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Journal  
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# WASHINGTON IN THE INFORMATION AGE

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*An Insider's Guide to Media Consumption  
and Collaboration Inside the Beltway*

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Questions concerning use of these materials should be directed to:

**Alisha Johnson**

Associate Publisher  
National Journal Group

**The Watergate**

600 New Hampshire Avenue, NW  
Washington, DC 20037

Phone: 202-266-7312

Fax: 202-266-7320

Email: [ajohnson@nationaljournal.com](mailto:ajohnson@nationaljournal.com)



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## STATEMENT OF PURPOSE

In 2002 and again in 2007, National Journal Group's *Washington in the Information Age* chronicled how "Washington Insiders" were navigating the fast-changing media landscape. The 2002 study focused on the impact of the Internet on Washington's media-consumption habits, while the 2007 report explored the Internet's role as a gateway to content originating in other media platforms, such as television, radio and print.

If anything, the pace of change in the media has accelerated in the two years since the completion of the 2007 report. News sources, media brands and new platforms continue to proliferate. Blogs and other "new media" sources have gained national acceptance as trustworthy sources of information, and even of breaking news. News content has become a lot more "mobile-friendly," while smartphones have become increasingly "reader-friendly." The growing popularity of DVRs, online video, audio-on-demand, smartphones and e-readers calls into question the place (and utility) of more "traditional" media platforms – TV, radio and print. Social networks (such as Facebook and LinkedIn) and sites such as Twitter have gone mainstream, with just about every politician and cause jockeying to attract "friends," "fans," and "followers."

But what effect have these changes had on the way Washington's information-hungry elite stays connected and informed? How far ahead (or behind) are D.C.'s media consumers in comparison to their counterparts outside the Beltway? What is the role and significance of new digital communication tools, like Facebook and Twitter, for Washington Insiders? How have all these changes affected the way the inside-the-Beltway audience is influenced and influences others?

By analyzing nearly 1,000 survey responses and conducting dozens of in-depth interviews, National Journal Group's research team has endeavored to further illuminate Washington's changing media habits. Whenever possible, findings from this year's research were compared to data from the 2007 study to help enhance our understanding of the information revolution that is underway.



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## RESEARCH TEAM

Bernadette Ryan-Leduc  
*Director of Research*

Erin Dumbacher  
*Senior Research Analyst*

Lucie Coneys  
*Senior Research Analyst*

Emily Quanbeck  
*Research Analyst*

Ory Rinat  
*Research Analyst*

Kayla Hammond and William Mills  
*Research Interns*

For further information on topics covered in this presentation, research findings, methodology, and/or materials, please contact any member of our staff at 202-266-6000.

## PRODUCTION TEAM

Chris Donovan  
*Design Director*

Meg Szabo  
*Project Manager*

## MEMYSELF&CO. DESIGN TEAM

Nello DeBlasio  
*Managing Designer*

Adrian Constantyn  
*Relationship Manager*

Jason Korth  
*Graphic Designer*



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## METHODOLOGY

The research for *Washington in the Information Age* was conducted in discrete stages, which include in-depth interviews, refinement of hypothesis, field research (including first-person observation and one-on-one interviews), surveying, intensive data analysis, and a comprehensive review of relevant qualitative and quantitative secondary sources.

### IN-DEPTH INTERVIEWS

The research team conducted two dozen in-depth interviews over the phone with Capitol Hill staff and senior government-affairs executives. To further enhance our understanding of media consumption on the Hill, a National Journal Group research analyst spent over twelve hours observing Capitol Hill staff in their workplace. Onsite interviews and follow-up correspondence also supplemented the observational data. Vital to the analysis, these findings were used to narrow the focus of the research, refine working hypotheses, and add color and depth to quantitative and other qualitative data.

### QUANTITATIVE DATA

National Journal Group's in-house research department conducted an online survey of Washington Insiders in August 2009 which targeted Capitol Hill staff, federal government executives, and private-sector public affairs professionals based in the DC area. An invitation to a web-based survey was sent to approximately 8,000 Capitol Hill staff, 7,800 private-sector professionals, and more than 28,000 federal executives. Contact information for all survey and interview participants was gathered through the KnowWho database (of Hill staff), the Lobbyist.Info database maintained by *Columbia Books*, and CQ Press' Federal Staff Directory. In order to avoid inadvertent selection bias for the purposes of our competitive set research, we specifically did not use contact information from National Journal Group's databases.

Almost 1,000 Washington Insiders completed the survey during the allotted four weeks: almost 200 from Capitol Hill, more than 300 from the private-sector public affairs community, and over 400 from Washington-based federal executives. This survey repeated some of the questions used in the 2007 survey, although many were added or updated to reflect the changing nature media consumption in Washington. For this reason, not all data collected in 2009 is directly compared to that collected in 2007.

### QUALITATIVE DATA

The survey format encouraged respondents to share written elaboration on multiple choice questions. Each question generated, on average, 57 written comments, and some questions received more than 300, ranging from one word to several paragraphs in length. Respondents' remarks provided added insight into their answers as well as into broader trends uncovered through the interviews, firsthand observation, and quantitative data.

### SECONDARY RESEARCH

In addition to analyzing in-house research findings, we consulted a number of secondary sources in order to compare Washington Insiders to their equivalent national media audience. The most consistently useful studies were the Pew Research Center's *Biennial Media Consumption Survey* (2008) and the *Internet and American Life Project* (2008), also from Pew. To select a national audience ethnographically comparable to the Washington Insider group, when possible we selected from the Pew respondent pool those who are employed full-time, registered to vote, and hold an undergraduate degree or higher, and whose household income is \$30,000 or more.

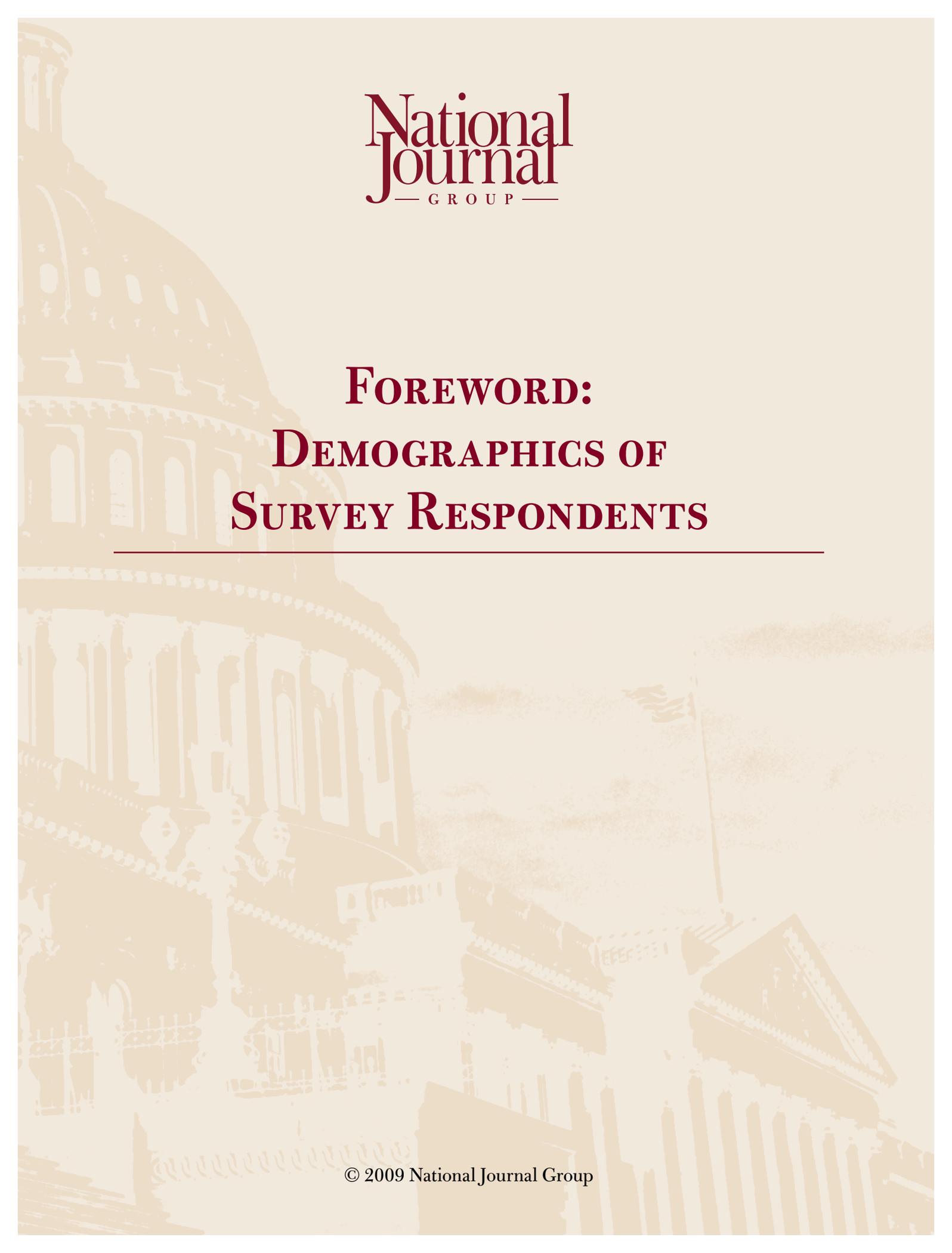


## WASHINGTON IN THE INFORMATION AGE

### An Insider's Guide to Media Consumption and Collaboration Inside the Beltway

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**FOREWORD:  
DEMOGRAPHICS OF  
SURVEY RESPONDENTS**

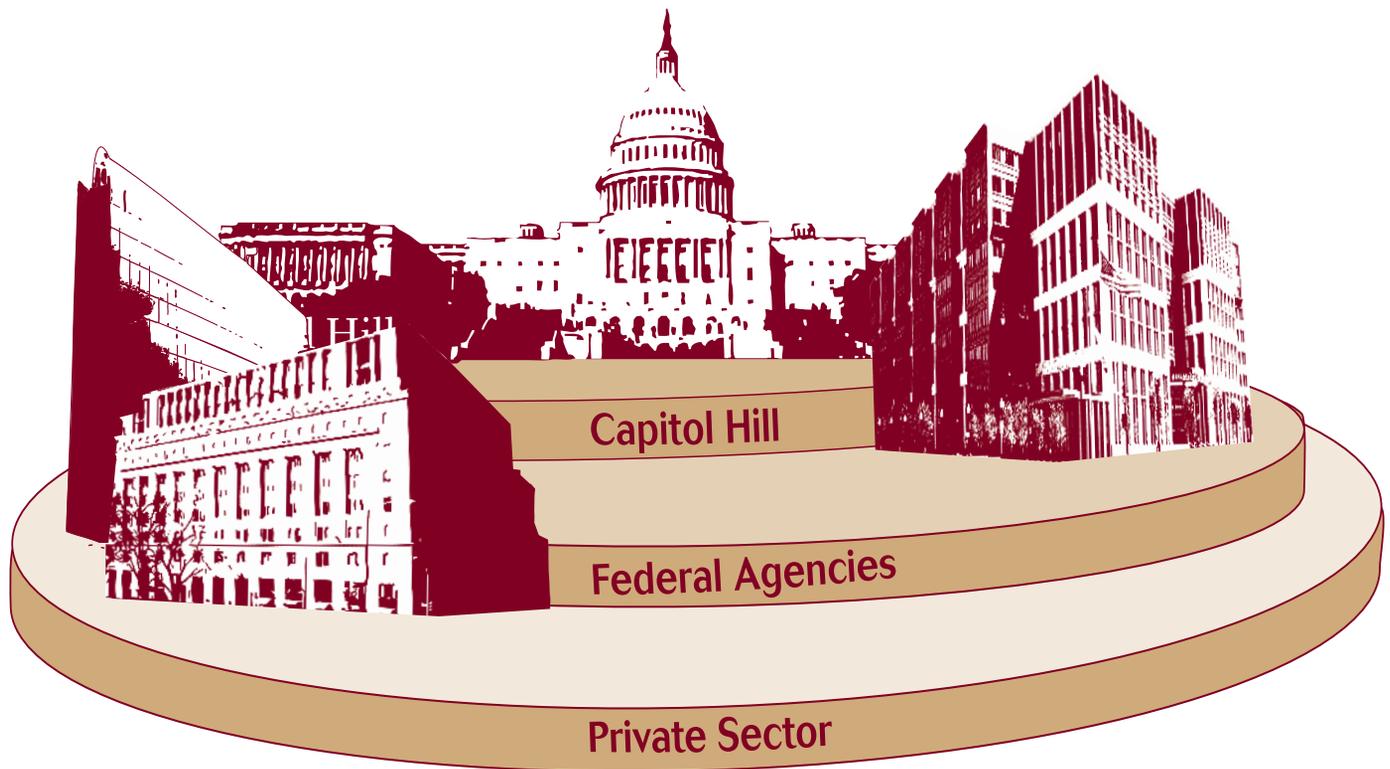
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It's not just elected or appointed officials who set the direction in the nation's capital. Capitol Hill staff as well as public servants in federal agencies influence policy decisions on a daily basis. Lobbyists, policy advocates, think tank experts, academics, and associations substantially contribute to the policy conversation in Washington. Therefore, this research endeavor includes all three groups of Washington Insiders: Capitol Hill staff, federal executives, and private-sector insiders.

## INFLUENCERS, PUBLIC AND PRIVATE

Public Servants and the Private Sector All  
Contribute to the Policy-Making Process



### A NOTE ON “WASHINGTON INSIDERS”

The research analyzed responses from nearly 1,000 professionals across Capitol Hill, the executive branch, and the private sector, including corporate and association government affairs executives, lobbyists, non-profit policy advocates and think-tank professionals. Understanding the complexity of the world of Washington decision-making and the important role of “unofficial Washington” in the deliberations of Washington’s official policy makers, we cast a wide net to capture a broad cross-section of Washington’s governing elite and influential groups.

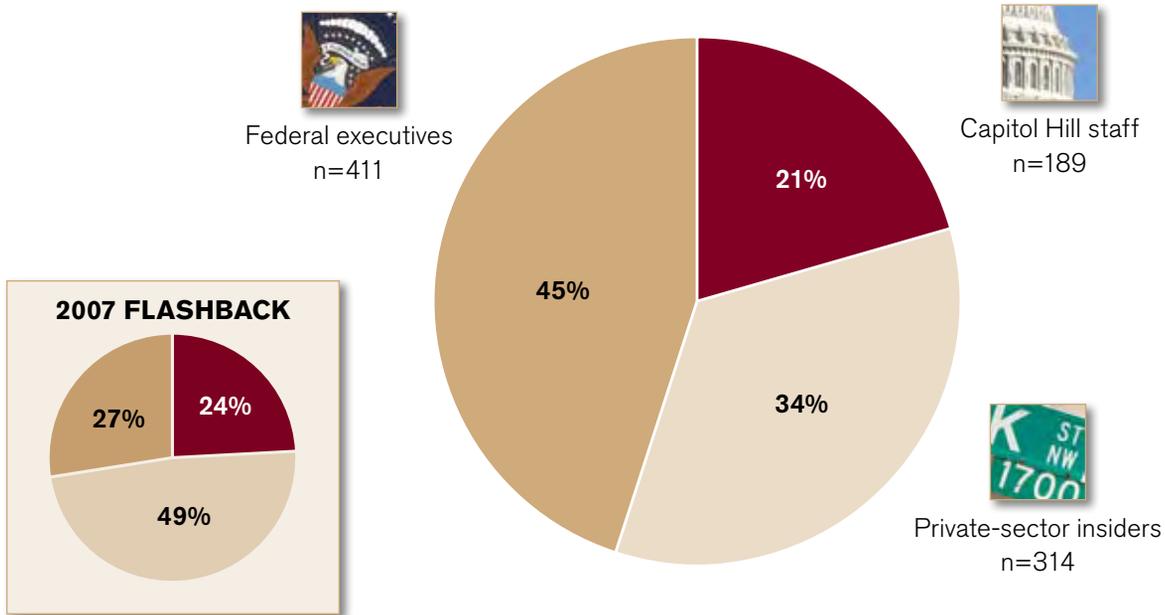
*National Journal's 2009 Media Habits Survey* gathered information about media consumption and online habits among Washington's three groups of influencers: Capitol Hill staff, senior-level (non-Capitol Hill) federal executives, and policy-influencers in the private sector. Findings draw on an online survey of nearly 1,000 Washington Insiders, as well as dozens of in-depth interviews and observational research. While there are proportionally more federal executives and private-sector insiders than in 2007, distribution of respondents by age mirrors that of 2007.

## WASHINGTON'S VOICES

Nearly 1,000 Washington Insiders Contributed to Research

### Composition of Survey Respondents

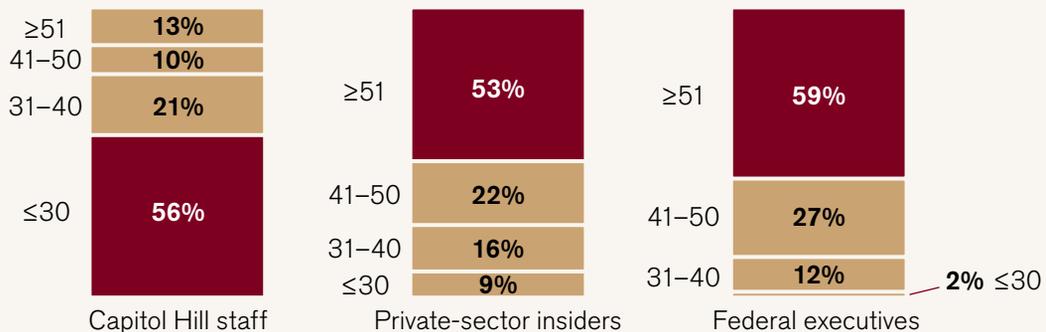
percentage of respondents, n=914



### RECURRING TREND

#### Composition of Survey Respondents by Age

percentage of respondents

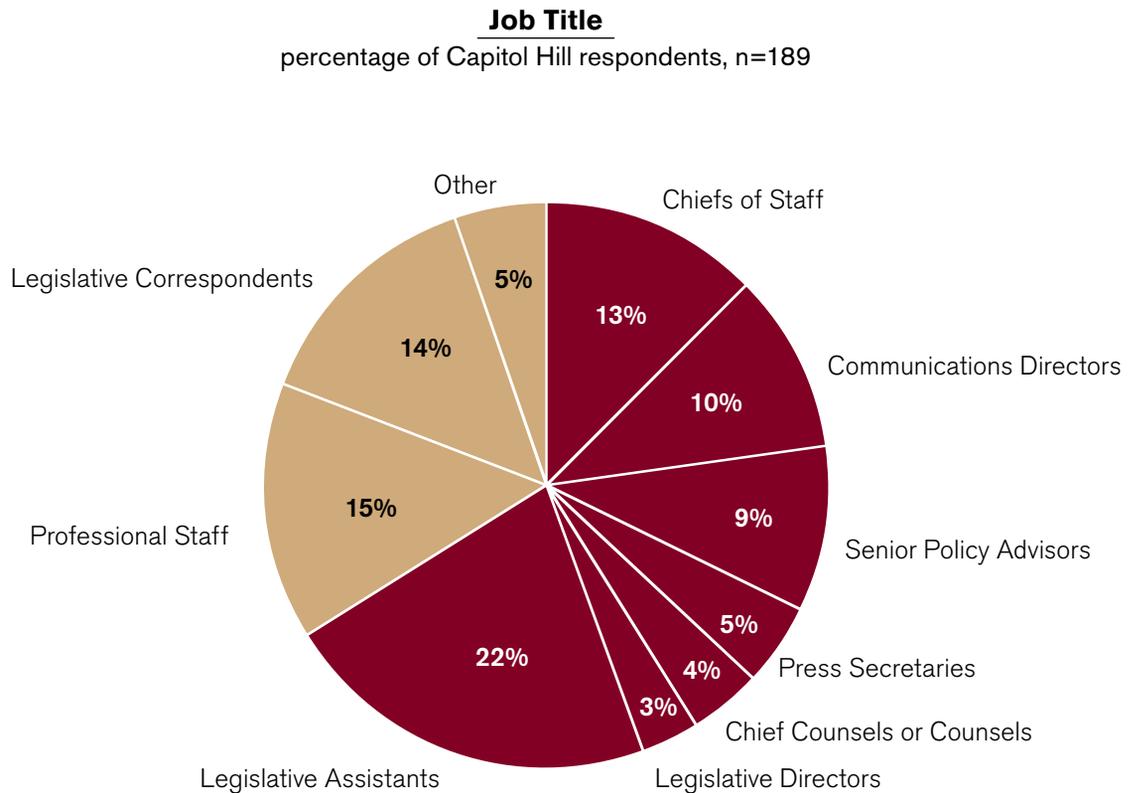


Nearly 200 Capitol Hill staff in Member, Leadership, and Committee offices completed the *2009 Media Habits Survey*. Most respondents work in policy-oriented positions, and almost half hold senior-level positions. Survey responses and dozens of in-depth interviews were complemented by observational research conducted in the halls and offices of Capitol Hill.



## NOW REPRESENTING THE HILL

### Respondents Offer a Rare Glimpse Into Media Habits and Preferences on Capitol Hill



## CAPITOL HILL SURVEY FACTS

*National Journal's 2009 Media Habits Survey* was distributed online via an emailed invitation in August 2009 to individual staff members with the following titles: Chief of Staff, Deputy Chief of Staff, Counsel or Chief Counsel, Senior Policy Advisor, Legislative Director, Communications Director, Legislative Assistant, Legislative Correspondent, Press Secretary, and Professional Staff.

The survey was sent to over 8,000 Member, Committee, and Leadership staff in the House and Senate as listed in the KnowWho database as of July 2009.

A total sample of 189 Hill staff completed the survey and came from 25 unique Senate offices, 86 House offices, and 33 Senate and House Committee and Caucus offices. Qualified respondents completed at least 89 percent of the survey.

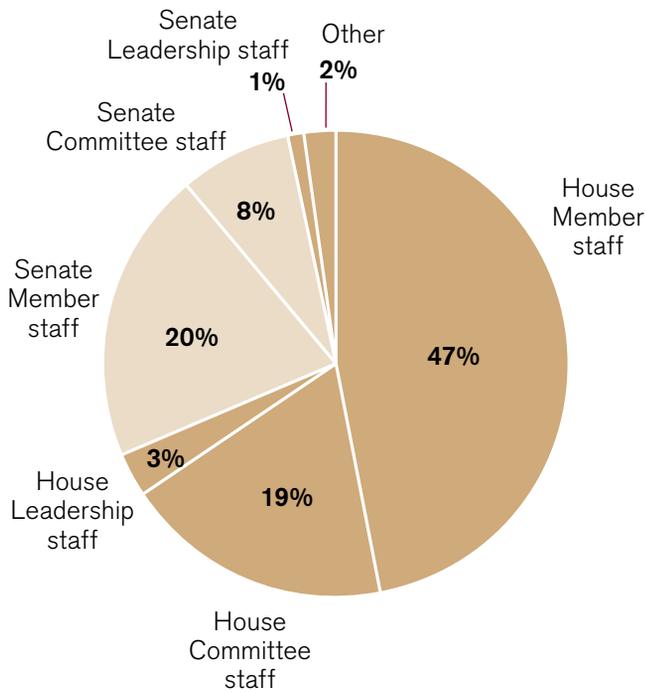
This study's Capitol Hill respondents reflect the demographics of the overall Capitol Hill population. The current Democratic Party majority in both chambers, as well as the larger House-side population, is reflected in respondent composition. Respondents' age and tenure distributions also correspond to Capitol Hill's overall relatively young workforce, most new to the Hill.

## ALONG PARTY LINES

Respondents' Profiles Reflect the Current Makeup of the Broader Capitol Hill Population

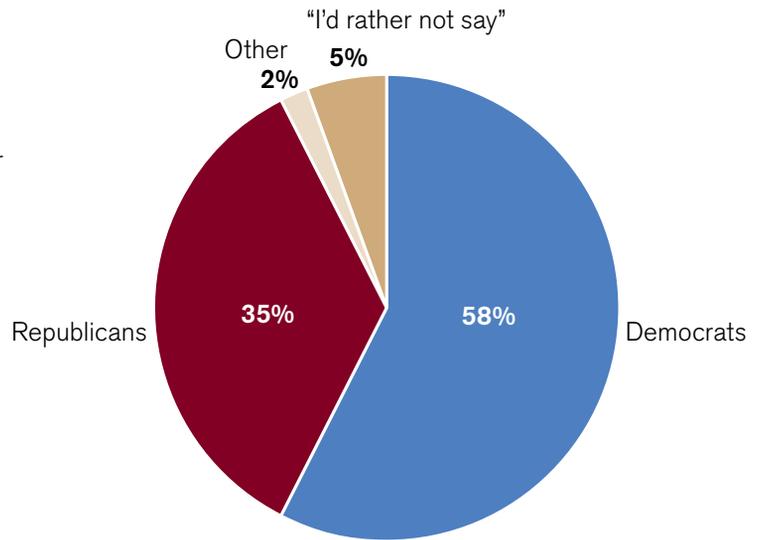
### Staff Representation

percentage of Capitol Hill respondents



### Party Affiliation

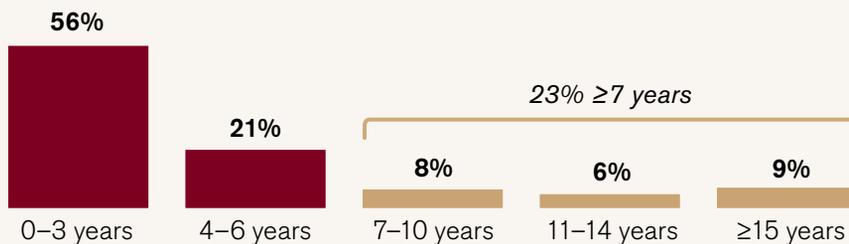
percentage of Capitol Hill respondents



## OUT WITH THE OLD, IN WITH THE NEW

### Tenure on Capitol Hill

percentage of Capitol Hill respondents

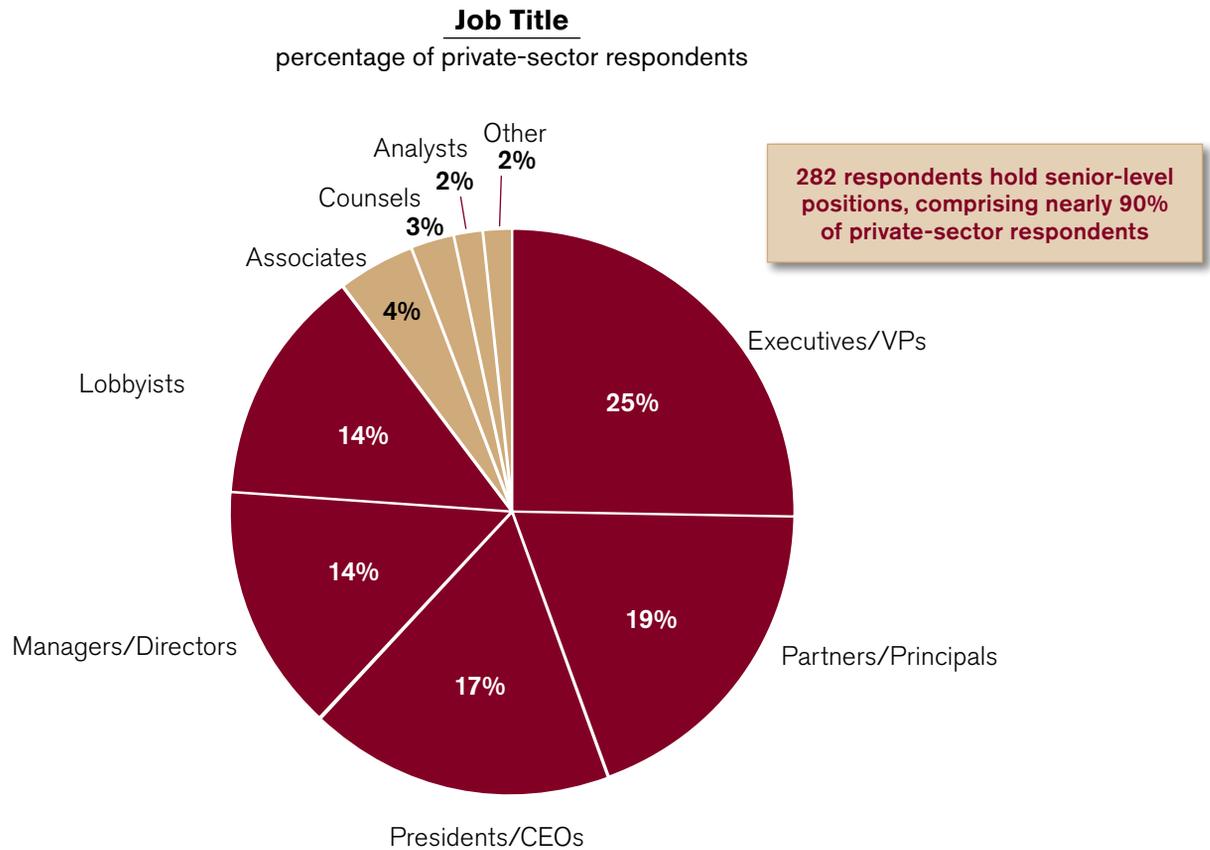


Respondents to *National Journal's 2009 Media Habits Survey* included over 300 of DC's policy influencers outside of the government. Nearly 90 percent of respondents hold senior-level positions at public affairs shops, interest groups, think tanks, and academic institutions. Sixty-one percent of the respondents are senior partners or executives at their organizations.



## THE UNOFFICIAL INFLUENCERS

Study Includes Seasoned Professionals and Subject-Matter Experts Outside of Government



### PRIVATE-SECTOR INSIDER SURVEY FACTS

*National Journal's 2009 Media Habits Survey* was distributed via email in August 2009 to approximately 7,800 private-sector professionals in Washington, DC, listed in *Columbia Books' Lobbyists.info* database as of August 2009. Respondents come from public affairs, public policy, communications, lobbying, advocacy, think tanks, and universities.

The total sample of 314 respondents represents 270 unique organizations. Qualified respondents completed at least 89 percent of the survey.

While respondents' job functions range from public policy to communications, they are collectively referred to as "private-sector insiders" hereafter in this study.

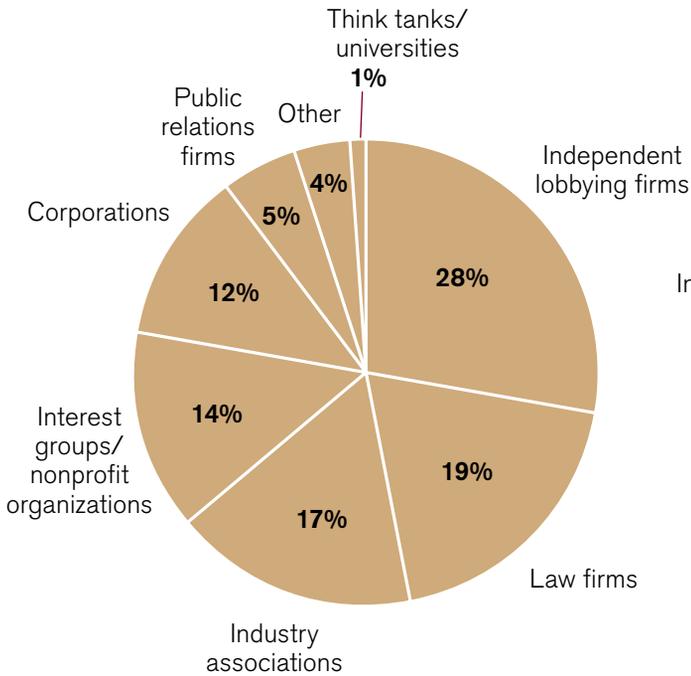
Private-sector respondents speak from experience: nearly seven out of 10 private-sector respondents have at least 15 years of experience in public policy, advocacy, or public affairs. Respondents also represent a range of party (and independent) affiliations, reflecting the kind of experience that outlasts partisan fortunes on Capitol Hill.

## VOICES FROM K STREET

### Highly Experienced Private-Sector Respondents Contribute to the Policy Conversation

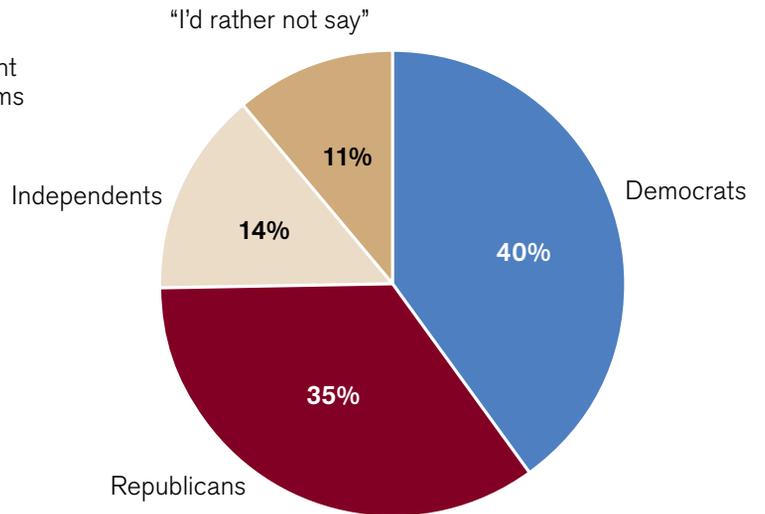
#### Professional Affiliation

percentage of private-sector respondents



#### Party Affiliation

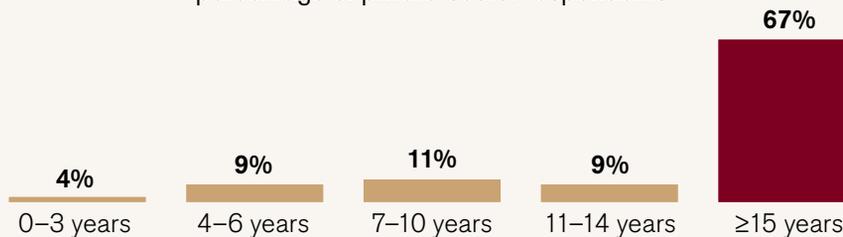
percentage of private-sector respondents



## EXPERIENCE SPEAKS

#### Tenure in Public Affairs, Advocacy, or Public Policy

percentage of private-sector respondents



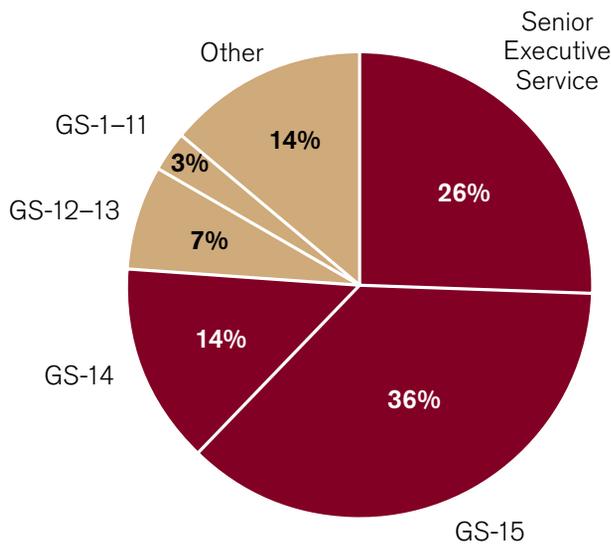
More than 400 executives in the federal government participated in *National Journal's 2009 Media Habits Survey*, giving voice to the third group of policy influencers. The survey targeted high-level and experienced managers and decision-makers in a broad range of departments and agencies in the federal space. More than three-quarters of respondents hold senior-level positions and seven out of ten have 15 or more years of experience. Federal executives were not asked their political affiliation.



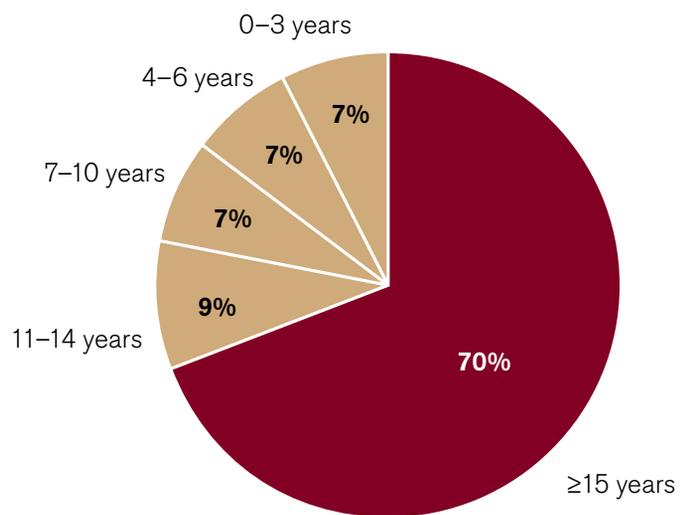
## SENIOR PUBLIC SERVANTS

Over 75 percent of Federal Respondents Hold a GS-14, GS-15 or SES Position

**Civil Service GS Level**  
percentage of federal respondents



**Tenure in Federal Government**  
percentage of federal respondents



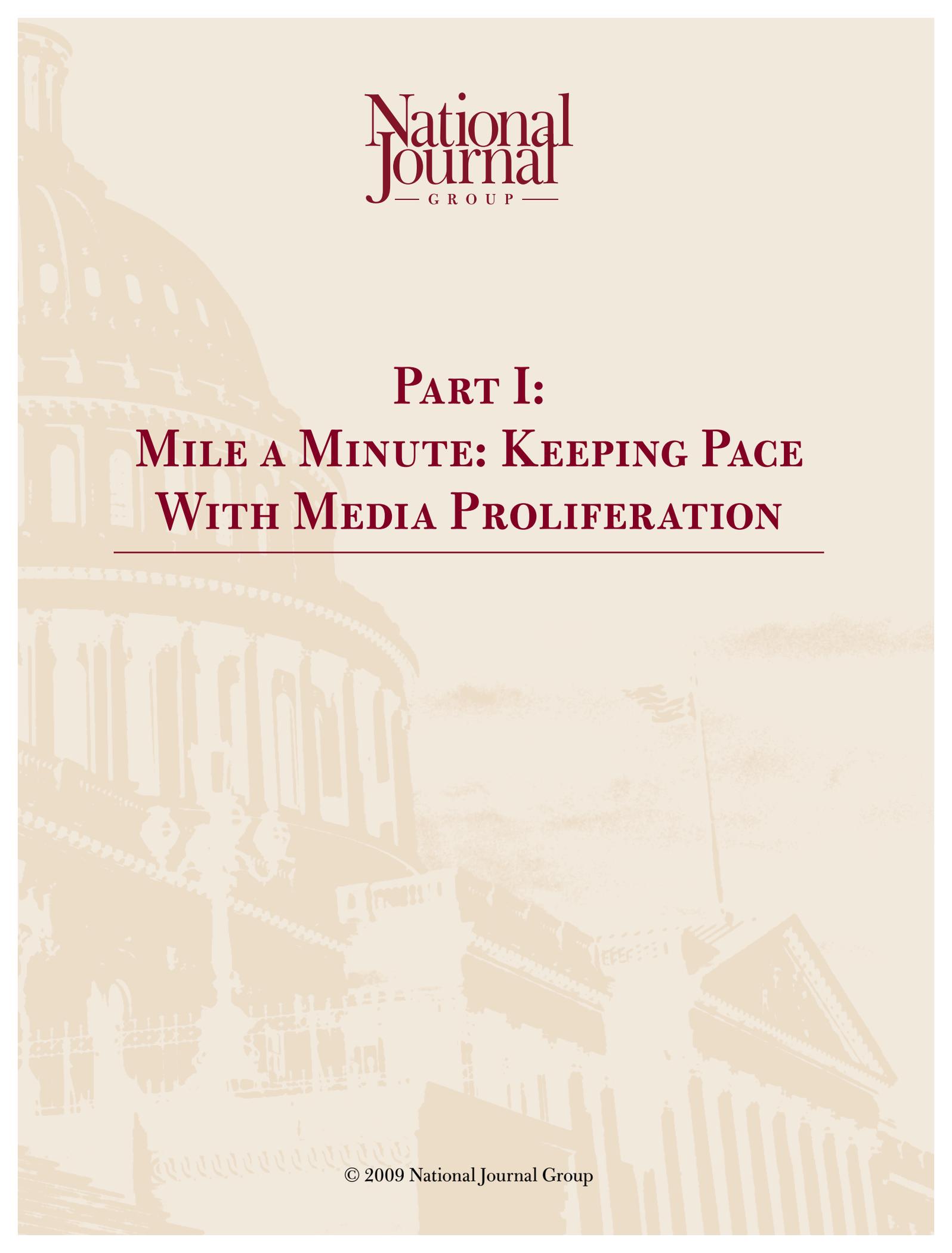
### FEDERAL SURVEY FACTS

*National Journal's 2009 Media Habits Survey* was distributed in August 2009 via email to more than 28,000 federal government executives from CQ Press' Federal Staff Directory as of August 2009. The survey was sent to those whose titles include one of the following: Congressional, Analyst, Policy, Legislative, Chief of Staff, Secretary, Leader, Adviser, Officer, Chief, Senior, Manager, Executive, Head, Associate, Deputy, Vice President, Director, Coordinator, or Specialist. With a focus on Washington, only federal executives located in the DC metropolitan area were included in this analysis.

The total sample of 411 executives represents 15 Cabinet-level departments and 41 independent agencies. Qualified respondents completed at least 89 percent of the survey.







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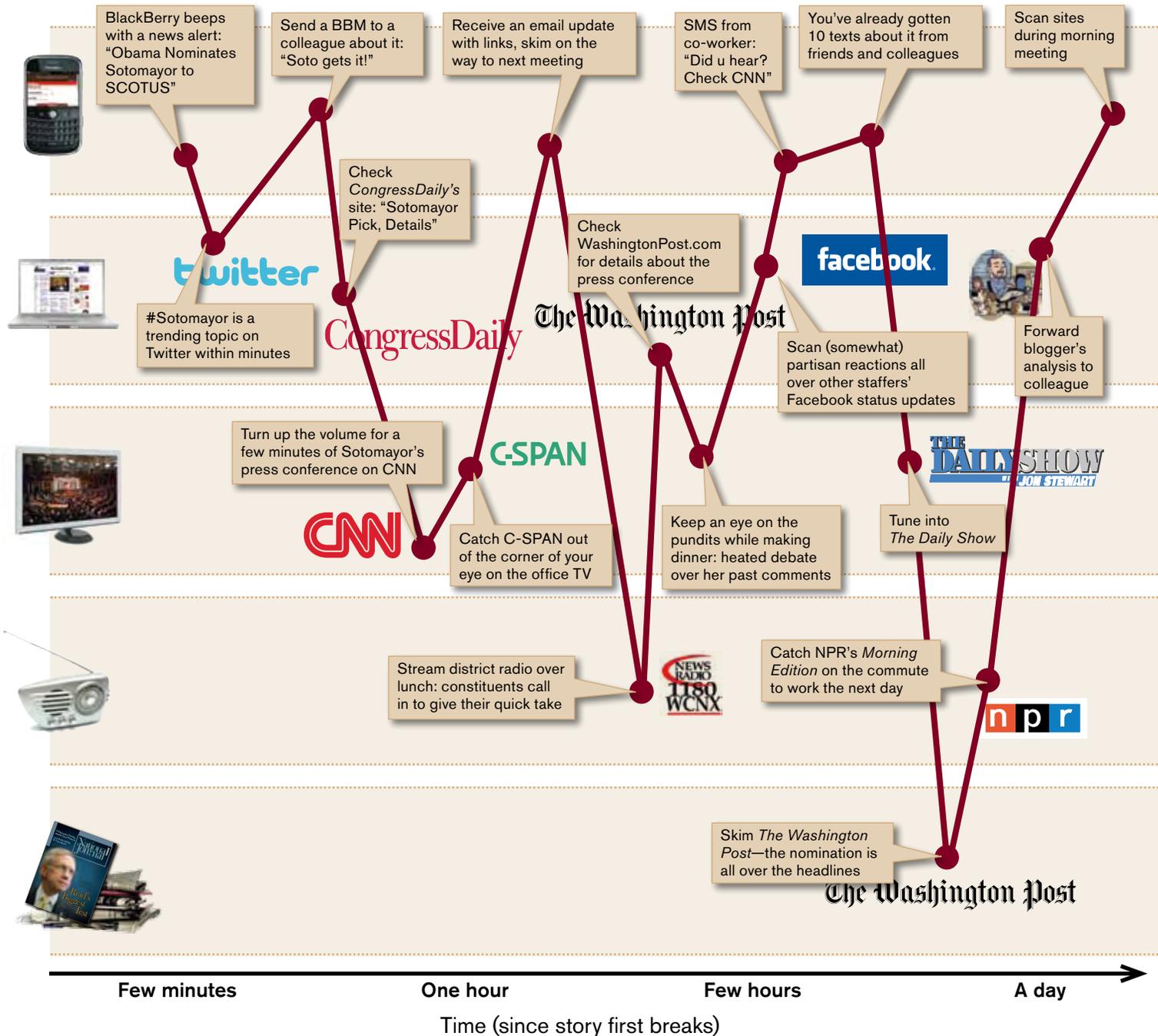
**PART I:**  
**MILE A MINUTE: KEEPING PACE  
WITH MEDIA PROLIFERATION**

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News stories in Washington develop at lightning speed. When a story breaks, Washington Insiders will often first learn about it on their mobile devices. A headline or BBM (a short message sent through BlackBerry Messenger, for the uninitiated) from a friend lacks the details they crave, so a quick check of the news sites and cable news channels, simultaneously, ensures they are not missing any details.

## NEWS TRAVELS FAST...

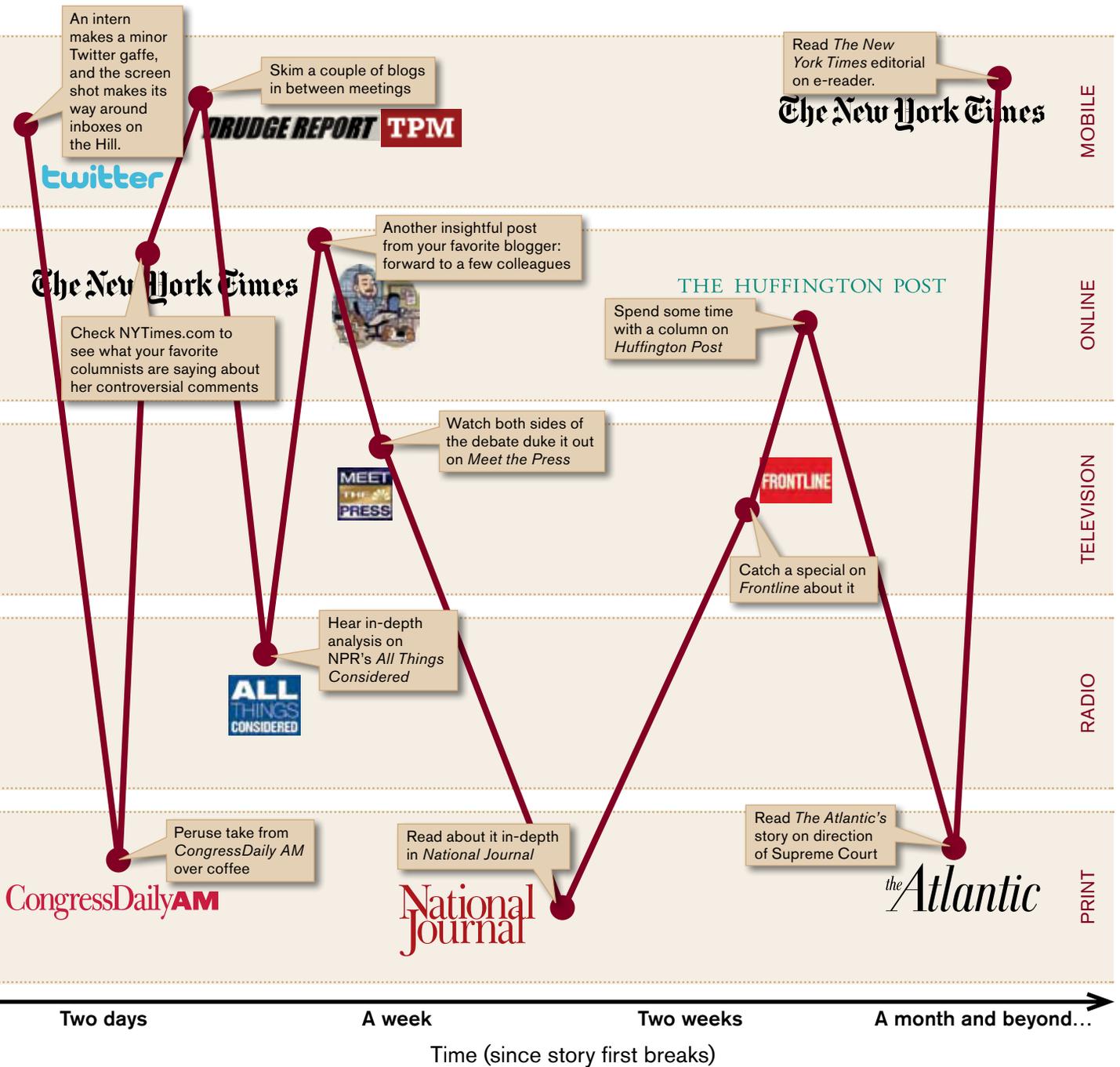
As a Story Breaks, Washington Bounces from One Source to Another to Stay on Top of Developments



As the story evolves, Washington Insiders seek more analysis and opinion. Platforms and sources that support lengthier content and deeper digging, such as print, the blogosphere, national news sites, and Sunday morning talk shows, attract greater Insider attention.

# ...AND HAS STAYING POWER

## As Time Passes, Washington Places Greater Emphasis on Sources Providing Analysis and Opinion

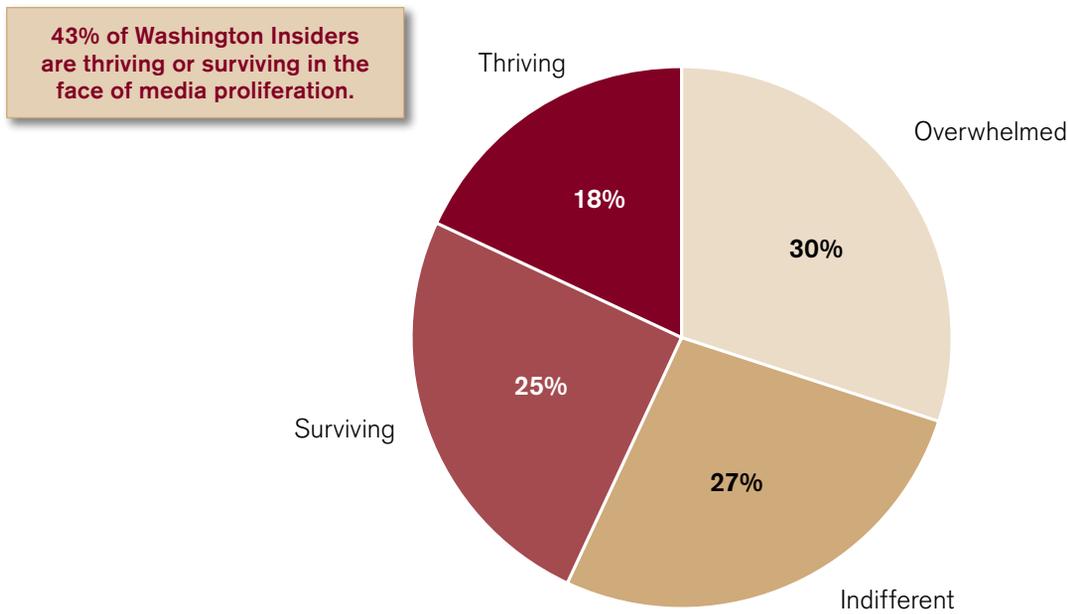


Washington Insiders are adjusting to the media game in spite of the proliferation of content and platforms: nearly half of respondents are either “thriving” or “surviving” in the current news and information environment. Most recognize that keeping up with media takes substantial time and energy, but understand that news and information remain the currency of power and influence in Washington.

## BRING IT ON

### Washington Insiders Keeping Up With Media Proliferation; Fewer Than One-Third Overwhelmed

**Reaction to Proliferation of Media Content, Sources, and Platforms**  
percentage of respondents



## A FLOOD OF INFORMATION

“My job is news-dependent, so I have to keep up with the media, even though it can be a lot of work. It’s a huge, important part of my day.”

– House Legislative Assistant

“More information is always a double-edged sword. It’s great to be able to access so much information so quickly, but following a number of sources can be almost a full-time job.”

– Executive/VP at a Private Lobbying Firm

“I feel compelled to read more now. While that has made me better informed about the issues that I cover, it also requires me to work longer hours to synthesize the data and information, not to mention the fact that it has made me a ‘news junkie.’”

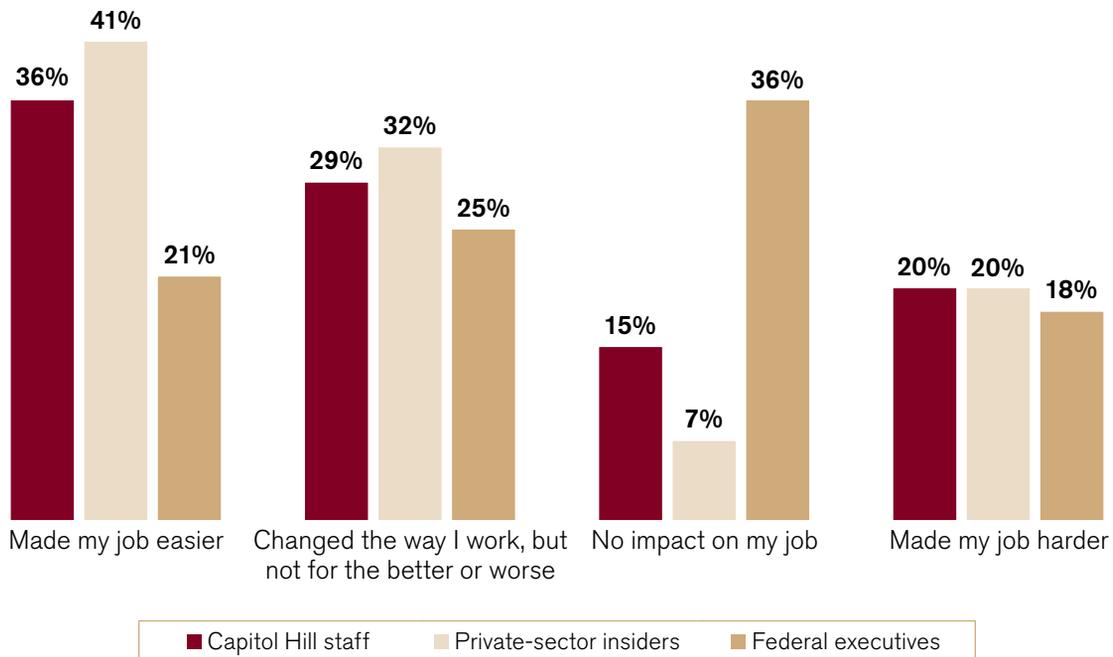
– University Lobbyist

More than one-third of Capitol Hill staff (and 41 percent of private-sector insiders) consider the proliferation of media a boon to their professional lives, while only one in five federal executives say the same. Federal executives, who consume on average significantly less news media than Hill staff and private-sector insiders, are the most likely to say that their jobs have not been affected at all. Across all groups, those who rely more on digital sources for their daily news than print say that they're faring better in this new media world.

## MEDIA MAKES THE WORLD GO 'ROUND

### Majority of Washington Insiders Unencumbered by Increase in Media Resources

**Impact of Media Proliferation on Job**  
percentage of respondents



## DIGITAL MAKES THINGS EASIER

**Platform Preference for Reading Daily News by Impact on Job**  
percentage of respondents



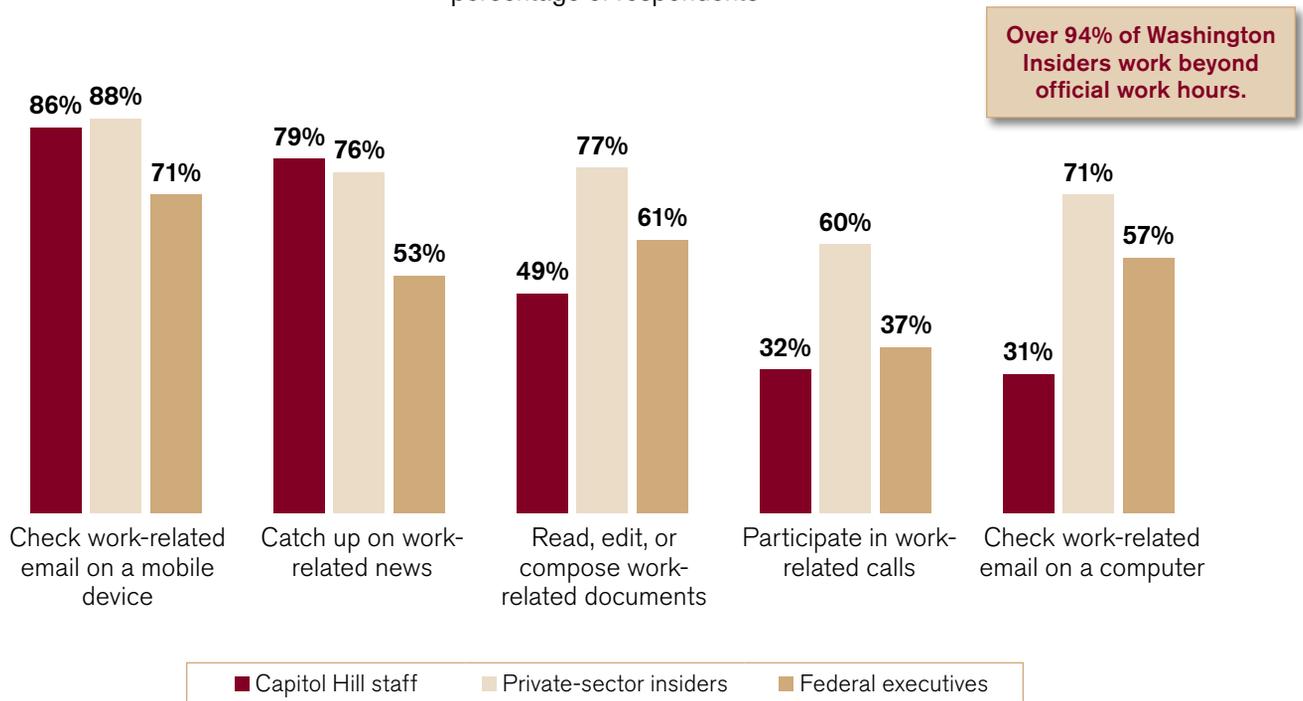
A typical day in Washington is a constant juggle of competing priorities amid the onslaught of news and information. With such a frenetic work pace, Washington Insiders can't afford to be disconnected. With news and analysis communicated every microsecond, being the first to know (or at least not the last) takes round-the-clock attention. It should come as no surprise then that over 94 percent of Washington Insiders report working beyond "official" work hours.

## THE 24-HOUR WORKDAY

### Washington Insiders Continue to Work Long After the Bell Rings

#### Work Tasks Performed After-Hours

percentage of respondents



## PRODUCTIVITY DURING "PERSONAL TIME"

"I start my day at 5:00 a.m. by checking my BlackBerry and then compiling news clips for my boss on my home computer."

– House Deputy Chief of Staff

"There is no such thing as 'official' hours. If I am awake, I am officially working."

– Federal Executive

"I always check work-related email on a home computer or BlackBerry in the evenings, on weekends and even vacation. Occasionally I participate in calls, document reviews, etc. I usually succeed in not being obsessive and finding a good balance—it's just easier to keep up by periodically knocking things out while on personal time."

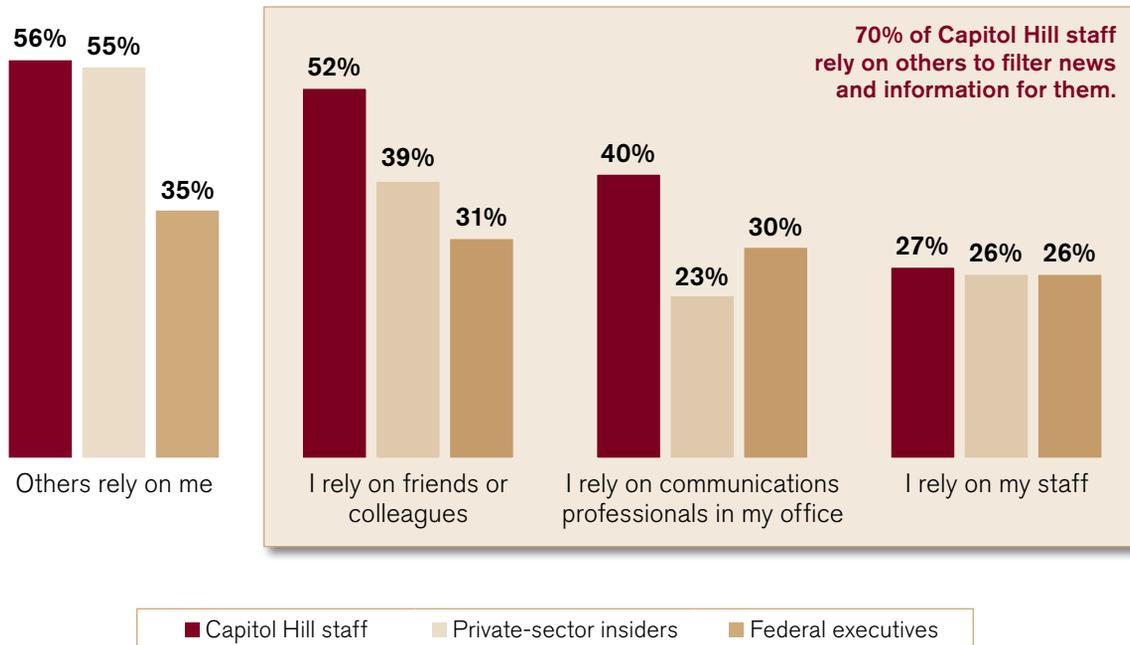
– Federal Senior Executive

Staying on top of the 24-hour news (and information) cycle is more than a full-time job, so how does Washington do it? Professional peers pass items of interest on to each other, creating an unofficial network of media-sharing. Over 70 percent of Capitol Hill respondents rely on others to send information their way, and more than half return the favor. The filter of trusted friends and colleagues ensures that nothing is missed.

## GETTING BY WITH A LITTLE HELP...

### Most Washington Insiders Rely on Others to Help Them Sort Through News and Information

**Responsibility for Filtering and Prioritizing News and Information**  
percentage of respondents



## NETWORKING NEWS

“Usually things I get from friends grab my attention more than other stuff, but the subject matter has to be worthwhile for me to pursue it. And it’s probably not the first time I’ve heard it, but it does reinforce that it’s important if someone sent it to me.”

– Senior Policy Advisor, Senate Committee

“A trusted source of analysis? The many friends who send email links to articles and essays and news. They are volunteer news amalgamators who share my views and send me clips every day. Very helpful and important.”

– Partner/Principal at a Law Firm

“If you’re in this town and know what you’re doing, you call your contacts and friends for the real information because it helps you screen the editorial from the factual.”

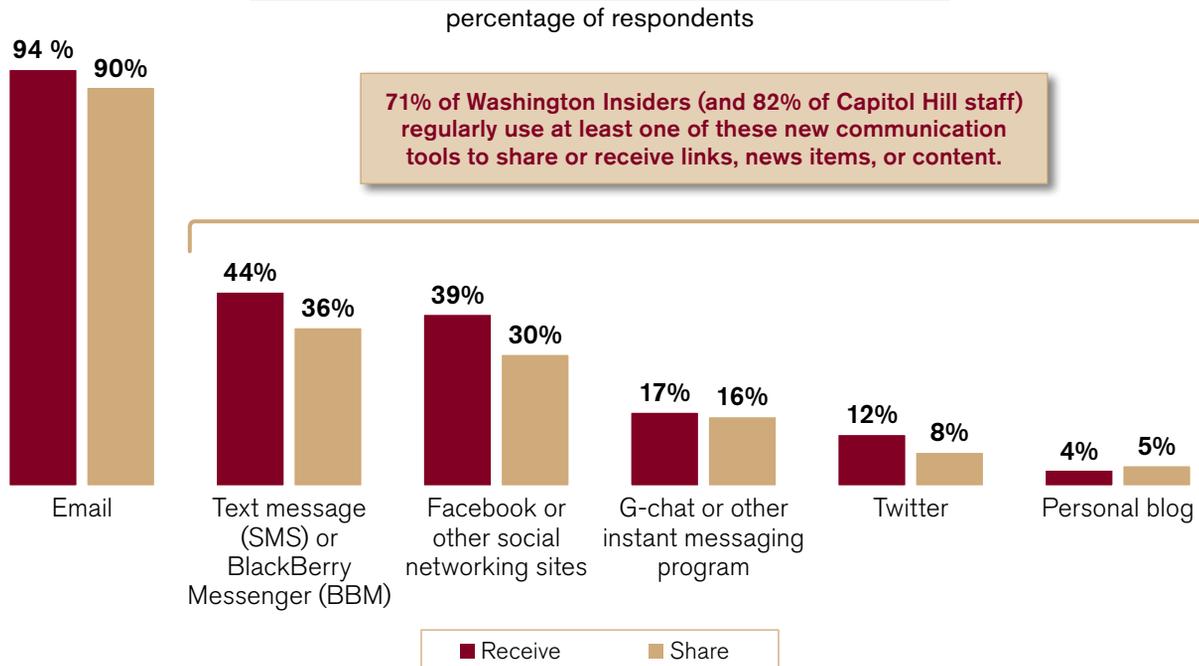
– Executive/VP at an Industry Association

While the bulk of those news referrals come in an email, a new class of communication tools are becoming increasingly popular. Collectively, nearly half of Washington Insiders regularly use social networking sites (such as Facebook and LinkedIn) to share or receive content, and text messages and chat services provide another, more private mode of communication. But at the end of the day, it's still all about who you know: almost 70 percent of recipients prioritize incoming messages based on their familiarity with the sender.

## EXPANDING THE TOOLKIT

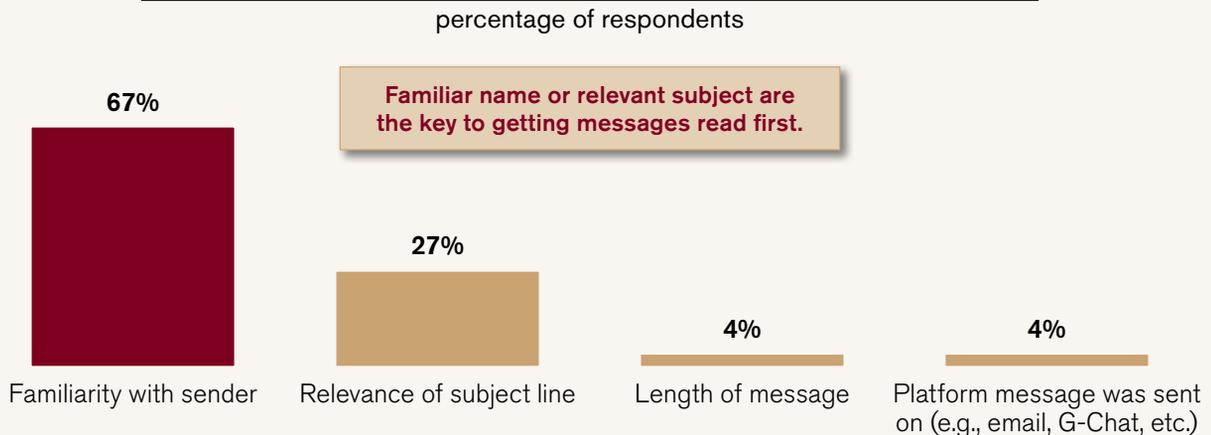
### Alternative Means of Communication Are Gaining Credibility Among Washington Insiders

#### Tools Regularly Used to Share or Receive Content



## BREAKING THROUGH THE CLUTTER

#### Most Important Factor for Prioritizing Incoming Email Messages



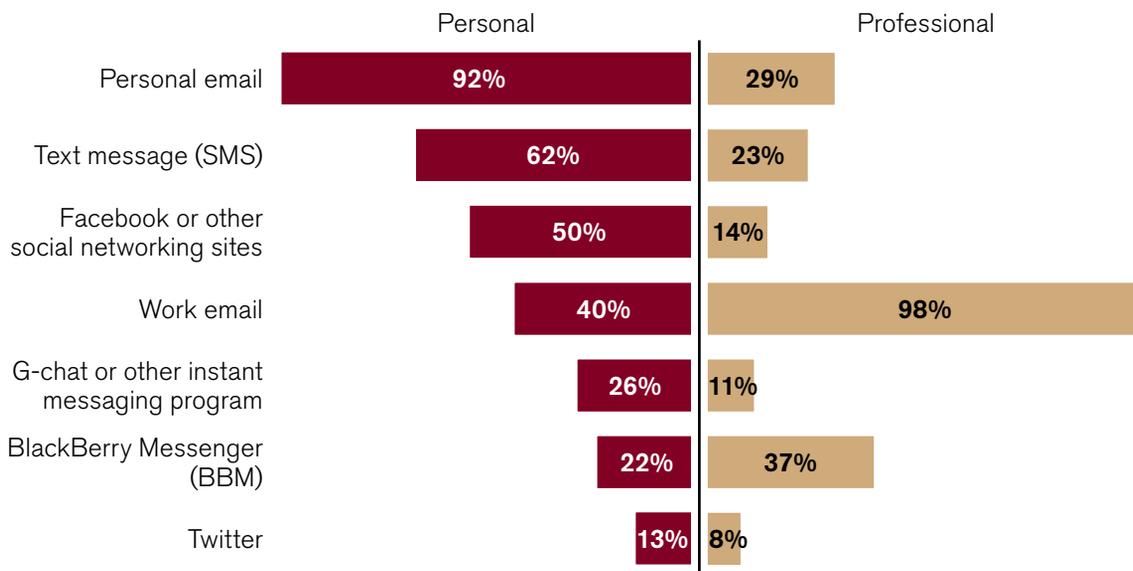
While newer communication tools are predominantly used for personal purposes, Washington has begun to find professional utility in these digital innovations. Just as personal email is used for sending and receiving work messages, Washington Insiders are increasingly texting, “Facebooking” or “G-chatting” with colleagues and other professional contacts to stay connected and in-the-know about work-related news and information.

## CLARK KENT, MEET SUPERMAN

### Tools Traditionally Used for Personal Communication Now Part of Professional Arsenal

#### Purposes for Using Digital Tools

percentage of respondents



## THE TOOLS THAT SAVE THE (WORK)DAY

“BlackBerry Messenger is huge. When I first got my BlackBerry it was only being used in case of emergencies by my office, but it has exploded and now everyone has it. People use it when they don’t want things to be on email.”

– House Legislative Correspondent

“I only use social networking sites for professional purposes. LinkedIn has a measure of privacy which other social networking sites do not have. I can look up contact information for other DC professionals and quickly reach them on critical issues.”

– House Legislative Fellow

“While I usually use personal email for personal matters and work email for professional matters, there is some overlap. Barriers are getting more fluid. Sometimes work items (e.g., an article in daily news report) may be more suitable for personal use or I want to forward it to a friend so I’ll send it to my personal account. I have work links on Twitter and Facebook as well as personal.”

– Federal Senior Executive

The calendar of a typical Capitol Hill staffer does not always reflect a “real” day on the Hill. As the ultimate media multitasker, a staffer fills almost every spare minute with news media. Attention bounces from mobile news alerts to cable news, from inside-the-Beltway publications to national news sites. Mobile devices, new digital communications tools, and friends and colleagues help to manage the overwhelming volume of news and information.

## A TYPICAL DAY ON CAPITOL HILL: What Looks Like a Busy Day...

### ON THE MOVE ALL DAY

“I need to know what’s happening in brief, to-the-minute, and continuously.”  
– *House Communications Director*

“I begin getting news on my BlackBerry first thing in the morning, from the minute I take it off silent mode.”  
– *Senate Committee Senior Policy Advisor*

“I’m attached to my BlackBerry all the time. It allows me to work longer hours. I work from home by checking emails on my BlackBerry and respond to emails until about 11 p.m.”  
– *House Chief of Staff*

“My BlackBerry is invaluable in meetings and hearings, because it allows me to multitask during long sessions away from my computer.”  
– *House Legislative Fellow*

“I never turn off my BlackBerry. It’s always close to me in case my boss needs something or sends me an email.”  
– *House Legislative Assistant*

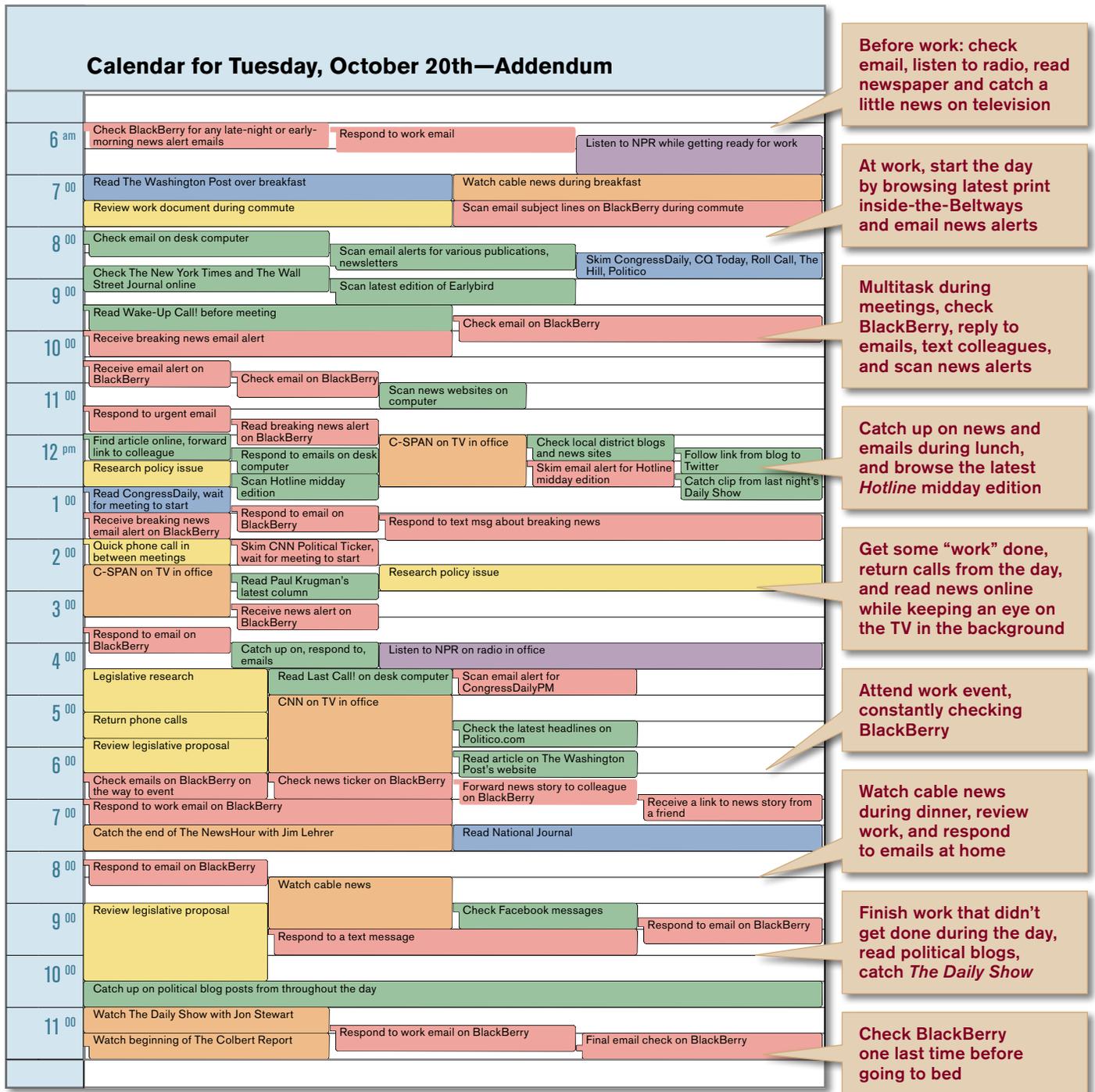
- Scheduled task/meeting
- News/email on a mobile device
- News on a computer
- News in print
- News on television
- News on the radio
- Non-media activity

Calendar for Tuesday, October 20th	
6 <sup>am</sup>	
7 <sup>00</sup>	
8 <sup>00</sup>	
9 <sup>00</sup>	Prep for Briefing Member Briefing
10 <sup>00</sup>	Attend meeting with Member Meet with constituents
11 <sup>00</sup>	Conference call with interest group Attend meeting with Member
12 <sup>pm</sup>	
1 <sup>00</sup>	Meet with committee staffers
2 <sup>00</sup>	Meet with lobbyist
3 <sup>00</sup>	Staff Meeting Meet with constituents
4 <sup>00</sup>	
5 <sup>00</sup>	
6 <sup>00</sup>	Attend work event
7 <sup>00</sup>	
8 <sup>00</sup>	
9 <sup>00</sup>	
10 <sup>00</sup>	
11 <sup>00</sup>	

Not one media platform is neglected by the Capitol Hill staffer. The day starts with a BlackBerry buzzing and NPR playing. Inside-the-Beltway publications are referenced throughout the day, while cable news plays in the background. Lunch is time to catch up on news or favorite blogs and watch a clip from last night's *Daily Show*. In between—and even during—meetings, the BlackBerry is an ever-present source of media. It's just another typical day in the life of a Hill staffer.

# ALL IN A DAY'S WORK

## ...Is Just the Tip of the Iceberg





**PART II:**  
**WASHINGTON INSIDERS’**  
**MEDIA CONSUMPTION**

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- ∞ Reading: Best of Both Worlds
- ∞ Watching: As It Happens
- ∞ Listening: Situation-Dependent

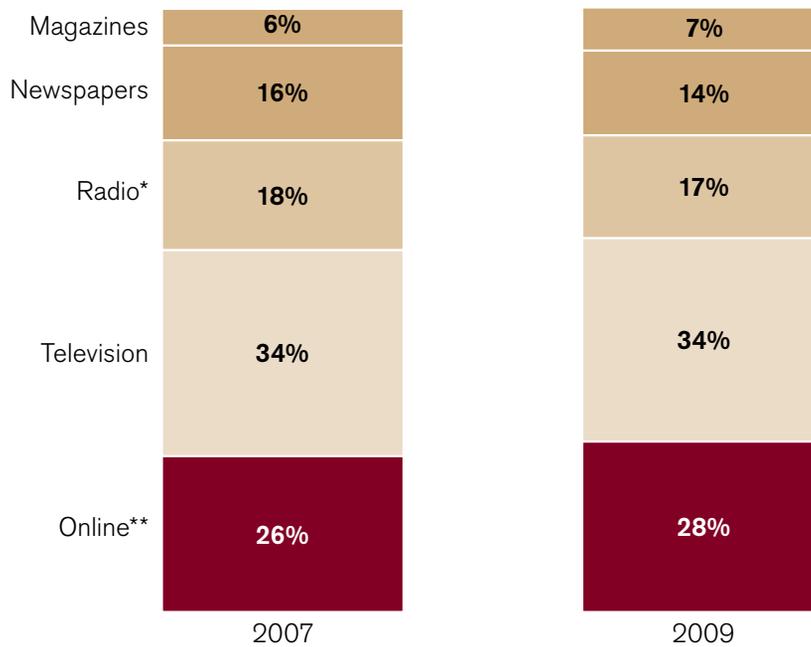
Washington Insiders allocate their time across different news-media platforms in much the same way they did two years ago. Given national trends, it is not particularly surprising that online gained slightly at the expense of newspapers and radio. Yet, it is surprising that online, with so many digital alternatives, hasn't absorbed a much larger share of media time. Traditional platforms (print, radio, television) collectively continue to absorb the bulk of people's news-media time in Washington.

## ALL IN THE MIX

### Washington Insiders Have Maintained a Steady Allocation of Time Across News-Media Platforms

#### The Average Washington Insider's Daily News-Media Consumption

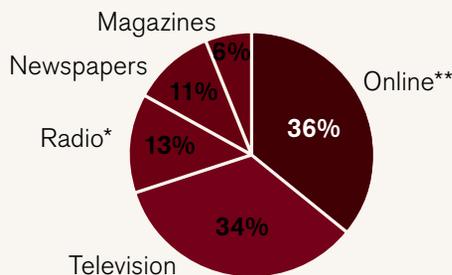
share of average total news-media consumption



## THE ONLINE AGE GAP

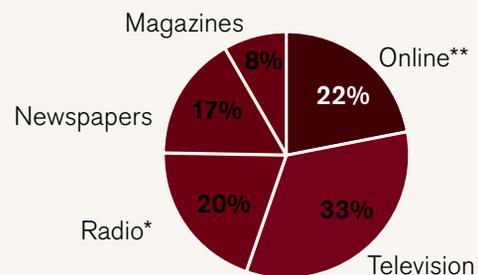
#### News-Media Consumption, Ages 45 and Younger

share of average total news-media consumption, n=352



#### News-Media Consumption, Ages 46 and Older

share of average total news-media consumption, n=534



\*Unless otherwise noted, "radio" refers to content listened to using traditional or satellite radio.

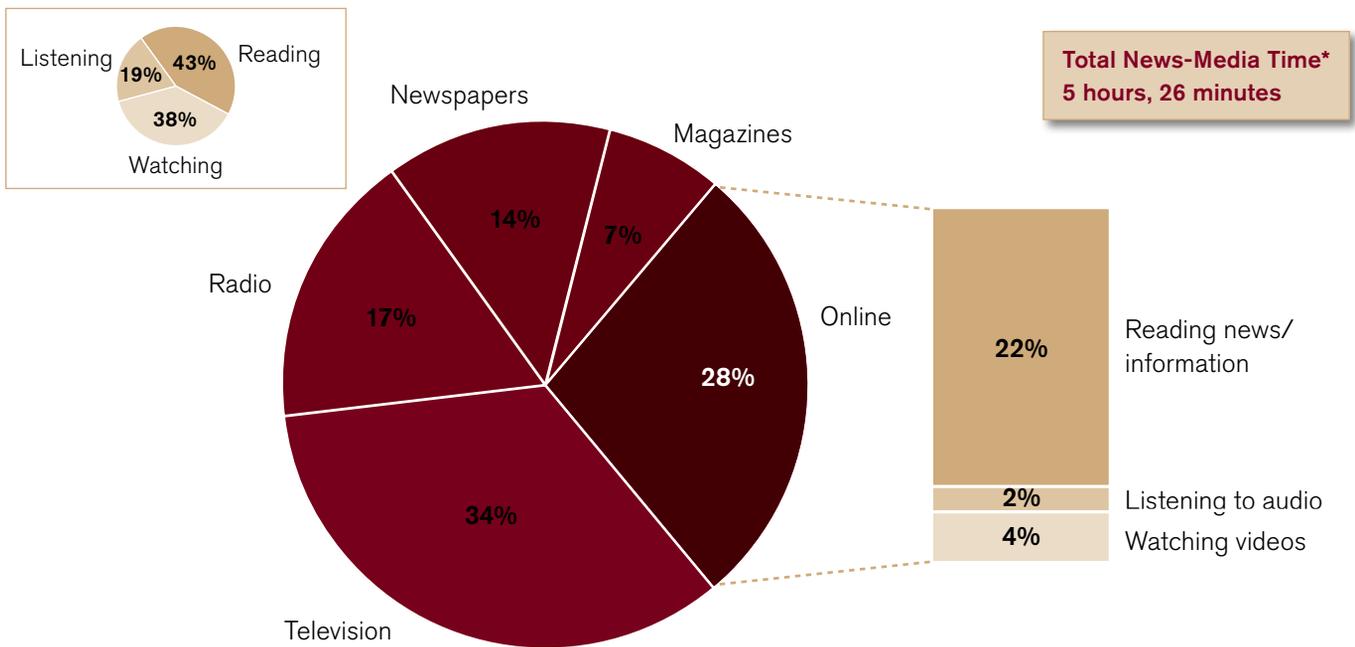
\*\*Unless otherwise noted, "online" includes browsing on a computer or mobile device.

On average, Washington Insiders spend nearly five and a half hours per day with news media; the majority of that time is spent online or watching television. By activity, 43 percent of their time is spent reading news, 38 percent watching news, and 17 percent is spent listening to news. As with the national audience, Washington Insider’s time spent on media is complicated by their habit of “media multi-tasking” (i.e., simultaneously reading, watching, or listening to news).

## DAILY NEWS SOURCES

Washington Insiders Spend Almost as Much Time Reading News in Print as Online

**The Average Washington Insider’s Daily News-Media Consumption**  
share of average total news-media consumption



## MEDIA MULTI-TASKING: A NATIONAL PHENOMENON\*\*

The busy Washington Insider does not always have the time to devote his or her attention solely to one media platform or another. As one federal executive explained about her time consuming news media across various platforms, “some of this involves multi-tasking, i.e., simultaneous radio or TV with print or online news.”

Research on national audiences indicates that media multi-tasking is widespread.

**Out-of-Home**

- 62% of Internet use is done while simultaneously working
- 46% of TV viewing is done while simultaneously working or interacting with others

**At Home**

- 19% of magazine reading is done while watching TV
- 15% of newspaper reading is done while watching TV
- 17% of Internet use is done while watching TV

\* Because of variations in the way the questions were asked, we are not comparing total news-media time spent in 2009 with that of 2007.

\*\* National data from MRI’s 2008 MediaDay Study, September 2008.

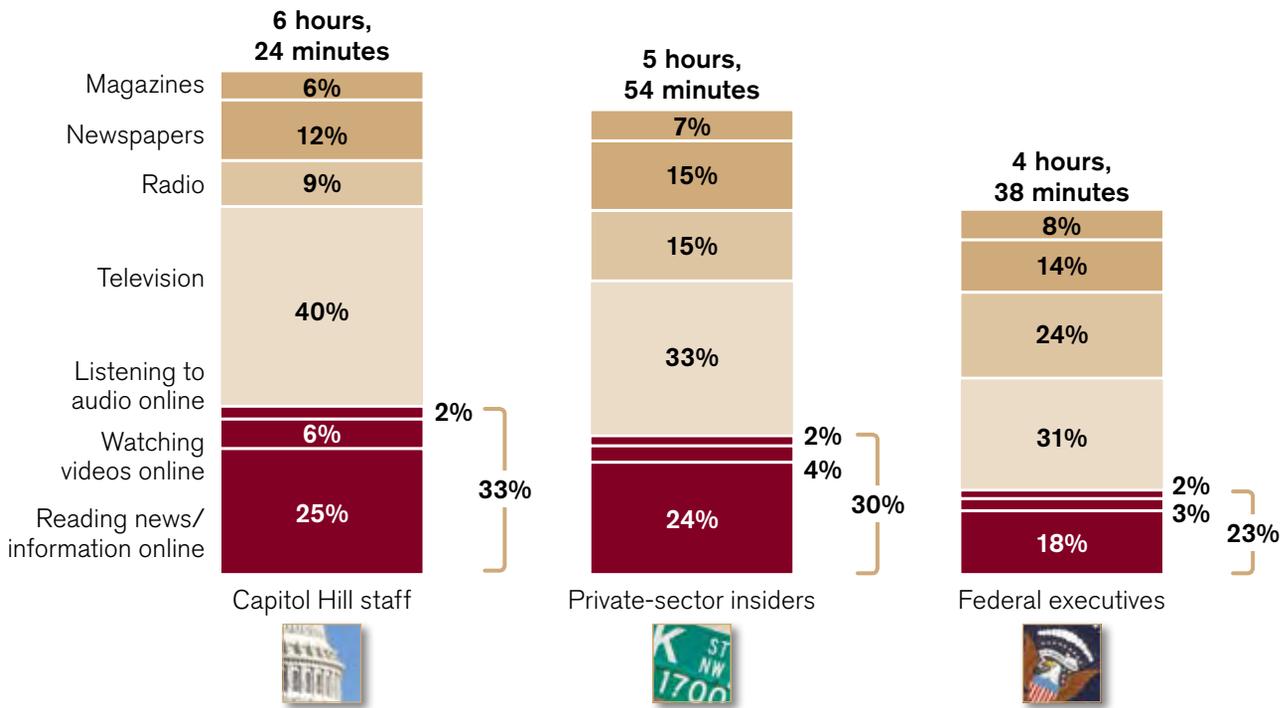
Capitol Hill staff have the biggest appetite for television and online media, as well as for news media overall. Across a typical workday, they consume nearly six and a half hours of news media—half an hour more than private-sector insiders and one hour and forty-five minutes more than federal executives. This media saturation has a price: almost one-third of Capitol Hill staff and private-sector insiders say they are overwhelmed by the proliferation of media content, sources, and platforms.

## STAYING INFORMED

### Capitol Hill Staff Consume the Most News Media in Washington

#### Average Daily News-Media Consumption by Platform

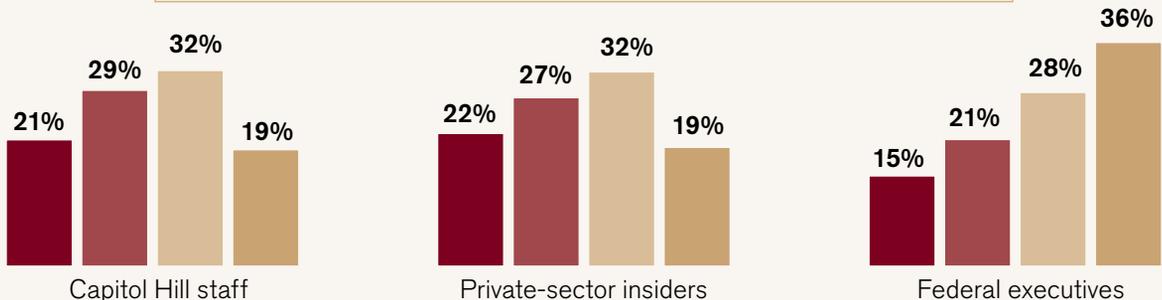
time per day, share of average total news-media consumption



## HANGING IN THERE

#### Reaction to Proliferation of Media Content, Sources, and Platforms

percentage of respondents

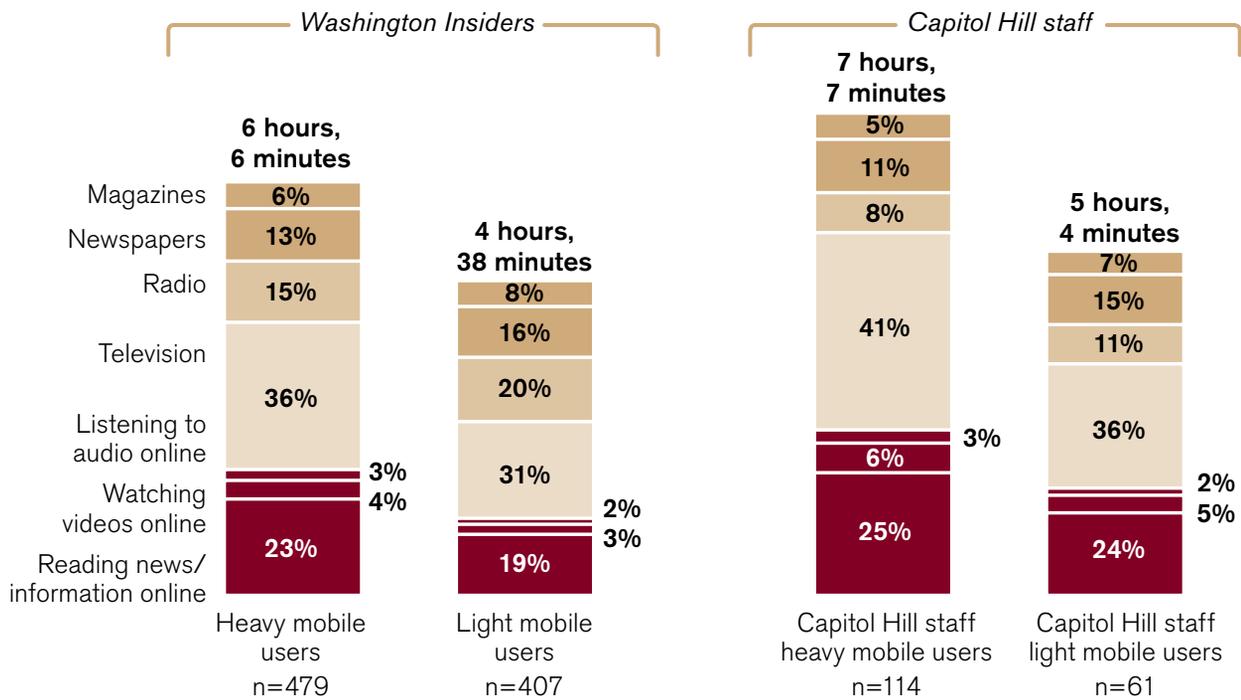


“Heavy” mobile users are those who frequently receive news email alerts, read news and information through a mobile browser, or use a search engine on their mobile device at least several times a day. On average, heavy mobile users spend nearly an hour and a half more than “light” mobile users consuming news media each day. On Capitol Hill, the difference is even more dramatic: heavy mobile users spend two more hours with news media each day than do light users.

## THE MOBILE CONNECTION

### Heavy Mobile Users Spend More Time Consuming News, Especially on Capitol Hill

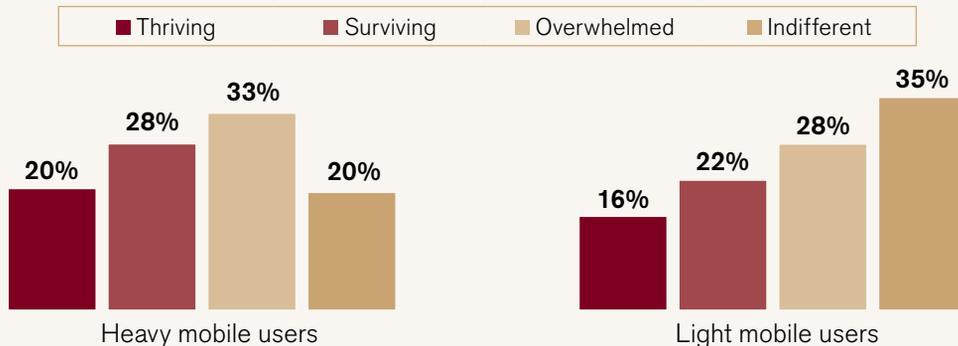
**Average Daily News-Media Consumption by Mobile Usage\***  
time per day, share of average total news-media consumption



## A BLESSING OR A CURSE?

**Reaction to Proliferation of Media Content, Sources, and Platforms by Mobile Usage**

percentage of respondents



\* Heavy mobile users are those who get news email alerts, read news and information through a browser or application, or use a search engine on their mobile device at least several times a day.

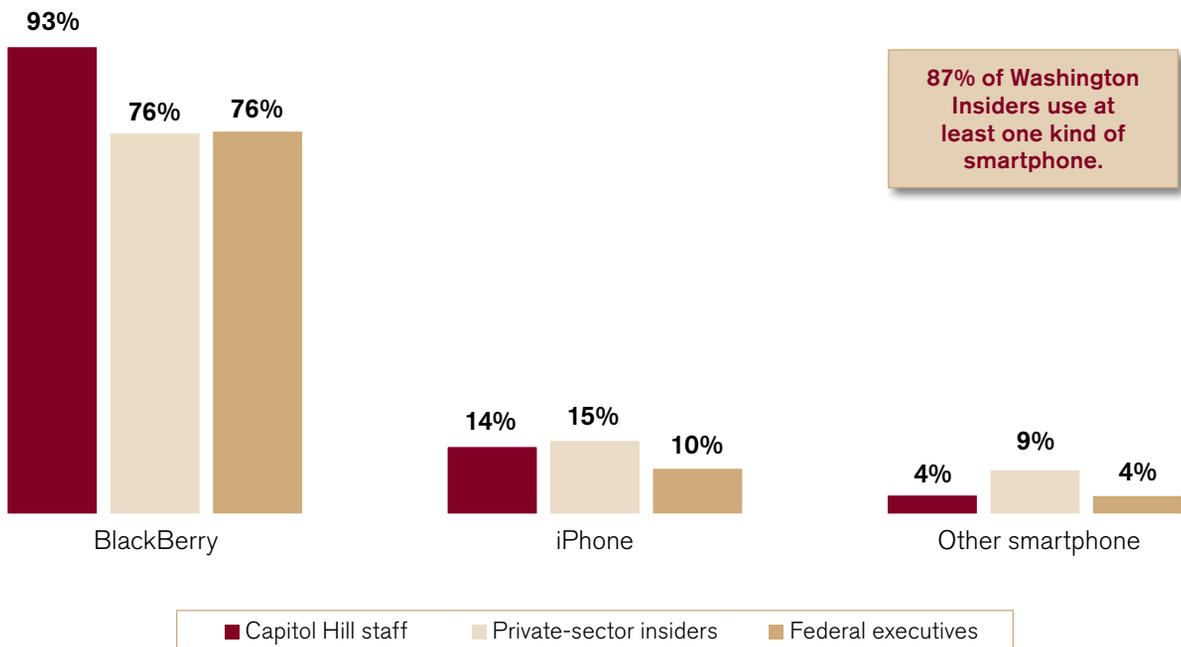
Mobile data devices are a standard part of the Washington Insider's toolkit. Work-issued BlackBerry smartphones dominate both on and off Capitol Hill, but other smartphones are making inroads, particularly among those who carry two or more mobile devices. In an attempt to separate the personal from the professional, a significant portion of respondents use a second smartphone or cell phone in addition to their primary device.

## DEARLY BELOVED

### BlackBerry Dominates Washington Smartphone Market; Most Have at Least One Mobile Data Device

#### Possession of Mobile Devices

percentage of respondents



## CAN'T GET ENOUGH

#### Possession of Mobile Devices

average number of devices\*



\* Devices include BlackBerry smartphones, iPhones, other smartphones, and cell phones. They do not include Kindles, e-readers, or netbooks.

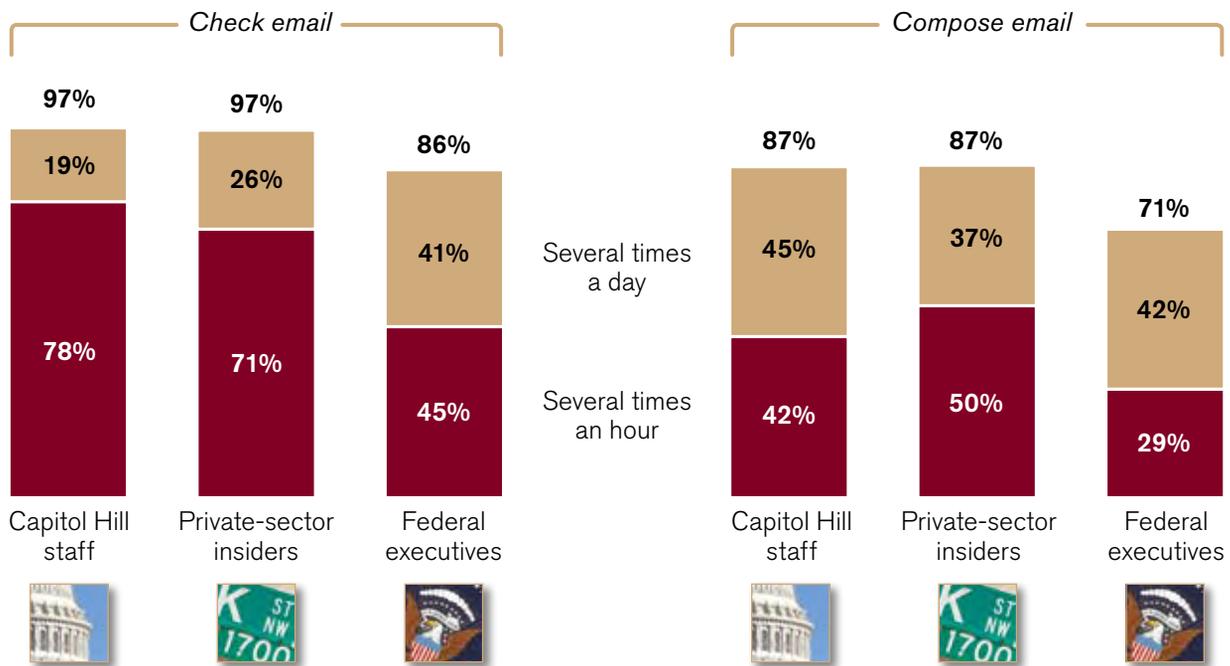
Mobile data devices, particularly the ever-present BlackBerry, were designed for reading email, and this remains by far the most frequently-used functionality. Most respondents cannot resist the buzz: three-quarters of private-sector insiders and Capitol Hill staff check their inboxes multiple times an hour. Writing emails on a mobile device takes nimble fingers and careful attention, yet nearly all Washington Insiders squeeze in at least a few mobile emails during the day.

## DIGITAL ADDICTION

### Washington Insiders Can't Put Down Mobile Email; Most Check Their Inbox Every Hour

#### Usage of Mobile Email

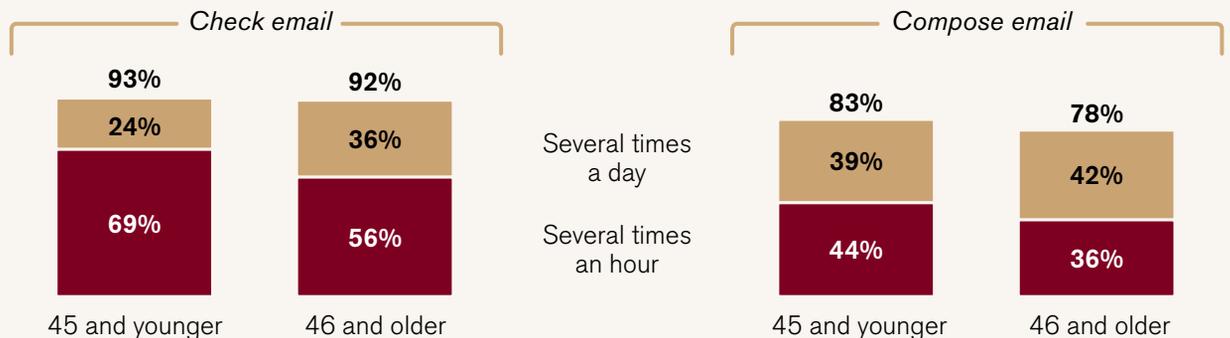
percentage of respondents with smartphone(s), n=792



### AGE DOESN'T MATTER... MUCH

#### Usage of Mobile Email

percentage of respondents with smartphone(s)



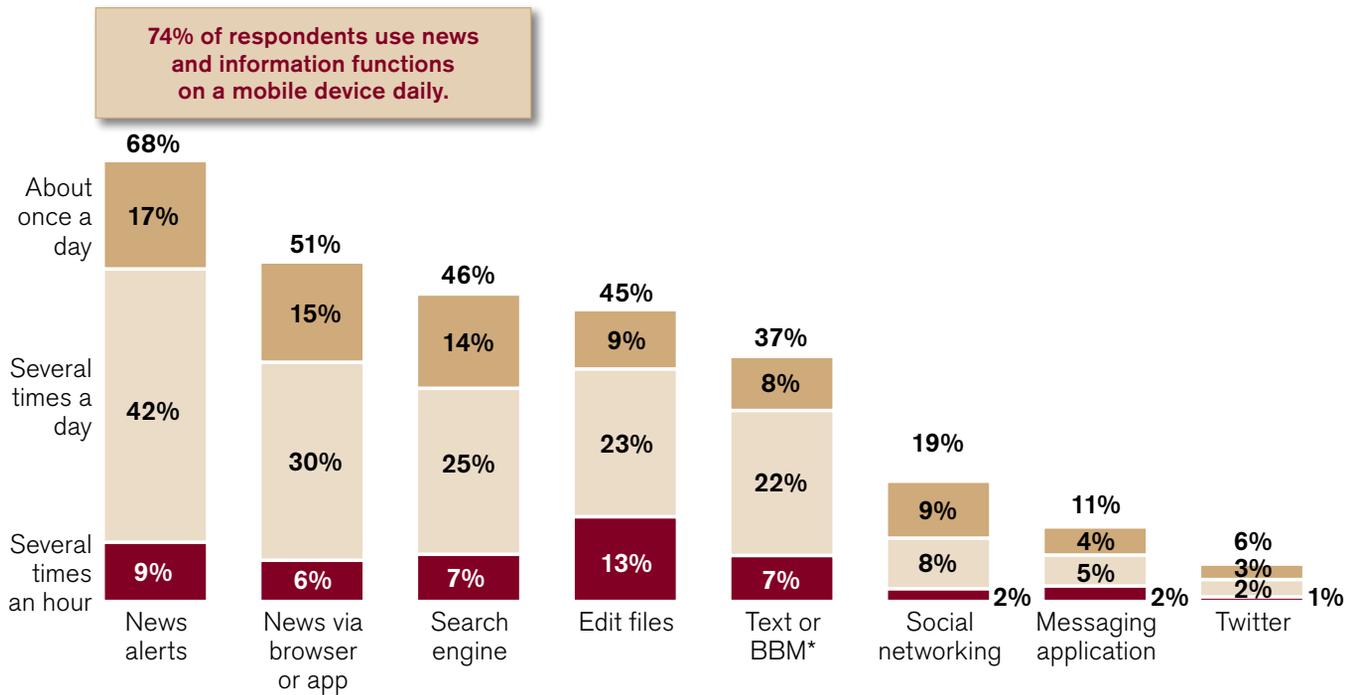
Washington Insiders are now often performing tasks in addition to email on their mobile devices. Over half get news on a mobile device at least daily in the form of news alerts, websites visited through a browser, or news applications. Many in Washington—private-sector insiders in particular—frequently edit files using mobile devices.

## NOT JUST FOR EMAIL ANYMORE

From Web Surfing to File Editing, Mobile Devices Live Up to Their Potential

### Usage of Functions and Applications on Mobile Devices

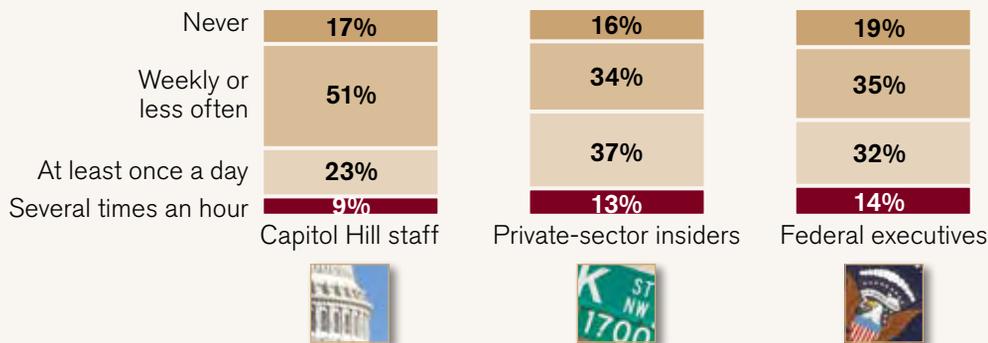
percentage of respondents with smartphone(s)



## TRAVELING DESKTOP FOR SOME

### File Editing on Mobile Device

percentage of respondents with smartphone(s)



\* BlackBerry Messenger

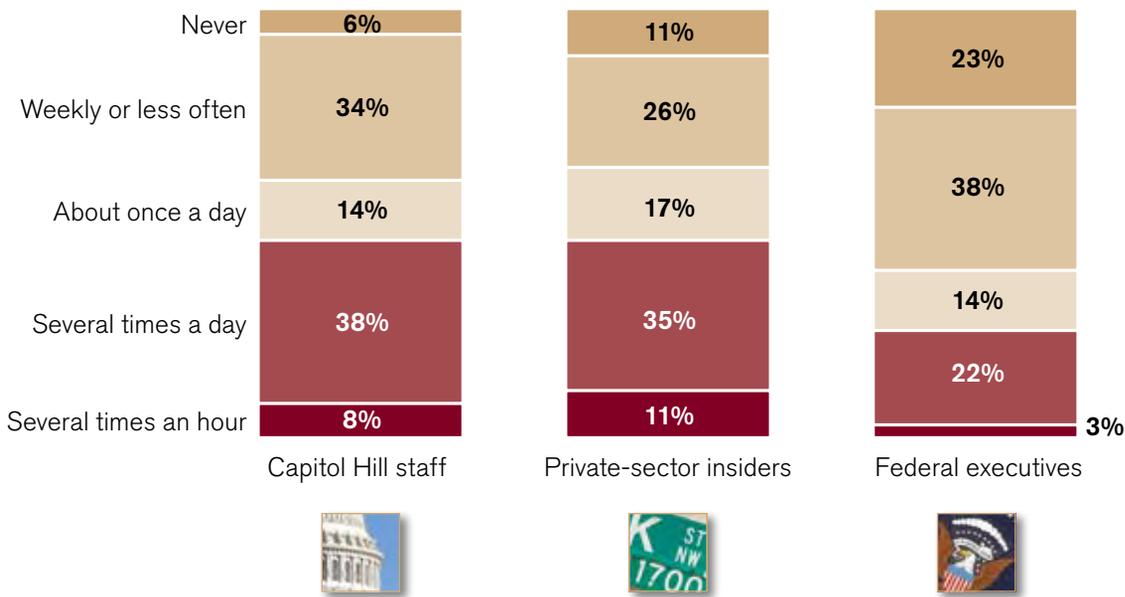
News is the staple of the Washington Insider’s day, and mobile devices allow many to stay constantly on top of developments. Capitol Hill staff and private-sector insiders use mobile devices for news applications more frequently than do federal executives, though a majority of respondents use news applications at least occasionally. Even among those describing themselves as tech novices or technophobes, 38 percent use mobile devices for news at least daily.

## NEWS...IN A NEW WAY

### Mobile Devices Essential for News and Information On the Go

#### Usage of Mobile Devices for News\*

percentage of respondents with smartphone(s)



## NOT SO SCARED

#### Usage of Mobile Devices for News\* by Tech Savviness

percentage of respondents with smartphone(s)



\* News accessed through a browser or application on a mobile device.

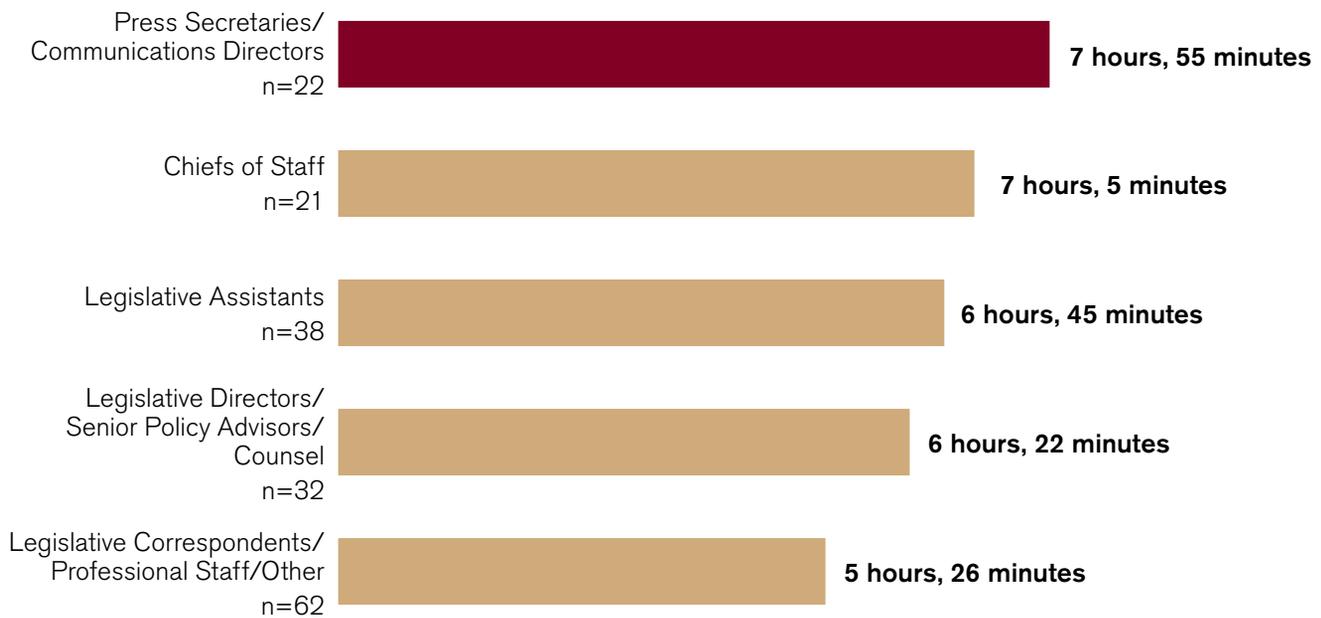
Capitol Hill staff are almost always tuned in to various types of news media as they multitask their workload and news consumption. On a typical day, Press Secretaries and Communications Directors read, watch, and listen to nearly eight hours of news, and Chiefs of Staff are not far behind. Those who feel that the increase in available news sources has actually made their job more difficult, on average, spend almost an hour longer consuming news media each day than their colleagues who feel it has made their job easier.



## ABOVE AND BEYOND

### Press Secretaries and Communications Directors Spend a Full Workday On News-Gathering

**Average Daily News-Media Consumption by Capitol Hill Position**  
time per day



## INFORMATION OVERLOAD



**Average Daily News-Media Consumption by Impact of Proliferation of News Sources**  
time per day among Capitol Hill respondents



Capitol Hill staff read, watch, and listen to a tremendous amount of news each day. When it comes to watching and listening, they prefer to use traditional platforms (e.g., television and radio), but when it comes to reading, Capitol Hill staff read more news and information online than in print newspapers or magazines. More than half of Capitol Hill staff view the Internet as a source for breaking news, but even more—nearly three-quarters—consider it to be one of their top sources for analysis.

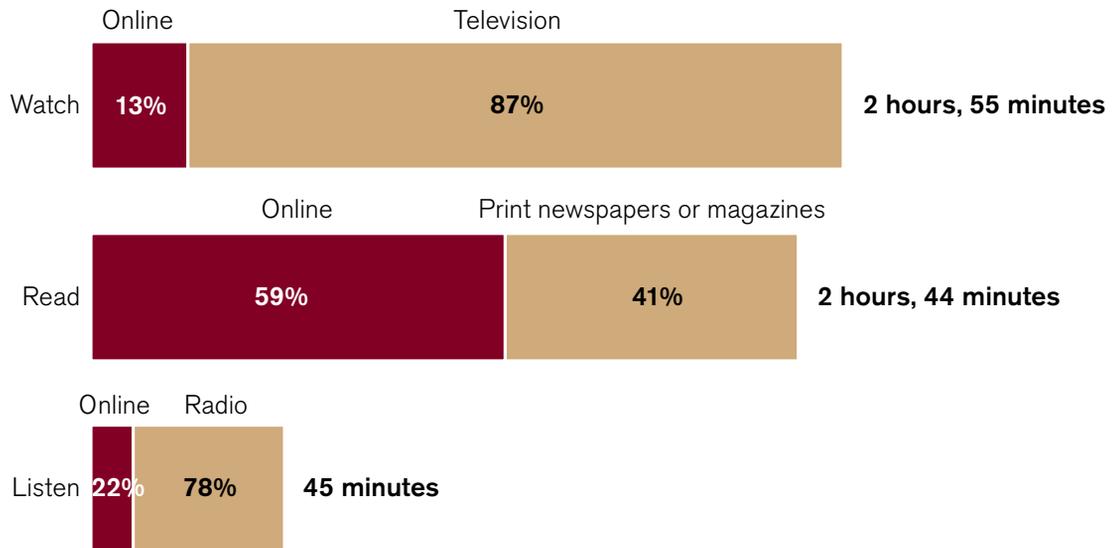


## WATCH, READ, LISTEN

### Capitol Hill Staff Prefer to Watch or Read Their News Content

#### Average Daily News-Media Consumption by Method on Capitol Hill

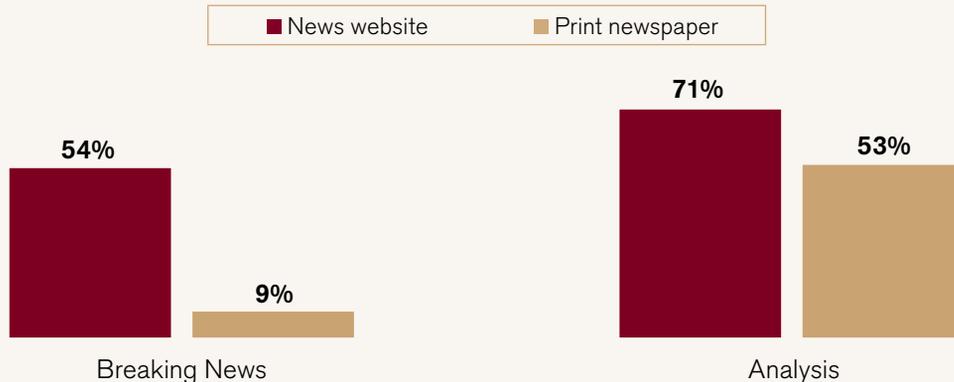
time per day, share of total average news-media consumption by method



## READING ONLINE VS. PRINT

#### Top Sources for Reading Breaking News and Analysis

percentage of Capitol Hill respondents\*



\* Respondents were asked to select up to four top sources for both breaking news and analysis.

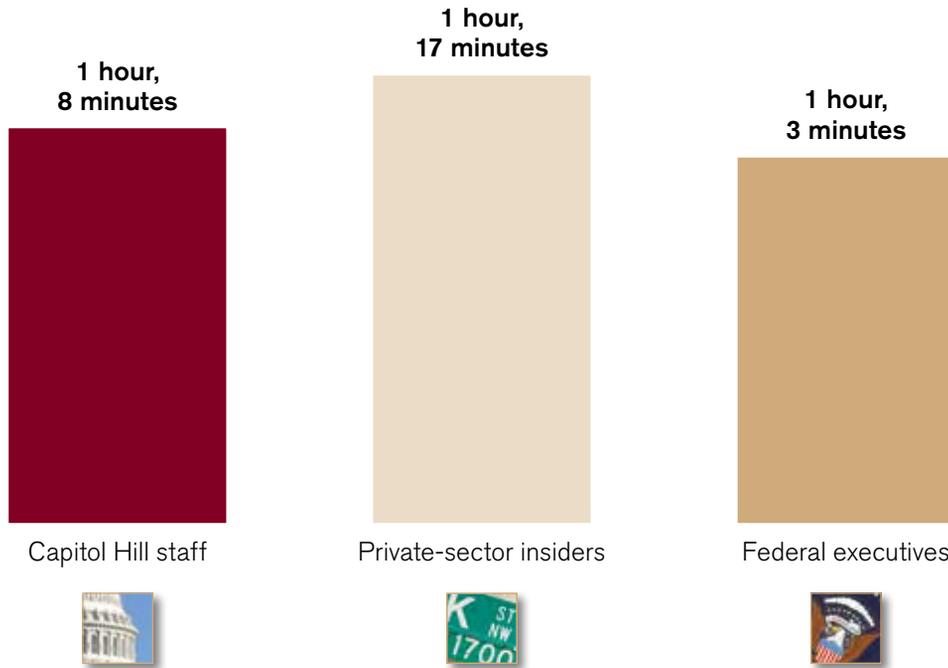
Reading news and information, whether online or in print, occupies the largest share of time spent with news media. Amid the proliferation of online news, print newspapers and magazines remain an important source of news among Washington Insiders. Print—the original mobile medium—offers convenience and enjoyment, particularly for reading long-form, in-depth analysis.

## TURNING THE PAGE...

### Washington Insiders Spend More Than One Hour Reading Print Newspapers and Magazines Daily

#### Average Time Spent Reading Print News Content

time per day



## LOYAL TO THE PRINTED PRESS

“Computer screens are not good for reading long, in-depth analysis. Print is much better.”

– House New Media Director

“There is nothing better than sitting down with an in-depth analysis or profile written in a good magazine like *National Journal*, *The New Yorker*, *Vanity Fair*, even *Time* or *Newsweek*. Don’t often have time to do it, but I love it when I do. Magazines are portable. They can go anywhere. Love them.”

– House Leadership Staff

“The act of actually sitting down with a paper or magazine is just as relaxing as it is informative.”

– Lobbyist

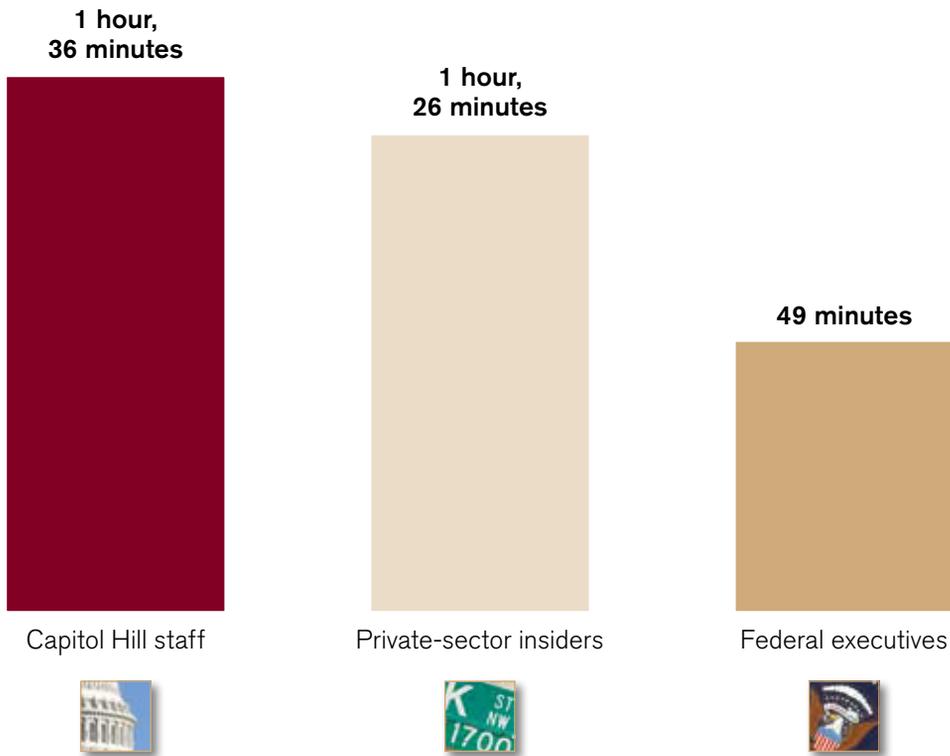
When it comes to reading news, Capitol Hill staff and private-sector insiders spend slightly more time on-line than off. Across all Insiders, watching video and listening to audio are a small but not insignificant share of time spent online. The largest consumers of online news, Capitol Hill staff, spend more than two hours reading, watching, and listening to news on the Internet every day.

## ...OR CLICKING THE MOUSE

Most Spend Slightly More Time Reading News Content Online

### Average Time Spent Reading News Content Online

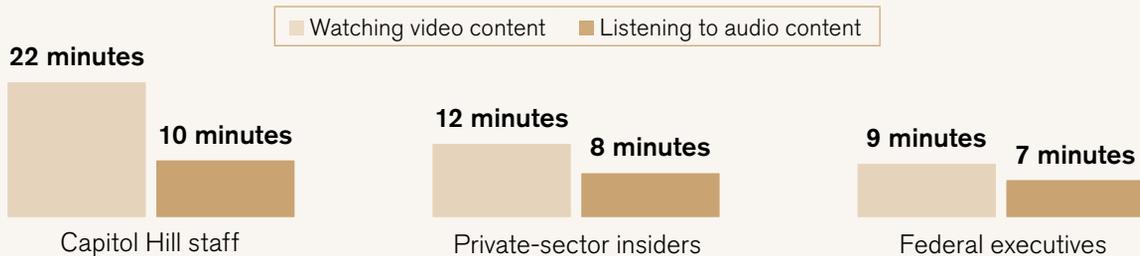
time per day



## OTHER ACTIVITY ONLINE

### Average Time Spent Watching and Listening to News Content Online

time per day



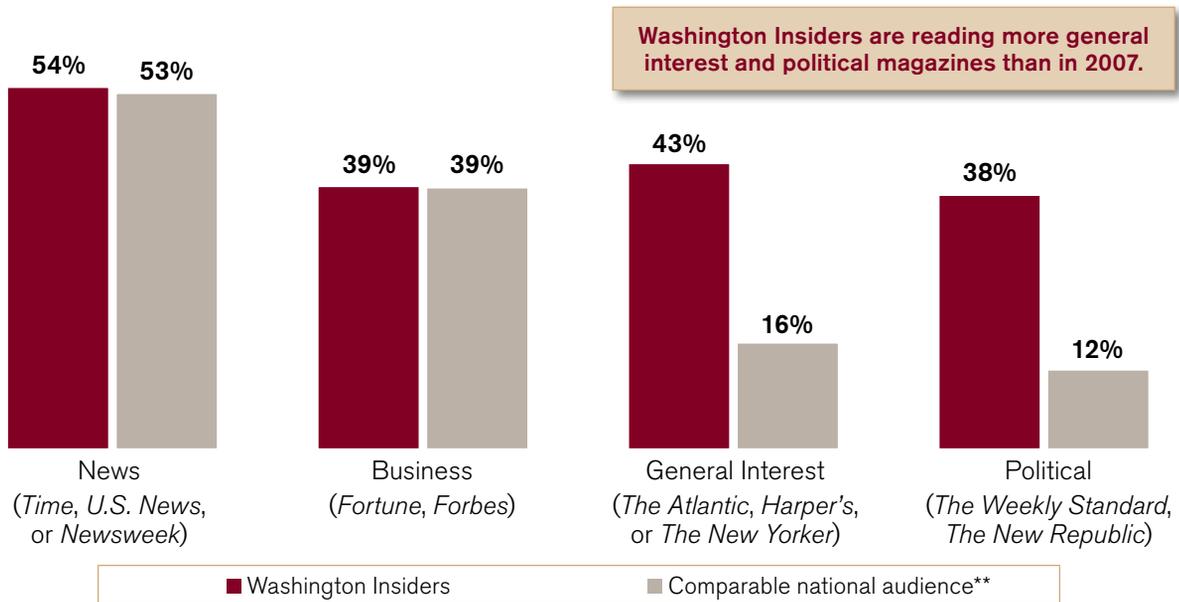
Washington Insiders are still reading news, business, general interest, and political magazines as often as they did in 2007. Meanwhile, magazine readership for the national audience as a whole has dipped in all publication categories except business. The inside-the-Beltway crowd stands out from the national audience in its readership of general interest magazines such as *The Atlantic*, *Harper's*, and *The New Yorker*, and political magazines such as *The Weekly Standard* and *The New Republic*.

## CATEGORIES CAPTURING CAPITAL CITY

### The Reading Gap Widens Between Washington Insiders and the General Population

#### Magazine Reading Habits

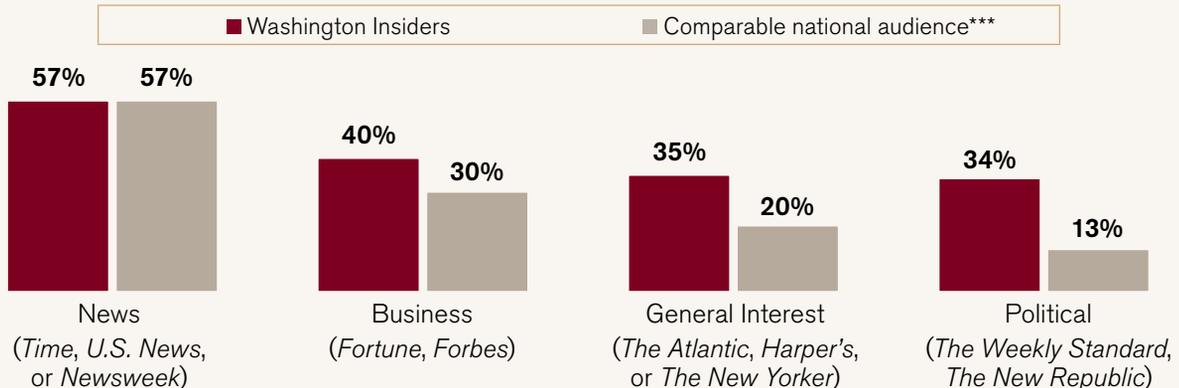
percentage of respondents who read frequently\*



## TURNING BACK THE CLOCK

#### Magazine Reading Habits in 2007

percentage of respondents who read frequently\*



\* "Frequently" defined as respondents who chose "regularly" or "sometimes."

\*\* Comparable national audience from Pew Research Center's *Biennial Media Consumption Survey 2008*.

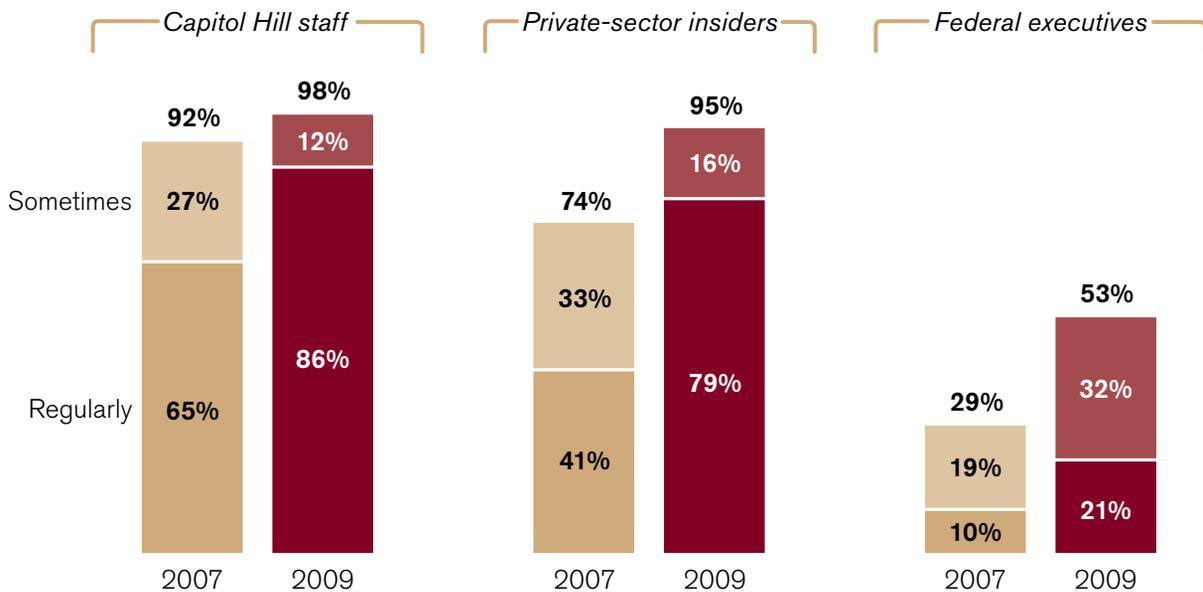
\*\*\* Comparable national audience from Pew Research Center's *Biennial Media Consumption Survey 2006*.

Washington Insiders increasingly view inside-the Beltway periodicals as must-reads. Nearly all Hill staffers and private-sector insiders read these types of publications frequently. Since 2007, regular readership of these publications has increased by 21 percentage points for Capitol Hill staff and has nearly doubled for private-sector insiders and federal executives. Within the category, *National Journal* and *CongressDaily* are considered to be among the most “objective” and “credible” on Capitol Hill.

## BOOM IN THE BELTWAY

### Washington Insiders More Dedicated to Reading Inside-the-Beltways than Before

**Readership Frequency of Inside-the-Beltway Publications**  
percentage of respondents who read frequently\*



## BEST IN SHOW



**Characteristics of Inside-the-Beltway Publications**  
percentage of Capitol Hill respondents

### “Objective”

- 1st **National Journal** . . . . 77%
- 2nd **CQ Today** . . . . . 76%
- 3rd **CongressDaily** . . . . . 71%
- 4th **CQ Weekly** . . . . . 64%
- 5th **Roll Call** . . . . . 49%
- 6th **Politico** . . . . . 32%
- 7th **The Hill** . . . . . 31%

### “Credible”

- 1st **National Journal** . . . . 76%
- 2nd **CongressDaily** . . . . . 71%
- 3rd **CQ Today** . . . . . 70%
- 4th **CQ Weekly** . . . . . 67%
- 5th **Roll Call** . . . . . 60%
- 6th **Politico** . . . . . 54%
- 7th **The Hill** . . . . . 42%

\* “Frequently” defined as respondents who chose “regularly” or “sometimes.”

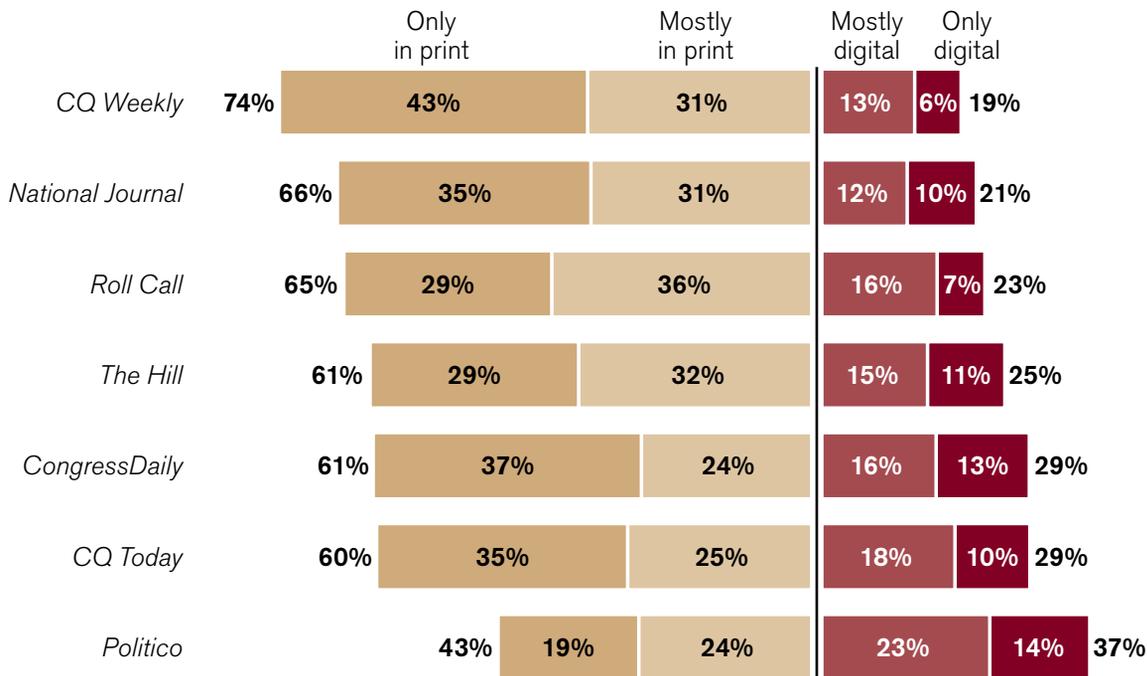
Across most inside-the Beltway publications, Capitol Hill readers have a pretty strong preference for reading in print. Although many still consume these publications through a mix of digital and print platforms, in general, Capitol Hill staff are taking a stronger stance toward print than they did in 2007. Two years ago, only twelve percent of Capitol Hill staffers reported reading inside-the-Beltway publications exclusively in print. Today, greater percentages favor reading these publications only in print.



## PICKING SIDES

### Among Capitol Hill Staff, Preference for Print is Strong for Inside-the-Beltway Publications

**Platform Preference for Reading Inside-the-Beltway Publications**  
percentage of Capitol Hill respondents



## THE HOME TEAM ADVANTAGE

“News magazines from outside the Beltway are essentially useless for anyone deeply involved with policy and politics. Inside-the-Beltway publications are more analytical, have a deeper grasp of the issues, and are generally better written.”

– House Senior Policy Advisor

“National Journal and CongressDaily are more immediate and include useful preliminary info that other inside-the-Beltways wait on.”

– President of an independent lobbying firm

“I’m a National Journal guy. It’s my homepage on my explorer browser and I read it first thing every morning. I print Earlybird, CongressDaily AM/PM, and then Hotline at lunch.”

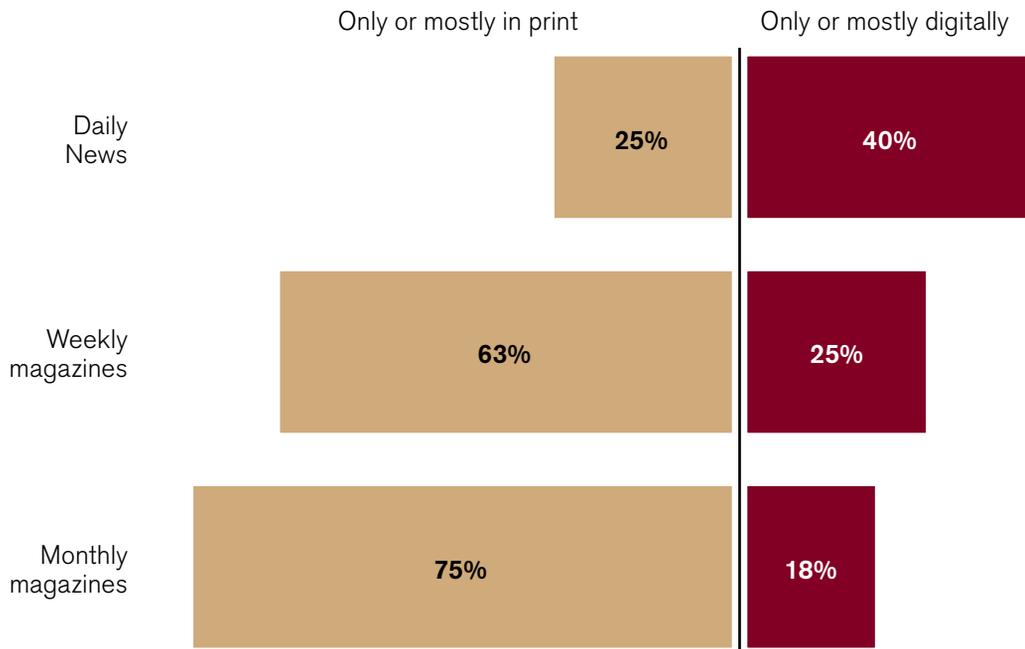
– Lobbyist

Washington Insiders continue to read their weekly and monthly magazine content primarily in print, regardless of their comfort with technology. After looking at various screens throughout the day (computer, television, or mobile device), many in Washington welcome the opportunity to read something on paper. Kicking back with their favorite publications can provide a sort of escape from the continual workday that encompasses much of Washington life.

## PUT IT ON PAPER

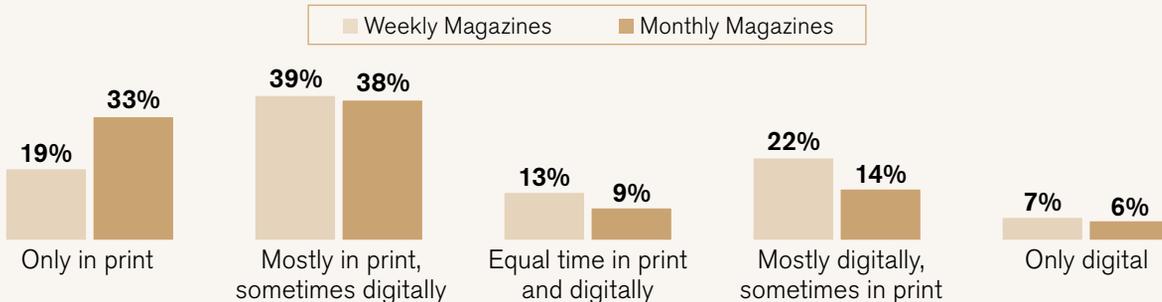
### Low-Frequency Content Finds Its Place: Weekly and Monthly Magazines Preferred in Print

**Platform Preference for Reading News by Frequency of Publication**  
percentage of respondents



## TECHNOLOGICAL ADVANTAGE

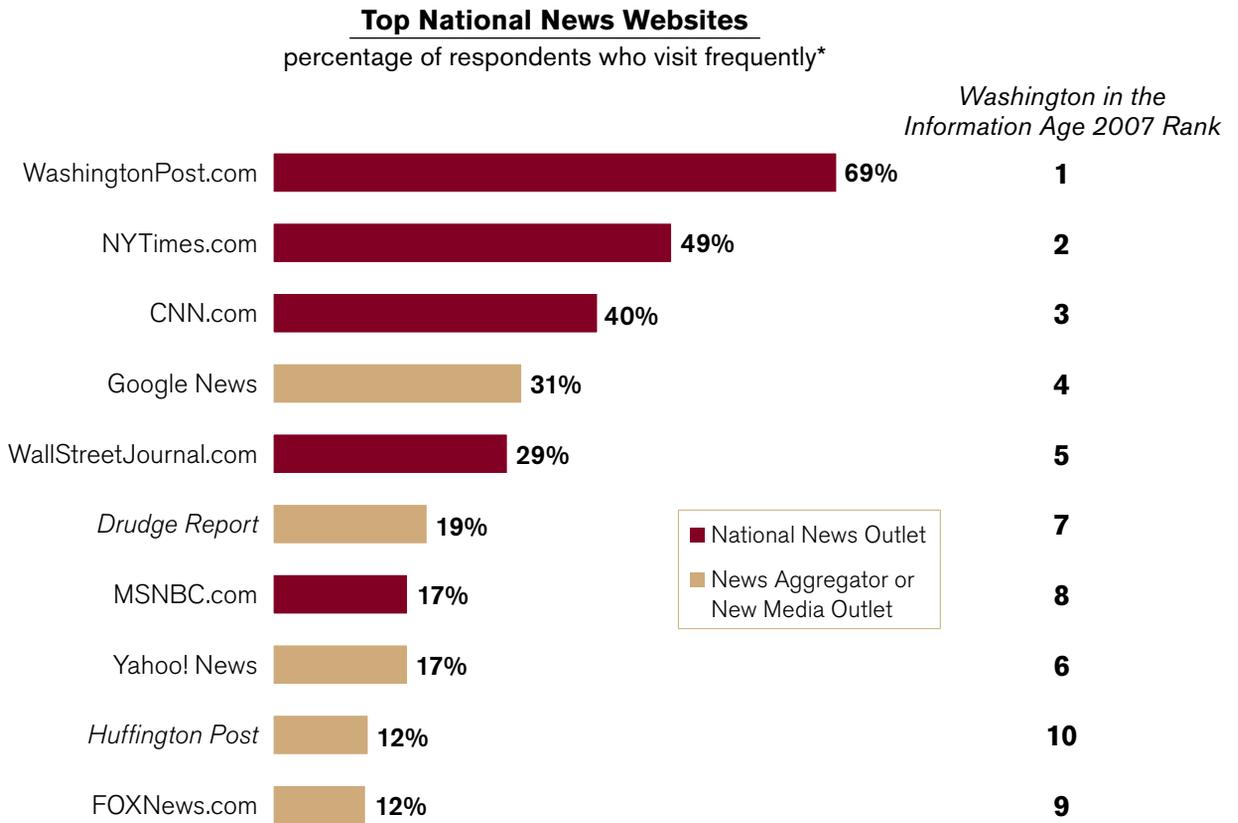
**Platform Preference for Reading News Magazines**  
percentage of tech expert and tech savvy respondents, n=658



Washington Insiders use websites to get much of their daily news and analysis. *The Washington Post* is by far the most popular online destination. National news outlets also publish six out of the top ten most-visited sites. As in 2007, *Drudge Report* and *Huffington Post* are the two most frequently checked “new media” news sites.

## WASHINGTON'S MOST WANTED

Washington Insiders Continue to Rely on the Same News Websites, Despite Competition From New Sources



### HONORABLE MENTION

**\* Respondents were asked to select up to five websites they visit most frequently from a list of 26 national websites and blogs.**

**Percentage of Respondents Visiting Other Websites Listed:**

*Bloomberg* (8%), *The Economist* (8%), *National Review* (6%), *The Atlantic* (5%), *Talking Points Memo* (5%), *Reuters* (4%), *Time* (4%), *The Daily Beast* (4%), *Foreign Policy* (4%), *Daily Kos* (2%), *Think Progress* (2%), *The Weekly Standard* (2%), *Wonkette* (2%), *Human Events* (1%), *RedState* (1%), *Townhall* (1%).

**Popular Write-in Responses:**

*RealClearPolitics*, *BBC*, *Slate.com*, *WTOP.com*, *Financial Times*, *USA Today*, *The Washington Times*.

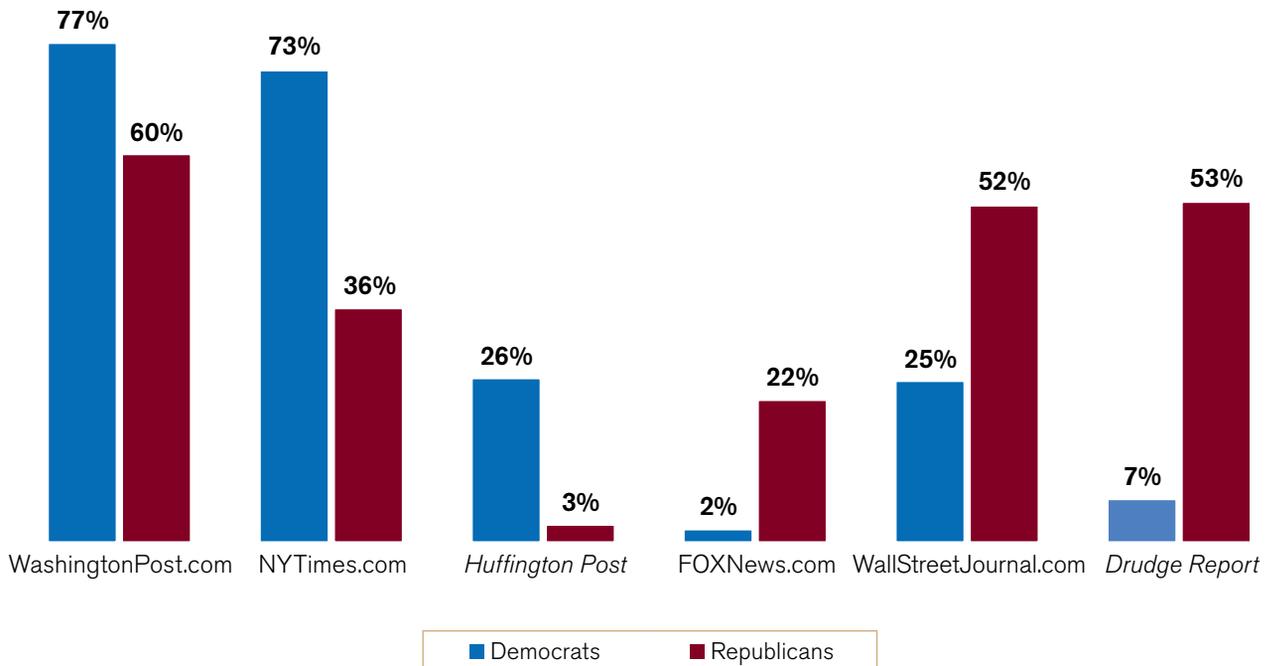
While both Republicans and Democrats regularly check *The Washington Post* and Google News, they tend to choose different sites for most of their other news. Democrats are far more loyal to *The New York Times* and *Huffington Post* while Republicans are more likely to follow *The Wall Street Journal* and *Drudge Report*. Consistent with more time spent consuming news, Capitol Hill staff check more websites regularly than do private-sector insiders. Federal executives check the fewest websites each day.

## IT'S A PARTY THING

### Republicans and Democrats Rely on Different Websites for News and Information

#### Most Visited National News Websites by Party

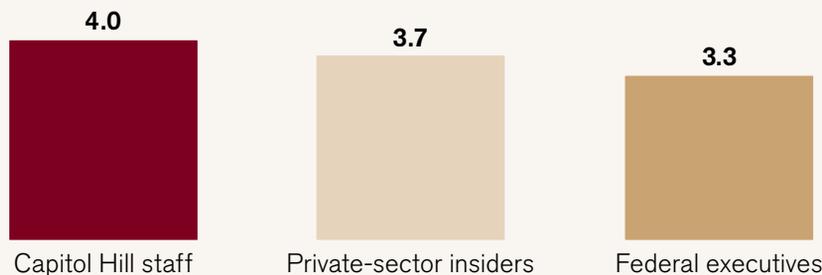
percentage of Capitol Hill staff and private-sector insiders who visit frequently\*



## HOW MANY CAN THEY HANDLE?

#### Average Number of Websites Visited Frequently

websites per respondent\*



\*Respondents were asked to select up to five websites they visit most frequently from a list of 26 national websites and blogs.

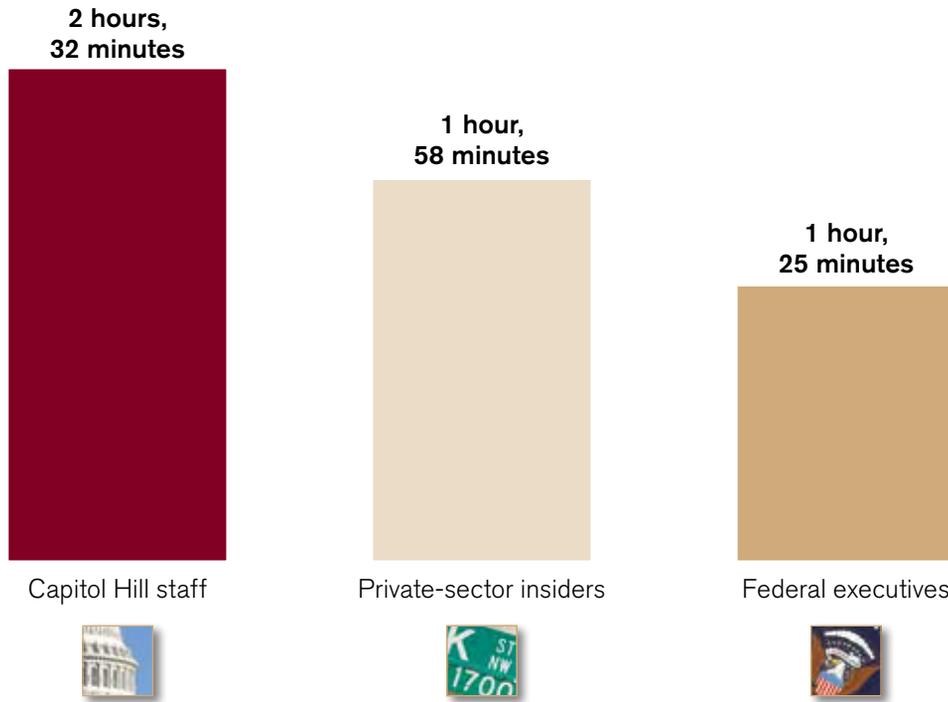
Television dominates media consumption for all Washington Insiders, but again Capitol Hill staff exceed the rest, spending over two and a half hours daily watching TV. Most Insiders have added modest quantities of online video to their daily news-media schedule, but most prefer watching news the old-fashioned way—on television.

## GLUED TO THE TUBE

Washington Insiders Watch a Lot of News on Television,  
Online Video Only Adds to the Lineup

### Average Time Spent Watching Television News

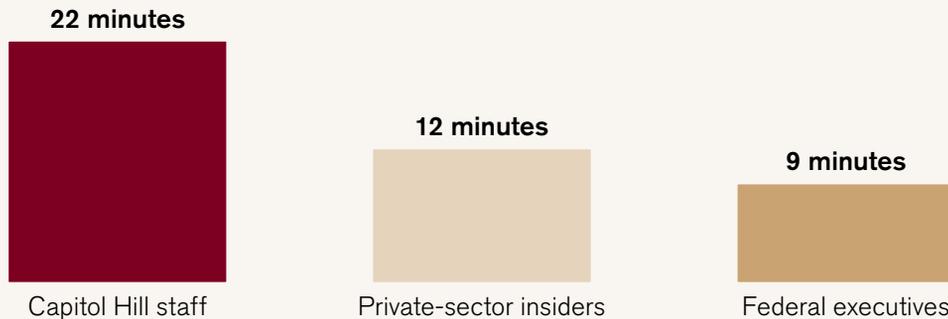
time per day



## ADDING TO THE LINEUP

### Average Time Spent Watching Video News Online

time per day



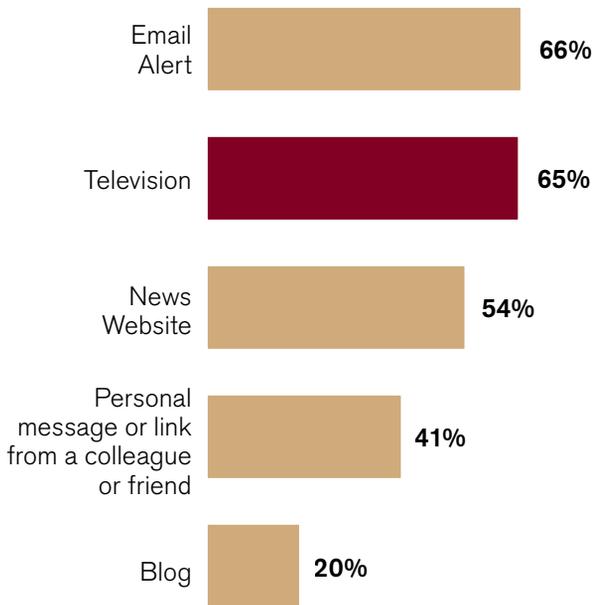
Even with the growth of online news sources, television remains an important platform for both breaking news and analysis for most Capitol Hill staff. With televisions on in the background throughout the workday, it is not surprising that so many on Capitol Hill continue to learn about breaking news from TV. Yet, a number of Capitol Hill staff also consider television a top source of analysis, an indication of the popularity of political talk shows and pundits in Washington.



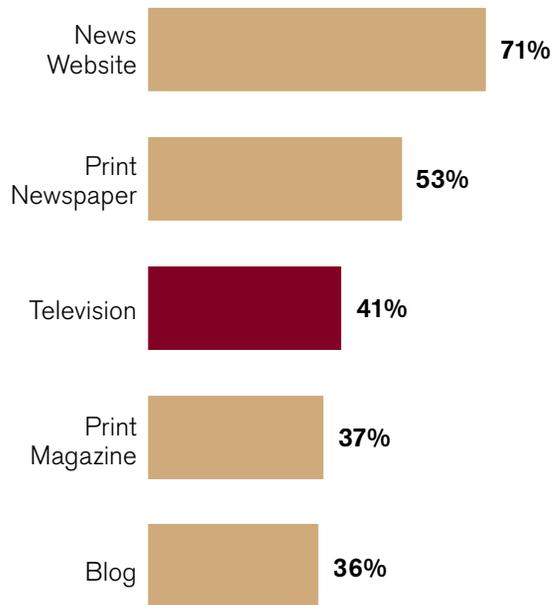
## THIS JUST IN...

### Television Remains Important Source of Both Breaking News and Analysis for Capitol Hill Audience

**Top Sources for Breaking News**  
percentage of Capitol Hill respondents\*

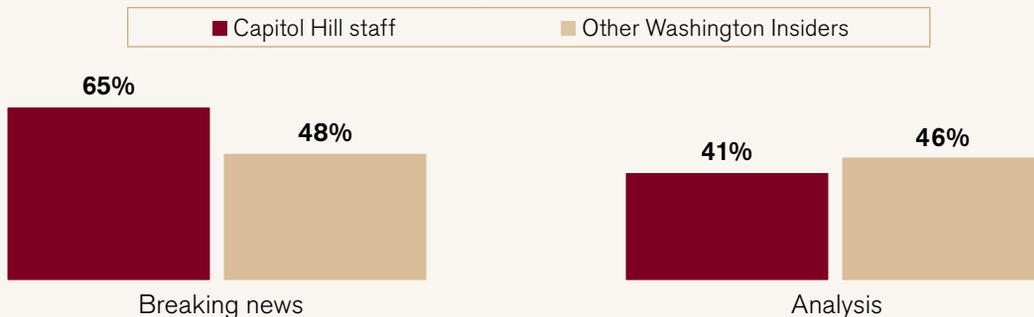


**Top Sources for Analysis**  
percentage of Capitol Hill respondents\*



## EVERYONE'S WATCHING

**Television as a Top Source of Breaking News and Analysis in Washington**  
percentage of respondents\*



\* Respondents were asked to select up to four top sources for both breaking news and analysis.

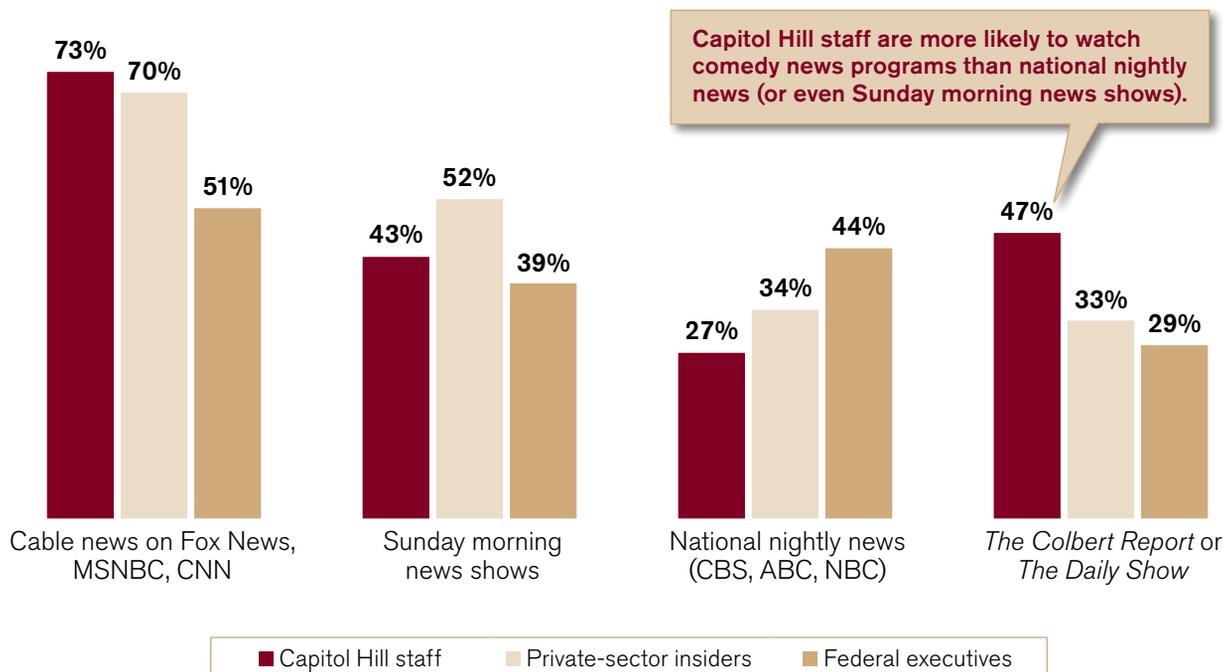
Cable news programs receive the highest ratings among the inside-the-Beltway audience, and Capitol Hill staff and private-sector insiders are significantly more likely than a comparable national audience to watch channels such as CNN, MSNBC, and Fox News. Capitol Hill staff are also more likely to watch comedy news programs such as *The Daily Show* or *The Colbert Report* than they are to watch nightly news programs on national networks.

## CABLE IS KING

### Cable and Comedy: Most Watched News Programs on Capitol Hill

#### Television News Program Viewing Habits

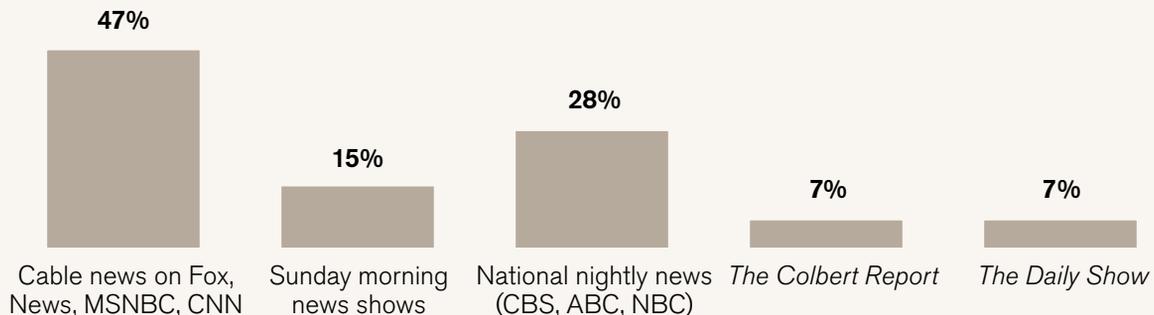
percentage of respondents who watch regularly on TV or online



## OUTNUMBERING THE NATIONAL AUDIENCE

#### Television News Program Viewing Habits Among National Audience\*

percentage of respondents who watch regularly on TV or online



\*Comparable national audience from Pew Research Center's *Biennial Media Consumption Survey 2008*.

As a group, Capitol Hill staff are watching more cable news, Sunday morning news shows, and national nightly news than they did in 2007. (Note: the 2009 survey included online viewing, and more and more shows have full episodes or segments available on the Internet.) Viewing habits of Capitol Hill Democrats and Republicans differ, especially when it comes to the Comedy Central programs, watched by a greater percentage of Democrats. On the other hand, Republicans on the Hill are more likely to watch cable news than Capitol Hill Democrats.

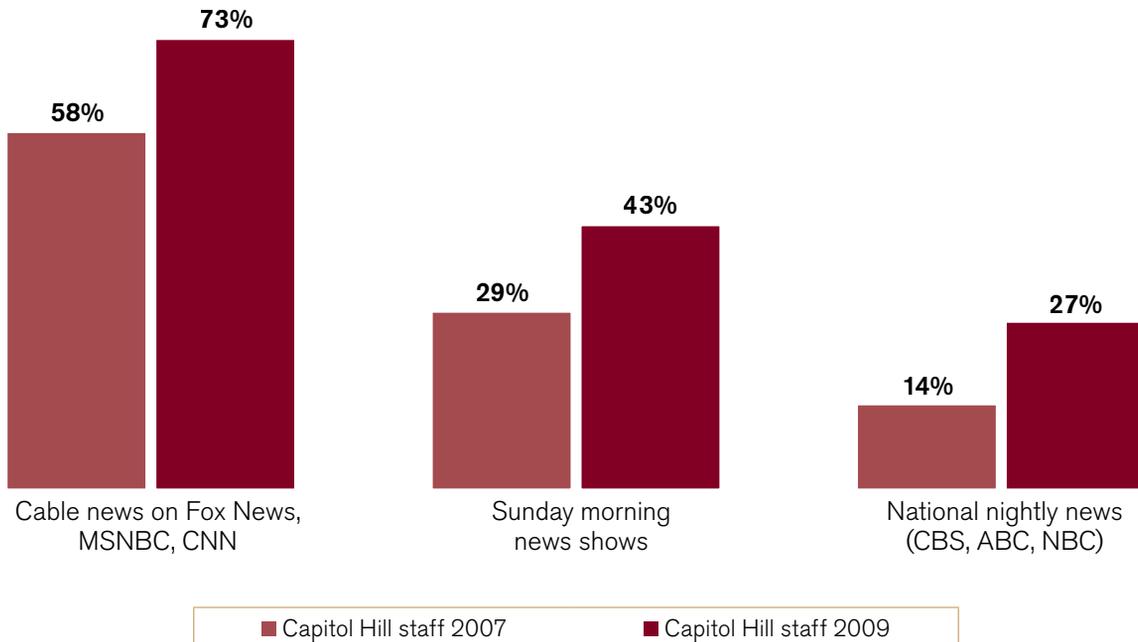


## MUST-SEE TV

### Capitol Hill Continues to Absorb More and More News Content

#### Television News Program Viewing Habits\*

percentage of Capitol Hill respondents who watch regularly on TV or online

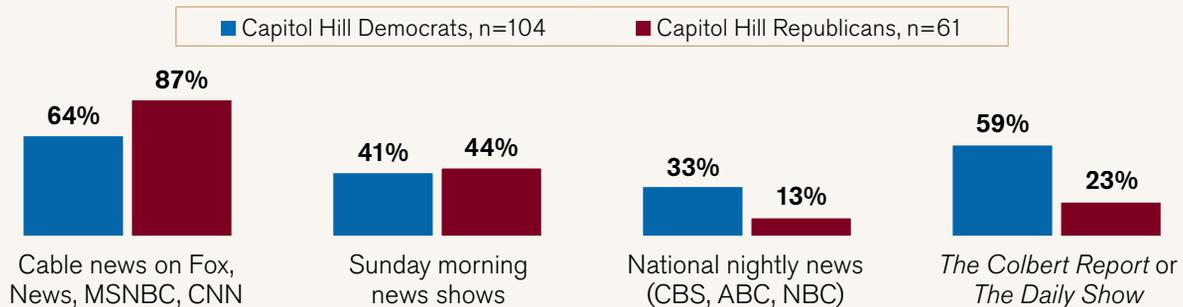


## WHAT'S SO FUNNY?



#### Television News Program Viewing Habits on Capitol Hill by Party

percentage of Capitol Hill respondents who watch regularly on TV or online



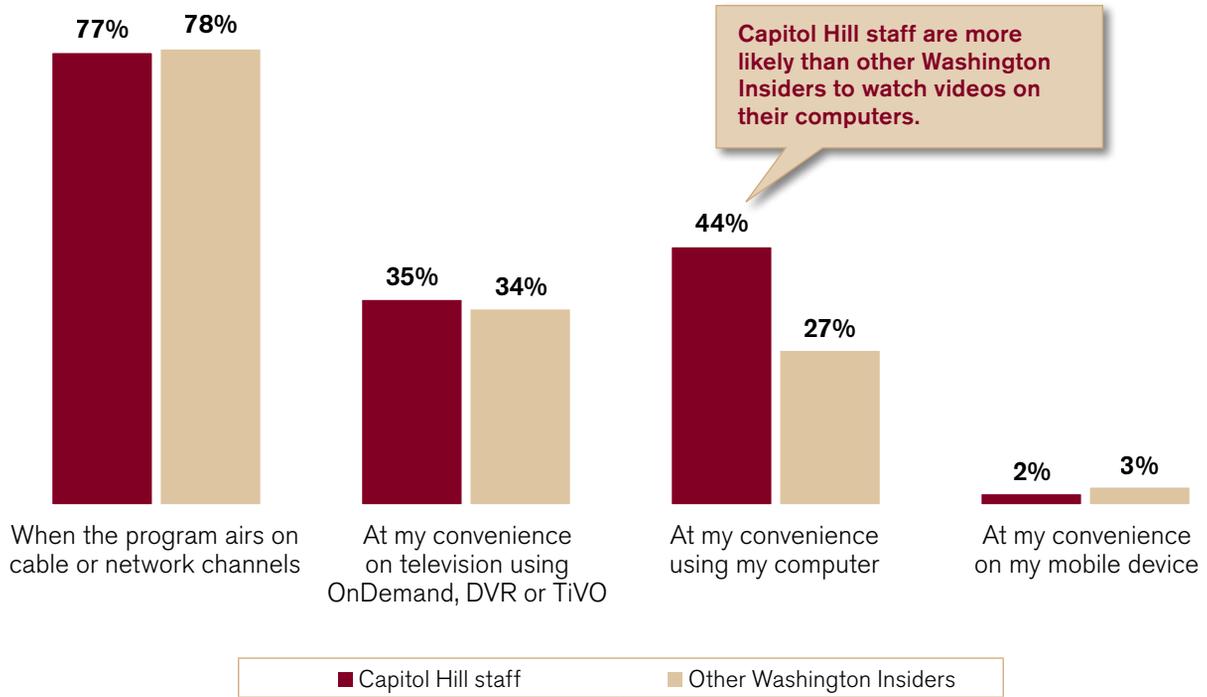
\*Comedy news programs *The Colbert Report* and *The Daily Show with Jon Stewart* were not included in the 2007 *Washington in the Information Age* study.

Despite the popularity of OnDemand, recording devices, and online video, Washington Insiders acknowledge that they are more likely to watch a program when it airs. Among Washington Insiders, Capitol Hill staff are the most likely to watch videos on demand on their computer, for an average of only half an hour per day. Television, on the other hand, remains a significant portion of Capitol Hill staff's media diet. On average, they spend almost an eighth of their day watching TV.

## PASSIVE VIEWERS

### Washington Insiders Tune in When Programs Air

**Regular Means of Watching Television or Video Content**  
percentage of respondents



## WHAT'S ON TV?

“I am tech savvy, but if I don’t watch it when it is on, then I usually don’t watch it.”

– Lobbyist

“TV is always on in the background (CSPAN, MSNBC, CNBC).”

– Senate Legislative Correspondent

“News/Cable is generally always on in background when in office...”

– House Chief of Staff

“Two TVs in office on all day: C-SPAN on 1&2 when Congress is in session; CNN and MSNBC when it’s not.”

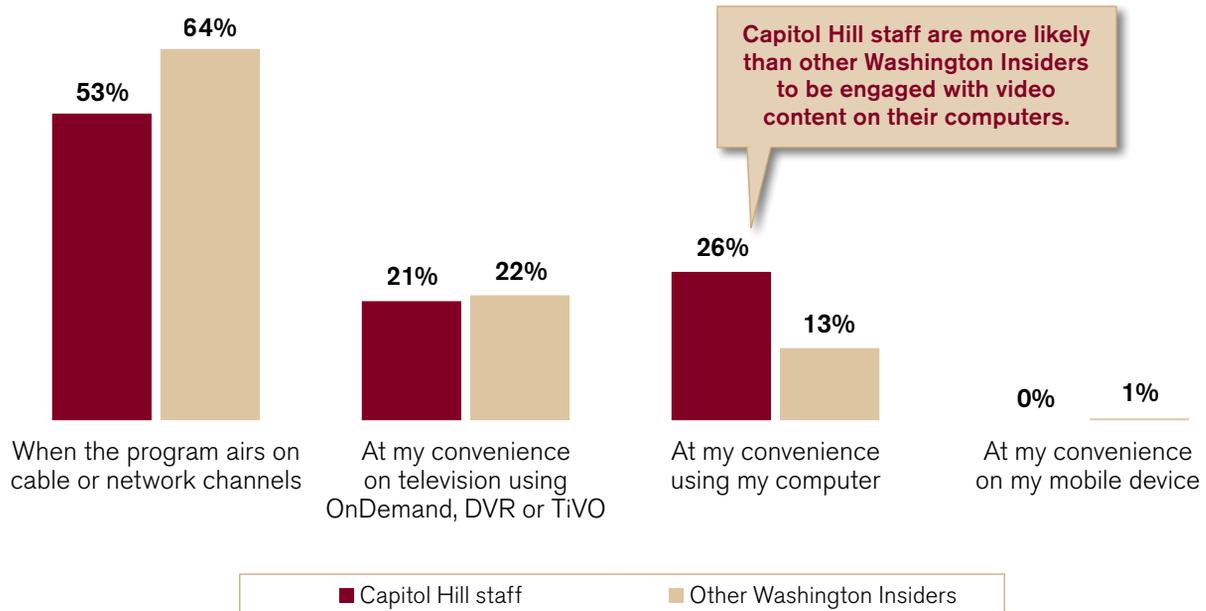
– Lobbyist

Washington Insiders never want to be the last to know what’s going on. They say they are “most engaged” with what they are watching when they view a program as it airs on cable or network channels. Reflecting their higher usage of online video, over a quarter of Capitol Hill staff feel they are most engaged when they are watching videos online on their computer.

## MAY I HAVE YOUR ATTENTION, PLEASE?

Washington Most Engaged with Television When Program  
Airs, Capitol Hill Staff More Likely to Engage on Computer

**Highest Engagement Watching Television or Video Content**  
percentage of respondents



### BACKGROUND NOISE

“Leave the TV on most of the day, not always paying attention.”

– Senate Legislative Correspondent

“TV is on background all day—but less watching, more just to ‘scan the headlines.’”

– House Chief of Staff

“I am most attentive to TV or video when it airs because I have to make a concerted effort to watch. Computer viewing is often interrupted or less concentrated in focus.”

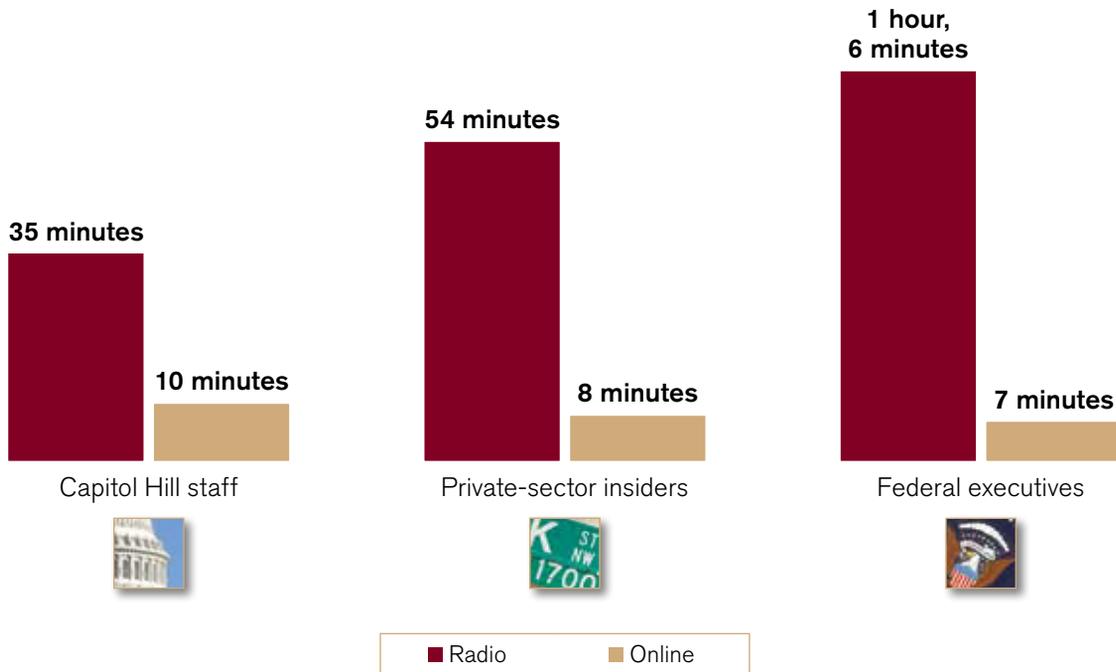
– House Leadership Communications Director

Washington Insiders listen to most of their audio news content on the radio, but they have added a small amount of online audio news content to the mix. Those older than 30 are much more likely to listen to the radio than their younger colleagues (mainly because the under-30 crowd rarely drives to work), helping to explain the gap between Capitol Hill staffers' and other groups' listening habits.

## STAY TUNED

### Capitol Hill Staff Lag Behind Other Washington Insiders in Time Spent Listening to Radio News

**Average Time Spent Listening to Audio News Content on the Radio and Online**  
time per day



## THE AGE OF RADIO

**Average Time Spent Listening to Radio by Age**  
time per day

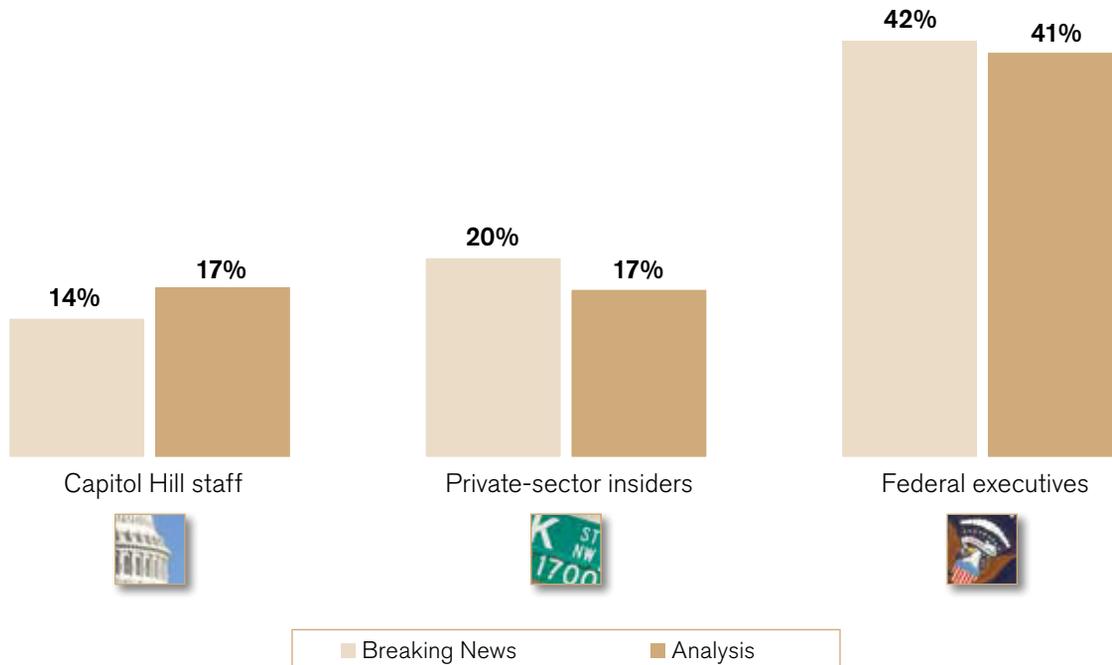


Given their greater use of the platform, it is not surprising that federal executives are the most likely audience segment to rank radio among their top sources of breaking news and analysis. They may hear about a breaking news event on the radio they play in their office during the day, or listen to analysis of a story on NPR on their drive to work in the morning. Capitol Hill staff and private-sector insiders are more likely to turn to a source that they can read or watch, rather than hear.

## DID YOU HEAR THAT?

### Federal Executives: Radio's Most Likely Audience for Breaking News and Analysis

**Radio as a Top Source of Breaking News and Analysis**  
percentage of respondent\*



## FEDERAL EXECUTIVES TUNING IN

“I listen to NPR going both to and from work in the car.”

– Federal Executive, GS-15

“Captive audience with commuting by auto 2 hours each day to Shady Grove Metro from outlying area.”

– Federal Executive, GS-15

“Listen to public radio during the day through the Internet at work.”

– Federal Executive, GS-12

“Most of my dedicated time for news happens during my commute, so radio is the easiest source for the approximately 2 hours per day I spend in my car going to and from work.”

– Federal Executive, GS-15

\* Respondents were asked to select up to four top sources for both breaking news and analysis.

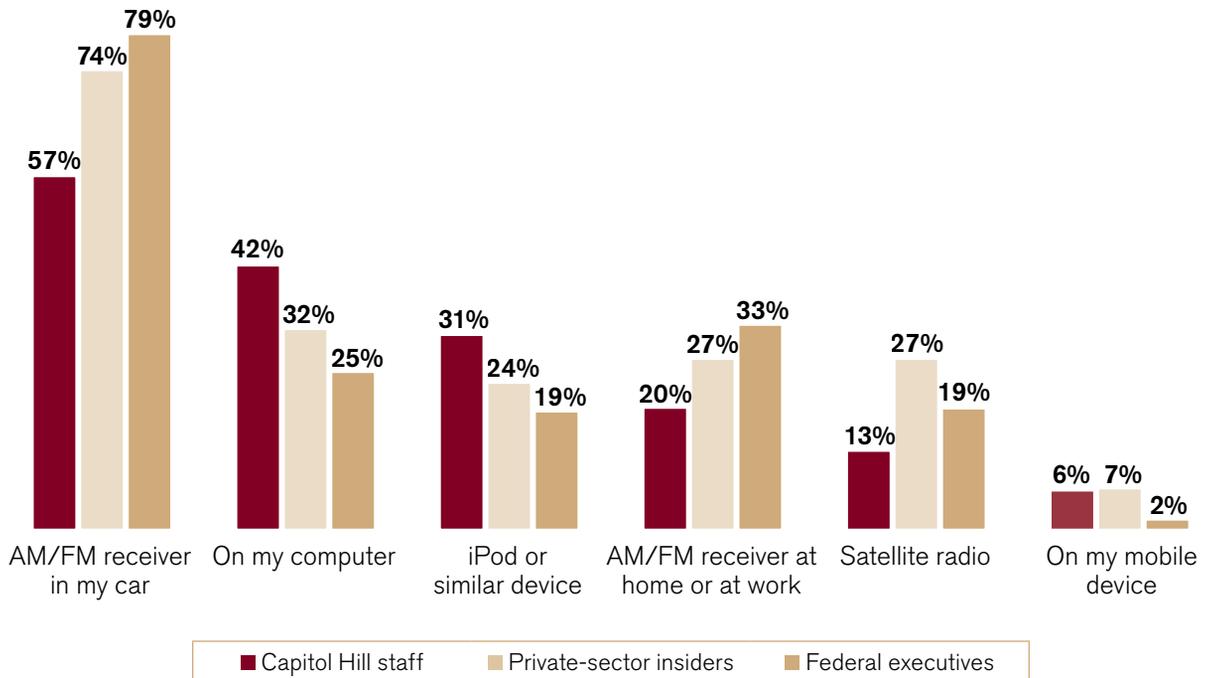
Federal executives and private-sector insiders, radio's top listeners, are more likely to drive to work than Capitol Hill staff, and they listen to the radio in their car on their commute. Meanwhile, Capitol Hill staff are more likely to listen to audio content on their computer or on an iPod than other audience segments inside the Beltway. Although many Washington Insiders describe themselves as "addicted" to their BlackBerry, the mobile device has not gained much momentum as a platform for audio content.

## LISTEN UP!

### Capitol Hill Consumes More on Computer, Less on Radio

#### Regular Means of Listening to Audio Content

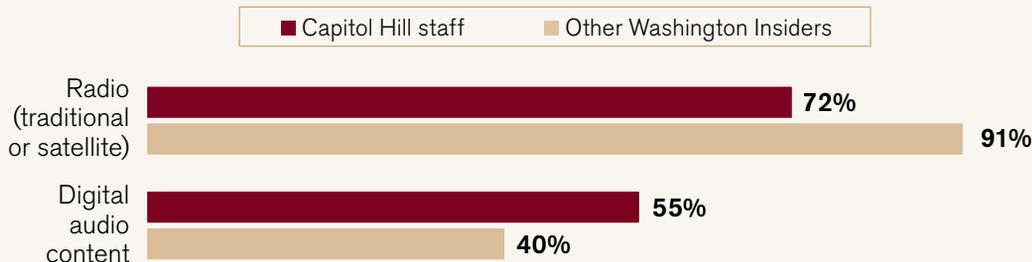
percentage of respondents



## THE HILL'S ALIVE WITH THE SOUND OF...

#### Regular Means of Listening to Audio Content: Radio vs. Digital

percentage of respondents

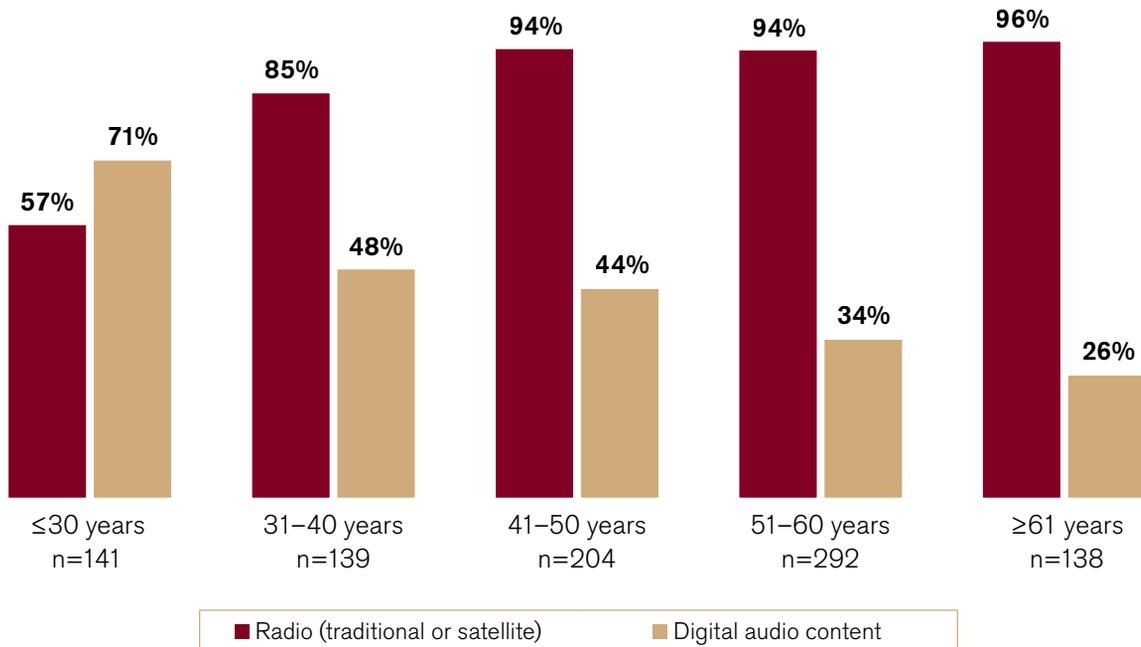


Younger Washington Insiders are less likely to listen to traditional or satellite radio and more likely to listen to digital audio content than their older inside-the-Beltway colleagues. Unsurprisingly, the gap between traditional and digital audio content increases with age. Washington Insiders who are 61 years and older are the most likely to listen to the radio both in the car and at work, and twice as likely to listen in both of these settings as their colleagues who are 30 or younger.

## PLATFORM PREFERENCES

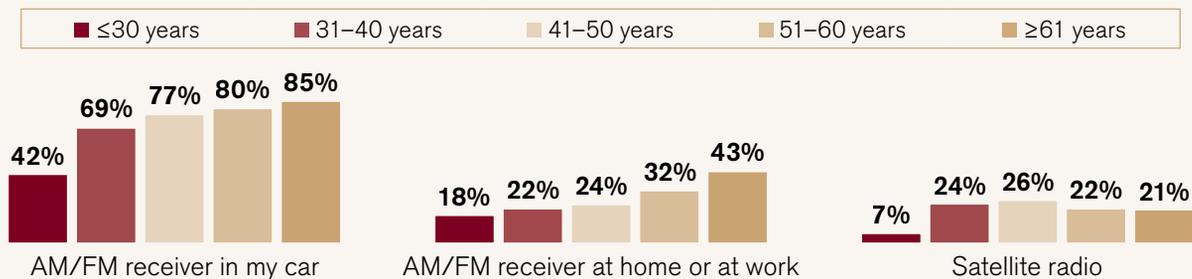
### Younger Washington Insiders Most Likely to Listen to Digital Audio Content

**Regular Means of Listening to Audio Content by Age**  
percentage of respondents

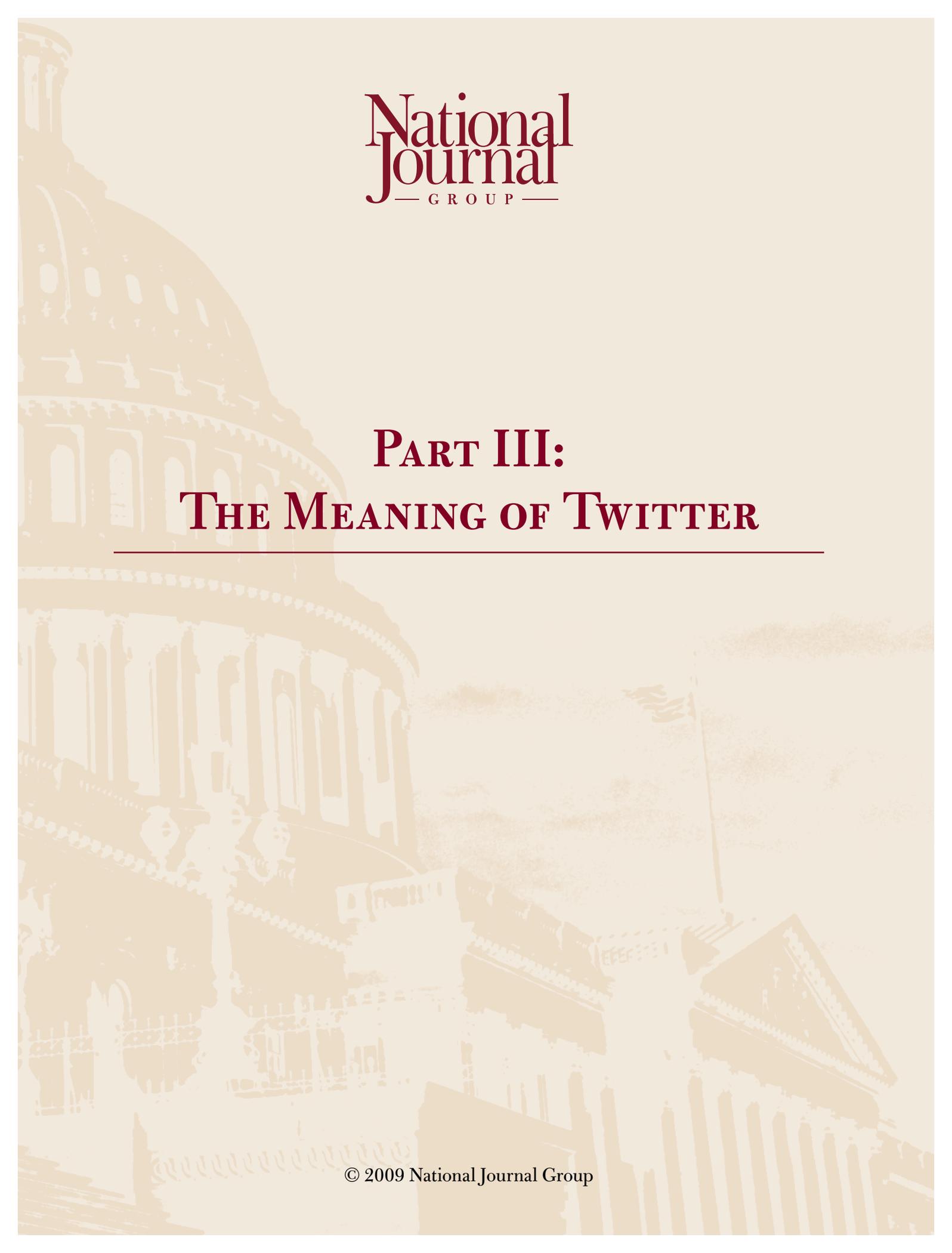


## SPOTLIGHT ON RADIO

**Regular Means of Listening to Audio Content by Age**  
percentage of respondents







National  
Journal  
— GROUP —

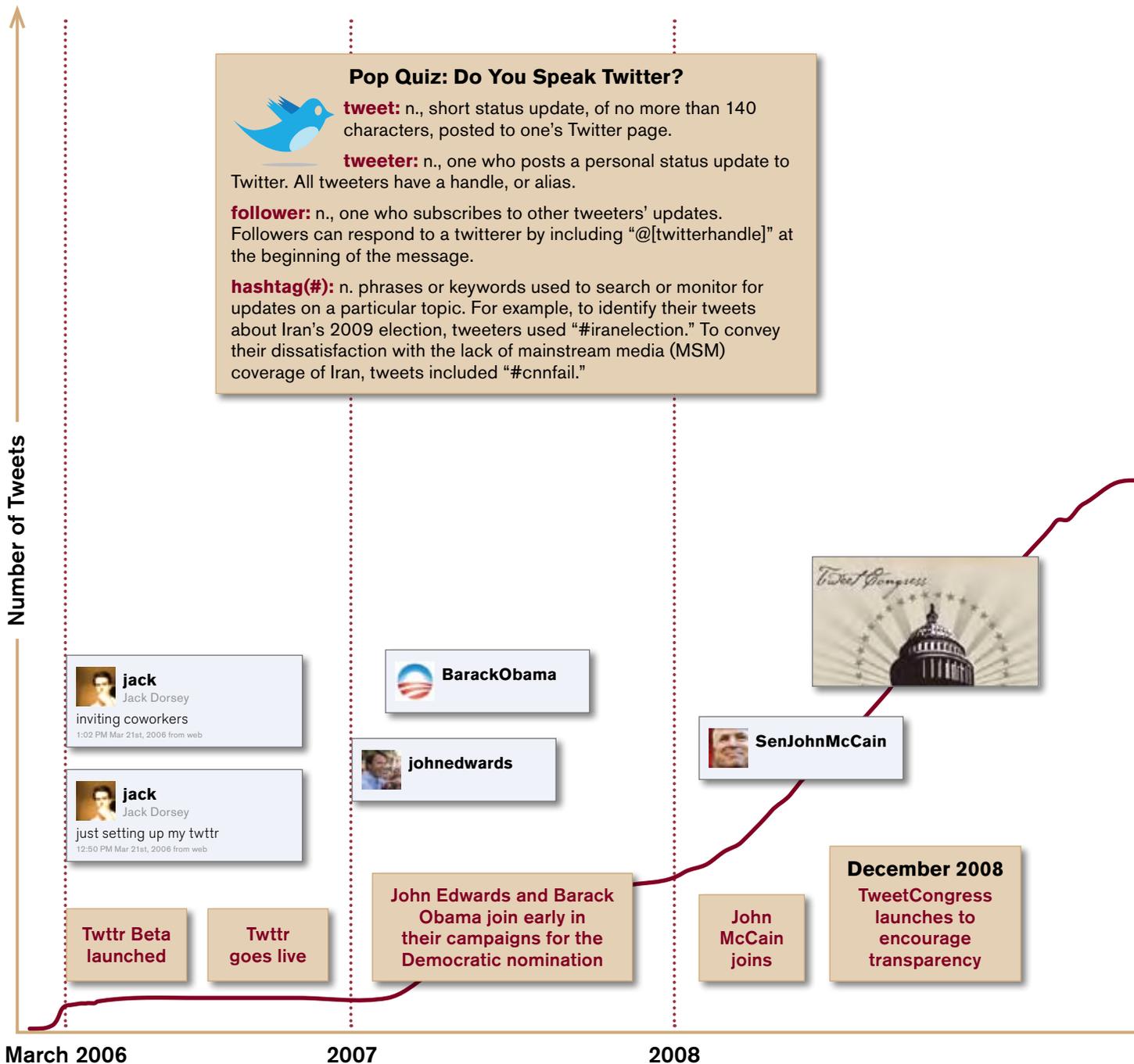
**PART III:**  
**THE MEANING OF TWITTER**

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Twitter, a micro-blogging site with social networking elements, has attracted many users and followers since its inception in 2006. At first, politics on Twitter was predominately Presidential. Now corporations, politicians, advocates, and individuals have joined the site to share opinions, running commentary on their days, and political positions, 140 characters at a time.

# AND THEN THERE WERE...140

## Politicians Join the World of Twitter



In the years since its inception in 2006, Twitter has attracted over 32 million users, many of whom participate in the policy conversation. Congressmen and Senators use the service to update constituents and colleagues on their day-to-day schedules and thoughts; businesses, advocacy groups, and federal agencies do the same. Media firms are getting in on the action, breaking news and distributing links to content via Twitter.

# ALL THE WORLD'S A-TWITTER

## With Over 32 Million Users, Twitter is Now Mainstream

"About one-in-ten online adults now use Twitter or a similar 'micro-blogging' service that allows them to share updates about themselves or to see the updates of others."  
 — Pew Center for Internet and American Life, Feb. 2009

**aplusk**  
 ashton kutcher  
 My millionth follower was...  
 @Sinnersatre100 thanks for you follow!  
 9:54 AM Apr 19th from web

**clairecmc**  
 Met with President of Bosnia and Herzegovina today a country that is working hard, but struggling to be strong democracy. Want NATO membrshp  
 2:59 PM Oct 16th from web

**repaaronschock**  
 RT@GOPLLeader Silence: Another Week Without a Small Business Job Creation Plan from Washington Democrats:  
<http://bit.ly/4zOq22>

**thejointstaff**  
 Adm. Mike Mullen  
 Spoke 2 Defense Forum on wounded care. We(military) need 2 get better at reaching out 2 other agencies 2 solve problems. Always on my mind.  
 2:01 pm Oct 16th from web

**WestWingReport**  
 West Wing Report  
 The President's #healthcare timeline keeps slipping. He wanted a bill by August, then by Thanksgiving, now by the end of the year  
 about 16 hours ago from mobile web

**johnfritchey**  
 John Fritchey  
 The House just voted 65-51 on a roll back of the Cook Co. sales tax from 1.75% to .75%. The bill needed 71 votes. It failed.  
 about 19 hours ago from web

**Nextgov**  
 House panel plans cybersecurity training session for members  
<http://bit.ly/18Vzt5> #gov20  
 2:01 pm Oct 16th from web

**jaketapper**  
 yeesh. night-night. i will be on the Roundtable on This Week w/ @GStephanopoulos tmrw.

**MoveOn**  
 MoveOn.org  
 Check out the Top 5 Health Care Lies—and how to Fight Back <http://bit.ly/Bncs5>  
 9:54 AM Aug 11th from web

**WSJ**  
 Pullback in Financials Hurts Stocks  
<http://bit.ly/4zOq22>  
 2:01 AM Oct 16th from web

**Microsoft**  
 A 'smart-grid' - tech-coordinated power use - needs standards quickly. That's what's happening on Worls Standards Day  
<http://bit.ly/2MuQmO>  
 about 24 hours ago from bit.ly

**nytimeskristof**  
 Democrats and teachers' unions as impediments to fighting poverty: My Thursday column  
<http://tinyurl.com/yzd62yv>  
 about 4 hours ago from web

"Twitter has 32 million users, an increase from about 2 million a year ago...some Internet measurement services show that figure increasing 50% to 100% month over month. While it is not clear that Twitter will become as large as social networks MySpace and Facebook or video-sharing site YouTube, the company could certainly have 50 million visitors by the end of the year."  
 — Douglas A. McIntyre, Time.com, May 2009

**Ashton Kutcher, a.k.a. "aplusk" boasts 1 million followers**

**April 2009 Reported 32.1 million Twitter users**

**June 2009 Number of tweets exceeds 2,147,483,647**

Members of Congress have gathered audiences on Twitter. John McCain brought to his Senate Twitter account followers of his 2008 campaign, making him the most-followed Congressman with over 1.5 million followers. Many other Members of Congress have taken a liking to the tool—over 150 and counting now tweet, the majority of them Republican—to distribute updates on their schedules and to promote their efforts on behalf of their constituents.

## TWEETING IN POLICY...

### Members of Congress Tweet to Share Messages with Constituents

#### Most-Followed Members of Congress on Twitter

Rank	Member of Congress	Twitter Handle	Followers*
1	Senator John McCain	@senjohnmccain	1,614,238
2	Senator Claire McCaskill	@clairecmc	34,970
3	Senator Jim DeMint	@jimdemint	28,751
4	Senator Charles Grassley	@chuckgrassley	17,534
5	Senator Barbara Boxer	@barbara_boxer	17,395
6	Rep. Eric Cantor	@ericcantor	16,501
7	Rep. John Boehner	@gopleader	14,571
8	Rep. Joe Wilson	@congjoewilson	13,398
9	Rep. John Culberson	@johnculberson	13,002
10	Senate Republicans	@senate_gops	12,809
11	Senator Mark Warner	@markwarner	12,403
12	Rep. Michele Bachmann	@michelebachmann	11,350
13	Senator Christopher Dodd	@senchrisdodd	10,144
14	Senator Tom Coburn	@tomcoburn	10,053
15	Rep. Peter Hoekstra	@petehoekstra	8,771
16	Senator Bill Nelson	@senbillnelson	8,260
17	Rep. Jason Chaffetz	@jasoninthehouse	8,160
18	Rep. Dennis Kucinich	@dennis_kucinich	8,033
19	Senator Russell Feingold	@russfeingold	7,923
20	GOP Conference	@gopconference	7,861

**13 Republicans  
7 Democrats  
in the top 20 most-followed**

### “A TALE OF 140 CHARACTERS, PLUS THE ONES IN CONGRESS”

“An estimated 80% of congressional tweets are links or messages for self-promotion rather than in promotion of transparency.”

– Dr. Jennifer Golbeck, Assistant Professor, University of Maryland

“Some members called it a new age of transparency, a bold new frontier in democracy. But to view the hodgepodge of messages sent from the House floor during [Obama’s] speech, it seemed as if [the President] were presiding over a support group for adults with attention-deficit disorder.”

– Dana Milbank  
The Washington Post, Feb. 25, 2009

\* Number of followers as of November 30, 2009.

Contributing to Washington’s Twitter chatter are numerous federal agencies and a few Cabinet Secretaries. While the White House has over one million followers, several federal agencies broadcast updates to tens of thousands of the Twitterati, who have signed up to follow their feeds. Federal executives themselves, however, are divided as to whether they should add their personal updates to the collective.

## ...AND IN PRACTICE

### Federal Agencies, for Transparency and Outreach, Post Announcements to Twitter

#### Selected Tweets from Top-Tweeting Federal Agencies

**The Federal Emergency Management Agency has 8,653 followers and shares emergency preparation tips.**

**femainfocus**  
FEMA  
Preparedness tip: Do you have family or neighbors who might need help in emergencies? <http://tinyurl.com/opehm6> Your plans can include them

**Commerce Secretary Gary Locke is one of three cabinet Secretaries to tweet frequently.**

**SecLocke**  
Going to White House to talk w/business leaders from around the country about opportunities for U.S. businesses in a clean energy economy.

**The FBI posts news of investigations completed and suspects sought. Its press office has 14,197 followers.**

**FBIPressOffice**  
More Than 300 Arrested in Two-Day Nationwide Drug Cartel Takedown: Over the past two days, 303 individuals in... <http://bit.ly/N9qvb>

**NASA**  
The space station crew is involved in experiment activity today and more testing of the newly installed COLBERT treadmill

**NASA shares scientific findings and notes on its missions with the agency's 154,751 followers.**

**The White House has 1,366,078 followers who receive press updates and links to slideshows.**

**whitehouse**  
The VP in Central Europe as 20th anniversary of the fall of the Berlin Wall nears. Remarks, photos <http://bit.ly/1PaU8L>

**The Department of Homeland Security broadcasts to 8,053 followers.**

**EPAgov**  
Blog: Reduce, Reuse, Recycle! Hey Pick 5ers, it's time again for you to share what you've done, how you d... <http://bit.ly/4dLo1b>

**The Environmental Protection Agency engages with news releases and blog posts. Its web communications staff has 4,192 followers.**

**Department of Agriculture food safety awareness efforts reach 6,562 followers.**

**USDAFoodSafety**  
Planning for Halloween festivities? Don't be tricked by unwanted bacteria - USDA tips for a [food] safe Halloween: <http://bit.ly/3vge08>

**DHSJournal**  
Homeland Security  
\$88 Million in Recovery Act Funding for Non-Intrusive Inspection Technology at Ports of Entry <http://bit.ly/2YKURf>

## TO TWEET OR NOT TO TWEET

“Twitter is another tool useful for passing information quickly to large audiences.”

– Senior Federal Executive

“I don’t ‘get’ Twitter. Who cares what everybody else thinks about unimportant things?”

– Federal Executive

“I have no interest in combing through seas of personal posts on Twitter. I follow only the feeds that are relevant to my life or work.”

– Senior Federal Executive

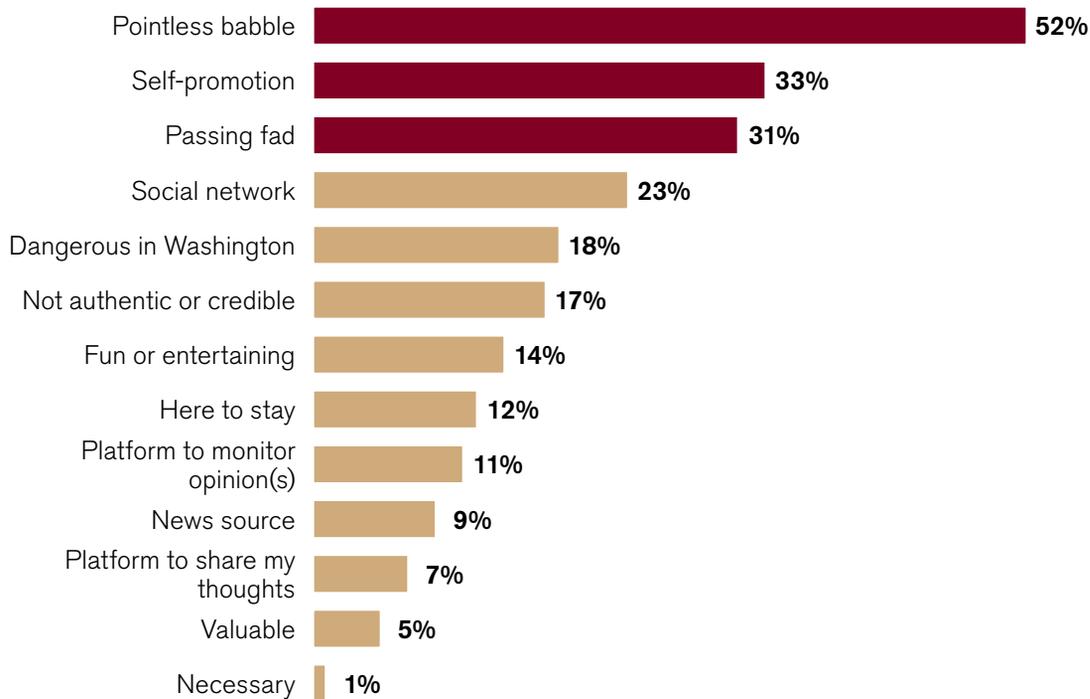
Inside Washington, Twitter is not as popular as the hype makes it seem. Most in Washington describe the platform as a place to find “pointless babble,” or as an outlet for “self-promotion.” This characterization is consistent with national research that describes the majority of tweets as insignificant. To some in Washington, the frequency of Twitter updates, combined with the unfiltered and unedited nature of tweets, poses a risk of “oversharing.”

## @TWITTER: #POINTLESSBABBLE

### Twitter Receives Less than Stellar Marks in Washington



**Characterization of Twitter**  
percentage of respondents



### RECURRING THEME

Research from “the Pear Analytics group took 2,000 tweets in English over a time span of two weeks, with 200 tweets captured each half-hour from 11 a.m. – 5 p.m. CST daily, categorizing tweets into types: news, spam, self-promotion, pointless babble, conversation, and pass-along value.” The study found that “40.55% of tweets are pointless babble.”

**#1 Pointless babble**

**#2 Conversational**

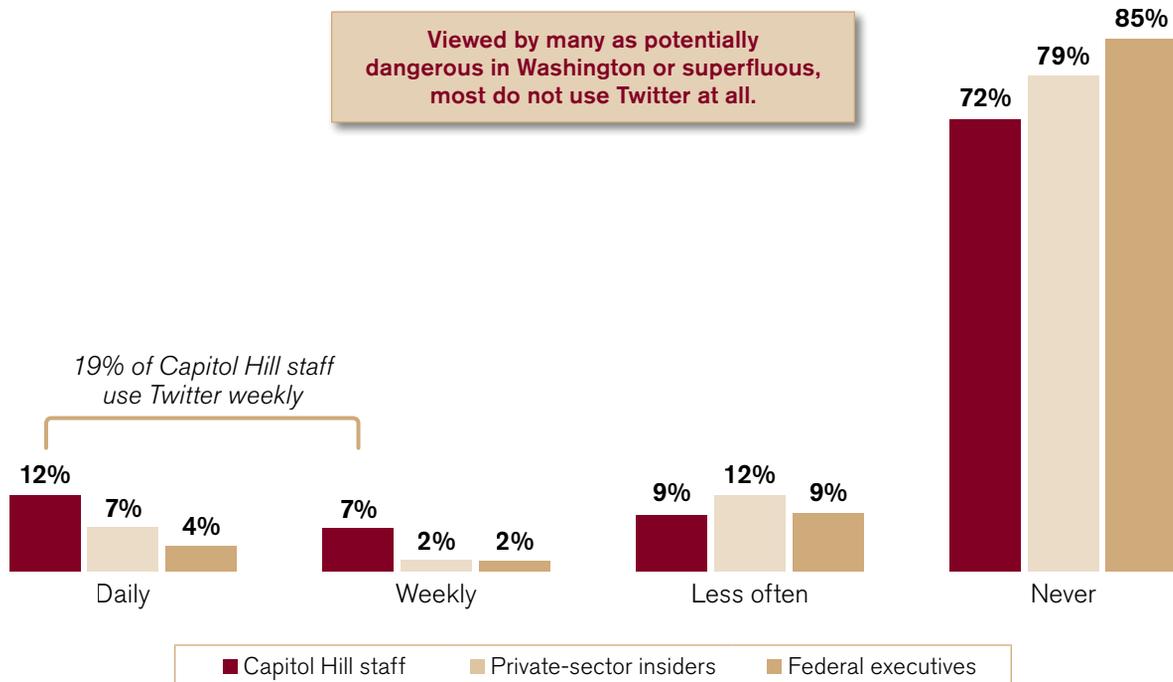
**#3 Pass-along value**

As a result, use of Twitter in Washington is not as widespread as one might think. While some Washington Insiders do visit and use the site for news and information daily, the vast majority—including 72 percent of Capitol Hill staff—never use Twitter. Those who do “tweet” are not always active in the flow of information; many monitor or read posts, but do not “share” by re-tweeting or “receive” content through subscribed feeds.

## INFREQUENT VISITORS

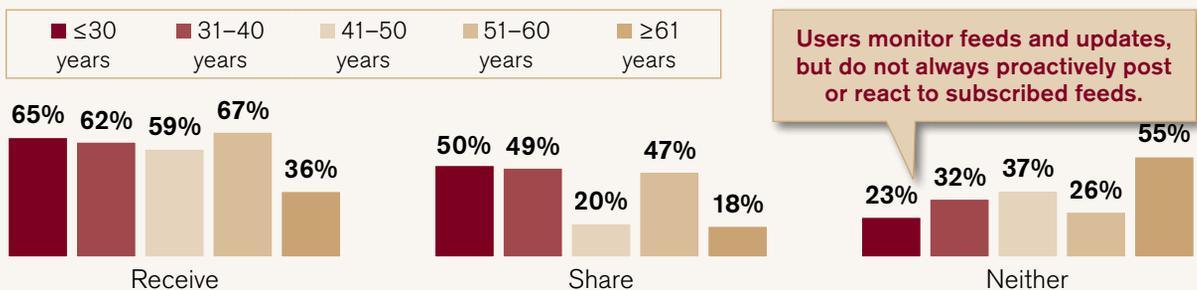
### A Minority in Washington Use Twitter Regularly

**Frequency of Using Twitter**  
percentage of respondents

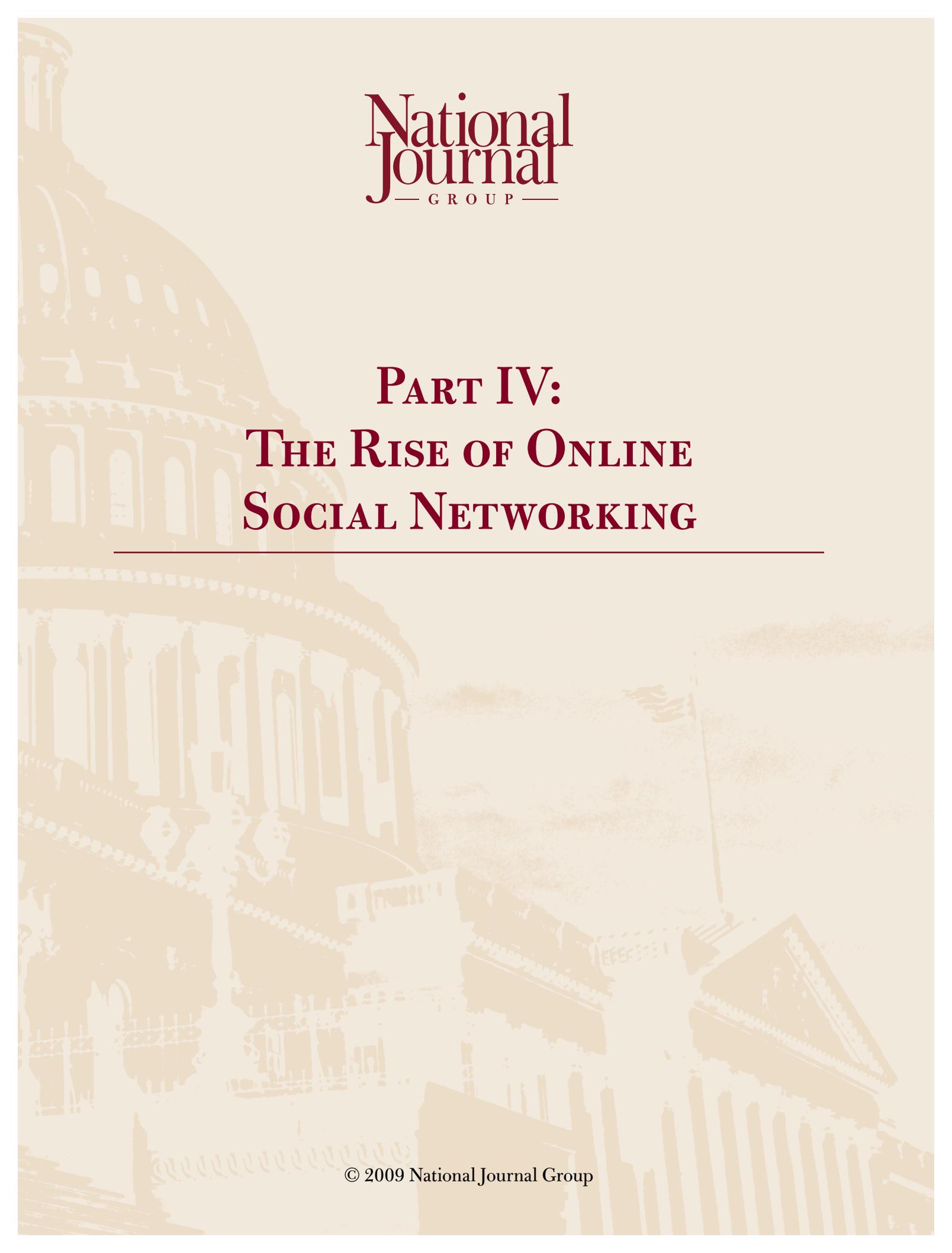


## SKIMMING FOR NEWS

**Use of Twitter to Share and Receive News**  
percentage of respondents who use Twitter, n=180







National  
Journal  
— GROUP —

**PART IV:**  
**THE RISE OF ONLINE  
SOCIAL NETWORKING**

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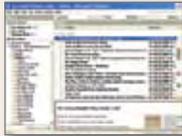
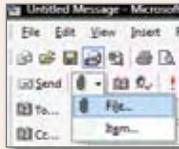
Email undoubtedly revolutionized the way people communicate and stay connected. Activities once tediously managed with mailing labels, paper clippings and business cards were expedited by email applications capable of digitally integrating contacts and content. For some, email is an organizing tool, but for most it remains a constant challenge to stay on top of overflowing inboxes and out-of-date contact lists.

## ORGANIZING

### Social Networking Sites: A Practical Enhancement

#### Once it was just...

#### ...then Came the Digital Age

<b>Keeping in Touch</b>	 <p>Memorize the phone numbers you need most; if you'd rather not, there's always that sea of business cards.</p>	 <p>Let your email program do the work of storing contact lists; you do the laborious task of updating names when learning of changes.</p>
<b>Sharing News</b>	 <p>Pass news clips around the office and save the best articles to the file cabinet.</p>	 <p>Send email to a distribution list of contacts, maybe with a link, to start a discussion.</p>
<b>Comments and Feedback</b>	 <p>Mail or fax a note—an idea or a draft—to your coworker or friend. Then wait, and wait, for their response.</p>	 <p>Attach your important document to an email, then wait expectantly for a response.</p>
<b>Events</b>	 <p>Receive a "Snail-mail" invitation at your office address.</p>	 <p>Receive email invitation in your inbox seconds after it is sent. Event details may or may not reach your calendar.</p>

Welcome social networking sites. Friends and colleagues update their own contact information, notifying you of any job changes or promotions without effort. Share news links, comments and other updates with favorite contacts, all in easy-to-locate topic headings—without cluttering your inbox. From integrated event and calendar functions to instantaneous connections, social networking sites offer the possibility of yet another revolution in communication.

## THE CHAOS

### to Washington's Networking Culture

#### Welcome the Social Networking Advantage

##### Keeping in Touch and Organized

If you know your contact's full name, great. If not, you can search on a social networking site by organization, keyword, or through lists of friends' contacts. Connections can provide online introductions and recommendations of colleagues' work. Bonus: you're not responsible for updating your contact list when your contact changes jobs.

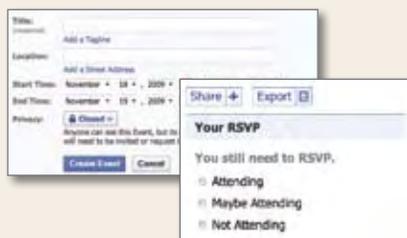


##### Sharing Today's News

Post a news link to your social networking page and distribute to a network of colleagues and friends. The link, with comments, will appear on contacts' updated news feed immediately.

##### Reaction and Discussion, Live

React on a social networking site to an update or news story posted by a contact; then respond to their comments. The discussion, organized by event, update, or link, is both up-to-the-minute and available to all specified contacts.



##### An Interactive Social Calendar

Log in to a social networking site to find event details, other invitees attending (or not), and to RSVP with a quick click. Post or read comments and articles on the event topic on the event's page and conduct all event prep and follow-up in one place.

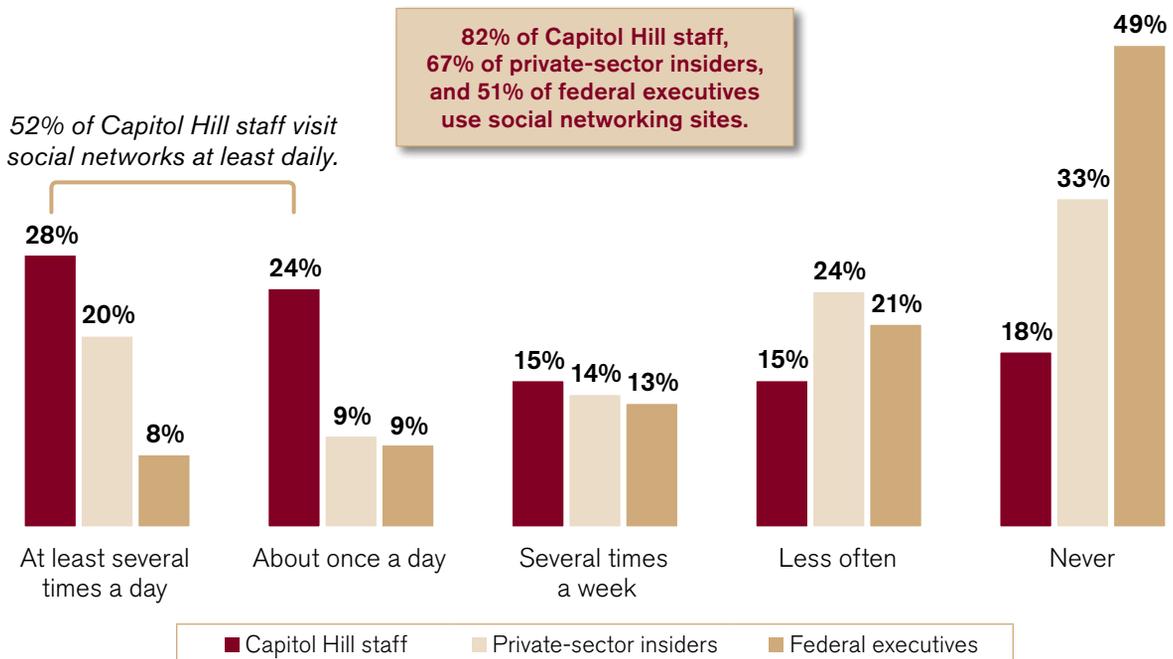
The age-old practice of networking on Capitol Hill and around Washington has extended online. In addition to—but not in place of—the happy hours and lunch meetings, there are wall posts and status updates. More than half, 52 percent, of Capitol Hill staff visit social networking sites at least daily. Even amid their busy work schedules, Capitol Hill staff and many other Washington Insiders find time to visit social networks more frequently than adults nationally.

## Now Online

### Washington's Networking Culture Extends into Digital

#### Frequency Visiting Social Networking Sites

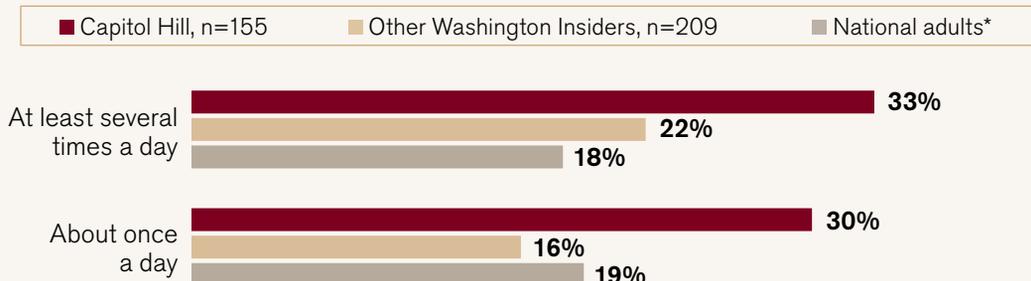
percentage of respondents



### FRIENDLIER THAN THE REST?

#### Frequency Visiting Social Networking Sites

percentage of respondents who use social networking sites



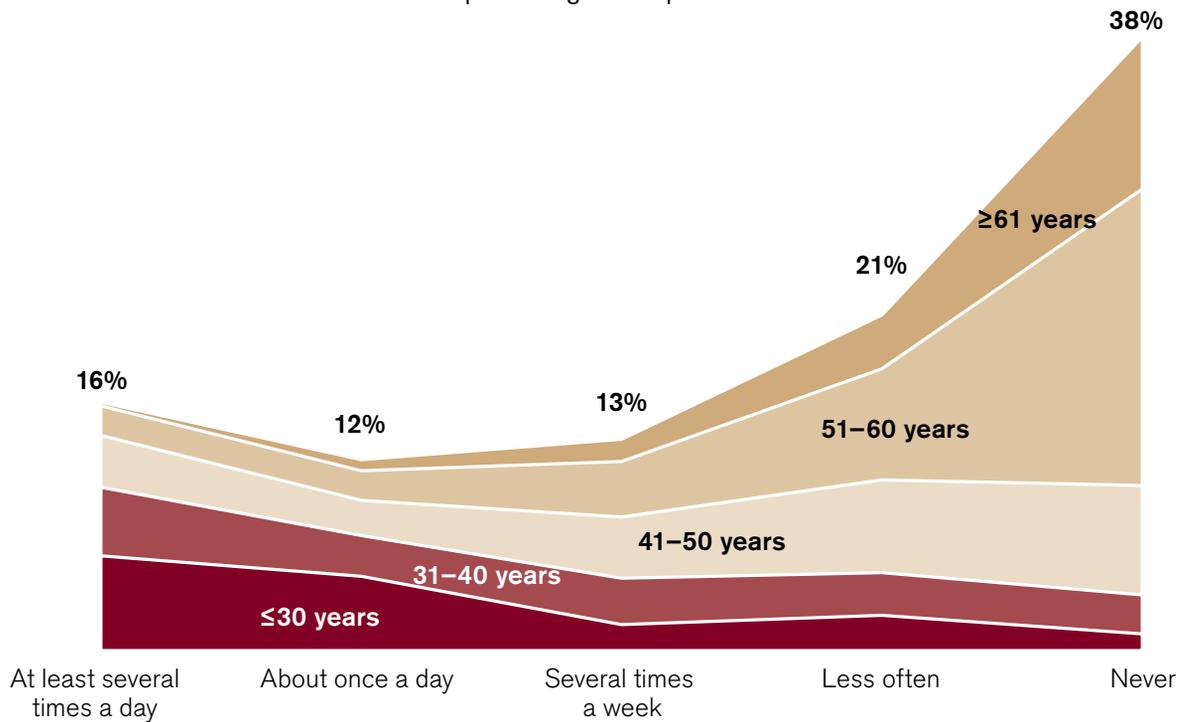
\* National adults who have a profile on a social networking site from Pew Internet and American Life Project, May 2008 Tracking Survey.

It's not only young Washington Insiders who find a use for social networking sites. Among the 28 percent of Washington Insiders who visit social networking sites daily, 36 percent are over the age of 40. Unsurprisingly, professional communicators spend the most time on the sites: communications professionals on Capitol Hill use social networking sites more frequently than their colleagues, with 79 percent on the sites at least daily.

## AGE IS JUST A NUMBER

### Active Users of Social Networking Sites Transcend Age Stereotypes

**Frequency Visiting Social Networking Sites by Age**  
percentage of respondents



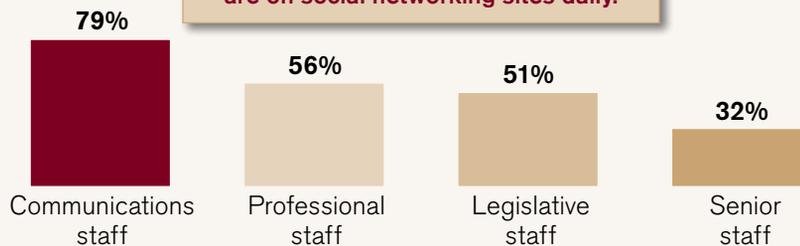
## COMMUNICATIONS CHANNELS

### Daily Visitors to Social Networking Sites

percentage of Capitol Hill respondents who use social networking sites



**Most Capitol Hill communications staff are on social networking sites daily.**



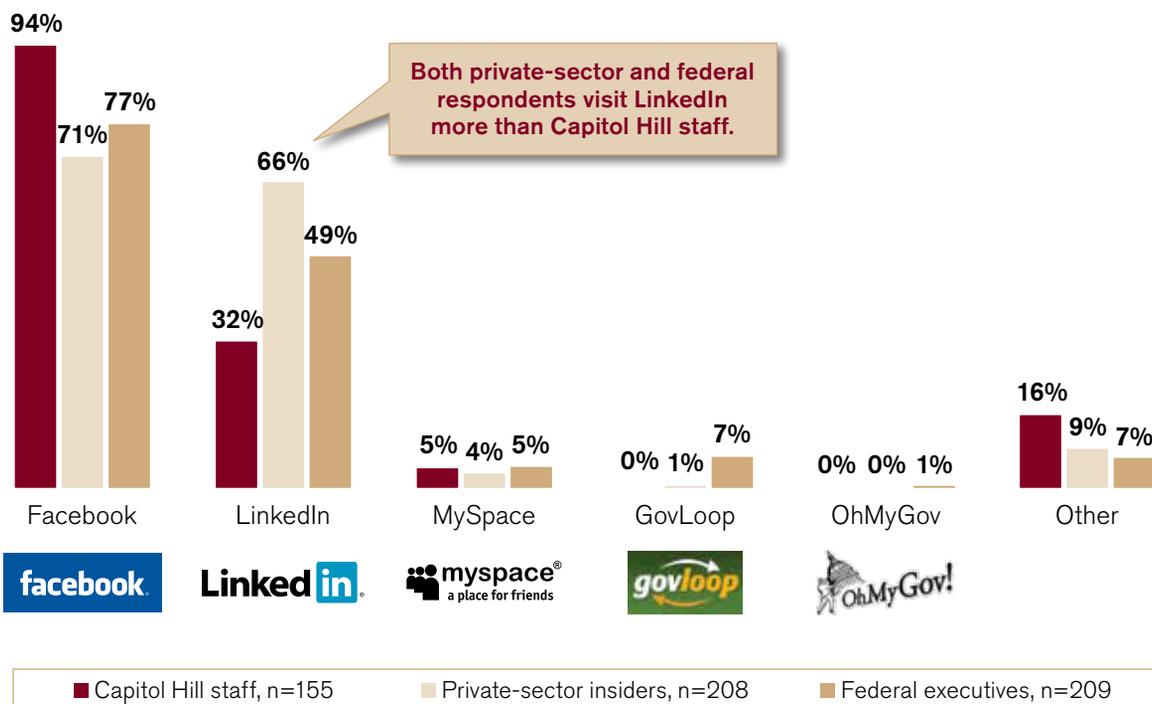
Most Washington Insiders on social networking sites are visiting Facebook and LinkedIn. Facebook is the most popular among Capitol Hill staff; 94 percent of those who use social networking sites use Facebook. Only 32 percent of Capitol Hill staff use LinkedIn, though significantly more private-sector insiders and federal executives find utility in the professionalism of the LinkedIn network. In response, specialized professional networks, such as National Journal Group’s 3121 and GovLoop, have emerged to serve the unique needs of Washington Insiders.

## FRIENDS (& COLLEAGUES) ALL AROUND

### Facebook and LinkedIn, the Most Popular Social Networking Sites in Washington

#### Social Networking Sites Used Regularly

percentage of respondents who use social networking sites



## TAILOR MADE



3121 is a new feature—part dynamic directory, part professional network—offered by National Journal Group for people who work on Capitol Hill.

- **A dynamic online directory**—3121 is pre-populated with names and titles, but also allows community members to update their own profiles.
- **Communication tools**—Through its recommendation engine and group pages, 3121 acts as a tool to connect with relevant Hill staff.
- **Customizable legislative news**—3121 allows for a customizable dashboard and customized news, from news on issues to Members of Congress.

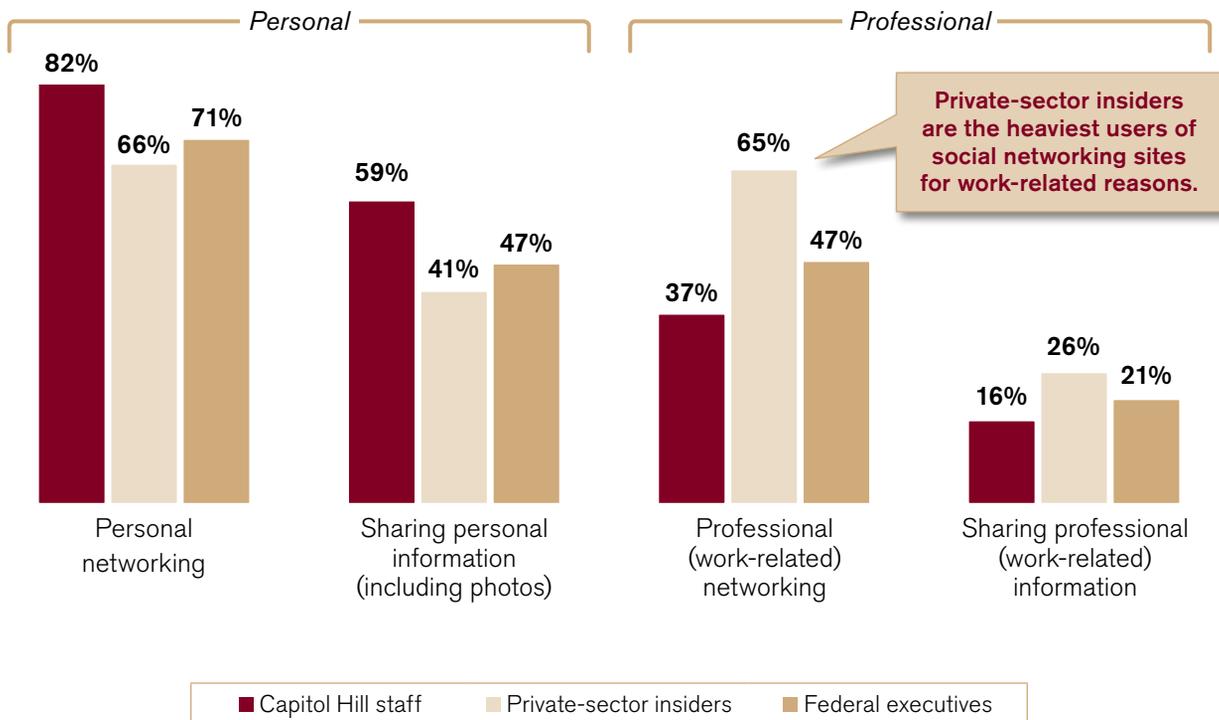
Washington Insiders rank personal networking as their first reason for visiting social networking sites. Sharing personal information and photos, for example, comes naturally to Capitol Hill networkers. Private-sector insiders, however, are the leaders when it comes to online professional networking. Like many nationally, some Washington Insiders maintain multiple profiles to distinguish the personal from the professional.

## VALUE IN THE PERSONAL

### Connecting with Friends and Family Principal Reason for Visiting Social Networking Sites

#### Purposes for Using Social Networking Sites

percentage of respondents who use social networking sites



## SPLIT PERSONALITIES

#### Reasons for More than One Social Networking Profile

percentage of national social networking site users with multiple profiles\*



"I have a second Facebook account in addition to my personal account and a Twitter account which I use for the sole purpose of following my employer on those networks."  
 — Senate Professional Staff

\* National adults who have multiple profiles on social networking sites from Pew Internet and American Life Project, May 2008 Tracking Survey.

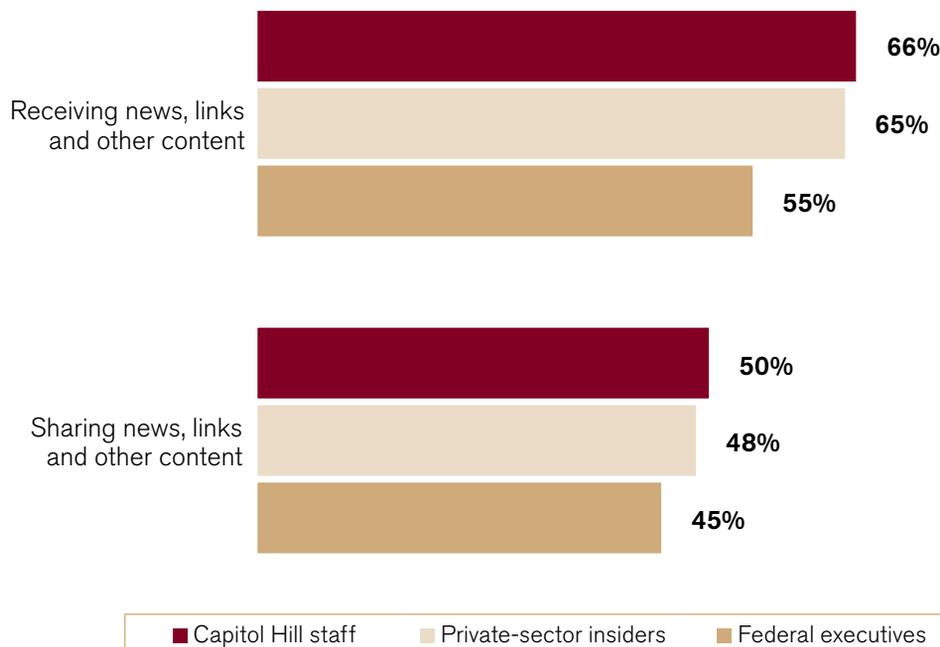
More than just family photos flow freely on social networking sites. Many in Washington use the platforms to share and receive news articles, links, and other information. Compared to social networkers nationally, significantly greater proportions of Capitol Hill staff and private-sector insiders send and receive news to friends and colleagues—66 percent of Capitol Hill staff and 65 percent of private-sector insiders on social networking sites report using the tool for news and other content.

## MORE THAN JUST FRIENDS

### Social Networking Sites: A Means for Sharing and Receiving News from Friends and Colleagues

#### Sharing and Receiving News on Social Networking Sites

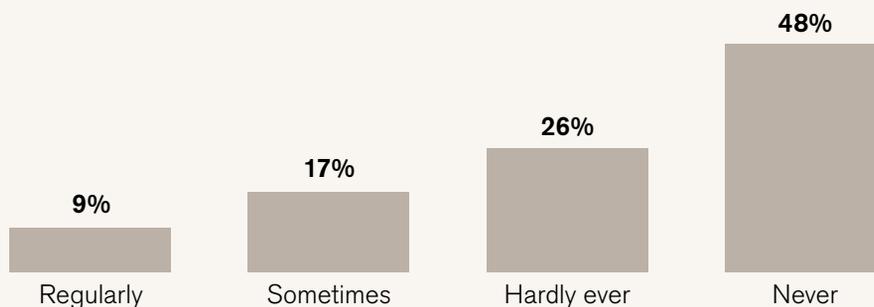
percentage of respondents who use social networking sites



## GREATER CONNECTION IN WASHINGTON

#### National Usage of Social Networking Sites for News

percentage of comparable national audience who use social networking sites\*



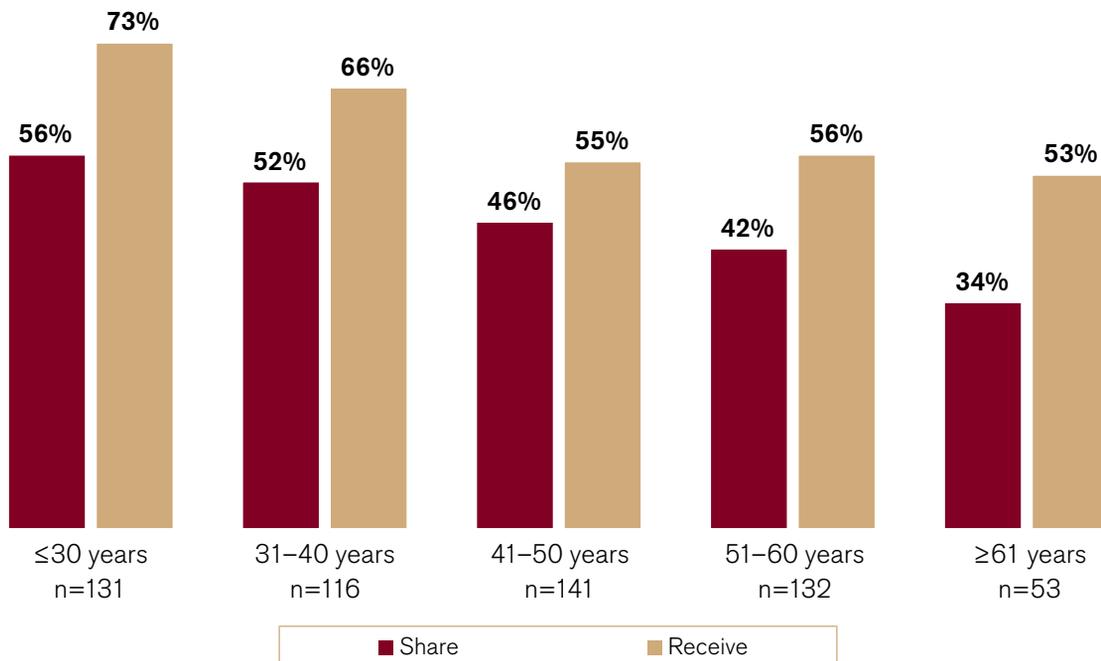
\* Comparable national audience who has a profile on a social networking site from Pew Research Center's *Biennial Media Consumption Survey 2008*.

Young professionals, in particular, have capitalized on the news-sharing functionality of social networking sites. Washington Insiders under the age of 31 use social networking sites to both share and receive news more regularly than their older colleagues. Across all ages, however, Washington Insiders are receiving news from friends more frequently than they're sharing. Politicians and policy makers, too, have plugged into the online networks to gain support for policies and issues.

## THE NEW “NEWS GENERATION”

### Young Professionals Most Likely to Share and Receive News via Social Networking Sites

**Sharing and Receiving News on Social Networking Sites by Age**  
percentage of respondents who use social networking sites



## IF YOU BUILD IT, THEY WILL COME

With visits to social networking sites growing nationally, politicians—even outside of campaign season—are increasingly using the tool to rally support for their policy positions.

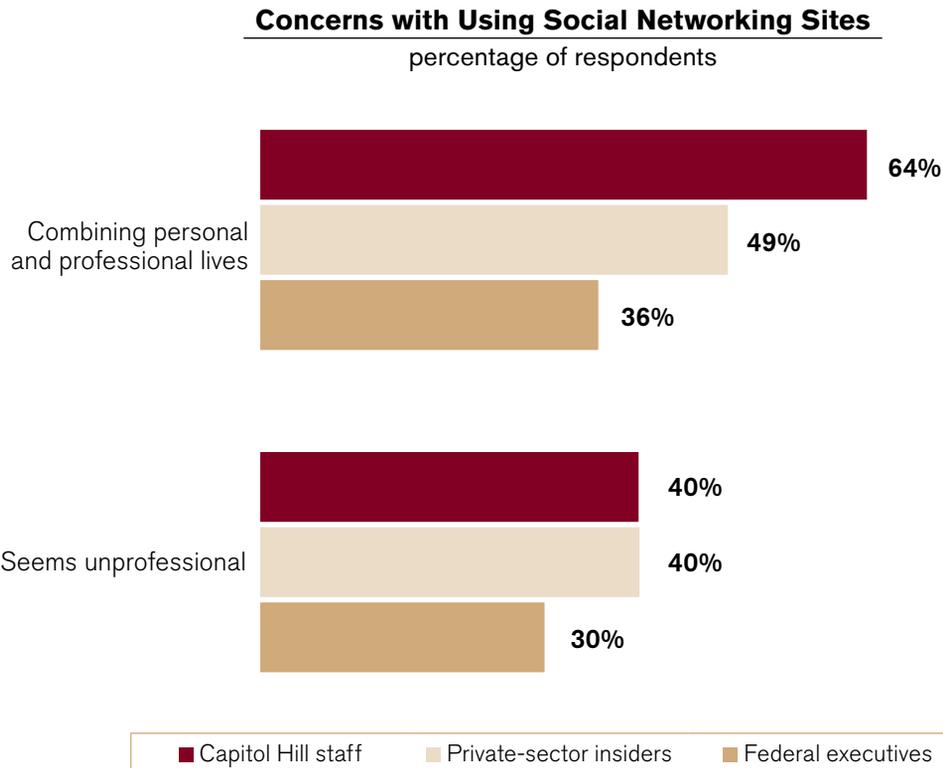
**“Ex-AK Gov. Sarah Palin (R) called for a troop increase [in Afghanistan] on her Facebook page, saying: ‘Now is not the time for cold feet, second thoughts, or indecision’**  
—Hotline’s Wake Up Call, Oct. 7, 2009

**Barack Obama asks his Facebook “followers” to help persuade Congress to enact his health care proposals.**

Despite the practicality of social networking sites, Washington remains cautious about using them. Capitol Hill staff feel they have the most to lose—64 percent are wary of combining personal and professional contacts and information. Young professionals on Capitol Hill are particularly hesitant to allow their personal and professional online lives to overlap.

## NE’ER SHALL THEY MEET?

New to the Workforce and Capitol Hill, Young Hill Professionals Hesitant to Mix the Personal with the Professional



## CAUTION TO THE YOUNG

**Concerns with Using Social Networking Sites by Age**  
percentage of respondents



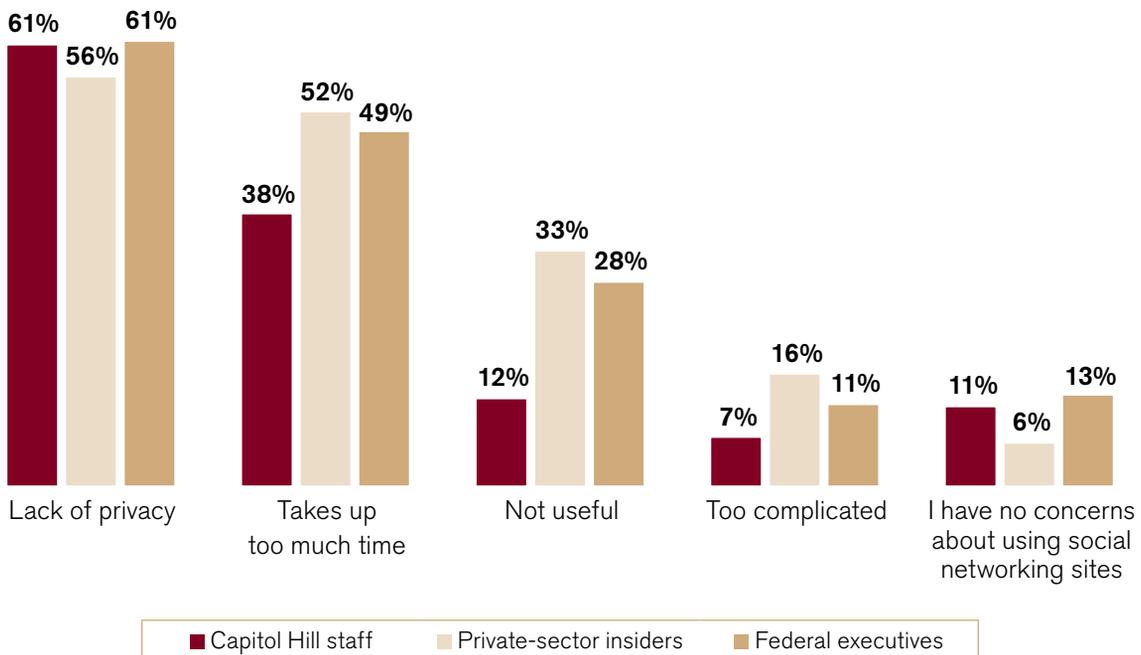
Other concerns with social networking sites revolve around privacy and time available. All groups of Washington Insiders worry that the sites aren't private enough—61 percent of Capitol Hill and federal executives hold privacy concerns, as well as 56 percent of private-sector insiders. Nevertheless, many Washington Insiders have found ways to manage the sites' risks and maximize the utility of the platforms.

## PRIVACY FIRST

### Privacy Concerns and Time Available Limit Washington's Use of Social Networks

#### Concerns with Using Social Networking Sites

percentage of respondents



## CONCERNS ASIDE, USEFUL STILL

#### How Washington Insiders Make Social Networking Sites "Work" For Them



##### ANONYMITY ON DEMAND

"I don't post the name of my boss to my profile. My employment information just says 'U.S. Congress.'"

— House Legislative Assistant



##### MAINTAINING SEPARATION

"There are certainly potential issues with having a personal account on a social media site that you also use for work, but with careful, informed usage it does not have to be a problem."

— Advocacy President

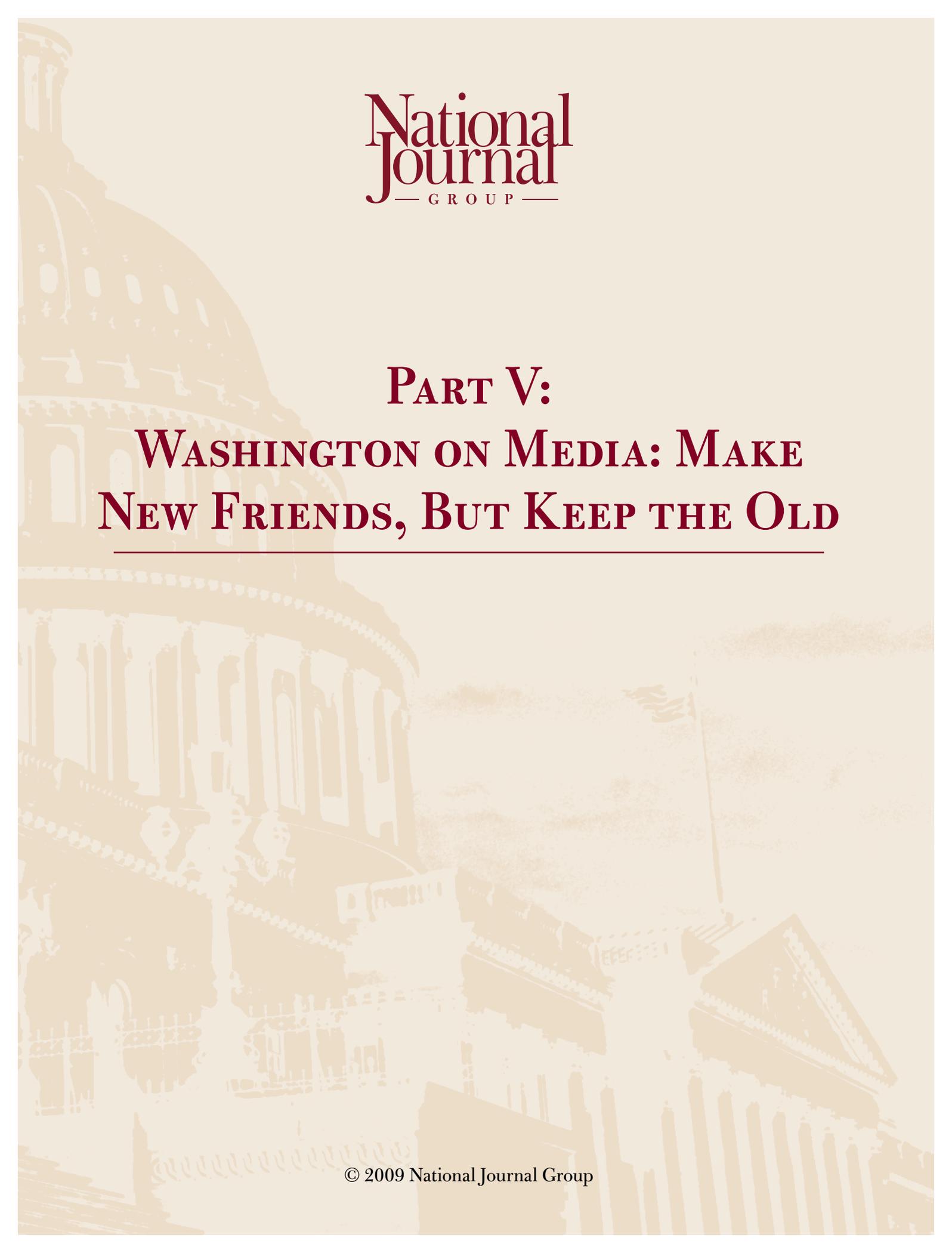


##### SETTING BOUNDARIES

"I don't 'friend' [on Facebook] people I work with, but I do use LinkedIn to connect with them."

— State Department Analyst





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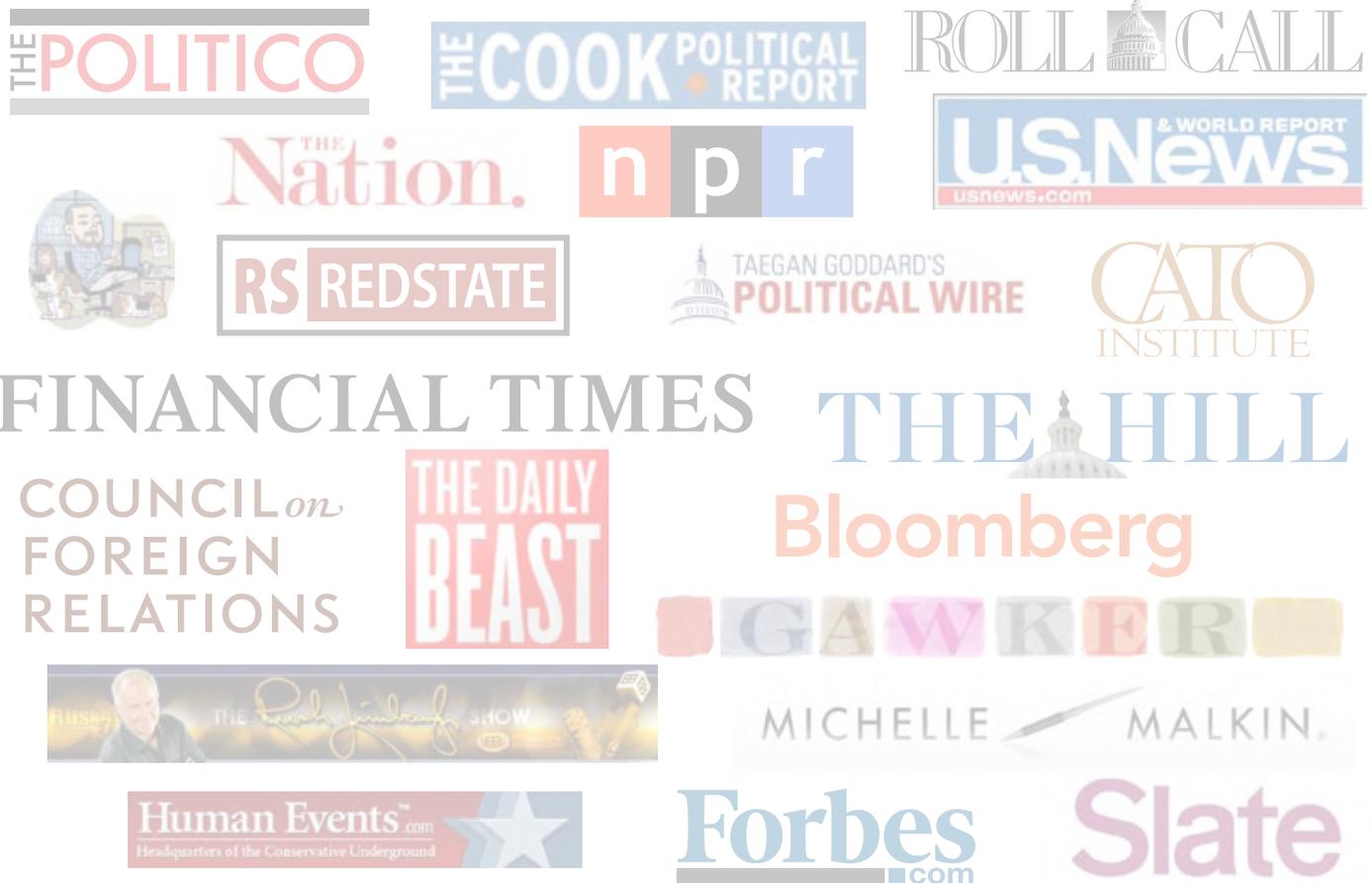
**PART V:  
WASHINGTON ON MEDIA: MAKE  
NEW FRIENDS, BUT KEEP THE OLD**

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The Internet has brought about the democratization of media. The explosion of independent voices and new online brands have changed the way Washington consumes news and information. With mobile applications, email alerts, blogs, and social networking sites, everyday duties for Washington Insiders may not have changed, but the tools they use to do their jobs have.



# AMID SO MANY VOICES,



The proliferation of sources raises some interesting questions. Has the sea of new voices, many of which have capitalized on new digital tools, supplanted traditional media? Have mainstream media brands, once the only sources for news and information in Washington, become obsolete? Are these new and independent voices as trusted as mainstream sources? Does brand still matter?



# WHICH MATTER?

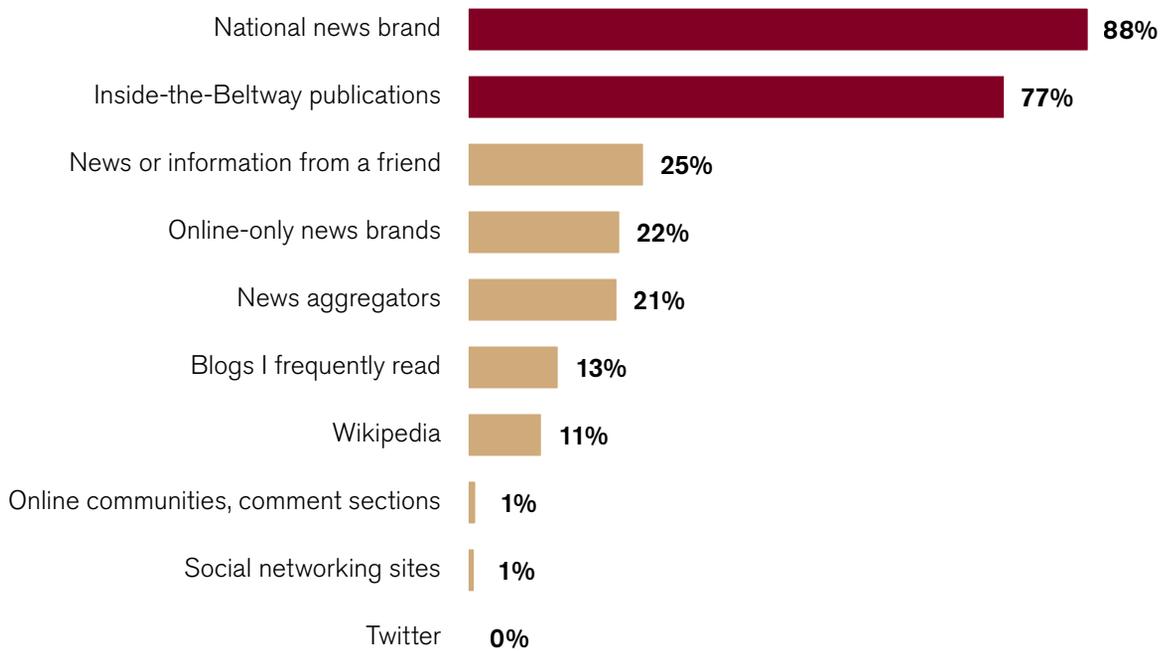
Washington Insiders may try to consume as much news as they can get their hands on, but they certainly don't trust everything they read. National news brands and inside-the-Beltway publications rise to the top as the most trusted sources in Washington. New media—online communities, social networking sites, and Twitter—have yet to earn Washington Insiders' confidence. Blogs and online-only news brands, however, are making inroads on traditional media, particularly among Capitol Hill staff.

# DON'T BELIEVE EVERYTHING YOU READ

## Washington Insiders Trust Mainstream Media Sources More Than New Media

### Most-Trusted News Sources

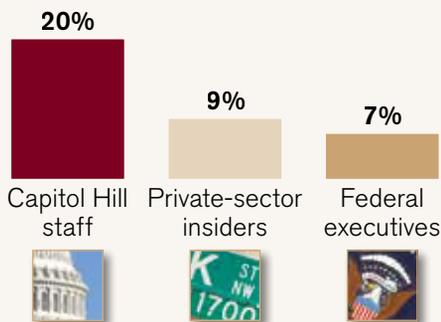
percentage of Capitol Hill and private-sector respondents\*



## IN BLOGS WE TRUST?

### Trust in Blogs

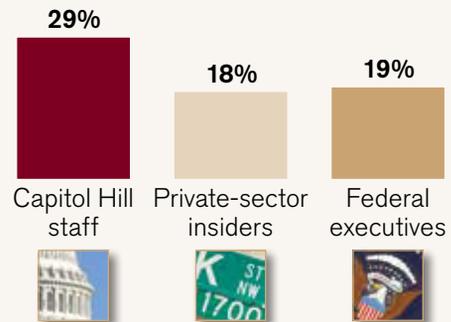
percentage of respondents



Capitol Hill staff are more likely than other Washington Insiders to trust blogs and other online-only news sources.

### Trust in Online-Only News Brands

percentage of respondents



\*Respondents were asked to select up to three types of news and information they trust the most.

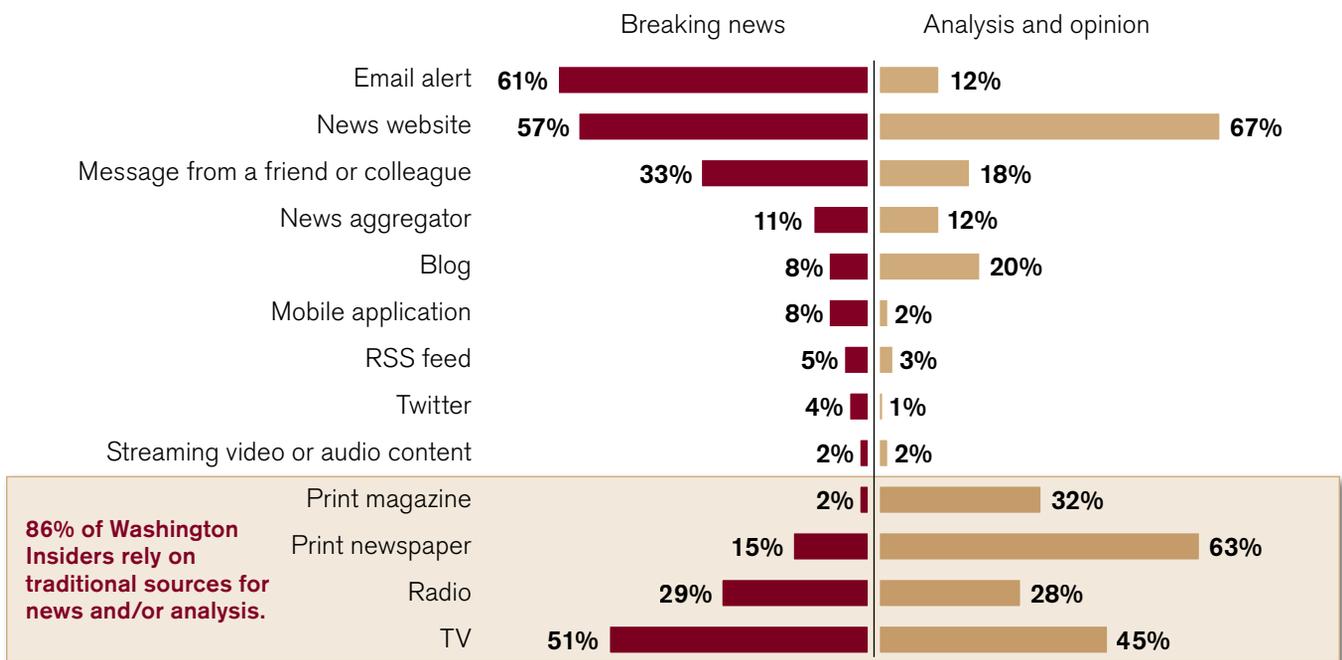
When it comes to methods for getting news, digital means have usurped the role of newspapers as a source of breaking news, but TV is still relied on for new developments. News websites are a leading source for analysis and opinion, but “traditional” platforms (e.g., radio, print, and television) remain indispensable to a majority of Washington Insiders. With so much news coming from so many platforms, it is no surprise that over 40 percent of Capitol Hill staff rely on friends and colleagues to stay on top of the news cycle.

## BACK TO BASICS

### “Traditional” Media Platforms Boast Big Audiences Among Those Seeking In-Depth Analysis

#### Top Sources for Breaking News vs. Analysis and Opinion

percentage of respondents\*



## FOLLOWING THEIR LEAD

#### Message from a Friend or Colleague as a Source of News

percentage of respondents

■ Capitol Hill staff ■ Private-sector insiders ■ Federal executives



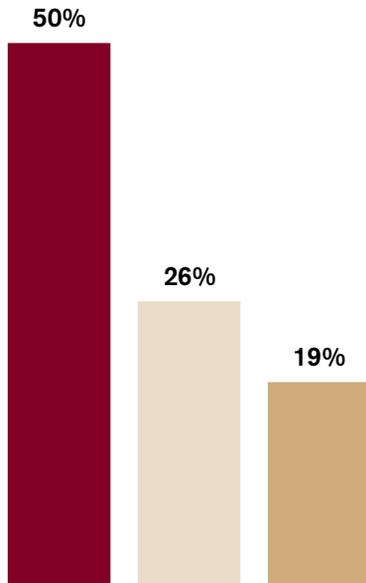
\* Respondents were asked to select up to four top sources for both breaking news and analysis.

Once the “newest” of the new media, blogs have evolved into a worthwhile source for opinion and news analysis. Today, not only do Capitol Hill staff read blogs more than other Washington Insiders, but they are also more likely to consider blogs to be a top source for both breaking news and analysis. With unique perspectives and often, early, up-to-the-moment reporting on a breaking story, few Capitol Hill staff or private-sector insiders can resist blogs.

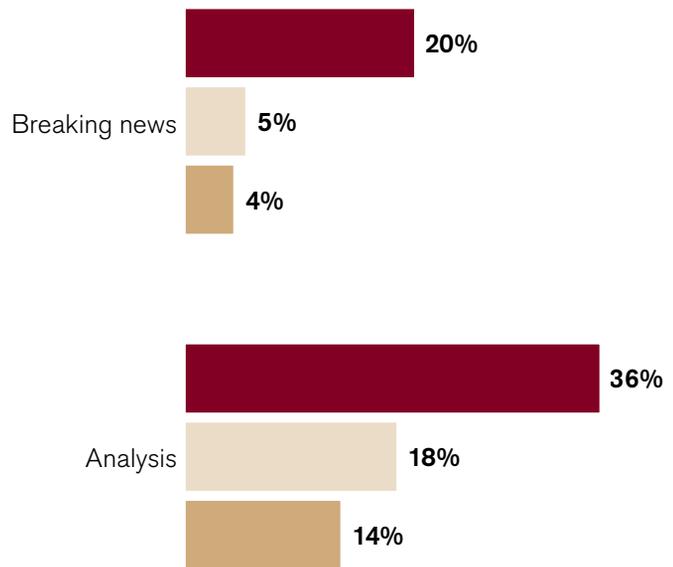
## KEEP AN EYE ON THE BLOG

### Capitol Hill Considers Blogs a Top Source of Breaking News and Analysis

**Blogs as a Source for Local, National, or International News and Analysis**  
percentage of respondents



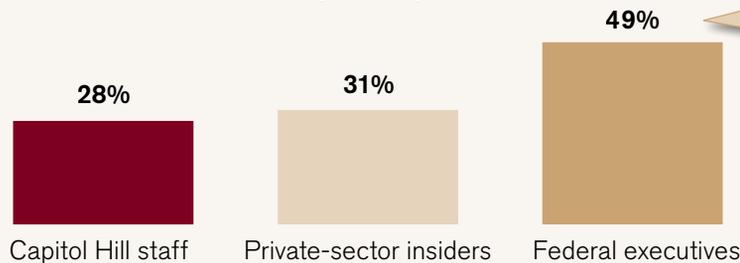
**Blogs as a Top Source for Breaking News and Analysis**  
percentage of respondents\*



■ Capitol Hill staff    ■ Private-sector insiders    ■ Federal executives

## WHAT'S ALL THIS “BLOG” STUFF ABOUT?

**Washington Insiders Who Don't Read Blogs**  
percentage of respondents



There are still those who abstain from blog-reading, mostly from federal agencies.

\*Respondents were asked to select up to four top sources for both breaking news and analysis.

Washington Insiders may not rely on blogs as their main source for news, but they find blogs useful for tracking the tone of discussions and debates. In 2007, the top reason for reading blogs was entertainment. Today, a majority of respondents—54 percent—report reading blogs because “they provide a window into the tone and tenor of issue discussions.” Entertainment now ranks lower than “keeping tuned into national and local politics;” in 2007, this reason ranked as sixth. Blogs are now relevant in Washington.

## A FINGER ON THE PULSE

### Washington Insiders Read Blogs to Keep Track of Trends and Discussions

**Reasons for Reading Blogs**  
percentage of blog readers, n=564

		2007 Percentage	2007 Rank
They provide a window into the tone and tenor of issue discussions	<b>54%</b>	41%	<b>2</b>
They keep me tuned into national/local politics	<b>45%</b>	26%	<b>5</b>
I find them entertaining	<b>44%</b>	54%	<b>1</b>
They cover issues and events that the mainstream media doesn't cover	<b>40%</b>	40%	<b>3</b>
They help me anticipate emerging policy debates	<b>39%</b>	29%	<b>4</b>
They provide a window into what the opposition thinks	<b>37%</b>	24%	<b>6</b>
They cover the most important news stories of the day	<b>30%</b>	15%	<b>9</b>
I respect/value the bloggers' perspective and insight	<b>26%</b>	24%	<b>7</b>
They help me know what like-minded conservatives/liberals are thinking	<b>25%</b>	23%	<b>8</b>
They provide me with in-depth policy analysis	<b>20%</b>	9%	<b>10</b>

### A NEW ANGLE

“Blogs are frequently the first to report breaking news. If I’m looking for the latest, I can find it online.”

– *Senate Chief of Staff*

“Blogs associated with news sites give early insight into developing stories and the angles reporters are taking as they cover an issue.”

– *House Chief of Staff*

“I tend to not rely on blogs for information, but I do use them to gauge what the far left and far right flanks in my district are talking about. Political opinion differs from news, but blogs help us learn what constituents think, even those who don’t contact us.”

– *Senate New Media Director*

Washington Insiders avidly follow many opinion makers. When asked to list which ones they follow most closely, respondents listed 515 distinct opinion makers. Washington Insiders listed fewer than 100 names three or more times, indicating the value of the “long tail” of perspectives inside the Beltway.

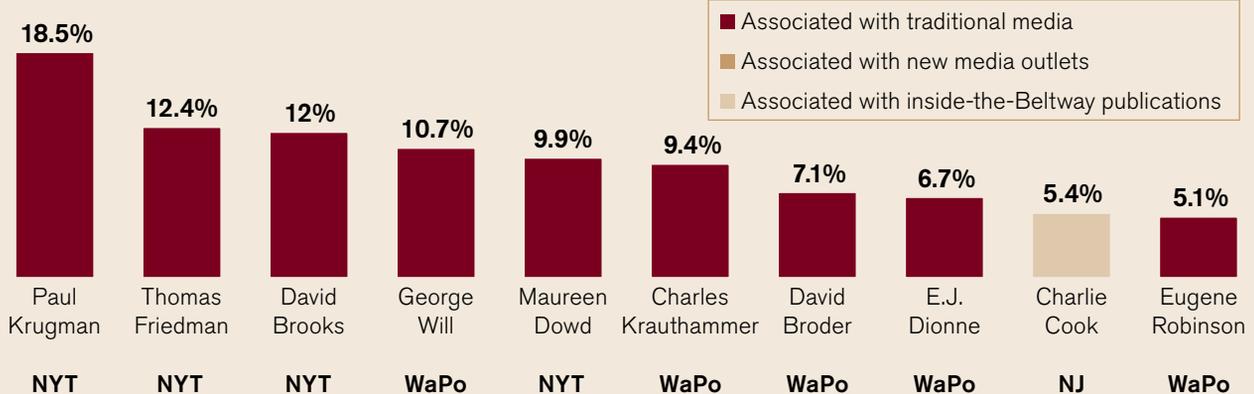
## THE INNER

Washington Insiders Name Hundreds of Opinion



### Top 10 Most-Followed Opinion Makers

percentage of respondents who wrote in at least one name, n=534



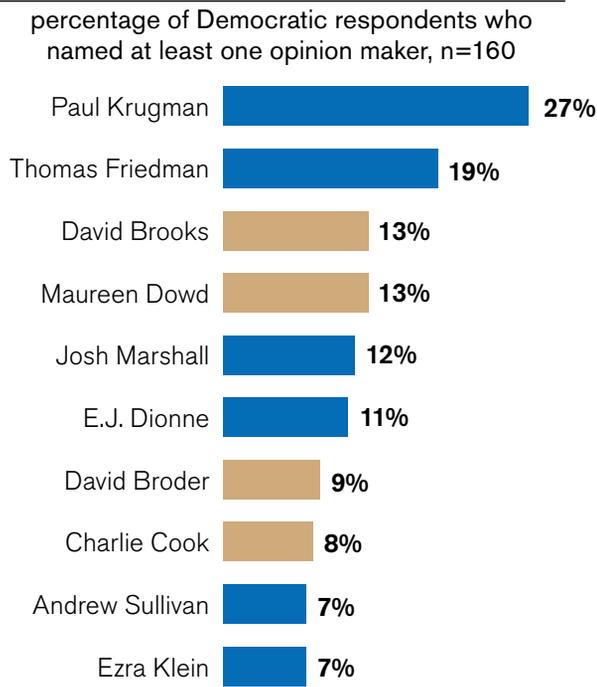


But not all Washington Insiders follow the same opinion makers. David Brooks is the only columnist followed by more than 10 percent of respondents on both sides of the aisle. Writers at *The New York Times* and *The Washington Post* are valued by both Democrats and Republicans, but Democrats prefer *The New York Times* to *The Wall Street Journal*. While Democrats turn to opinion makers at *Talking Points Memo* and MSNBC, Republicans go to *Drudge Report* and *National Review*.

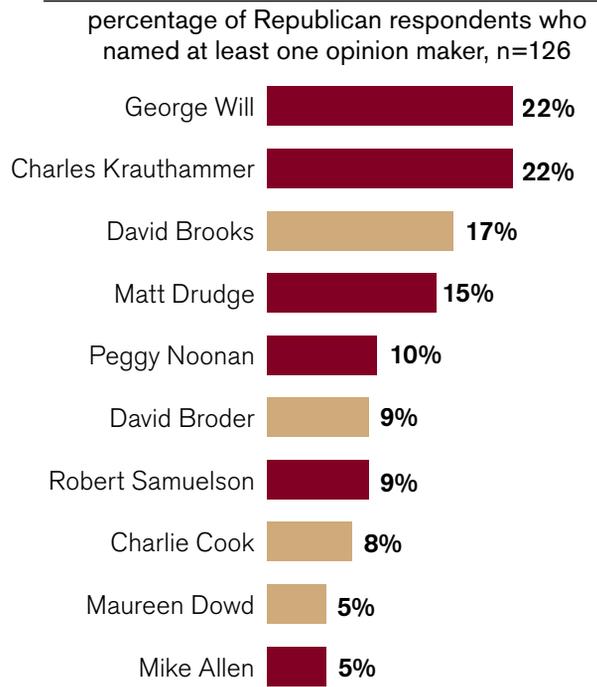
## YOU'VE GOT A FRIEND IN ME

### Washington Insiders Follow Opinion Makers Who Share Their Point of View

#### Top Opinion Makers Among Democrats\*



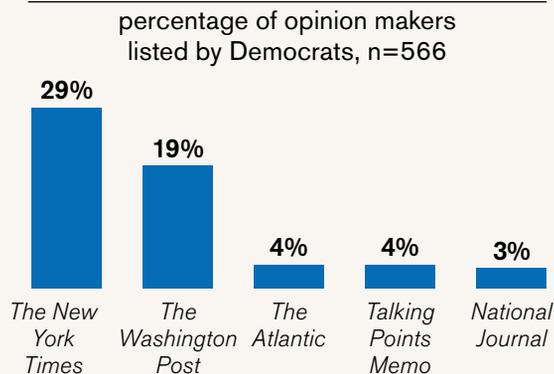
#### Top Opinion Makers Among Republicans\*



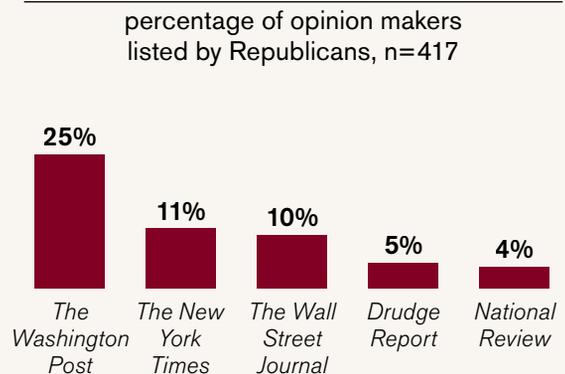
■ Top opinion maker for respondents of both parties

## OPINION MAKERS FIND THEIR HOMES

#### Top News Brands Among Democrats



#### Top News Brands Among Republicans



\*Among Capitol Hill staff and private-sector insiders who listed at least one opinion maker that they follow closely.

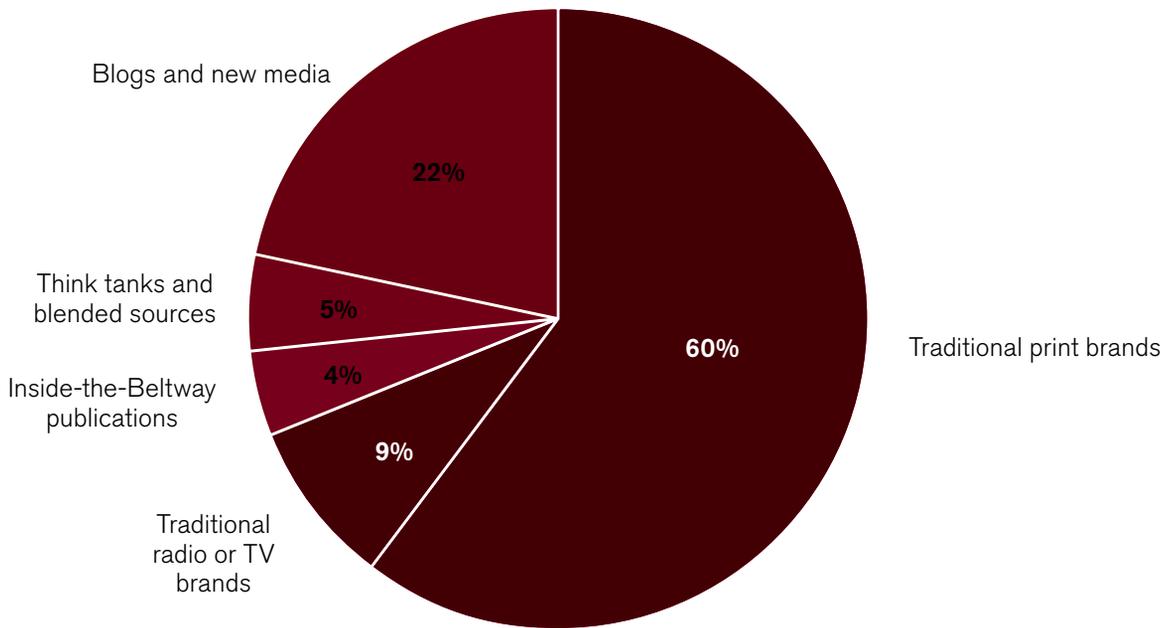
While new-media outlets have certainly made inroads with the Washington audience, opinion makers at traditional sources still dominate. Traditional print brands, radio, and television employ a full 73 percent of the opinion makers Washington Insiders follow. New-media voices may have gained in prominence in Washington, but have yet to take over.

## TRIED AND TRUE

### Traditional News Brands Continue to Dominate the Market of Opinion

#### Media Association of Opinion Makers\*

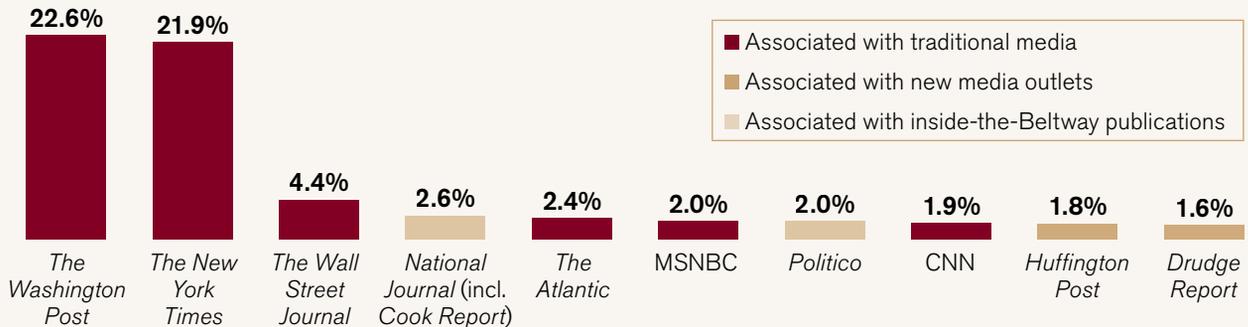
percentage of opinion makers categorized, n=1613



## WHERE THE IMPORTANT ONES ARE

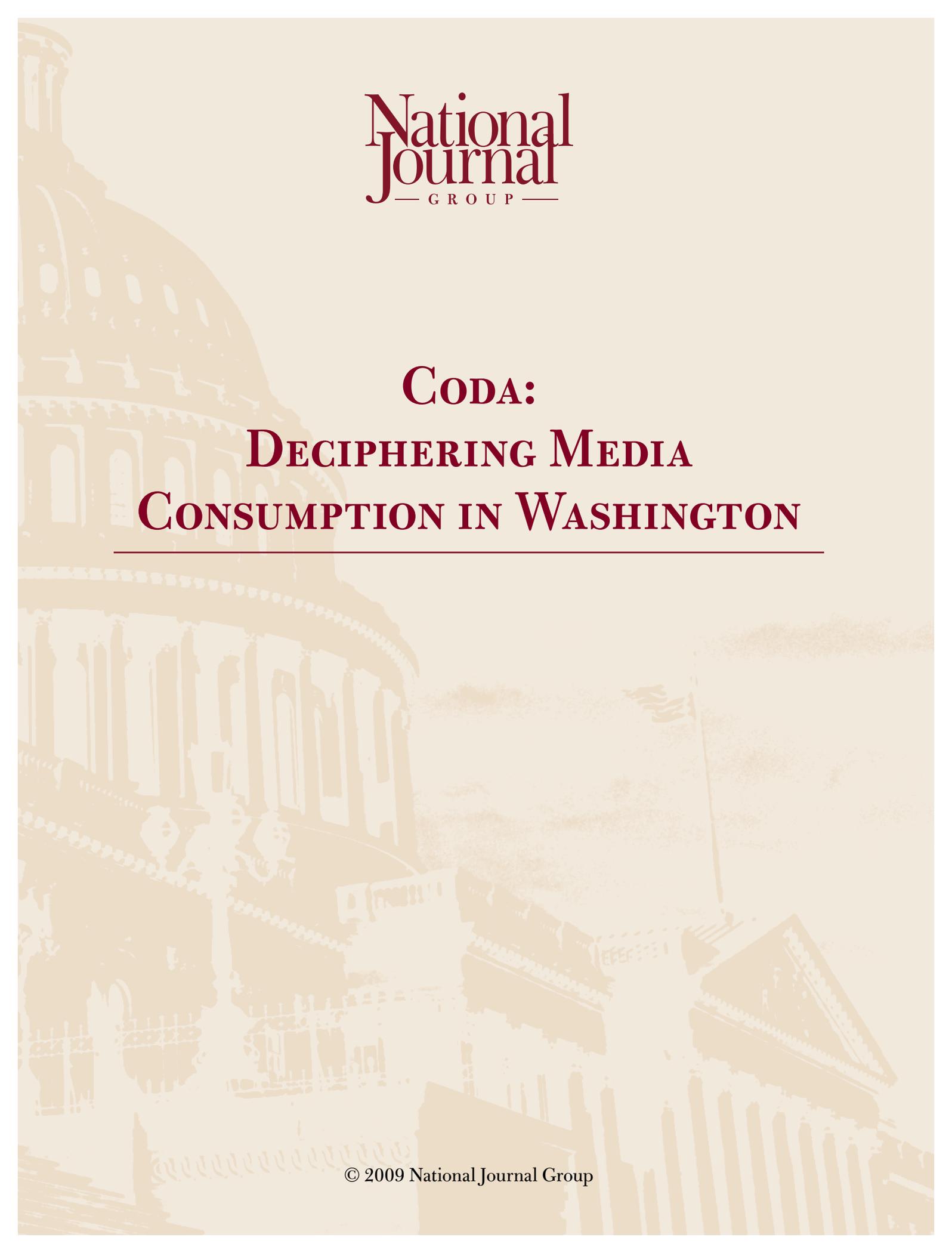
#### Top Opinion Maker's Publications

frequency of listing of associated opinion makers, n=1656



\* Platforms listed are the primary platform of the opinion makers affiliated publication or outlet.





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**CODA:  
DECIPHERING MEDIA  
CONSUMPTION IN WASHINGTON**

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# DECIPHERING MEDIA

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## **1. As the dust settles, traditional platforms—TV, print, and radio—remain essential components of the media mix**

Digital platforms are finding their place alongside traditional platforms as Washington Insiders use different platforms for different purposes. The Internet plays an important role in today's media landscape for breaking news and analysis, but traditional platforms remain an important component of Washington Insiders' daily media consumption. Print is still a significant source for analysis and opinion, while the ever-present television continues to provide breaking news.

## **2. Despite the plethora of choices, opinion makers associated with long-established brands carry the most influence online**

Only a handful of columnists and bloggers are followed by large numbers of Washington Insiders. Most of these most-followed opinion makers are associated with trusted, long-standing, traditional media outlets and inside-the-Beltway publications.

## **3. Yet, Washington Insiders also value a long tail of unique opinion makers**

More than 400 distinct opinion makers are respected enough to be followed by at least one Washington Insider. This heterogeneous group of writers and bloggers are associated with both new and traditional media sources, and are valued by Washington Insiders for their issue-specific coverage or personal perspectives.

## **4. Washington Insiders favor news sources that share their political point of view**

Washington Insiders are more likely to read sources that share their point of view and political leaning. Although some do try to keep an eye on what "the opposition" is saying (if only to stay on top of current events), they loyally follow sources, including publications, bloggers, and opinion makers, with whom they're already inclined to agree. It is often friends, colleagues, and late-night comedy shows that point out the prevailing opinions from the other side of the aisle in often-satirical ways.

## **5. No longer just for email, mobile devices are a gateway to news and information**

As mobile devices continue to improve in functionality and media companies have packaged their content to be more mobile-friendly, Washington Insiders have adapted to reading content on a small screen. As a result, Washington Insiders' use of these devices has expanded beyond just checking and sending email to include reading news and information and performing more complex work-related tasks, such as editing documents.

# CONSUMPTION IN WASHINGTON

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## **6. Mobile devices and new digital communication tools continue to blur the lines between the personal and professional**

What was once a detached 24-hour news cycle has become a fervent 24-hour workday. With a mobile device in hand, Washington Insiders are displaying new levels of dedication and engagement, from the first buzz in the morning to the last text at midnight, so as not to be the last to know. Mobile and other new digital communication tools allow Washington Insiders to fluidly (and privately) transition between work-related and personal tasks.

## **7. Online video and audio have yet to infringe on the dominance of TV and radio**

Despite the flexibility offered by the on-demand format of digital platforms, use of online video and audio remains secondary to traditional television and radio. Always aiming to be the first to know, Washington Insiders still prefer to watch television in real time, and listen to news radio during their car commute. With the availability of online audio and video content expanding and the inherent convenience they bring, all signs indicate that these platforms will become more prevalent in Washington over time.

## **8. The national attraction to Twitter fades inside the nation's capital**

Washington Insiders, including Members of Congress who “tweet,” use Twitter to reach external, or national, audiences, not colleagues within the Beltway. In Washington, Twitter updates are yet another weapon in public relations arsenals. Washington Insiders would rather avoid the loudspeaker-like communications style of Twitter, calling most of the messages on the site “pointless babble.” Twitter, to most Washingtonians, is just pointless babble.

## **9. Social networking sites are popular inside the Beltway**

Although Washington Insiders initially joined Facebook as a way to keep in touch with friends and family, they now use Facebook and other social networking sites as professional tools: a means for connecting with colleagues and sharing news. News items and employment recommendations can be posted to profiles, but real “connection” is still about who you know. Social networking tools only enhance Washington Insiders’ ability to maintain their offline networks.

## **10. The more things change, the more things stay the same: Washington's reliance on relationships extends online**

As always, Washington Insiders depend on those within their trusted personal and professional networks for insight and analysis. Links from friends and colleagues help filter the wheat from the chaff amid the proliferation of media. Yet digital communication tools (Facebook, G-chat, BBM, and others) have changed the means through which information is exchanged. A text message or Facebook post from a friend can get one's attention in the same way only a phone call once could.

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