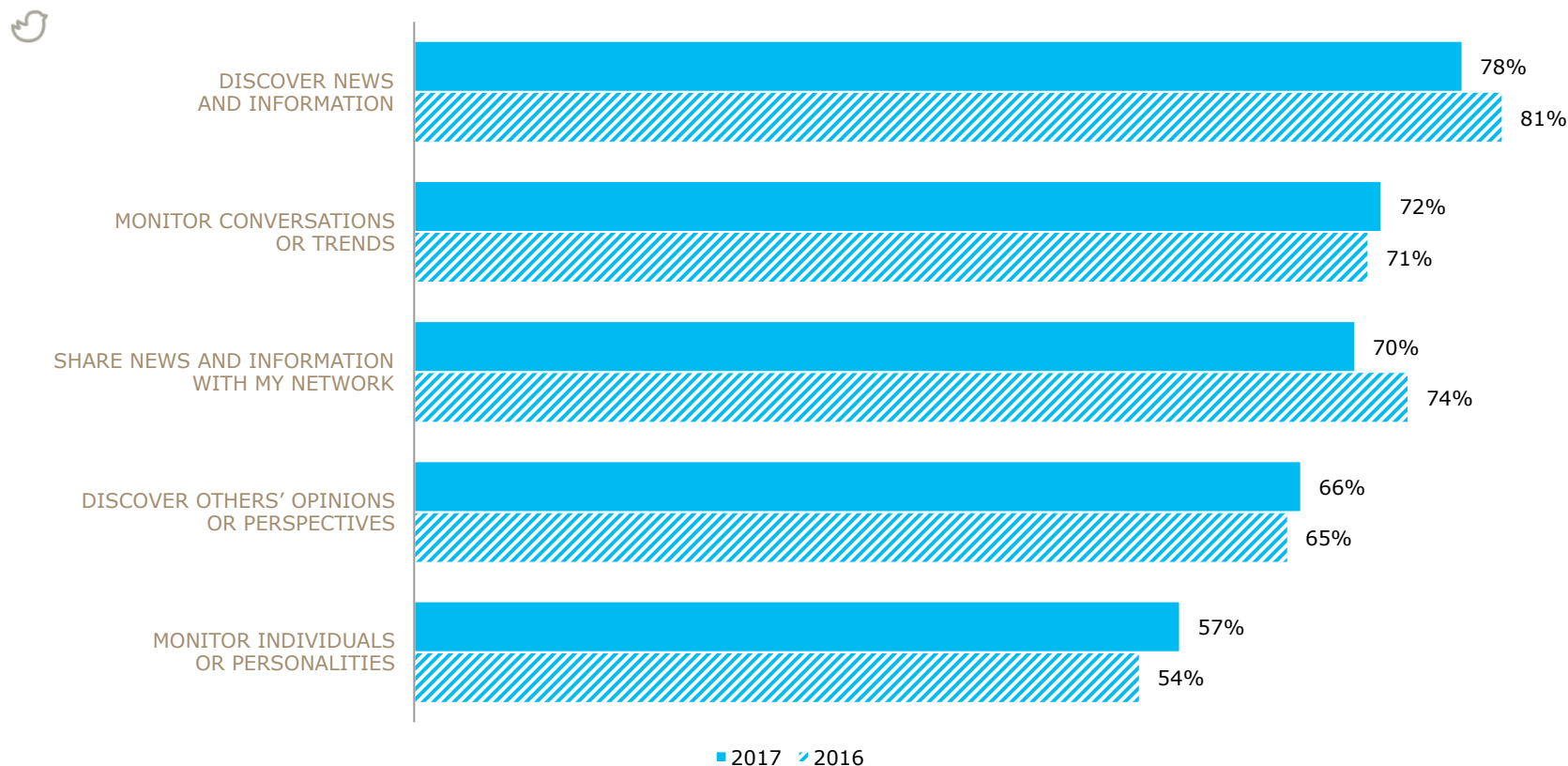
¹ Top five purposes within each platform highlighted.

Twitter: where news breaks (and policy is made)

Twitter reinforces its role as the channel for unfiltered breaking news; users focus on news discovery and intelligence gathering

Twitter

PERCENTAGE OF RESPONDENTS USING PLATFORM FOR EACH PURPOSE, 2016 VS 2017

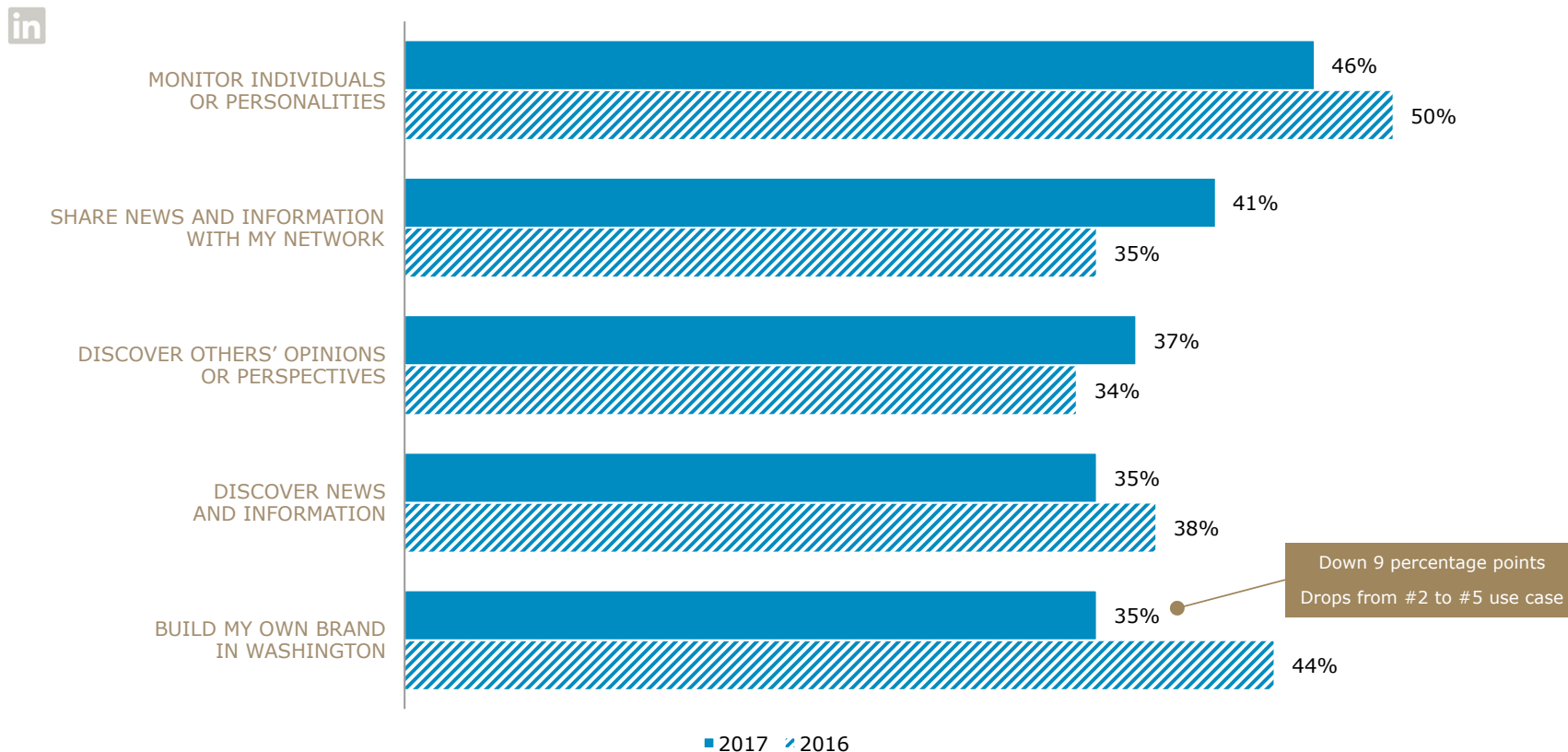


LinkedIn: mirroring workforce transitions

With fewer government professionals seeking new employment in 2017, main motivations for using LinkedIn shift from individual brand building to monitoring and information-sharing

LinkedIn

PERCENTAGE OF RESPONDENTS USING PLATFORM FOR EACH PURPOSE, 2016 VS 2017

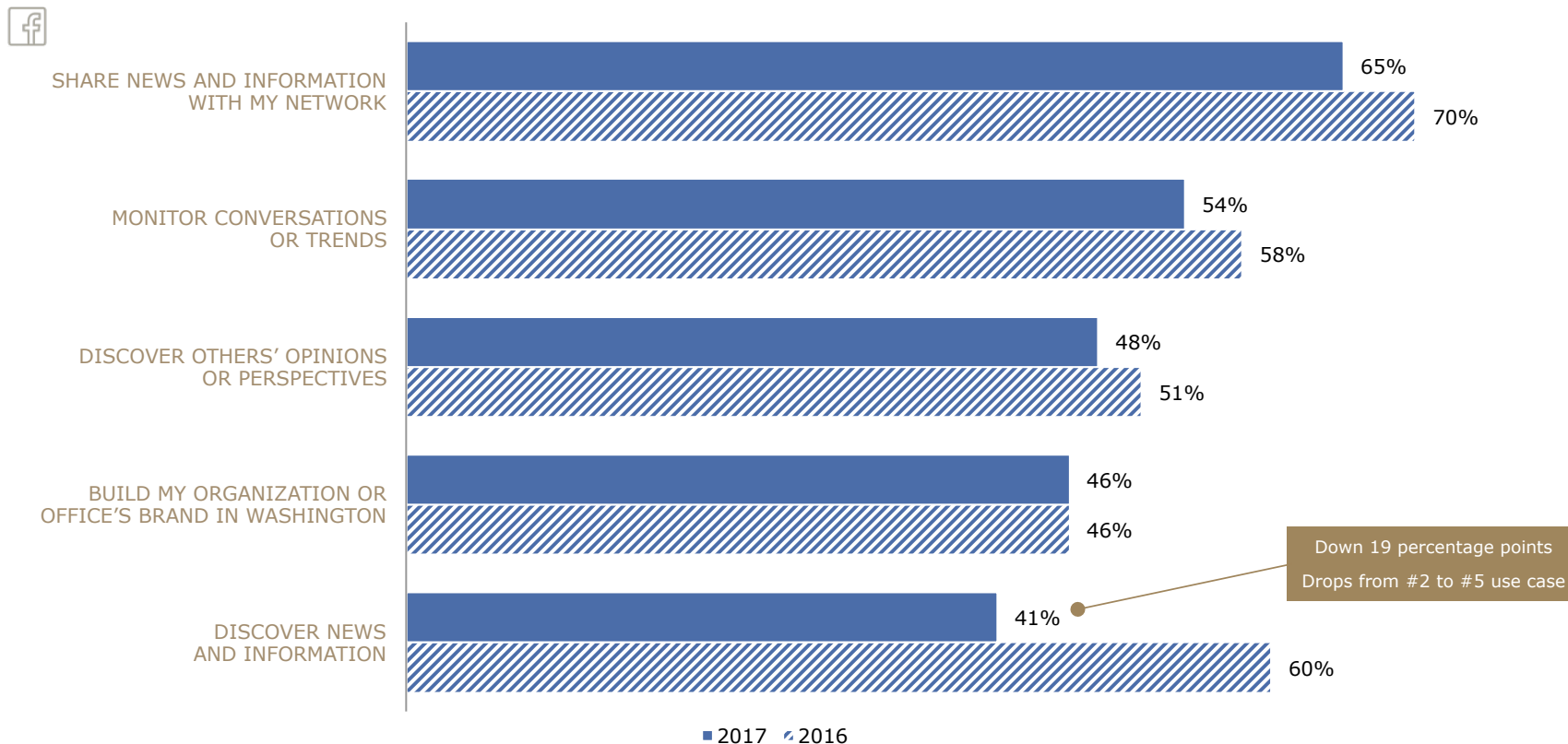


Facebook: evidence of the fake news problem?

While sharing and monitoring on Facebook remains high, significantly fewer insiders rely on it for news discovery

Facebook

PERCENTAGE OF RESPONDENTS USING PLATFORM FOR EACH PURPOSE, 2016 VS 2017



Capitol Hill respondent view: social media

Good old-fashioned interactions drive opinions; social media is a **check-in to see how things are playing**, but all too often, not a great gauge of a district.

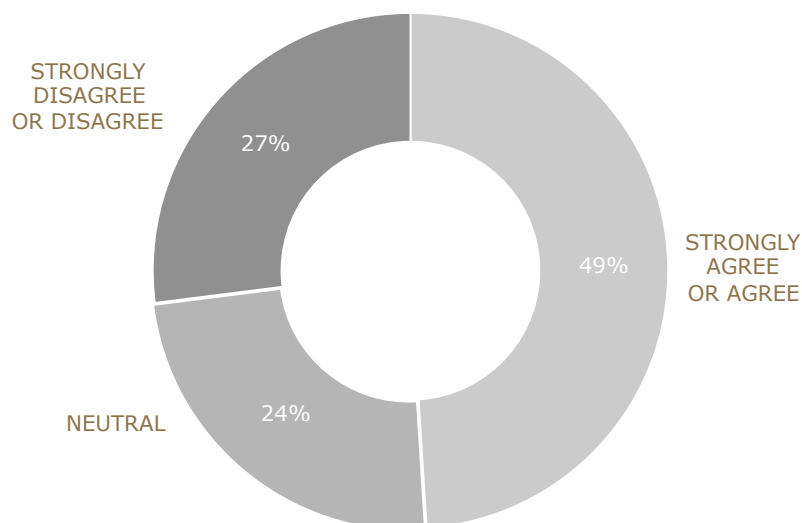
Capitol Hill, Republican, Generation X

Capitol Hill to constituents: Can we talk (online)?

Half of Capitol Hill respondents believe social media enables more meaningful interactions with constituents, yet nearly 3-in-4 find posts lack the detail needed to determine whether it is a constituent communication

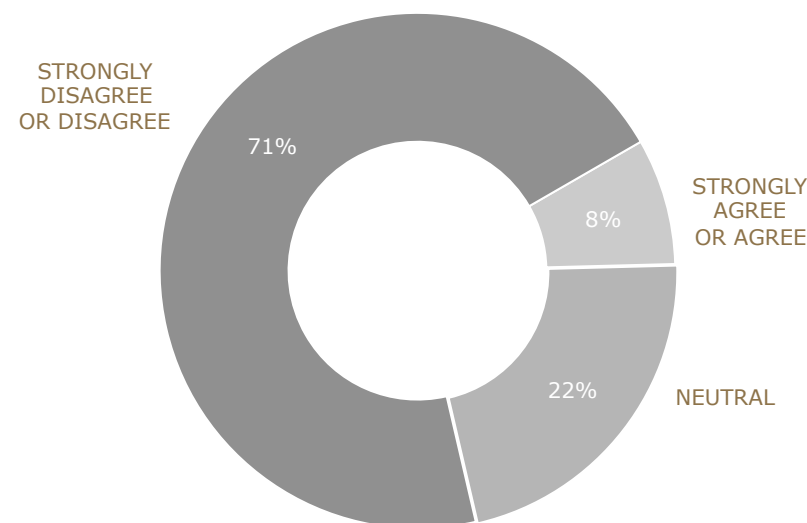
Social Media Enables Government Representatives to have More Meaningful Interactions with Constituents

PERCENTAGE OF CAPITOL HILL RESPONDENTS



Most Social Media Postings to Government Representatives' Platforms Provide Enough Information and Context to Determine if a Post is from a Constituent

PERCENTAGE OF CAPITOL HILL RESPONDENTS

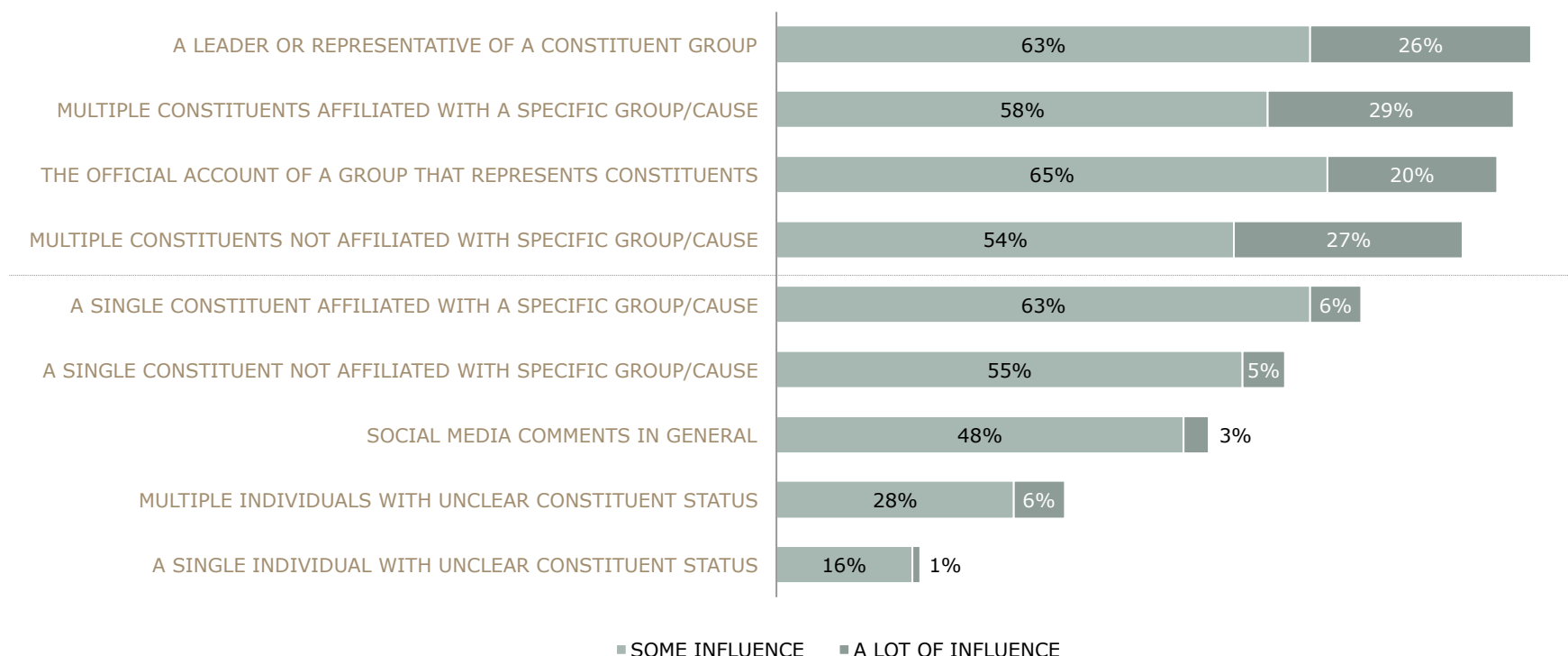


Not just size that matters

To persuade legislators with social, aim for a high number of constituents with a clear agenda or tie-in to the district/state; a high volume of posts from individual supporters is not necessary

**For a Member of Congress Who Has Not Arrived at a Firm Decision on an Issue,
Influence of Social Media Posts Directed at their Office on the Member's Decision**

PERCENTAGE OF CAPITOL HILL RESPONDENTS

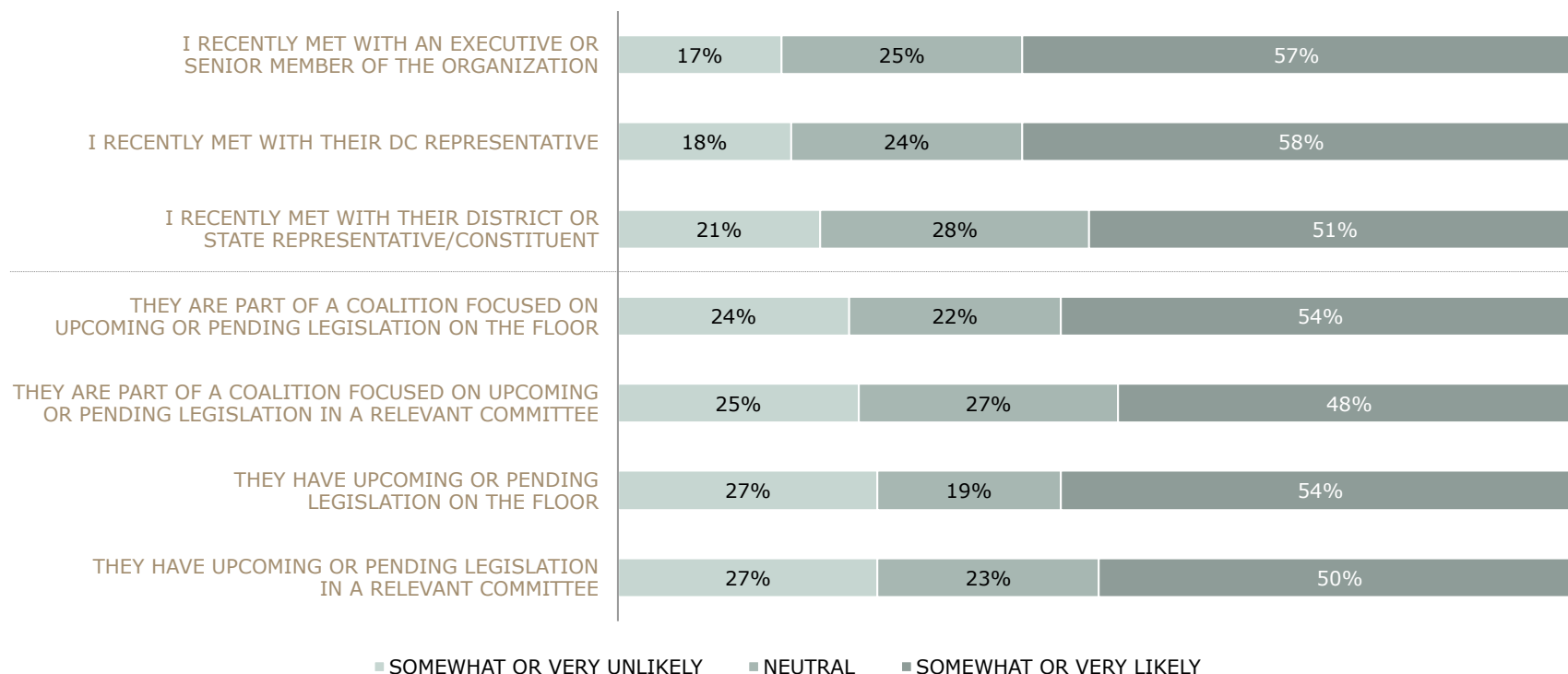


Face-to-face still relevant

Despite the growth (or hype) around digital communications, in-person interactions still matter; recent meetings with an organization or representative are most likely to result in social media follows for work purposes

Circumstances that Make Congressional Staff More Likely to Follow an Organization on Social Media for Work

PERCENTAGE OF CAPITOL HILL RESPONDENTS WHO USE SOCIAL MEDIA FOR WORK

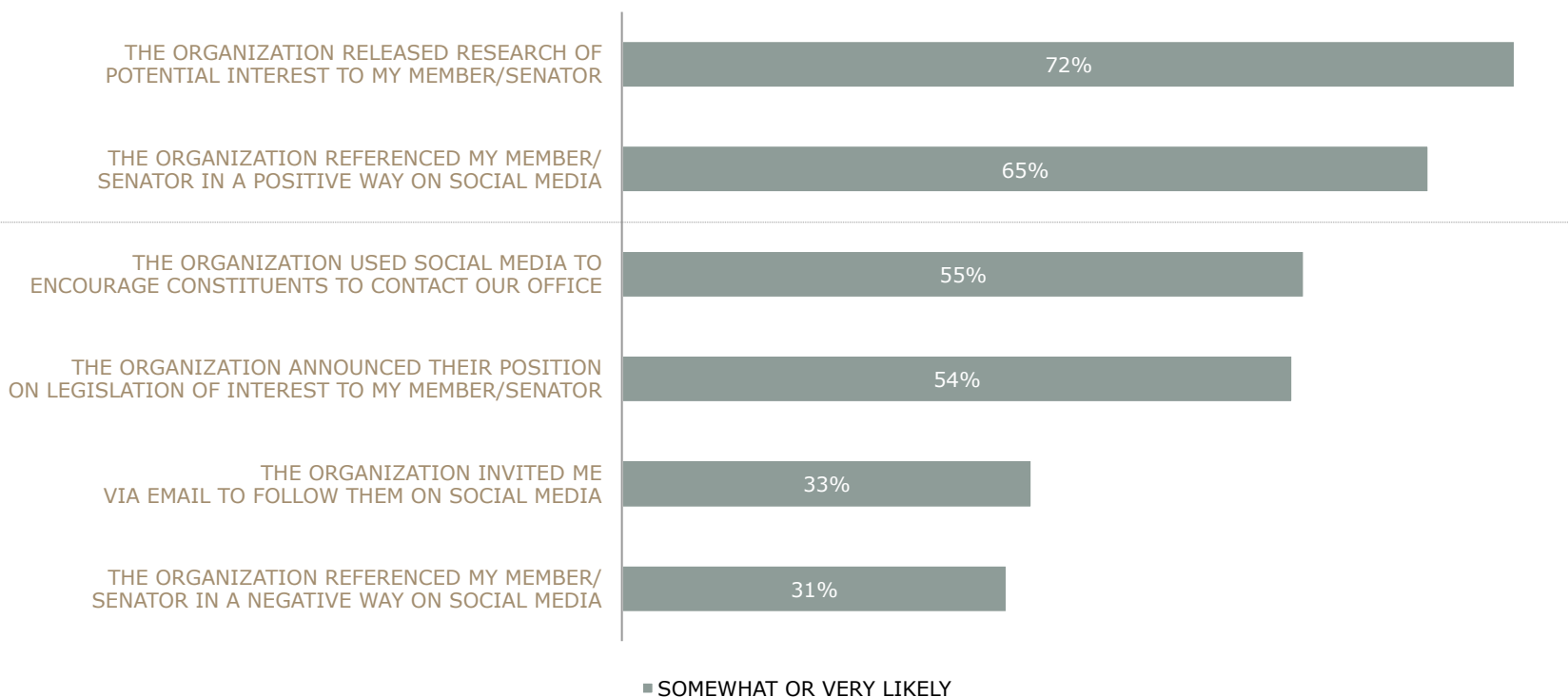


Help me, help you

Offering useful content and positive public recognition more likely to drive follows by congressional staffers; negative references on social and explicit “asks” are unlikely to deliver positive outcomes

Organization-Driven Actions that Make Congressional Staff More Likely to Follow an Organization on Social Media for Work

PERCENTAGE OF CAPITOL HILL RESPONDENTS WHO USE SOCIAL MEDIA FOR WORK



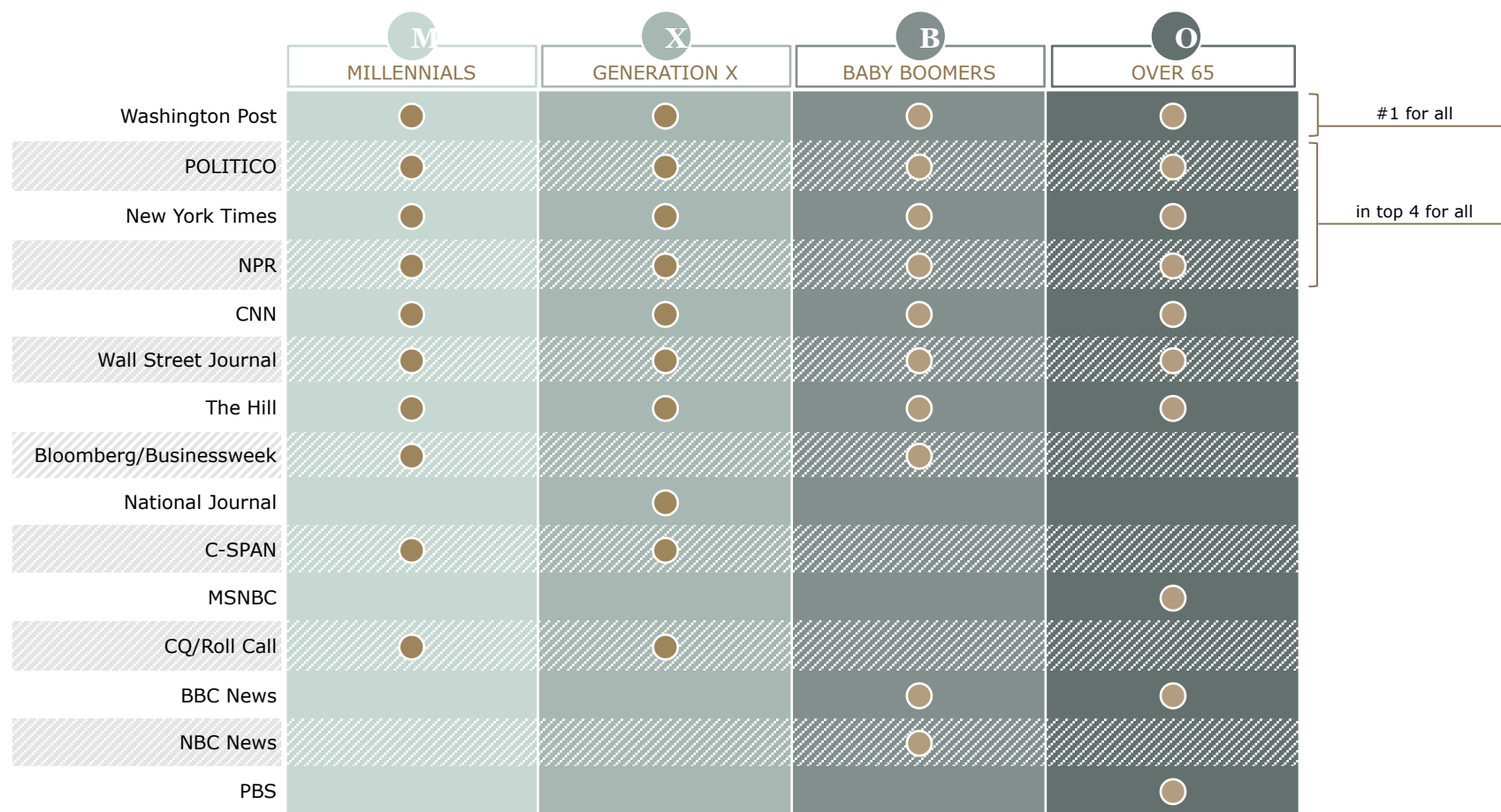
Media brands

- *Which media outlets are most relied on for Washington news and information?*
- *Which journalists are most widely followed by DC insiders?*

2017 top media brands consistent with 2016

Respondents vary across generations in their trust of news sources but share noteworthy overlap

MEDIA BRANDS PRESENT IN THE TOP 10 (OF 40+ TESTED) BY GENERATION¹



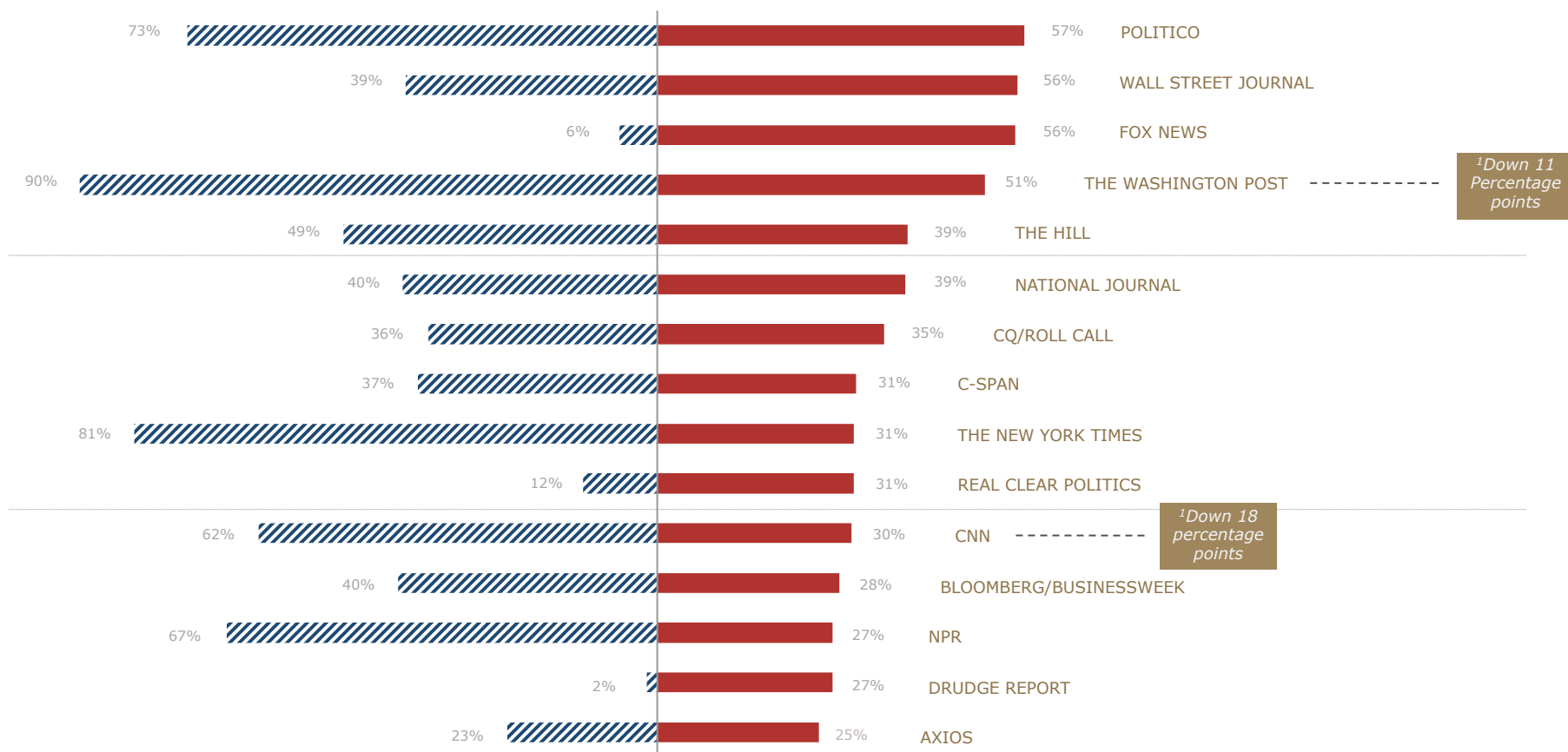
¹ Media brands sorted by overall consumption across all generations.

Choosing sides: Republican picks

Media brands of choice increasingly divided by party lines, Republican reliance on Washington Post, CNN drops steeply

Republicans' Top 15 Media Brands (of 40+ tested)

PERCENTAGE OF RESPONDENTS BY PARTY



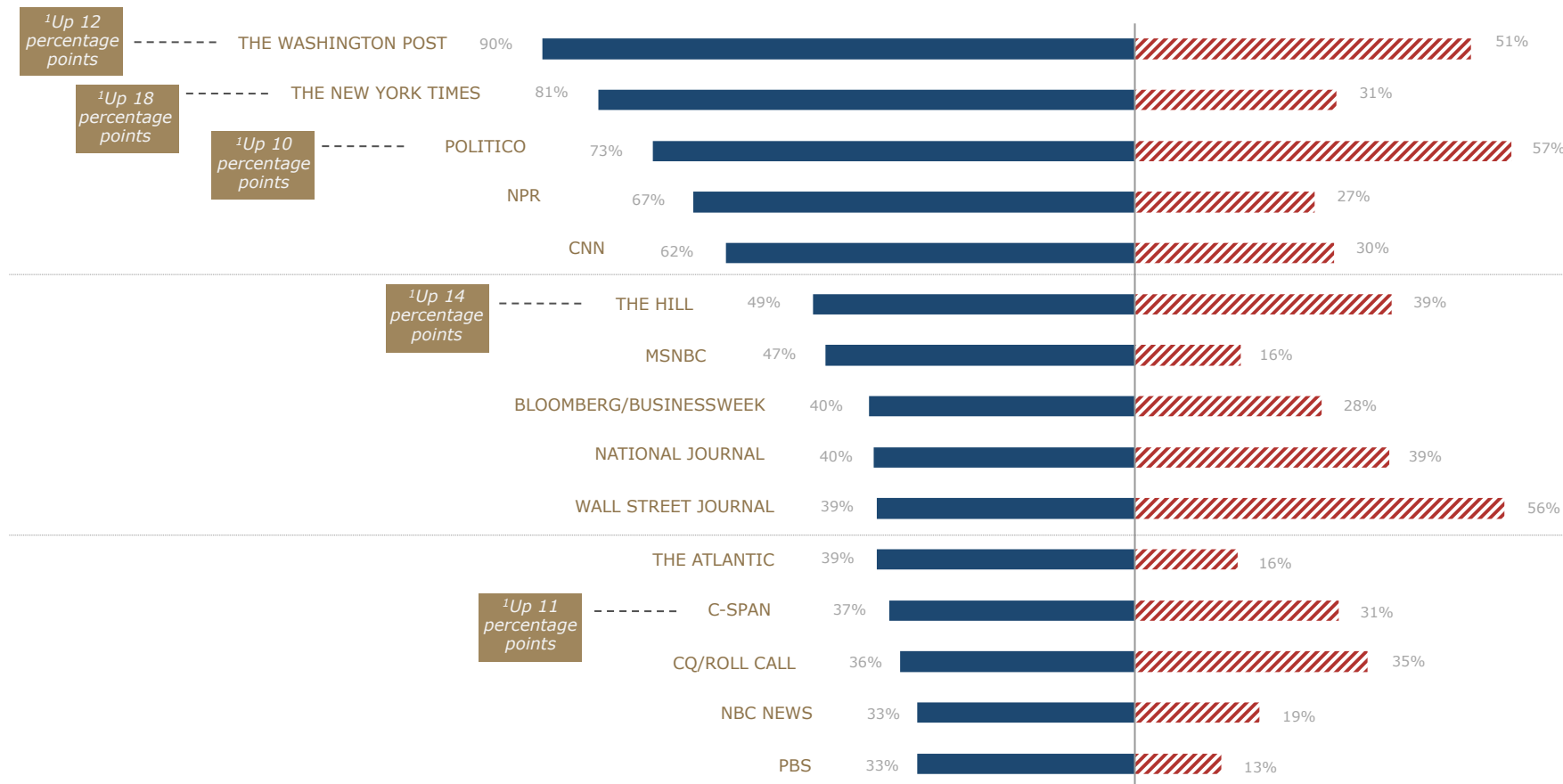
¹ Greater than 10 percentage-point change among top brands since 2016 Washington in the Information Age survey.

Choosing sides: Democratic picks

Media brands of choice increasingly divided by party lines, Democrats' reliance on Washington Post, NYT up dramatically

Democrats' Top 15 Media Brands (of 40+ tested)

PERCENTAGE OF RESPONDENTS BY PARTY



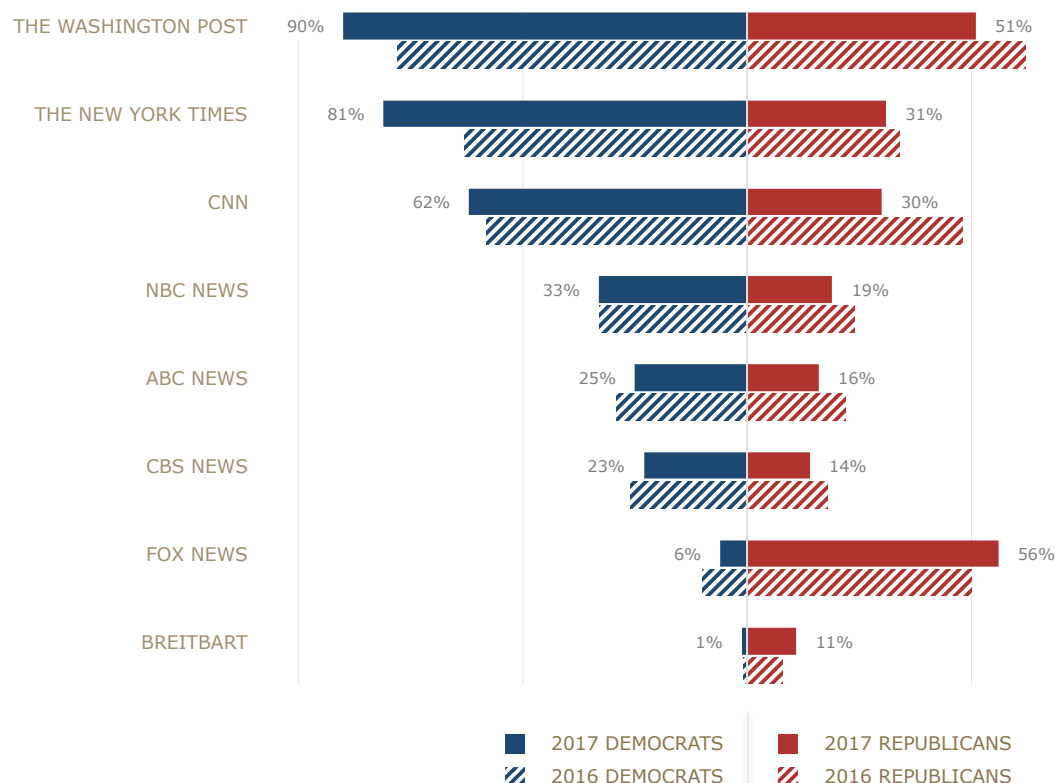
¹ Greater than 10 percentage-point change among top brands since 2016 Washington in the Information Age survey.

You win some, you lose some

For media outlets in the spotlight in 2017, gains and losses are largely party-specific; TV-oriented media brands see drops in utilization among both Democrats and Republicans

Selected Media Outlets Relied on for Washington News and Information

PERCENTAGE OF RESPONDENTS, REPUBLICANS VS DEMOCRATS, 2016-2017

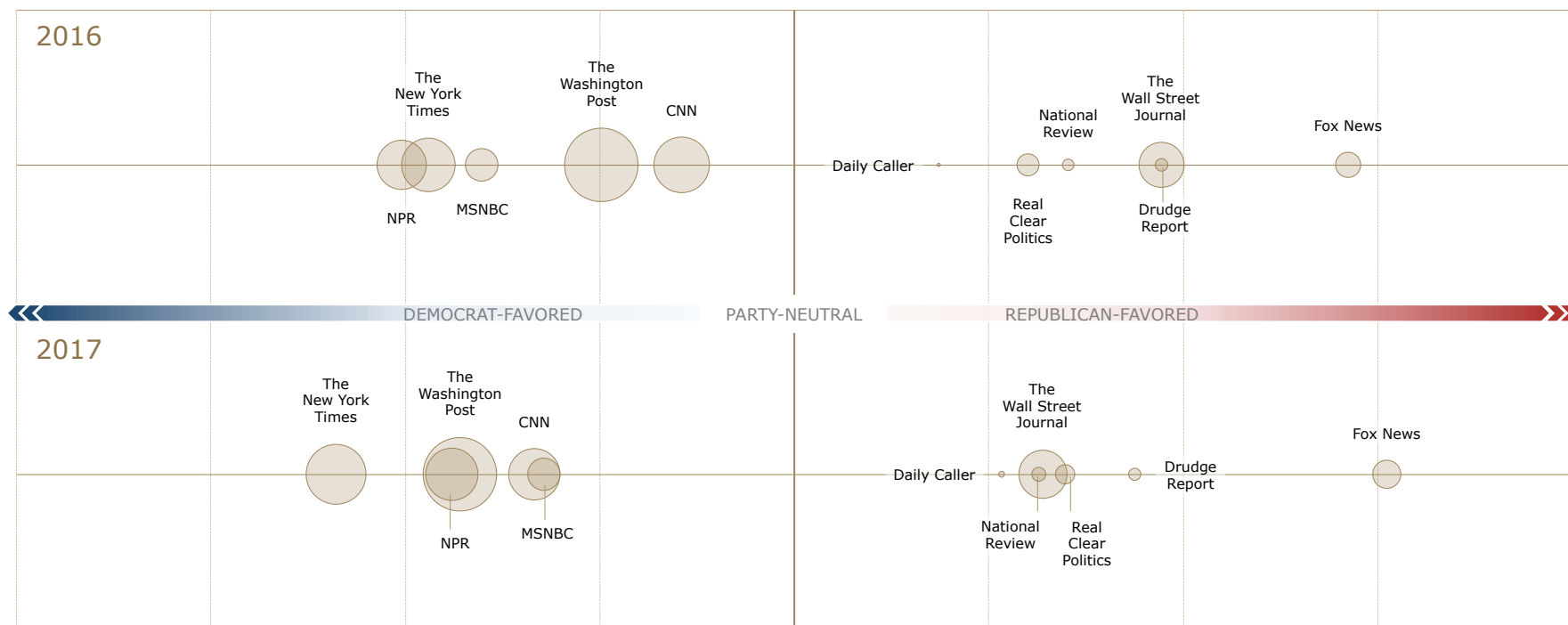


Pulling towards the poles

Between 2016 and 2017, a widening partisan readership gap among the most polarized brands, NYT and Fox; Wall Street Journal gains among Democrats

Most Polarized Readership of Media Outlets Relied on for Washington News and Information

PERCENTAGE OF RESPONDENTS, BY PARTY POLARITY



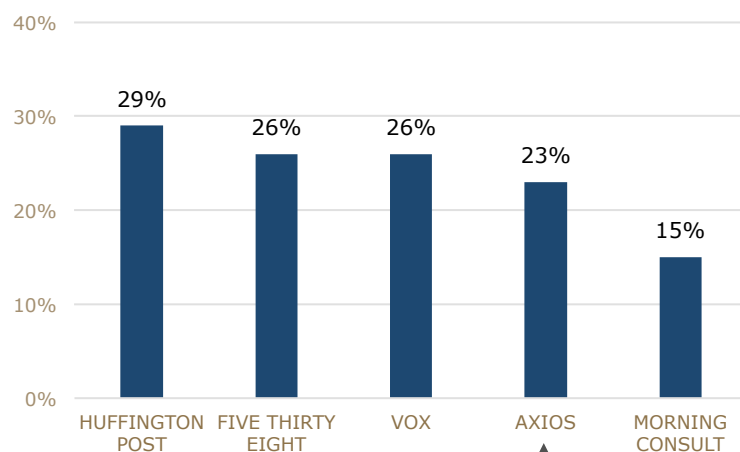
*Size of the bubble reflects the percentage of all insiders relying on the brand for Washington news and information; horizontal placement reflects the media outlet's "polarization score," i.e., the degree to which the brand is relied upon by Democrats (to the left) or Republicans (to the right); the polarization score is calculated as the difference between Republican and Democrat respondents for the brand and the average difference between Republican and Democrat respondents across all brands, expressed in multiples of the standard deviation of the difference between Republican and Democrat respondents across all brands

Up-and-comers in digital media

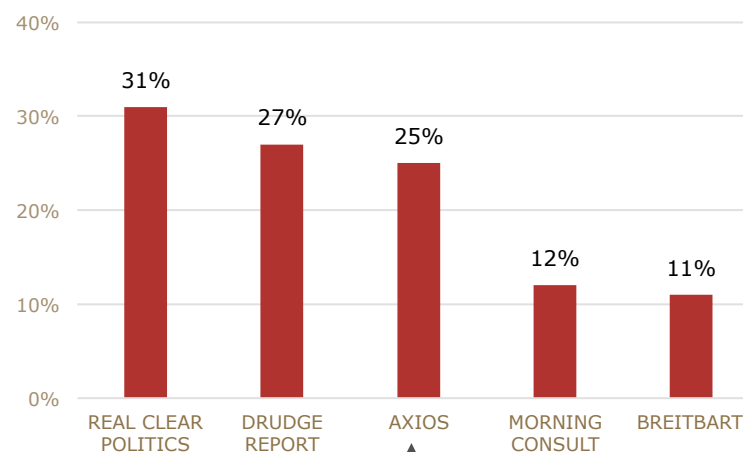
Pronounced partisan preferences for digital-only media brands; digital brands Axios and Morning Consult gain traction in 2017, Breitbart breaks into Republicans' top 5 digital brands

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

DEMOCRATS' TOP 5 DIGITAL-ONLY BRANDS



REPUBLICANS' TOP 5 DIGITAL-ONLY BRANDS



Launched
2017

The name game

Insiders rely on a broad mix of editorial and reporting coverage across the political spectrum; more than 600 individual names cited, with over 200 cited by more than one respondent

Journalists Regularly Followed for Washington-Related Opinions, News or Reporting

MOST FREQUENTLY CITED NAMES AMONG RESPONDENTS (OPEN-ENDED)



Channel and format preferences

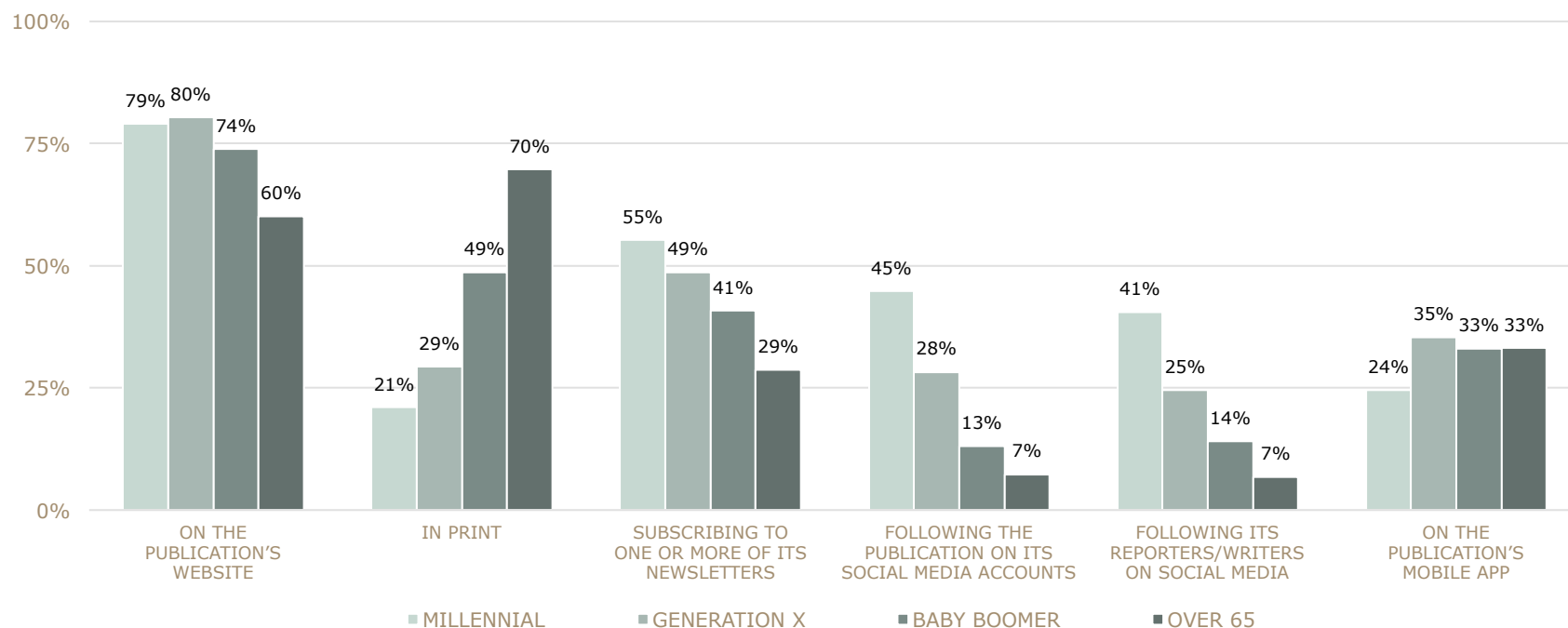
- *How do DC insiders access news and information today?*
- *What channels are insiders gravitating towards?*

Traditional print now accessed online

Majority of insiders accessing traditional print publications through websites and e-newsletters; print usage continues to decline across age groups, though still strong with older generations

Methods of Consuming Legacy Print Publications

PERCENTAGE OF RESPONDENTS, BY GENERATION

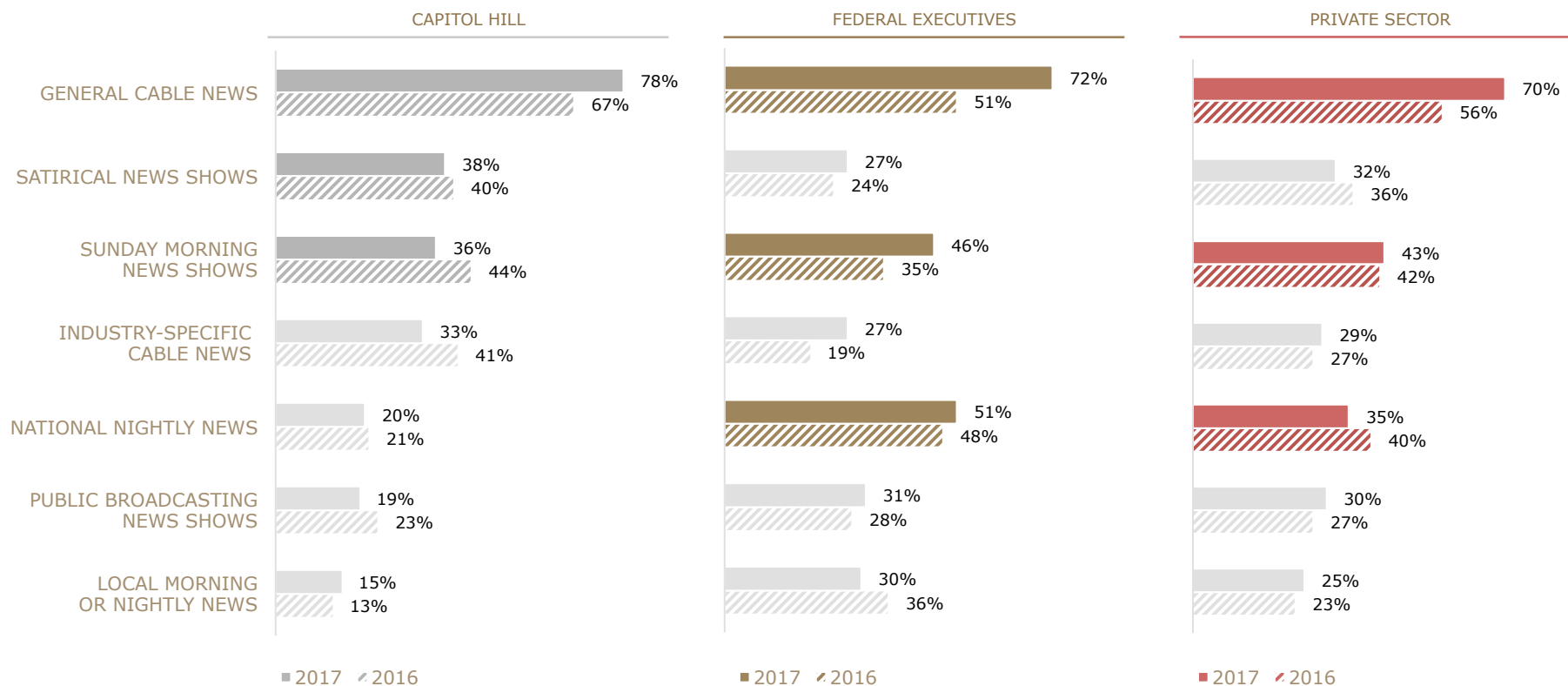


What's on television?

Beyond general cable programs and Sunday news shows, TV formats relied upon vary widely by workplace: satirical news shows more popular with Capitol Hill; Federal Executives and Private Sector more likely to watch national nightly news

TV Programs Relied on for Washington-Focused News and Information¹

PERCENTAGE OF RESPONDENTS, 2016 VS 2017



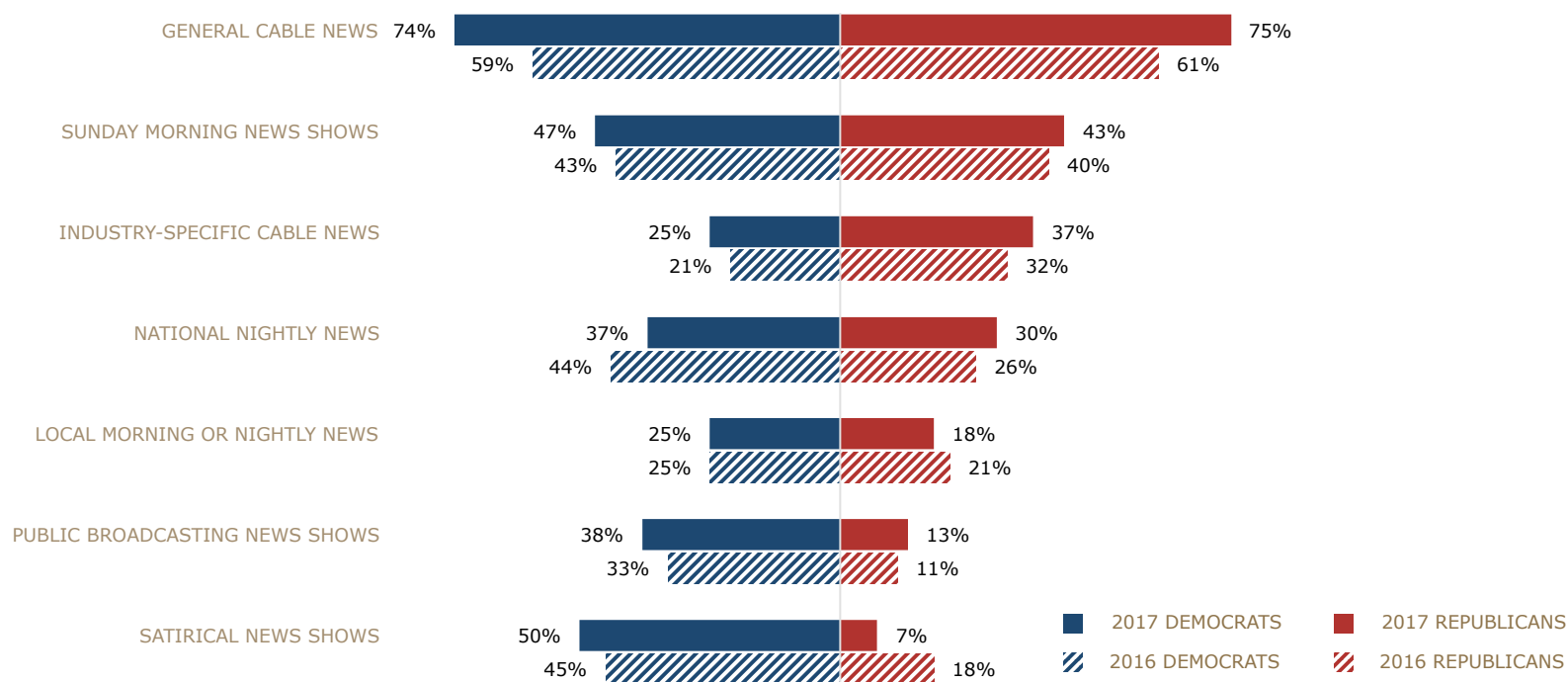
¹ Top three choices within each workplace highlighted.

Dems, GOP fight over the clicker

Apart from general cable and Sunday morning shows, Republicans and Democrats prefer different TV for news; Democrats more likely to rely upon satirical news programs relative to their Republican peers

TV Programs Relied Upon for Washington-Focused News and Information

PERCENTAGE OF RESPONDENTS, 2016 VS 2017

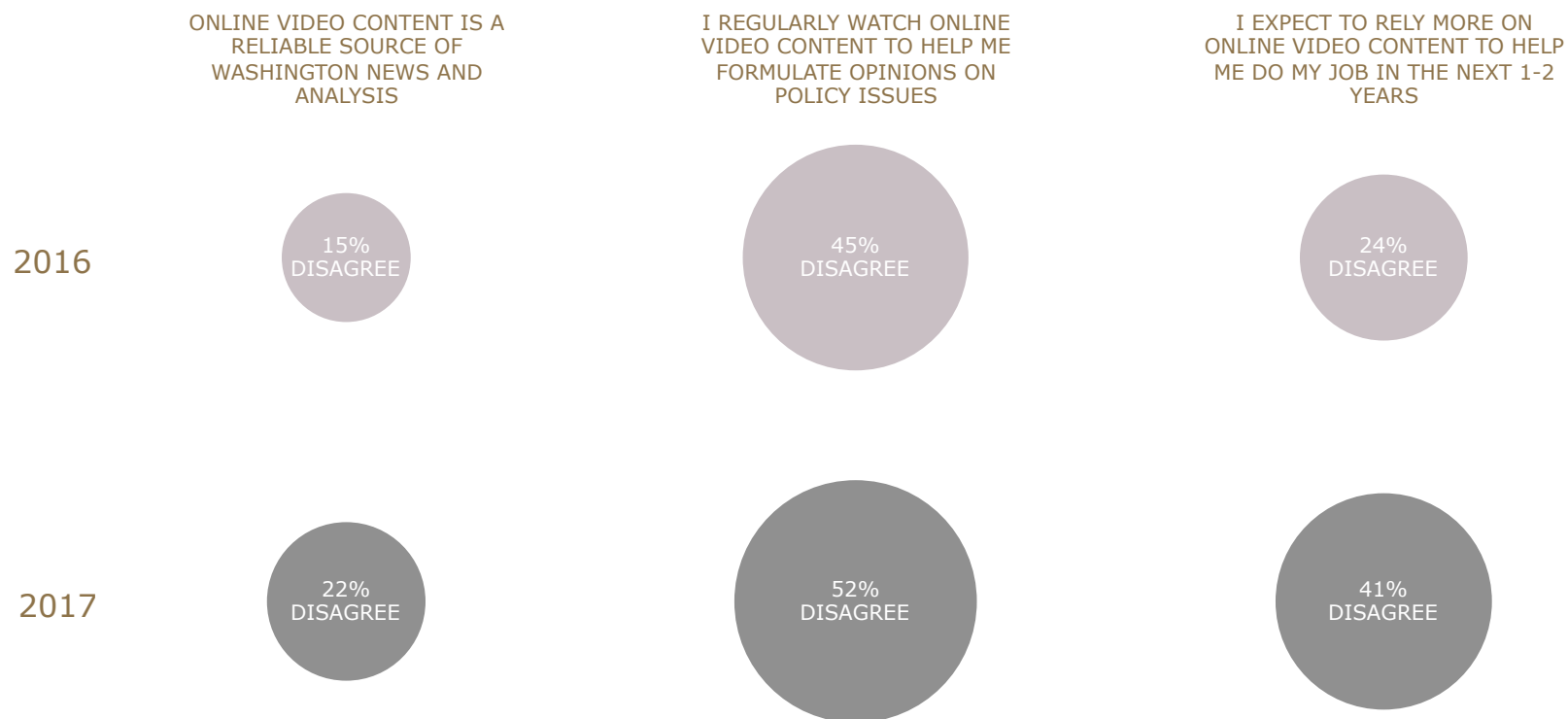


Tuning out online video

Use of online video for Washington content continues to lag; insiders have an increasingly negative outlook on the utility of video as a resource for policy work

Perceptions of Online Video's Role in Daily Policy Work

PERCENTAGE OF RESPONDENTS



Respondent view: online video

Videos can be helpful to get a **quick overview** of a subject, but they **tend to be even more prone to bias** than news articles.

Capitol Hill, Republican, Millennial

Because it requires volume, video content is mostly inaccessible to me—can't watch it in meetings or public places, and it's inconsiderate in a shared office. I find it **very frustrating when content I'm interested in is only available in video** and not in text.

Capitol Hill, Democrat, Generation X

Sound bites do not assist in formulating policy on complex issues—that is all video offers.

Federal Executive, Republican, Baby Boomer

On-line video **takes more time than it's worth**. Please **give me a summary paragraph with a link to more information** and I'm much better off.

Federal Executive, Independent, Over 65

Auto-Play video is the worst feature ever. While I may watch a video or two on a website, embedded videos in news articles are terrible and I wish they were banned.

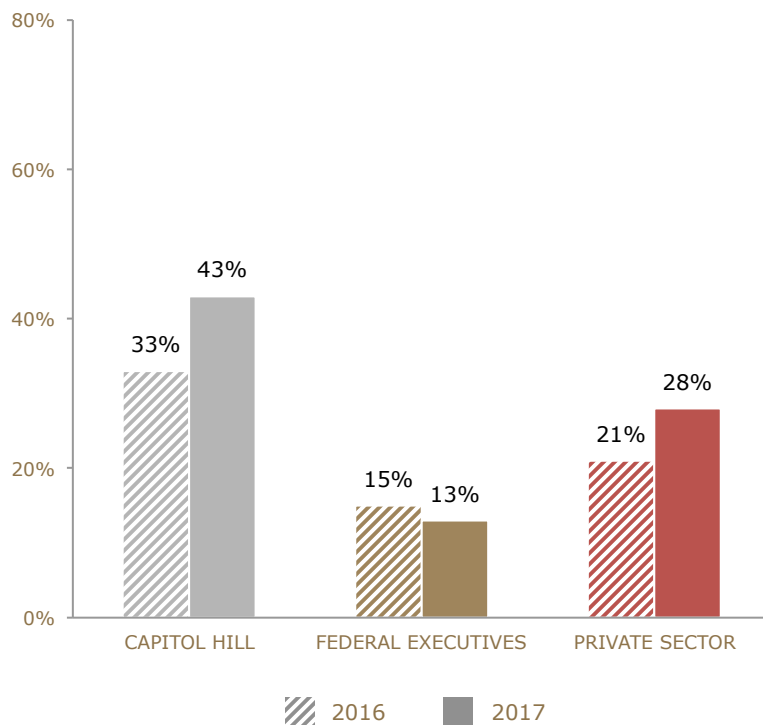
Private Sector, Republican, Millennial

Podcasts part of the media diet

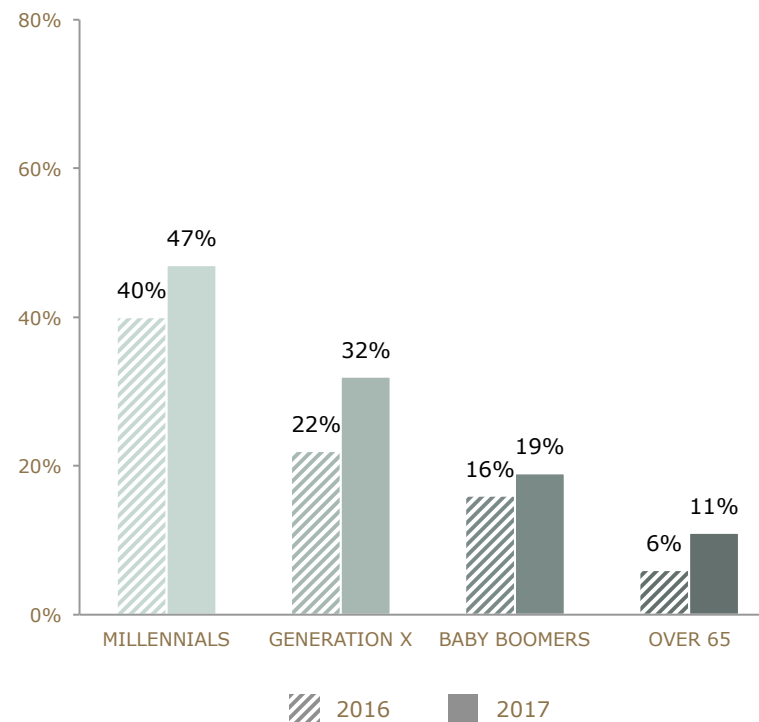
Podcast consumption increasingly part of DC insiders' workday; growth continues to be strongest among Millennials

Listen to Podcasts At Least Once Throughout the Workday

PERCENTAGE OF RESPONDENTS, BY WORKPLACE



PERCENTAGE OF RESPONDENTS, BY GENERATION

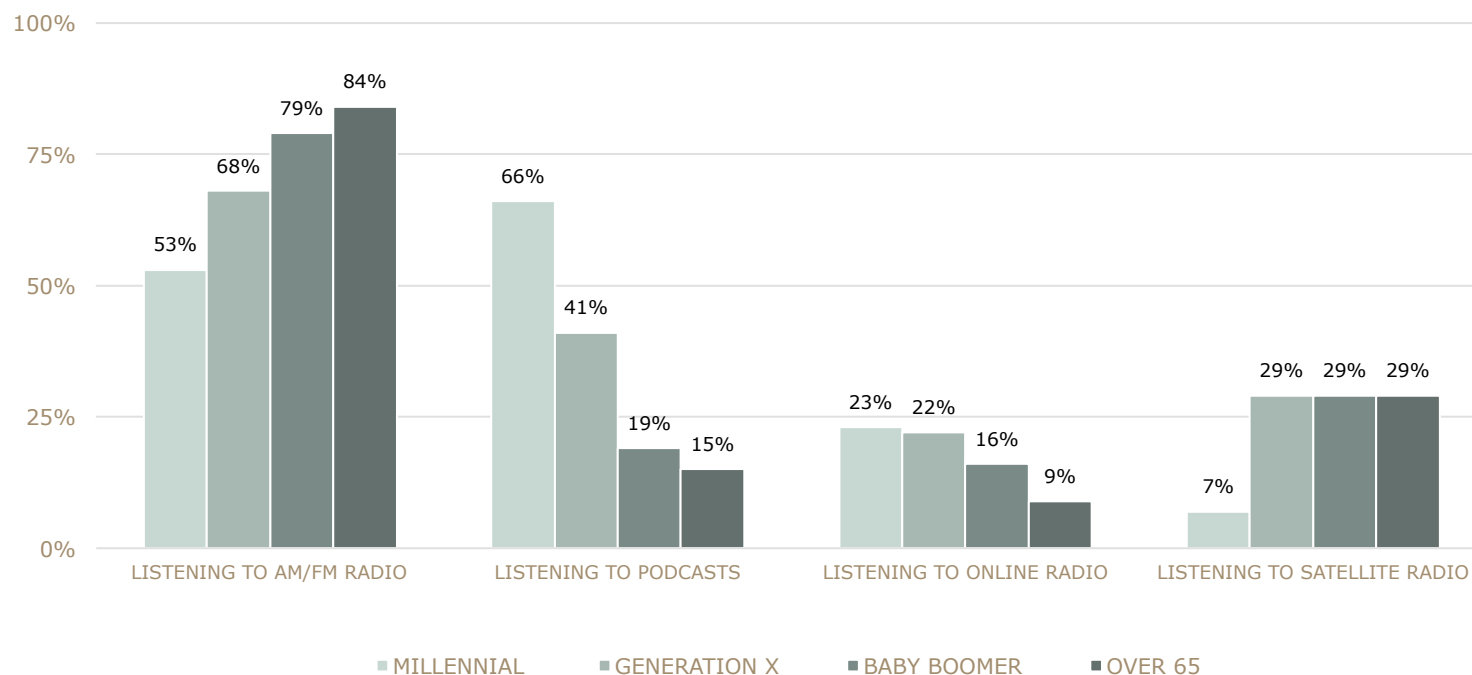


Terrestrial radio still on top

AM/FM radio remains the most popular method for consuming Washington-focused audio content, though Millennials more likely to consume audio through podcasts

Methods for Consuming Audio Content for Washington-Focused News and Information

PERCENTAGE OF RESPONDENTS, BY GENERATION



Respondent view: podcasts

Would include **podcasts**, Pod Save America being the main one for helping to formulate my opinions. I trust them.

Millennial

Podcasts are a growing source of information for me. I can download them before my morning and afternoon commute to stay caught up and hear new perspectives.

Generation X

I listen to audio from TV via **podcasts**—Sunday Shows, Morning Joe.

Generation X

More attention to podcasts would improve this research.

Over 65

I listen to the **Sunday shows** either as a **podcast** or sometimes on C-Span radio in the car.

Generation X

I also rely on **podcasts** from NYT, Slate, NPR, Pod Save America.

Baby Boomer

In previous years I would have gone more to national cable news agencies, but I no longer trust any of them... I rely more now on NPR—**including related podcasts**—and PBS.

Baby Boomer

Media organizations still drive **what I consume**, though it is now **spread around among print, cable, podcasts**, etc.

Baby Boomer

I don't turn to TV at all unless a relevant clip is emailed to me or shows up in a newsletter or my social feed. I **listen to a few policy podcasts** to stay on top of things and will tweet about them if I find them interesting.

Generation X

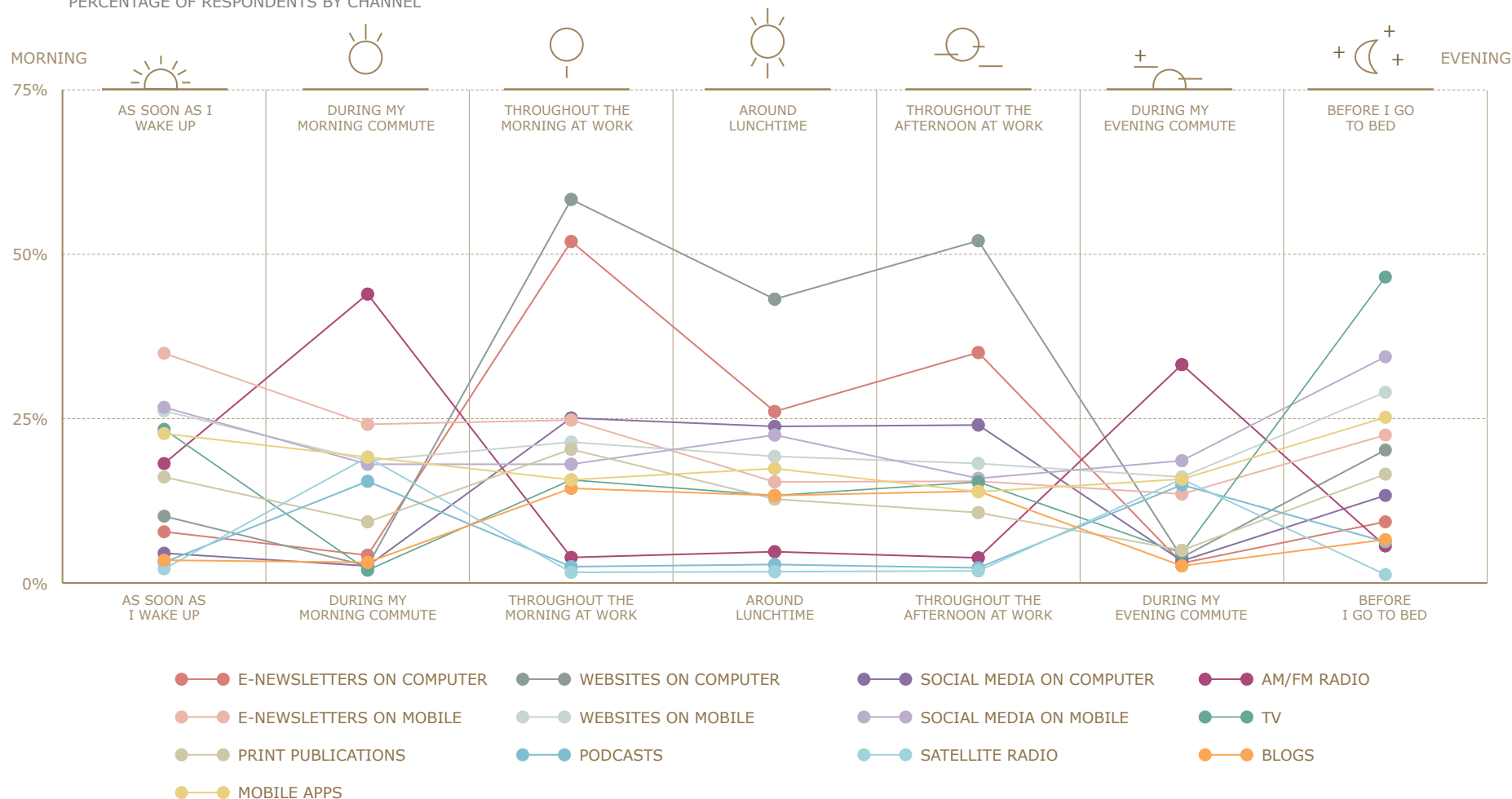
Information consumption by time of day

- *Which channels do DC insiders rely on for news and information across the day?*
- *How do patterns differ across workplaces?*

A Day in the Life of a Washington Insider in 2017

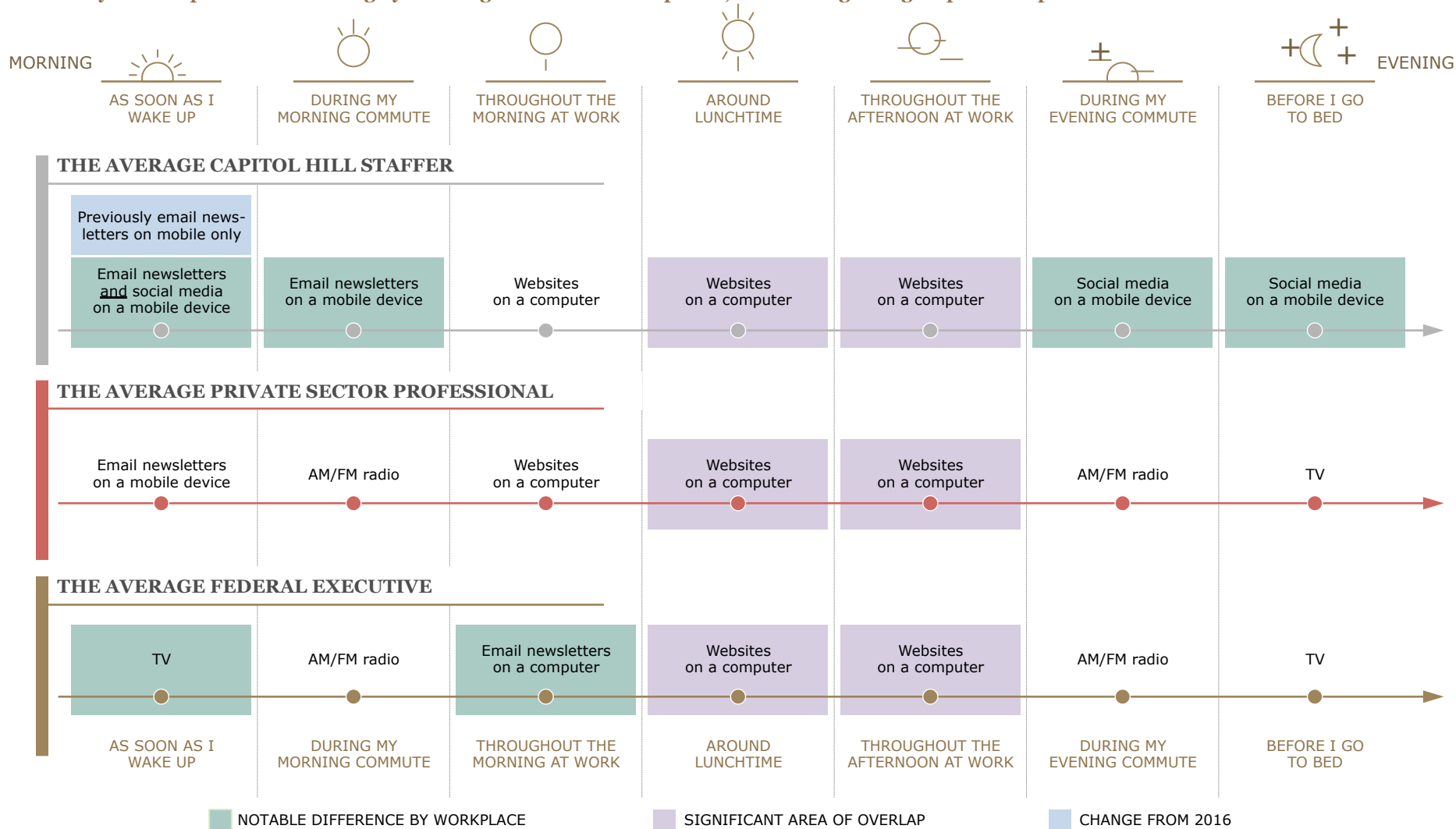
Channels used for Washington news and information throughout the weekday

PERCENTAGE OF RESPONDENTS BY CHANNEL



The shrinking sweet spot

Key consumption channels largely unchanged across all workplaces; hard to target all groups in one place at the same time



Source: Washington in the Information Age 2017; National Journal research and analysis.

Rich detail on DC insiders' information preferences

Media consumption habits cut by workplace, party and generation



2017 TOPIC COVERAGE

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

Day-in-the-Life of an Insider

- Workplace: Capitol Hill, Private Sector, Federal Executives
- Party: Republican, Democrat, Independent
- Generation: Millennial, Generation X, Baby Boomer, Over 65

Graphic appendix

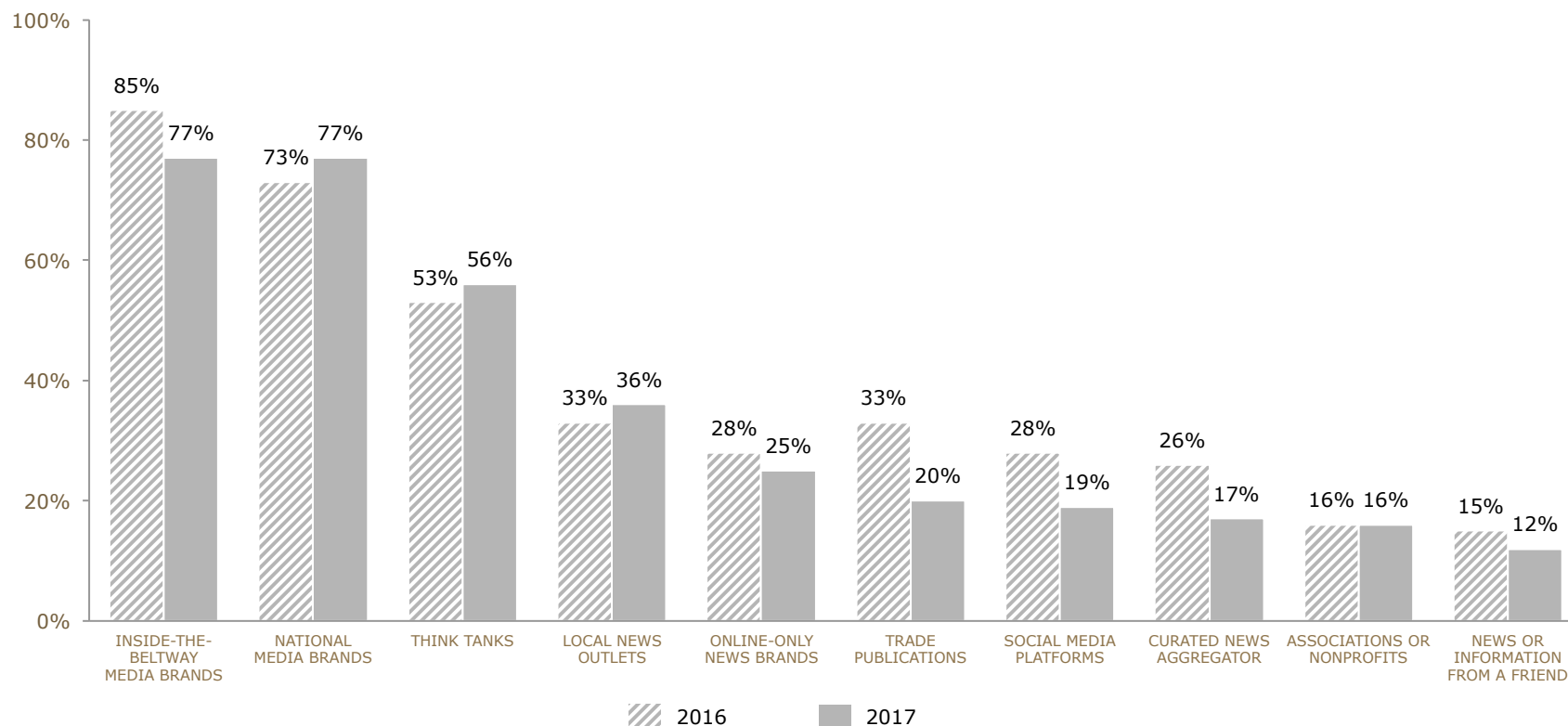
** Data appendices with question-by-question breakouts by demographic group are available as separate files*

Capitol Hill reports increased trust in national news brands, think tanks, local news sources

Trust declined in inside-the-Beltway publications, online-only news sources and social media platforms

Trusted Sources for Washington News and Information

PERCENTAGE OF CAPITOL HILL RESPONDENTS, 2016 VS 2017

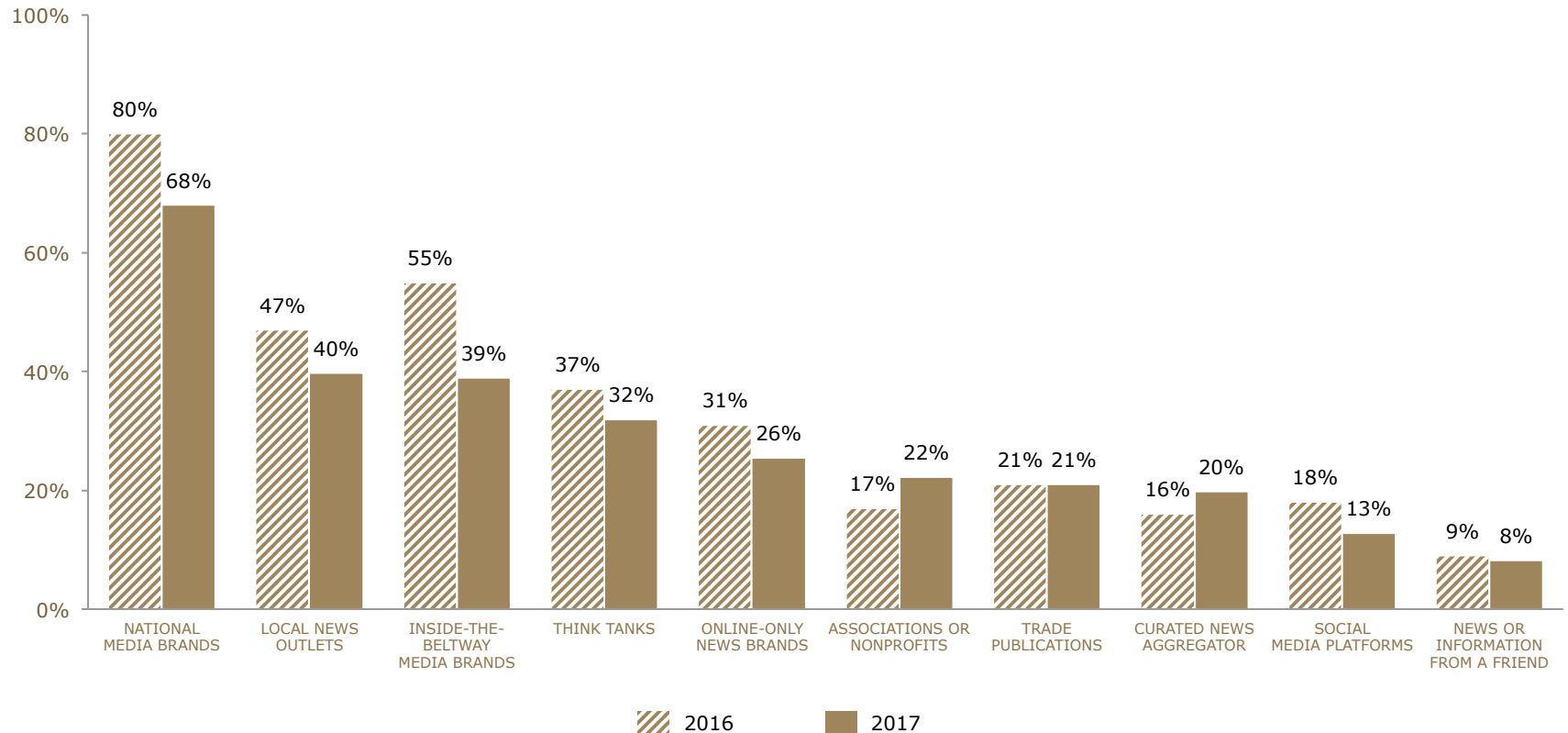


Federal executives report lower trust in national and inside-the-Beltway media brands

Federal agency respondents place greater trust in associations and nonprofits

Trusted Sources for Washington News and Information

PERCENTAGE OF FEDERAL EXECUTIVE RESPONDENTS, 2016 VS 2017

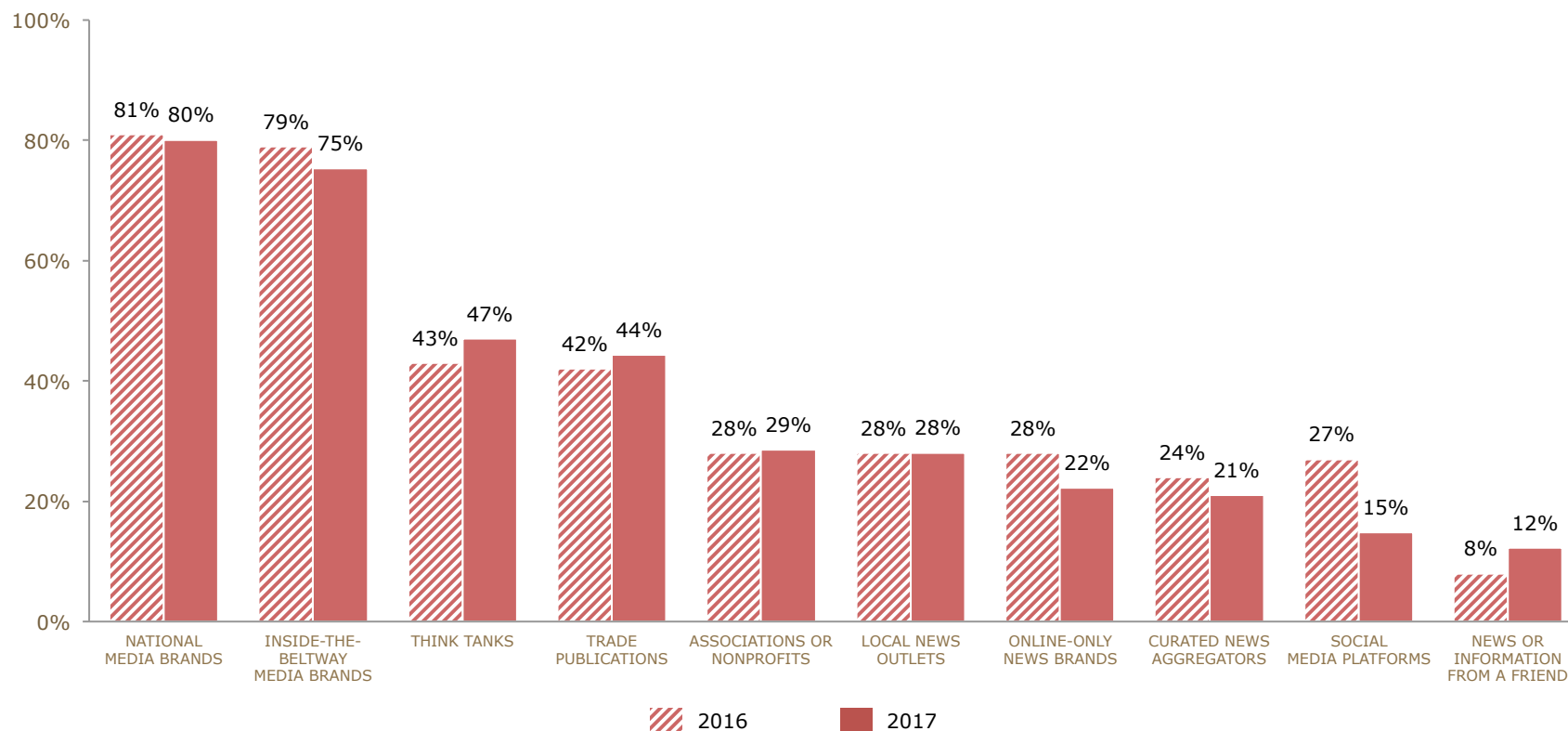


Private sector's trust levels were the most stable in 2017

Still, trust in online-only news sources and social media plummeted

Trusted Sources for Washington News and Information

PERCENTAGE OF PRIVATE SECTOR RESPONDENTS, 2016 VS 2017

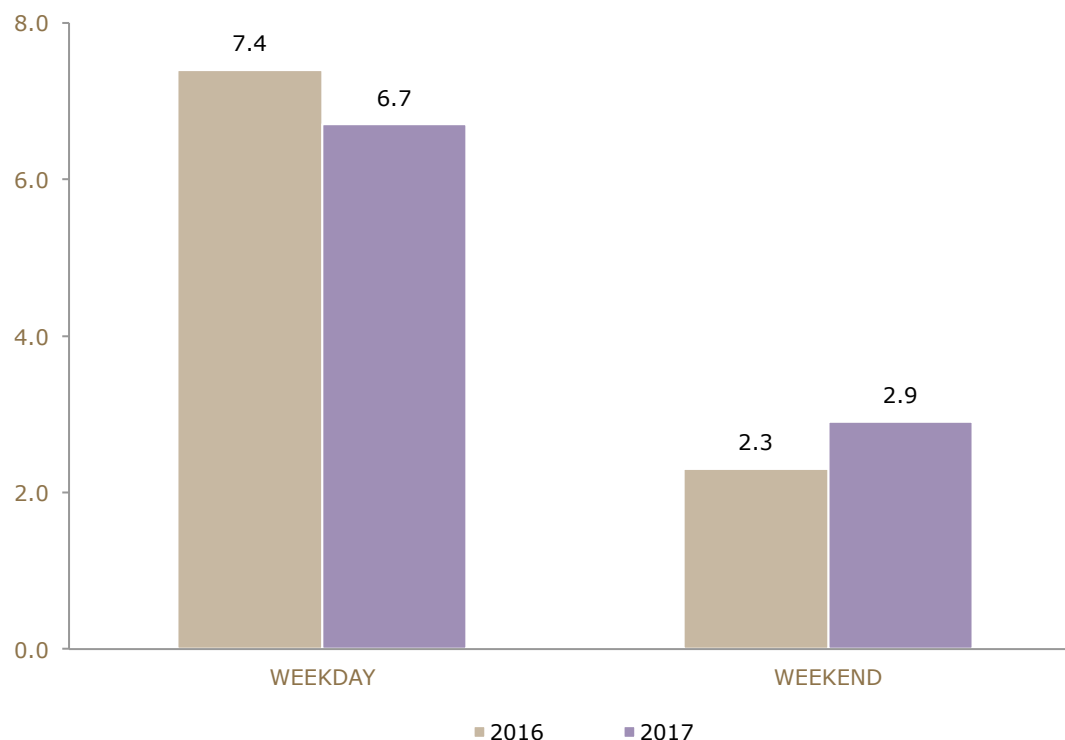


Growth in channel consumption focused on weekends

Insiders are consuming information more selectively on weekdays, returning to 2012 levels

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

AVERAGE UNIQUE CHANNELS PER RESPONDENT, 2016 VS 2017

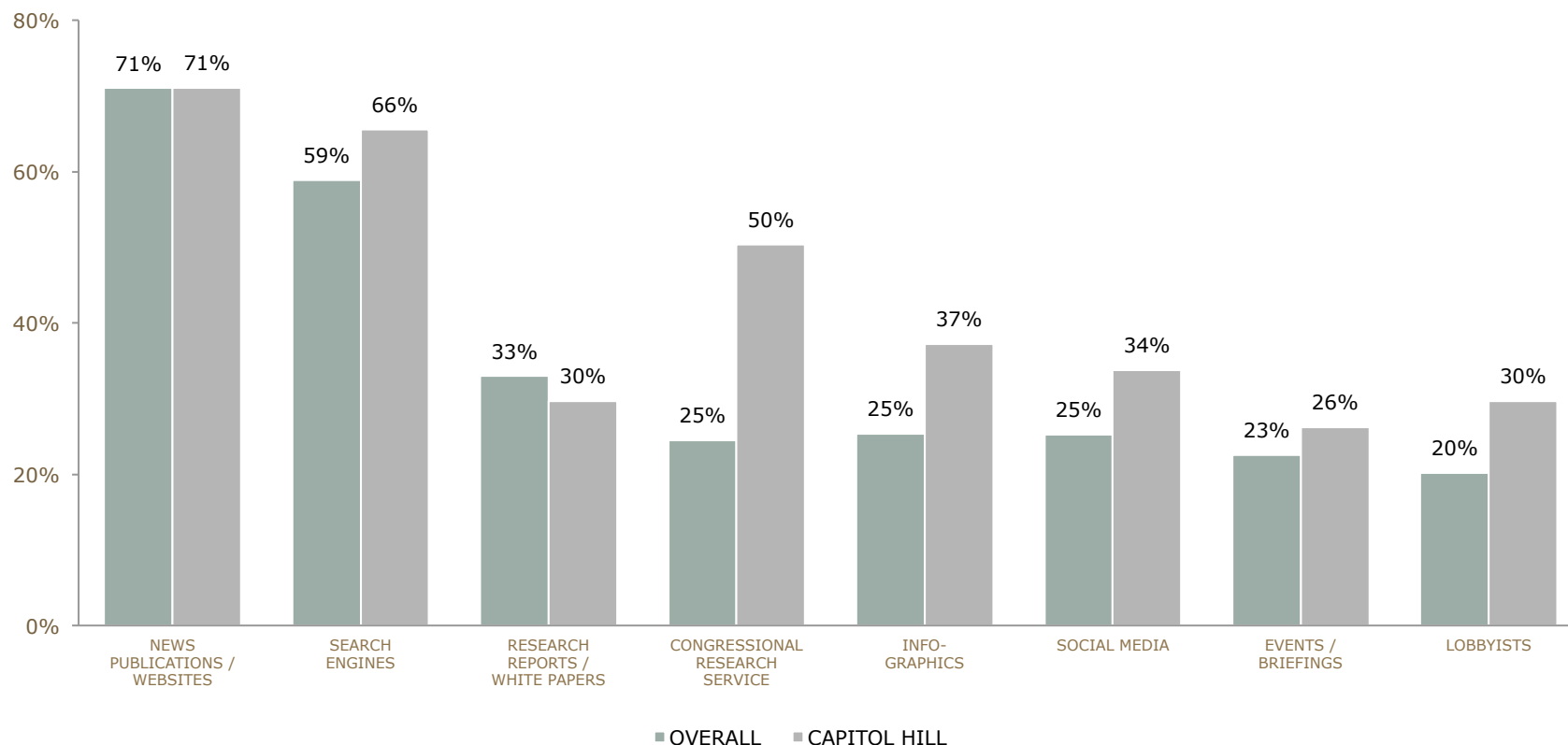


News publications and search engines most widely used to get up to speed; CRS also highly relied upon by Capitol Hill staff

Congressional staff more likely to rely upon infographics, lobbyists and social media in information gathering stage

Resources Used in Preparing for a Critical Vote: To Quickly Get Up to Speed

PERCENTAGE OF RESPONDENTS

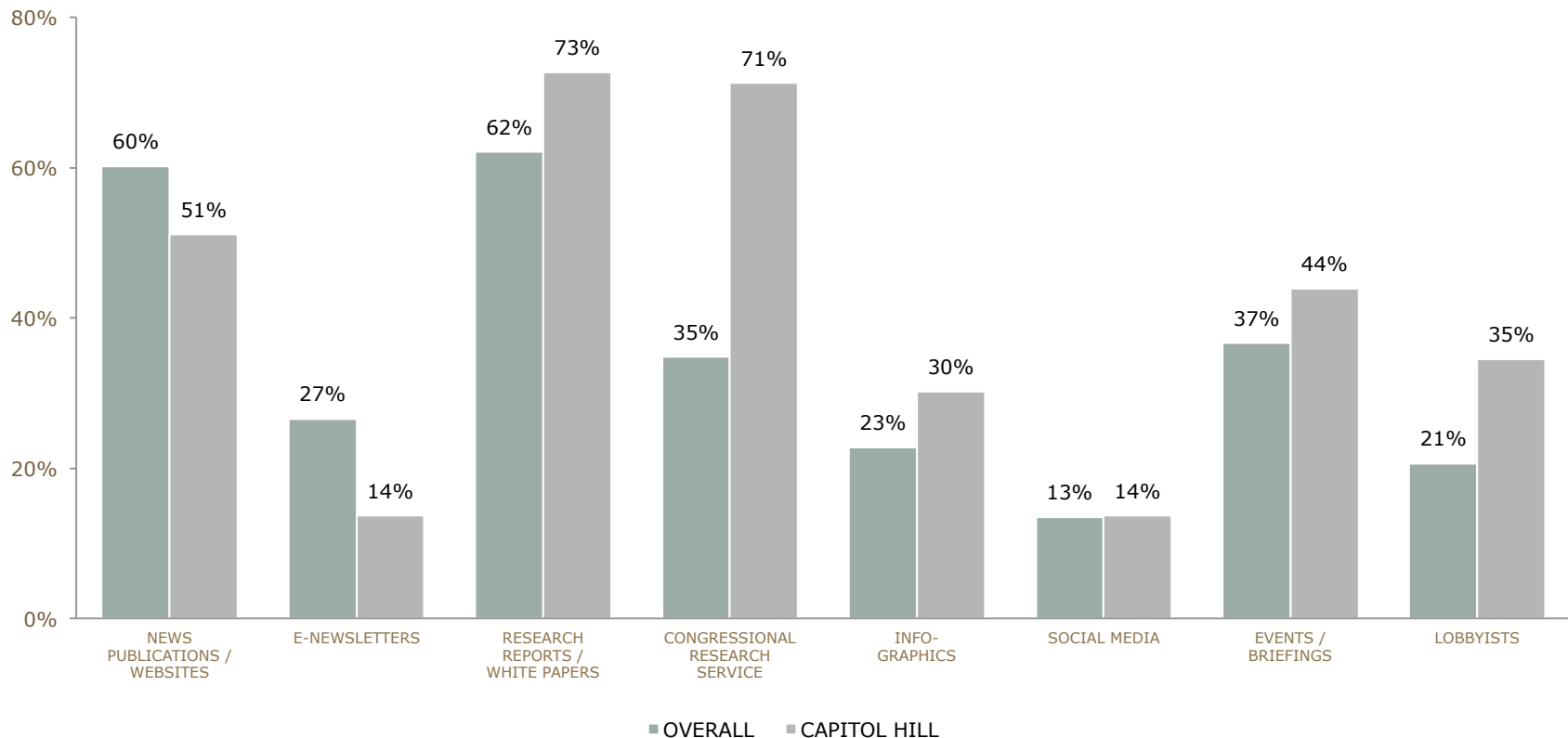


Research reports most critical for helping insiders formulate opinions; CRS particularly important for Capitol Hill staff

Lobbyists continue to play a more prominent role among congressional staff in formulating views on an issue

Resources Used in Preparing for a Critical Vote: To Formulate Opinions

PERCENTAGE OF RESPONDENTS

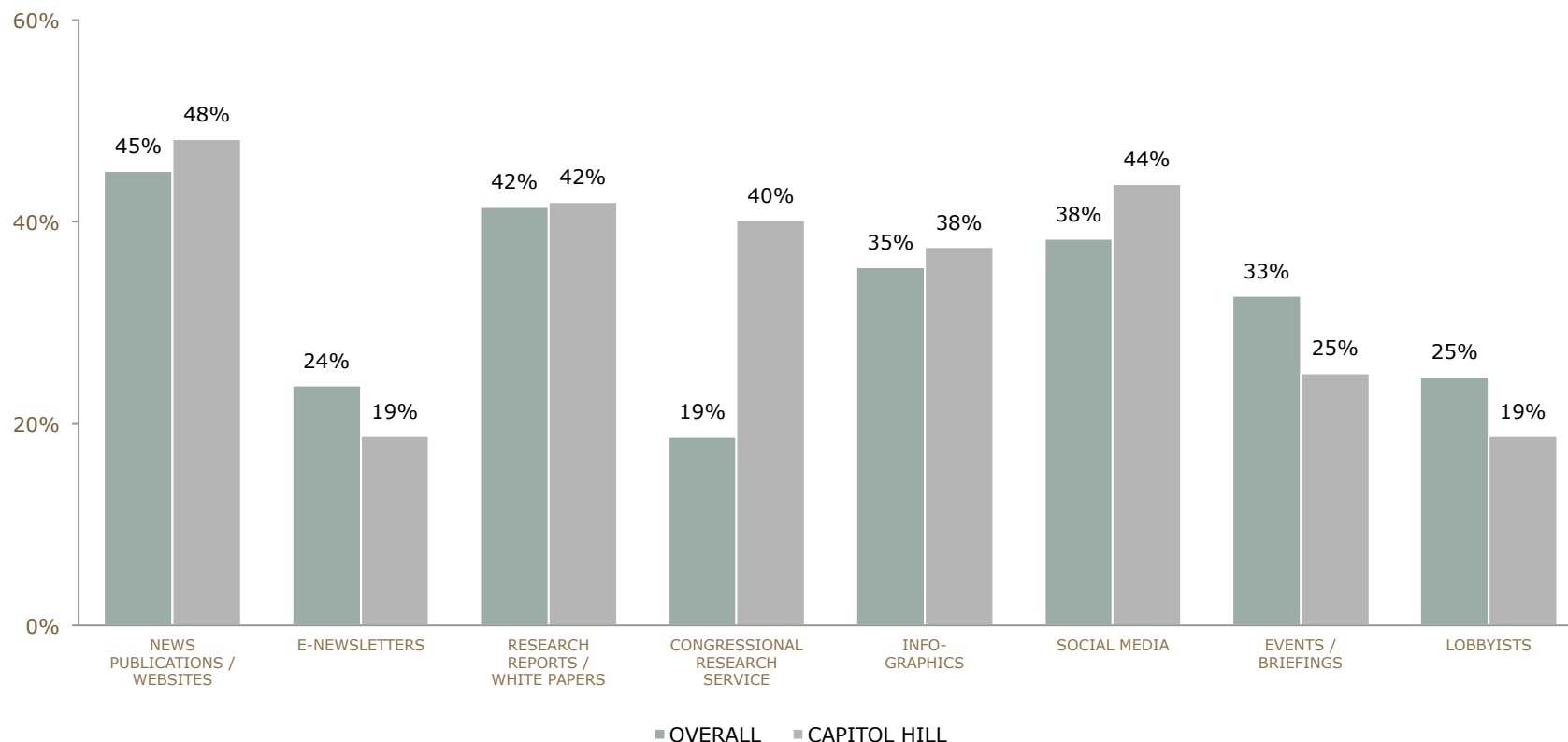


Insiders cite news, research, social media as primary resources relied upon to influence others ahead of a vote

Congressional staff continue to rely on CRS to persuade others

Resources Used in Preparing for a Critical Vote: To Influence Others

PERCENTAGE OF RESPONDENTS

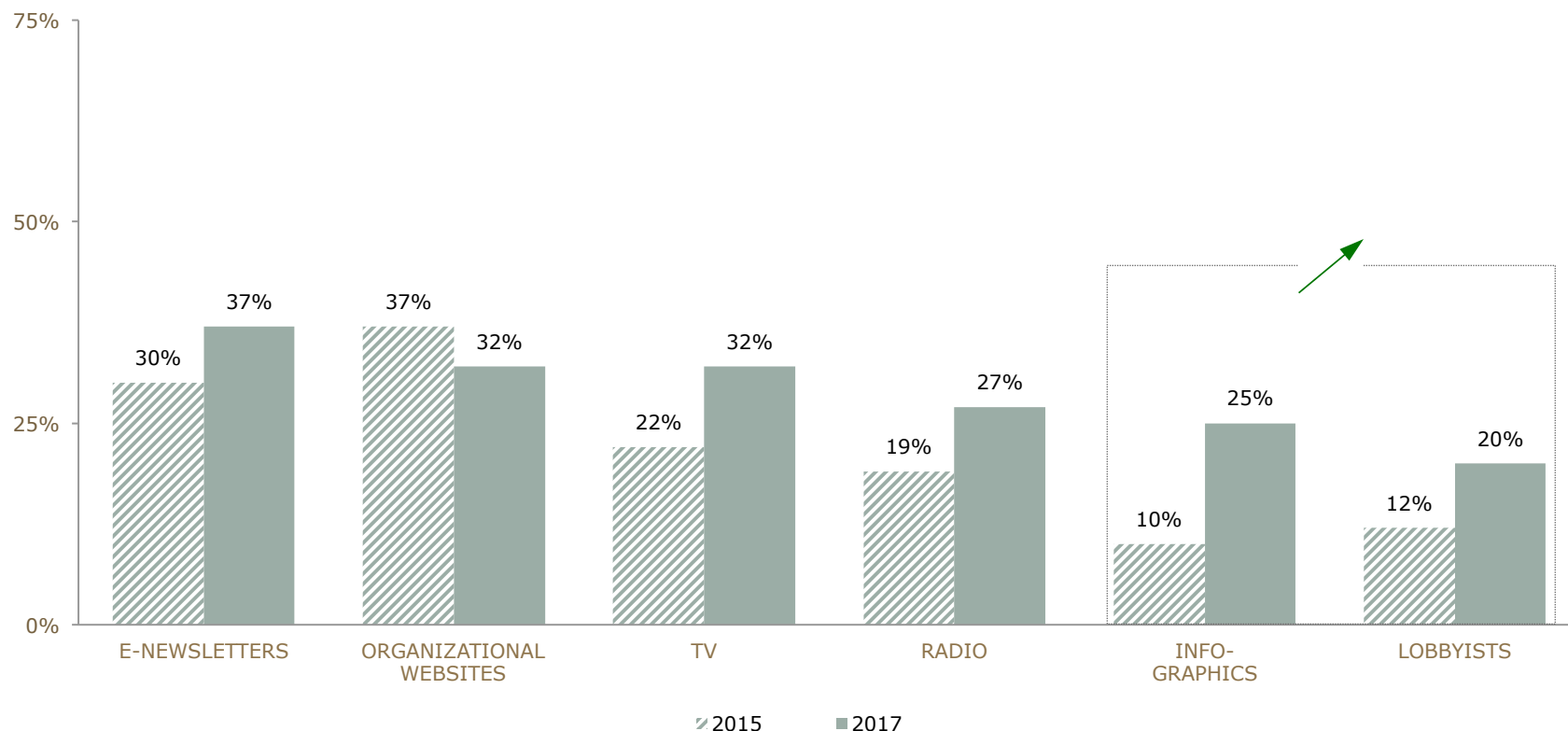


Since 2015, infographics, lobbyists, TV, radio and e-newsletters gain importance for getting up to speed...

Organizational websites have become less utilized for gathering information

Resources Used in Preparing for a Critical Vote: To Quickly Get Up to Speed

PERCENTAGE OF ALL RESPONDENTS

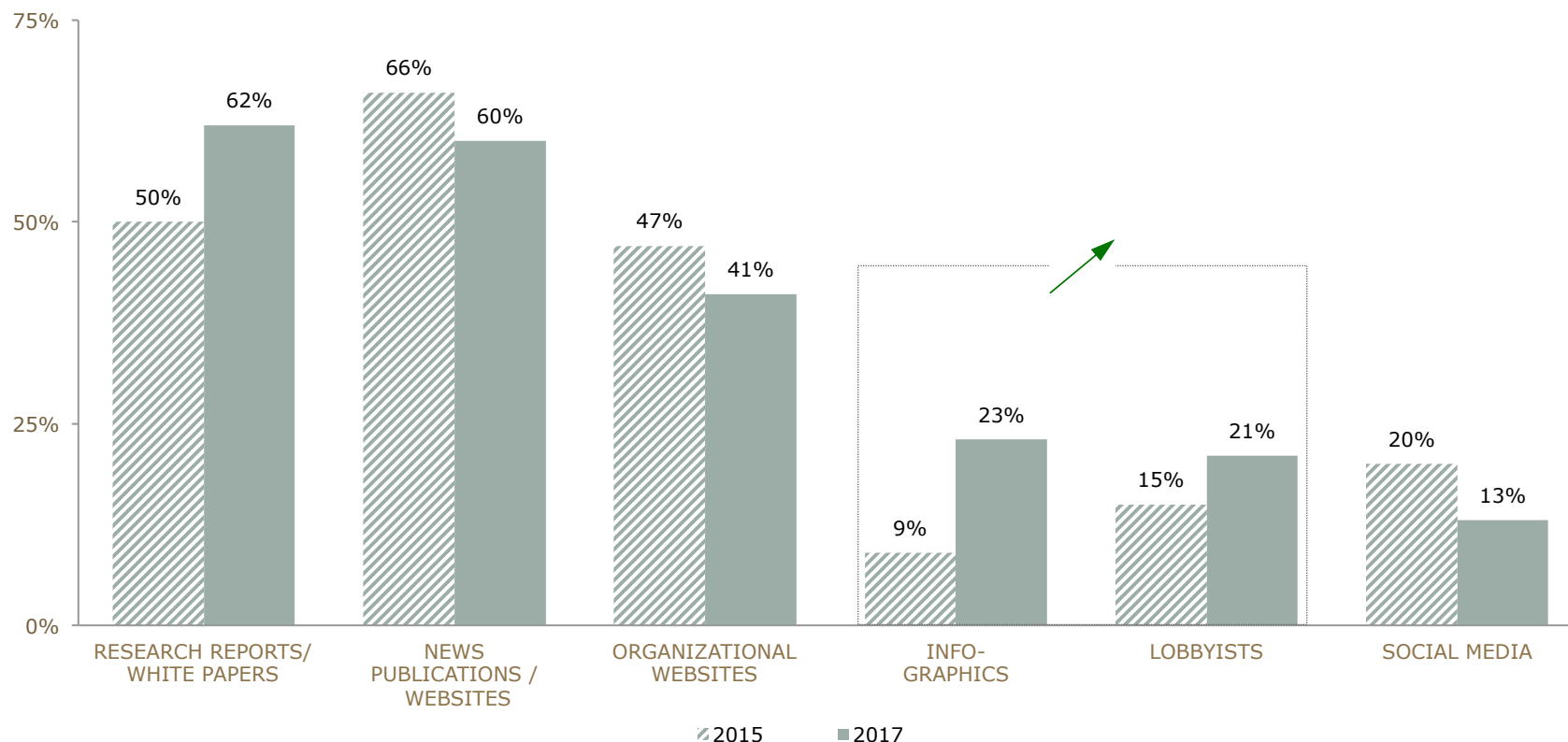


...Infographics, lobbyists and research reports also increasingly relied upon when formulating opinions...

Usage of social media to shape own opinions on the decline

Resources Used in Preparing for a Critical Vote: to Formulate Opinions

PERCENTAGE OF ALL RESPONDENTS

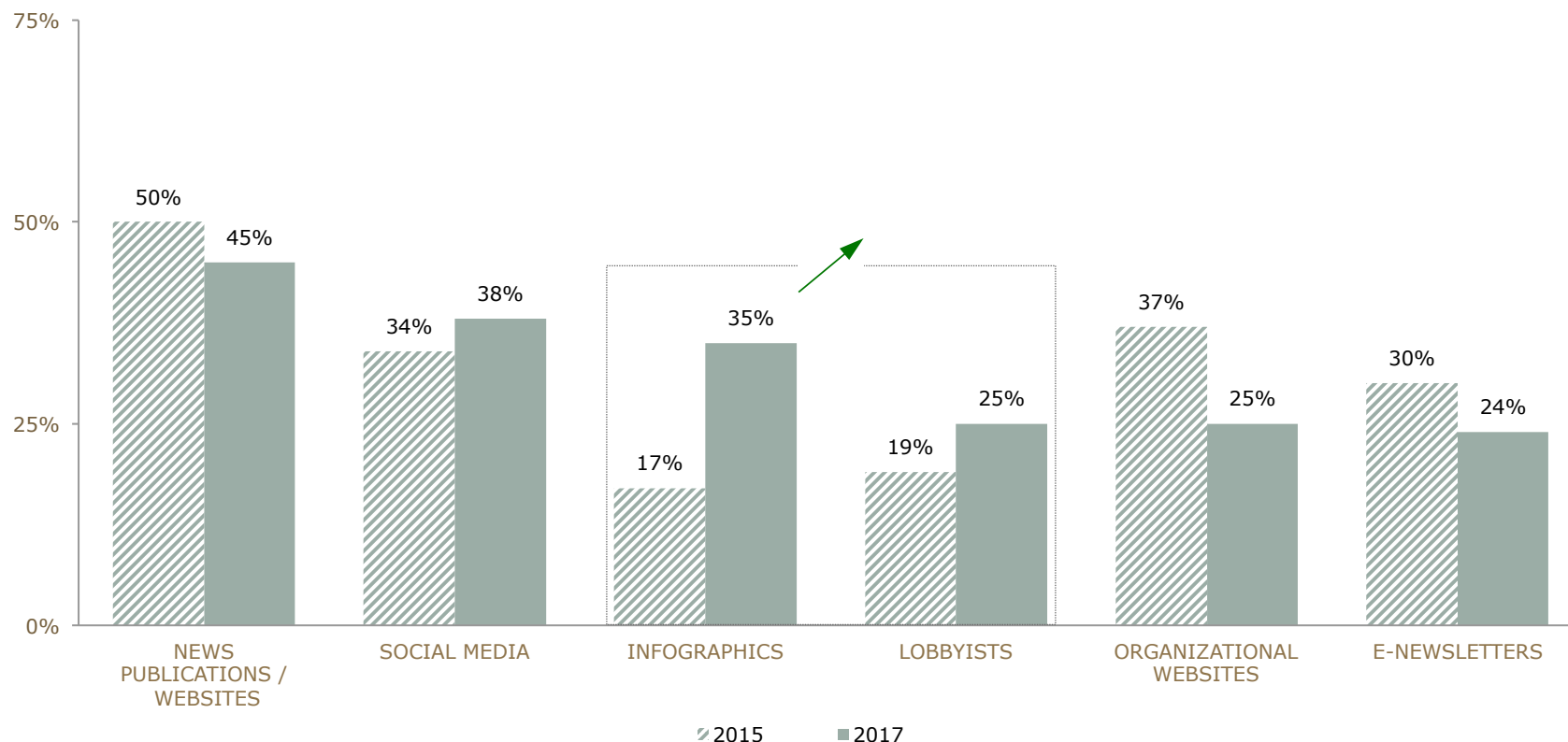


...And infographics, lobbyists and social media increasingly used to influence others

Organizational websites, e-newsletters and news publications less relied upon to sway others

Resources Used in Preparing for a Critical Vote: To Influence Others

PERCENTAGE OF ALL RESPONDENTS

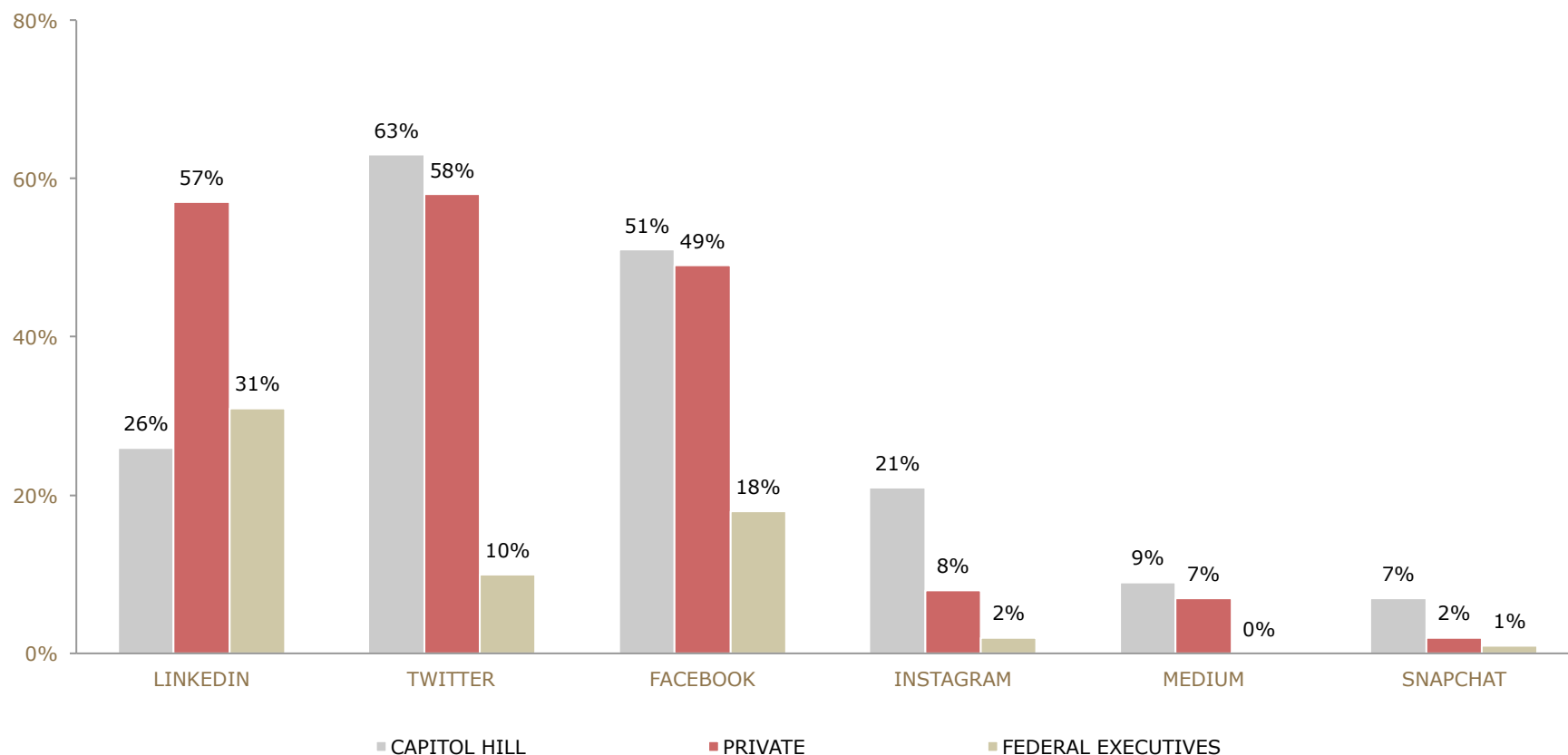


Usage of specific social platforms varies widely by workplace

Capitol Hill respondents in general use social media more than their counterparts while federal executives use it the least

Social Media Platform Usage for Work in Washington

PERCENTAGE OF RESPONDENTS USING PLATFORM IN LAST SIX MONTHS, 2017

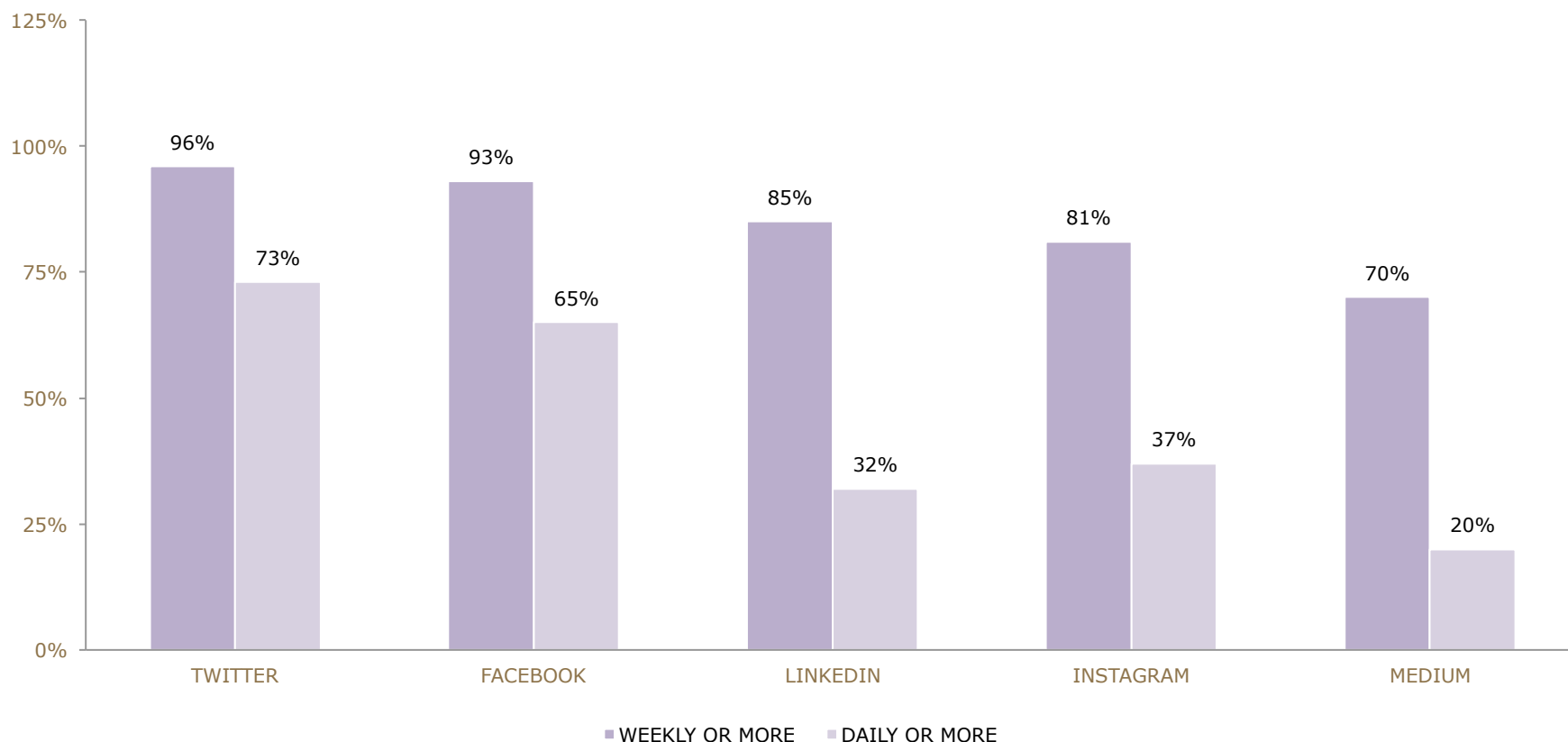


For insiders using Twitter for work, three in four access the platform daily

Twitter and Facebook stand far above other platforms in daily use overall

Frequency of Using Social Media Platforms as Part of Work

FREQUENCY OF RESPONDENTS USING PLATFORM AS PART OF WORK, 2017

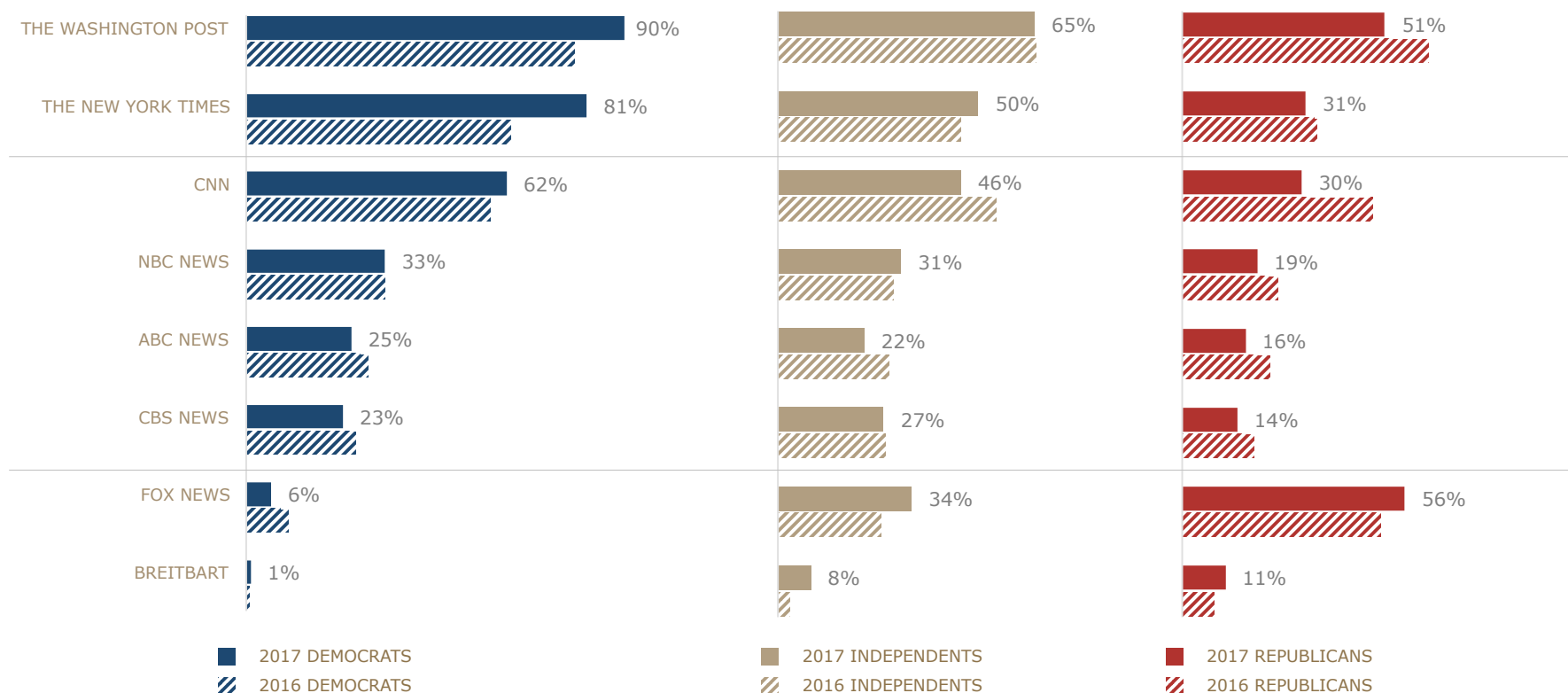


For media outlets in the spotlight in 2017, gains and losses are largely party-specific

TV-oriented media brands see drops in utilization among both Democrats and Republicans

Selected Media Outlets Relied on for Washington News and Information

PERCENTAGE OF RESPONDENTS, 2016 VS 2017

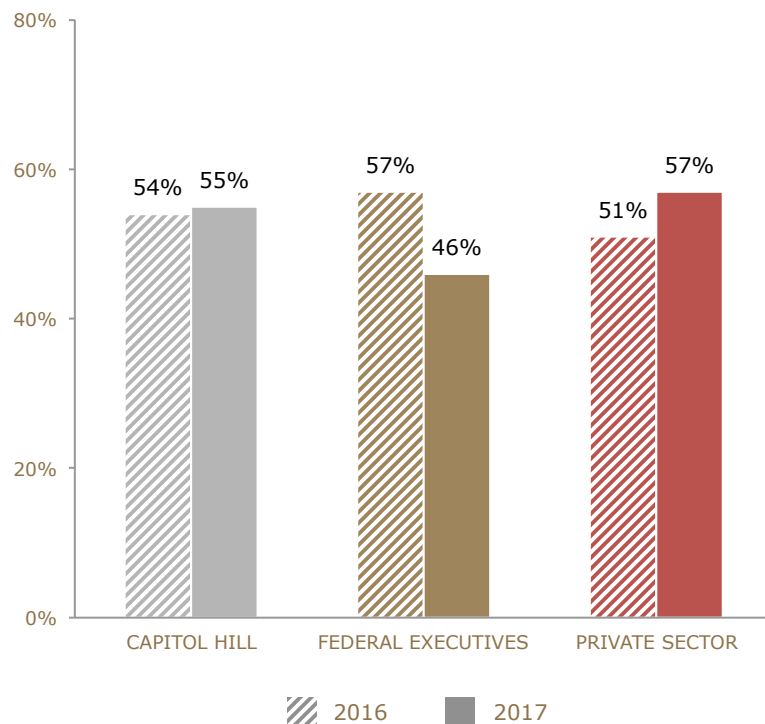


Slight decline in print usage across age groups

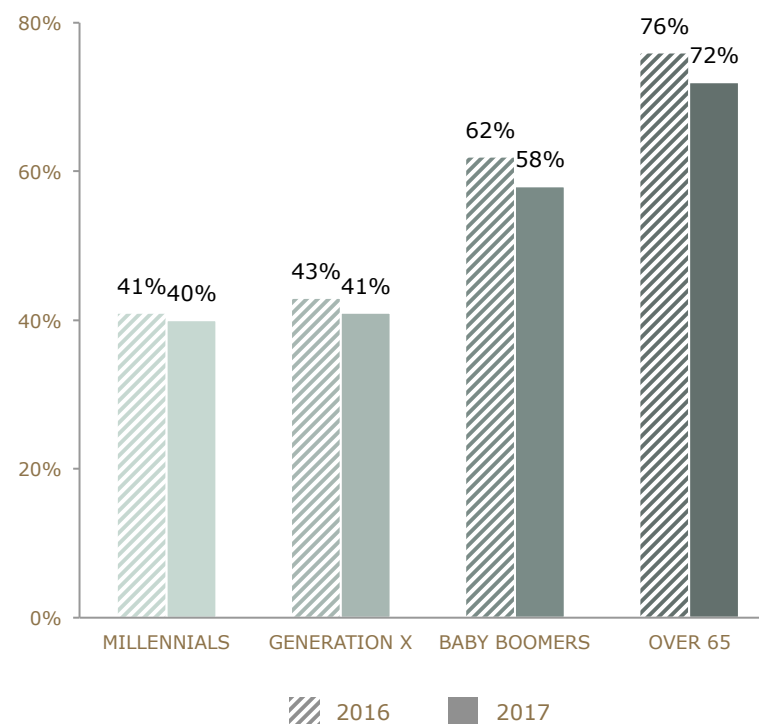
Certain workplaces more focused on reading printed content for Washington-focused news and information

Read Print at Least Once Throughout the Workday

PERCENTAGE OF RESPONDENTS, BY WORKPLACE



PERCENTAGE OF RESPONDENTS, BY GENERATION

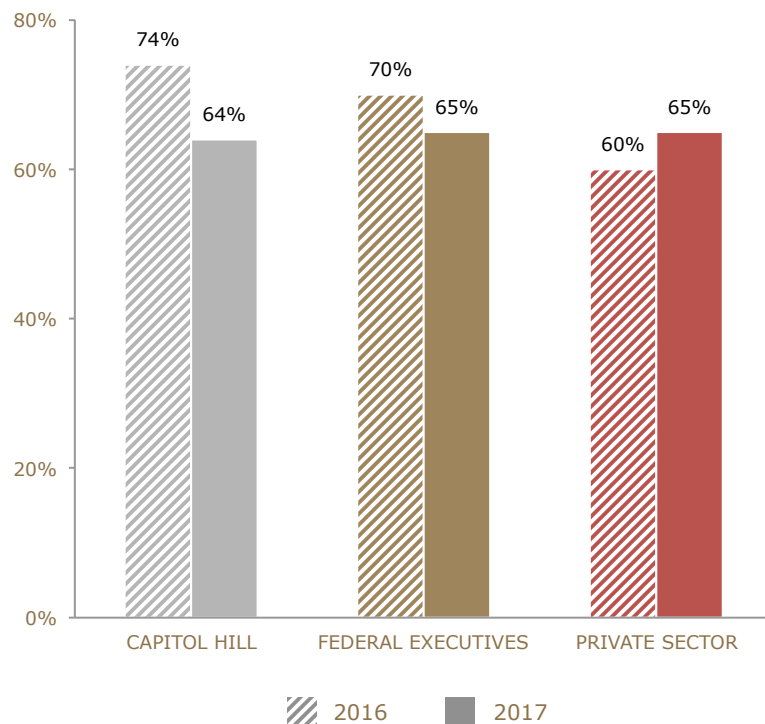


Majority of insiders of all ages still watching TV

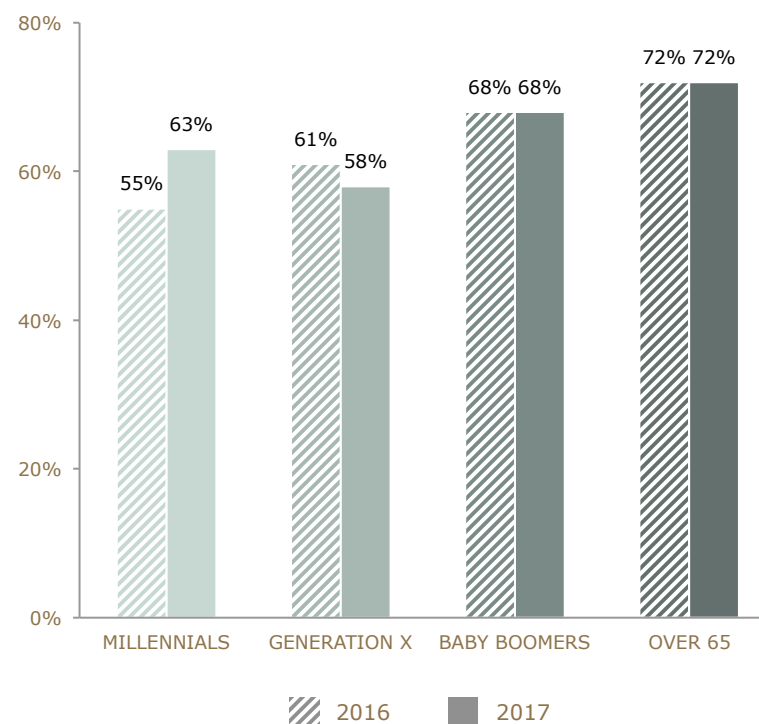
Fewer government insiders watching television for Washington-focused news and information

Watch Television at Least Once Throughout the Workday

PERCENTAGE OF RESPONDENTS, BY WORKPLACE



PERCENTAGE OF RESPONDENTS, BY GENERATION

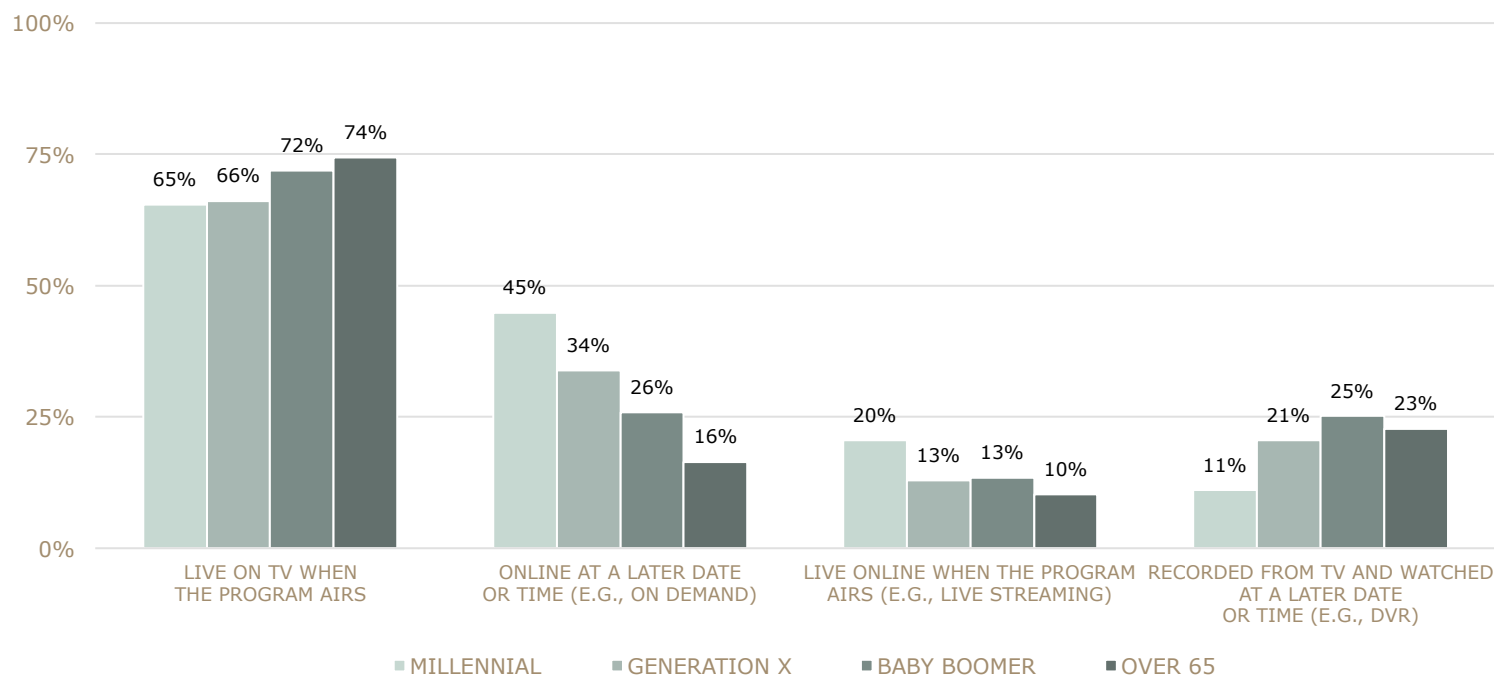


Live television most popular across generations

Younger generations trend toward online options

Methods for Accessing TV Programs for Washington-Focused News and Information

PERCENTAGE OF RESPONDENTS, BY GENERATION

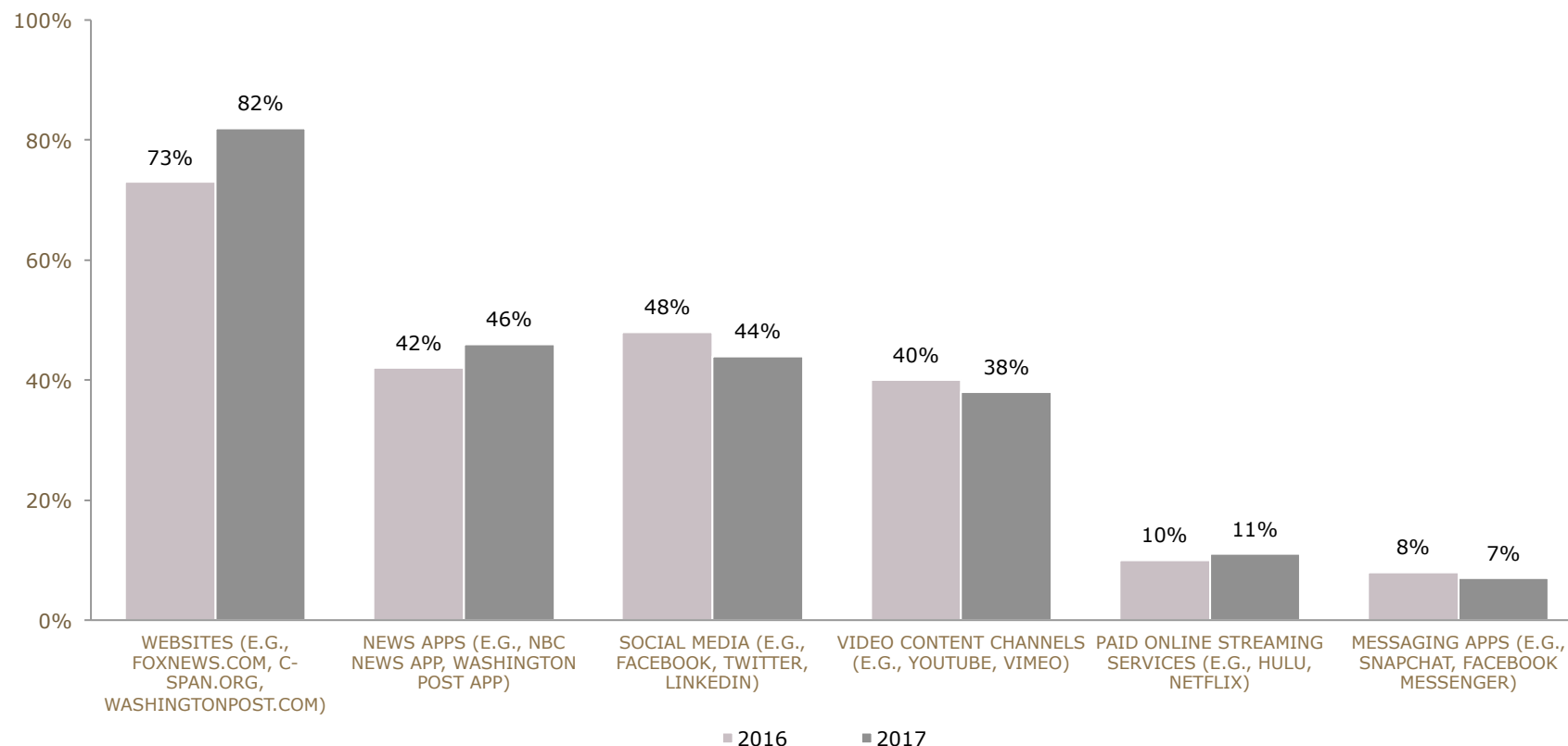


Where to go for Washington video

Most Washington-focused video content is watched directly on news websites; more insiders opt to consume video on news websites or apps rather than social media and video content channels

Primary Channels of Online Video Consumption

PERCENTAGE OF RESPONDENTS, 2016 VS 2017



RESEARCH TEAM

Principal Researchers

Abigail Kleva
Anthony Rini
Christine Yan

Chief Analytics Officer

Gina Kim

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