Federal Media & Marketing Study 2019

October 2019

Market Connections®
Research you can act on.

Table of Contents

Background & Methodology

Methodology

- Comprehensive respondent base
  - Market Connections proprietary Government Insight Panel
  - Third party databases
  - Print publications
  - Digital sites

- Over 200 media outlets

- Online survey fielded in June – August 2019

- Data weighted to ensure publications were not over- or under-represented in sample (total weighted sample size: approximately 2,800)

Topics Covered

Demographics
- Agency/Location
- Age
- Political affiliation

Job functions
- Over 25 job functions

Purchase responsibility
- Over 40 product/service purchase categories

Trade shows, webinars

Trusted sources of information

Time spent with media

Media usage
- Print
- Digital & social sites

Washington, DC
- Print, digital, broadcast

...and much more

Publications & Digital Sites

Government Media

- Over 65 media properties
- New this year
  - FedSmith.com
  - G2Xchange.com
  - RouteFifty.com
  - American City and County
  - Governing
  - Government Technology

Business & News Media

- Over 30 media properties
- New this year
  - ESPN.com

Technology & Industry

- Over 20 media properties
- New this year
  - Techwire.net

Social Media & Lifestyle

- Over 20 sites

WASHINGTON METRO AREA
Local Media: Print, Broadcast and Digital

- 20 AM/FM radio stations
- 11 television news networks
- 10 early morning political commentary programs
- Six local publications
- Companion sites

New This Year

- **Demographics:** Marital status, household composition, household income, resident status (e.g., own, rent), financial product and major purchase plans

- **News:** "Go-to" sources

- **Mobile:** Apps used, push notifications, podcasts

- **Events and Webinars:** Deeper dive

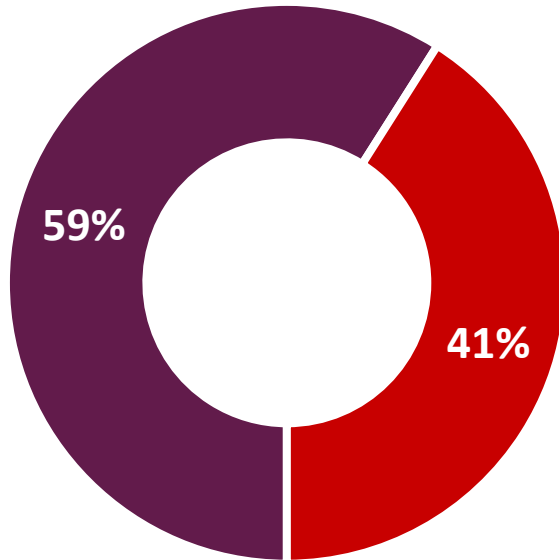- **Day in the Life:** Media exposure throughout a typical day

Demographics

DEMOGRAPHICS
Agency Type & Location

Agency Type

59% Civilian or Independent

41% Defense or Military

Location

81% Outside the Beltway

19% Inside the Beltway

■ Civilian or Independent   ■ Defense or Military
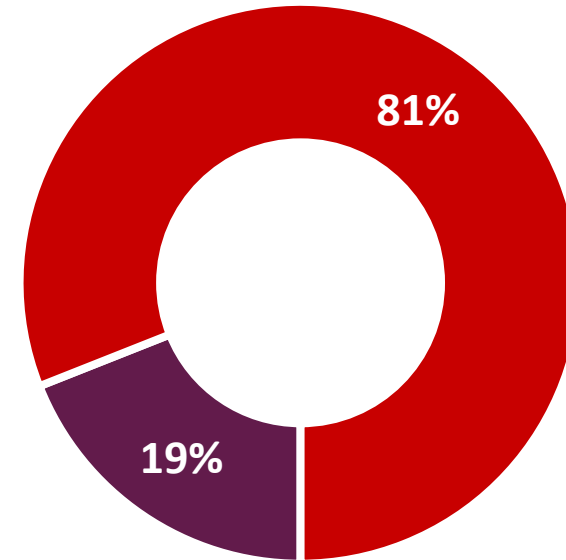
■ Inside the Beltway   ■ Outside the Beltway

What type of organization do you work for?
Are you located in the Washington DC Metro Area?

TREND 2017-2019

Age

Legend: 21 to 34 | 35 to 44 | 45 to 54 | 55+

2017: 3%, 11%, 29%, 56%
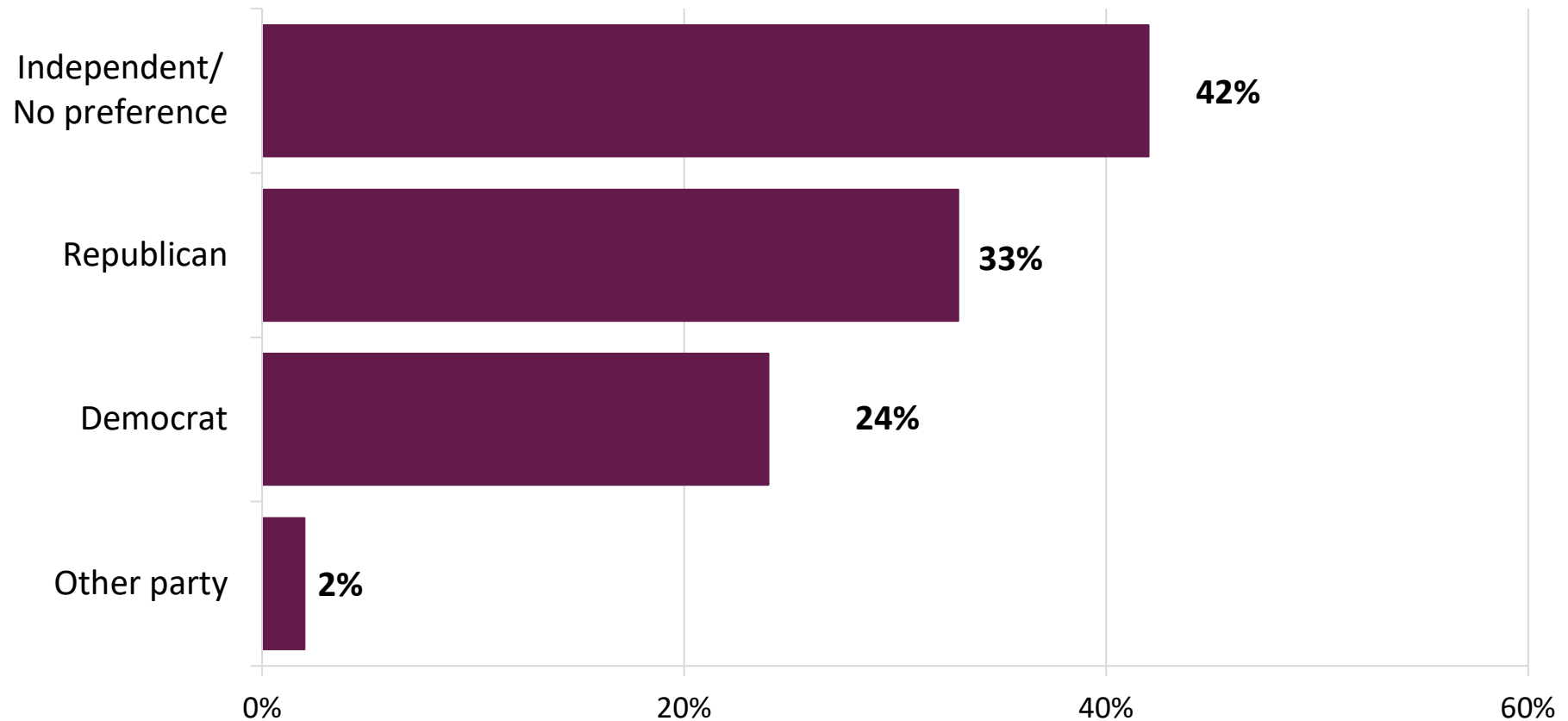**2018:** 12%, 16%, 23%, 47%
2019: 9%, 14%, 25%, 49%

What is your age?
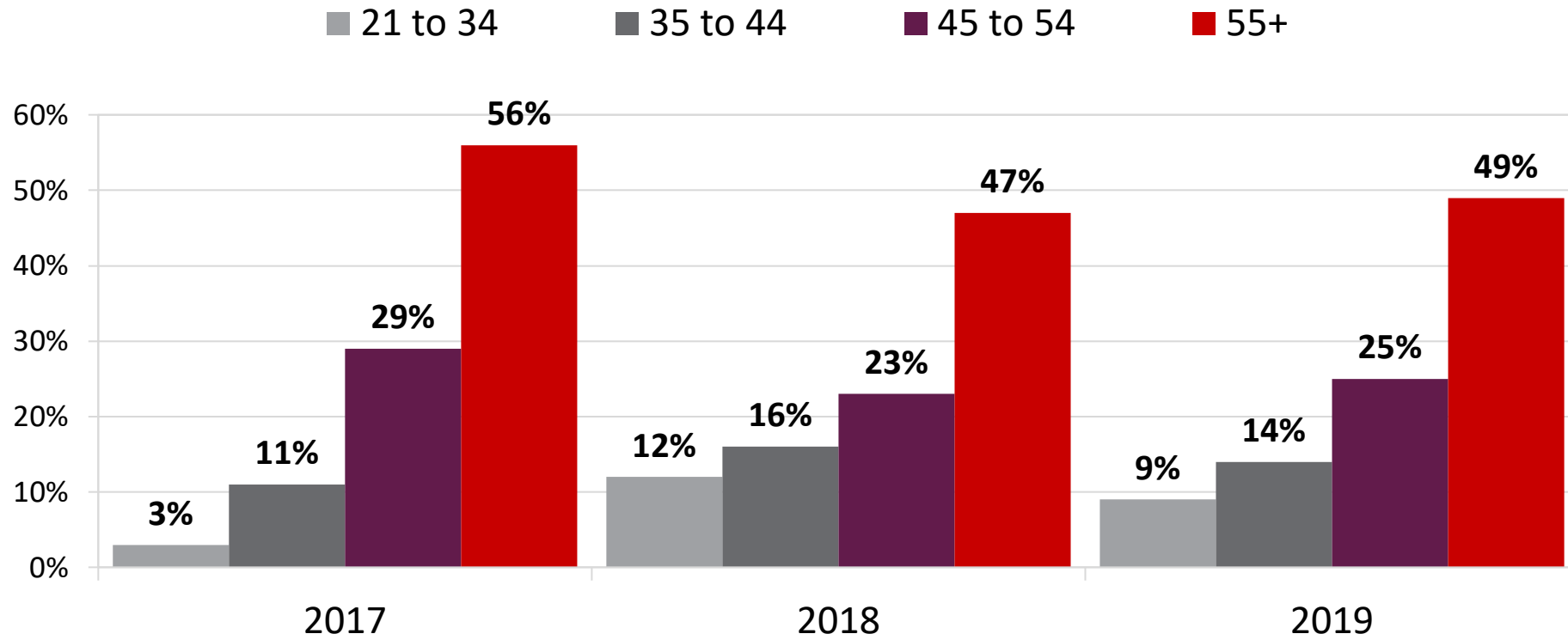
DEMOGRAPHICS
Political Affiliation

In politics today, do you consider yourself a Republican, a Democrat, or an Independent?

Top 10 Job Functions & Purchase Categories

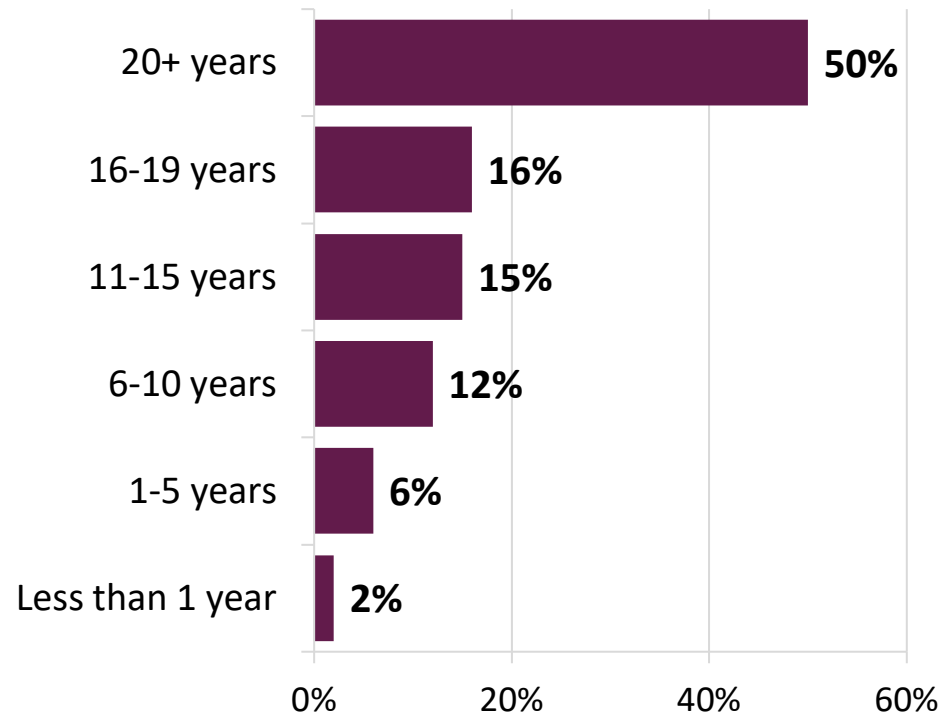| Job Function	Product/Service Purchase Categories
Administration and office services	Computer systems/hardware
Project/program management	Office equipment and supplies
Accounting, budget and finance	Education/training classes and services
Informational technology, computers, systems	Software
Training, education	Cloud computing services
Purchasing, contracting, procurement	IT services
Engineering/architecture	Communications/telecommunications
Human resources, personnel, benefits	Cybersecurity
Executive and command	Furniture/furnishings
Communications/telecommunications	Consulting services

Which of these categories best represents your area of responsibility at work? (select all that apply)
In the past year, for which of the following products or services have you been involved in the acquisition/procurement process (specify, evaluate, recommend, approve or buy)? (select all that apply)

Federal Environment

Tenure & Time Remaining in Federal Employment

Total Years as a Federal Employee

20+ years	50%
16-19 years	16%
11-15 years	15%
6-10 years	12%
1-5 years	6%
Less than 1 year	2%

Years Until Leaving Federal Employment

10+ years	21%
6-9 years	17%
3-5 years	23%
1-2 years	12%
Less than 1 year	9%
Don't know/Undecided	17%
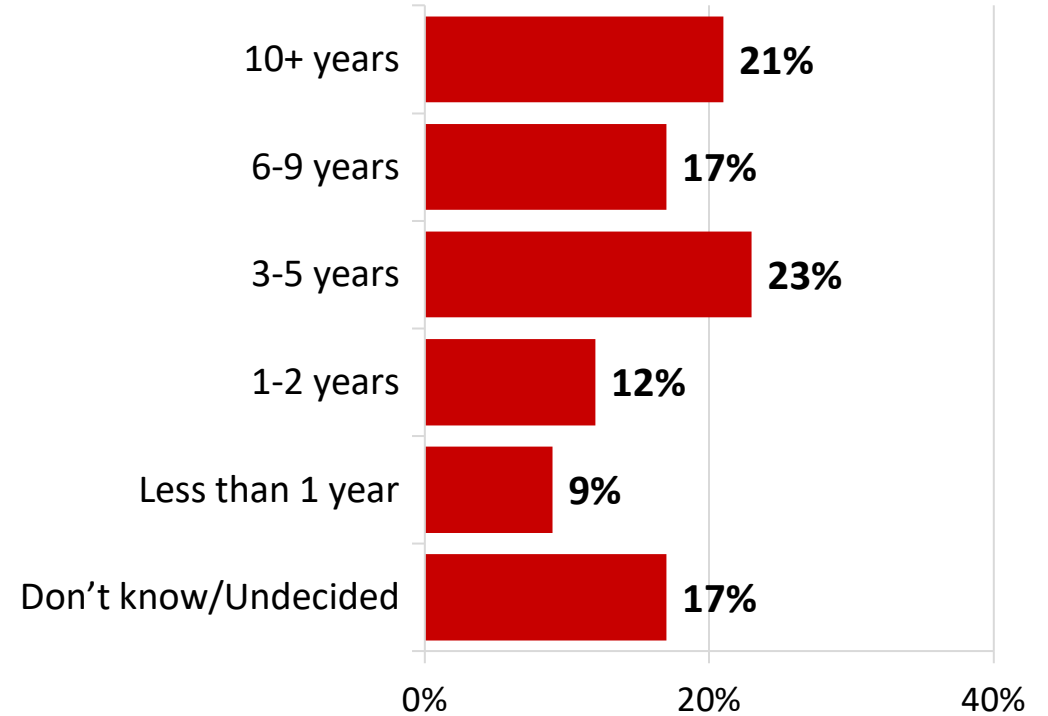
How many years in total have you served as a federal government employee? (Include military service, if applicable.)
In how many years do you plan to leave federal employment?

Future Plans

Plans After Leaving Federal Employment

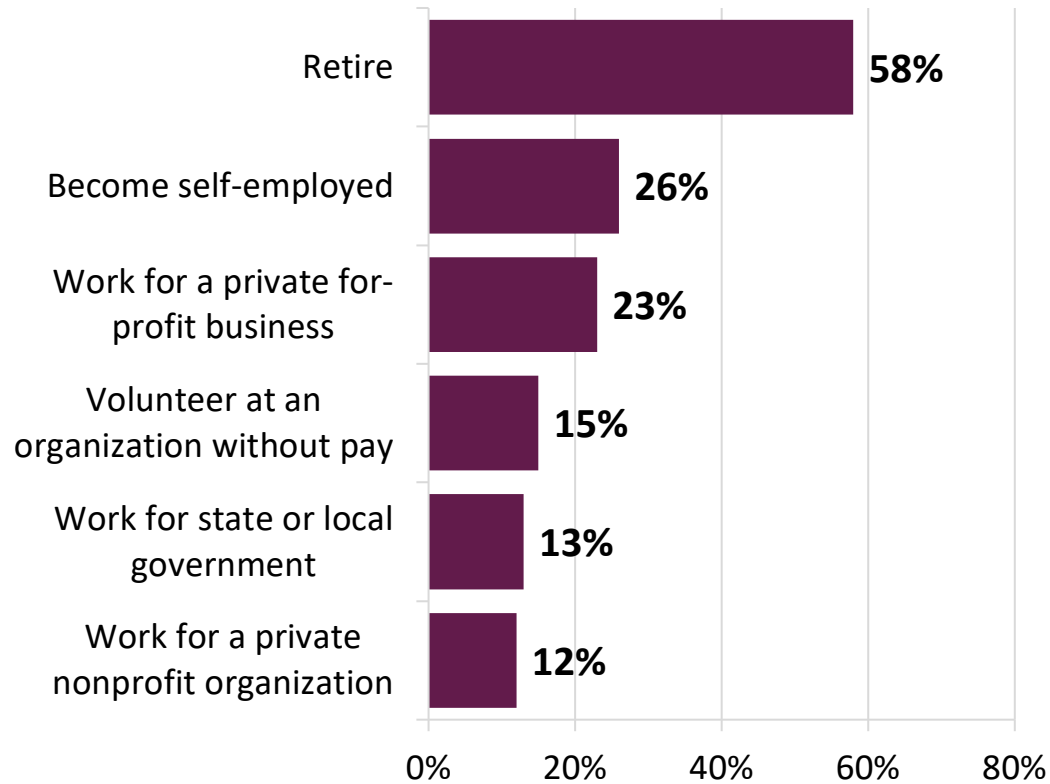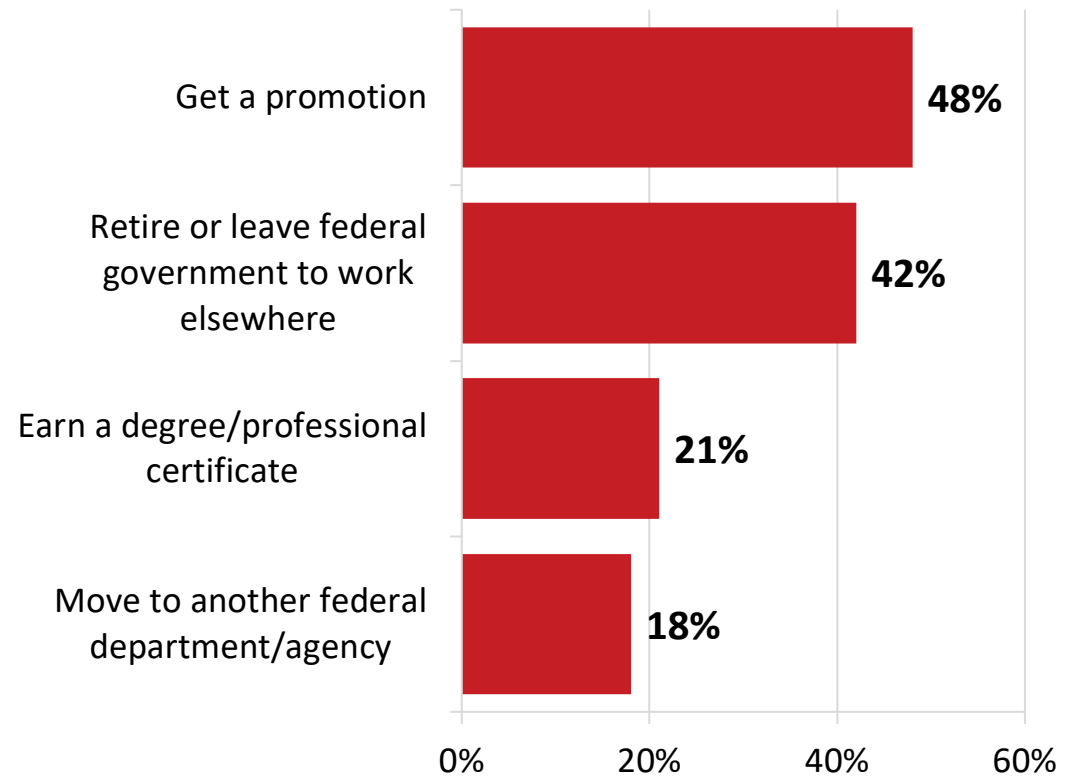|	
Retire	58%
Become self-employed	26%
Work for a private for-profit business	23%
Volunteer at an organization without pay	15%
Work for state or local government	13%
Work for a private nonprofit organization	12%

0%   20%   40%   60%   80%

Career Plans for the Next 5 Years

Get a promotion	48%
Retire or leave federal government to work elsewhere	42%
Earn a degree/professional certificate	21%
Move to another federal department/agency	18%

0%   20%   40%   60%

What do you plan to do after you leave federal employment? (select all that apply)
What are your career plans for the next 5 years? (select all that apply)

Top Work-Related Challenges Over Next Year

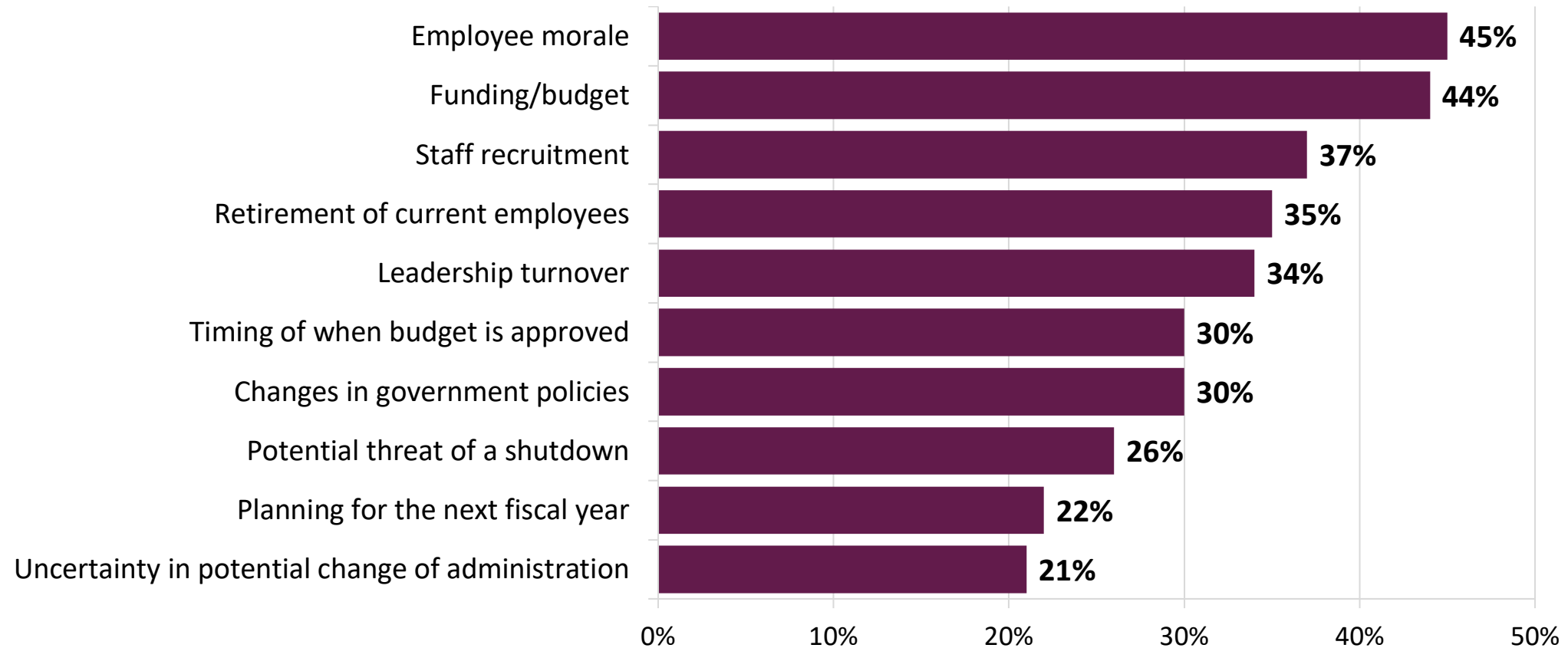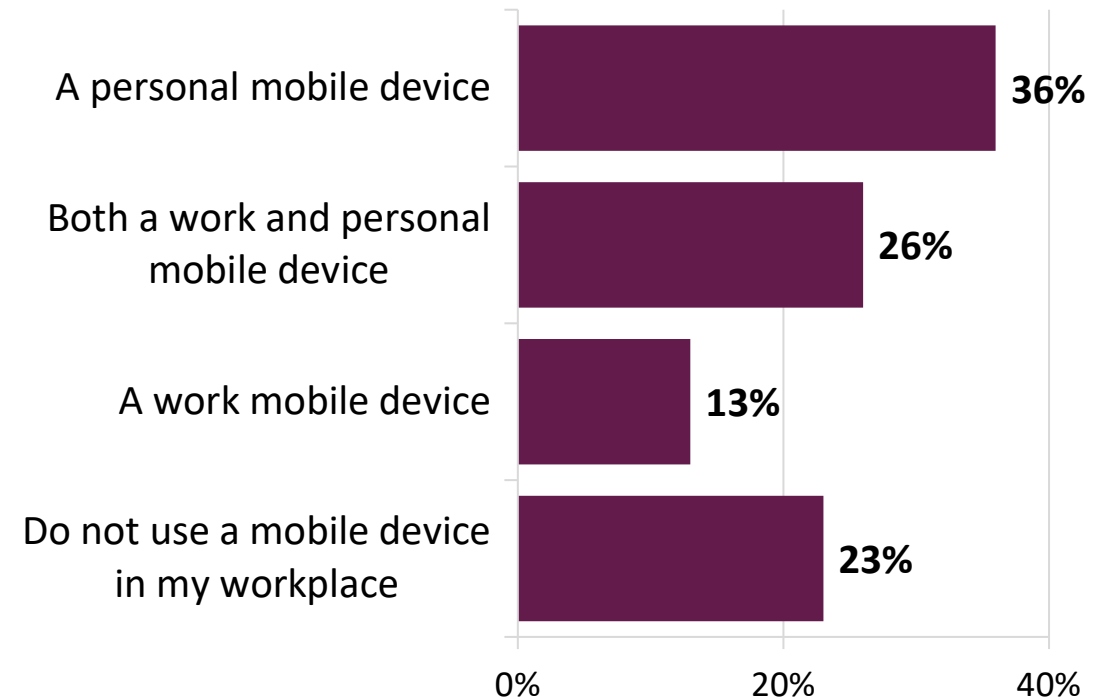| Challenge	Percentage
Employee morale	45%
Funding/budget	44%
Staff recruitment	37%
Retirement of current employees	35%
Leadership turnover	34%
Timing of when budget is approved	30%
Changes in government policies	30%
Potential threat of a shutdown	26%
Planning for the next fiscal year	22%
Uncertainty in potential change of administration	21%

What do you see as the biggest work-related challenges coming over the next year in your agency? (select all that apply)

Mobile Devices in the Workplace

Works in a Secure Space Where Personal Mobile Devices Are Prohibited

76%

23%

■ Yes   ■ No
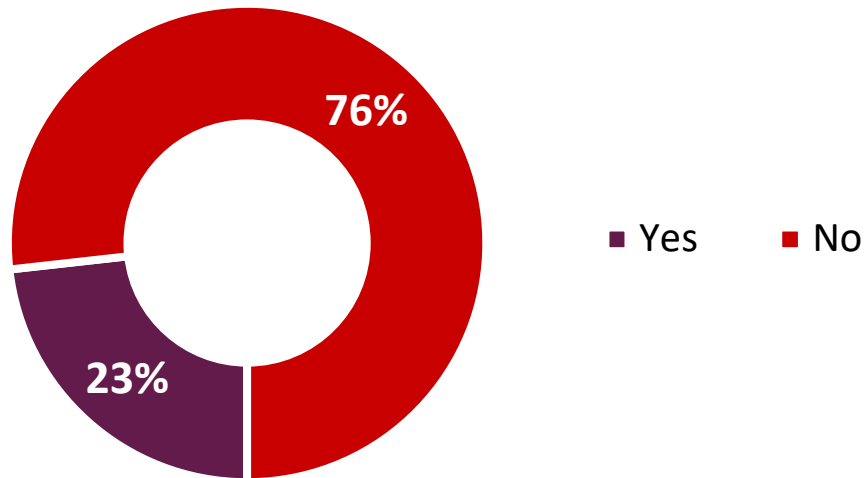
Mobile Device Use in the Workplace

Category	Percentage
A personal mobile device	36%
Both a work and personal mobile device	26%
A work mobile device	13%
Do not use a mobile device in my workplace	23%

0%   20%   40%

Do you spend the majority of your time at work in a secure space where personal mobile devices are prohibited?
Which of the following do you use while you're at your workplace?

Work Locations

% Always/Often

Location	Percentage
Traditional office space	80%
Shared office space	21%
Telework from home	12%

How often do you work in each of the following locations?
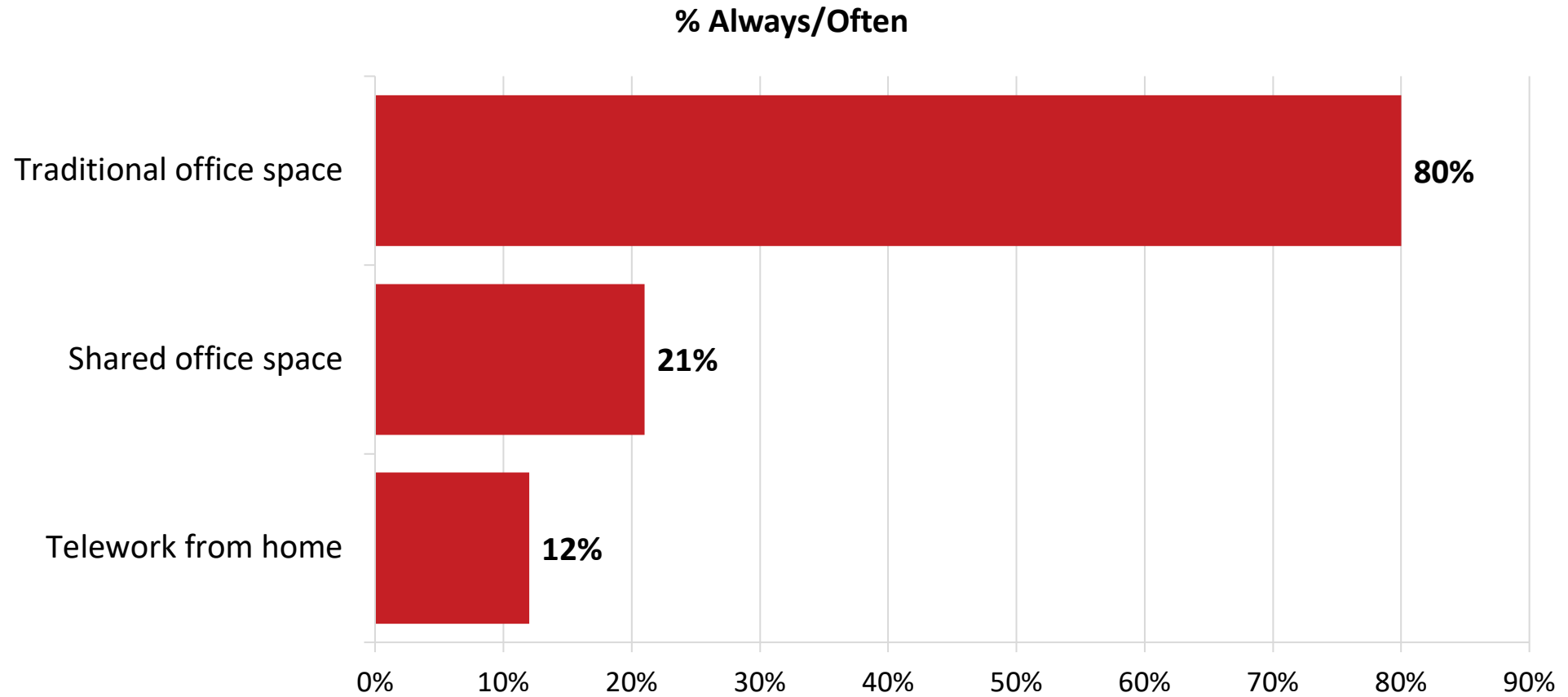
Media Results

Top Print Business & News Publications Read
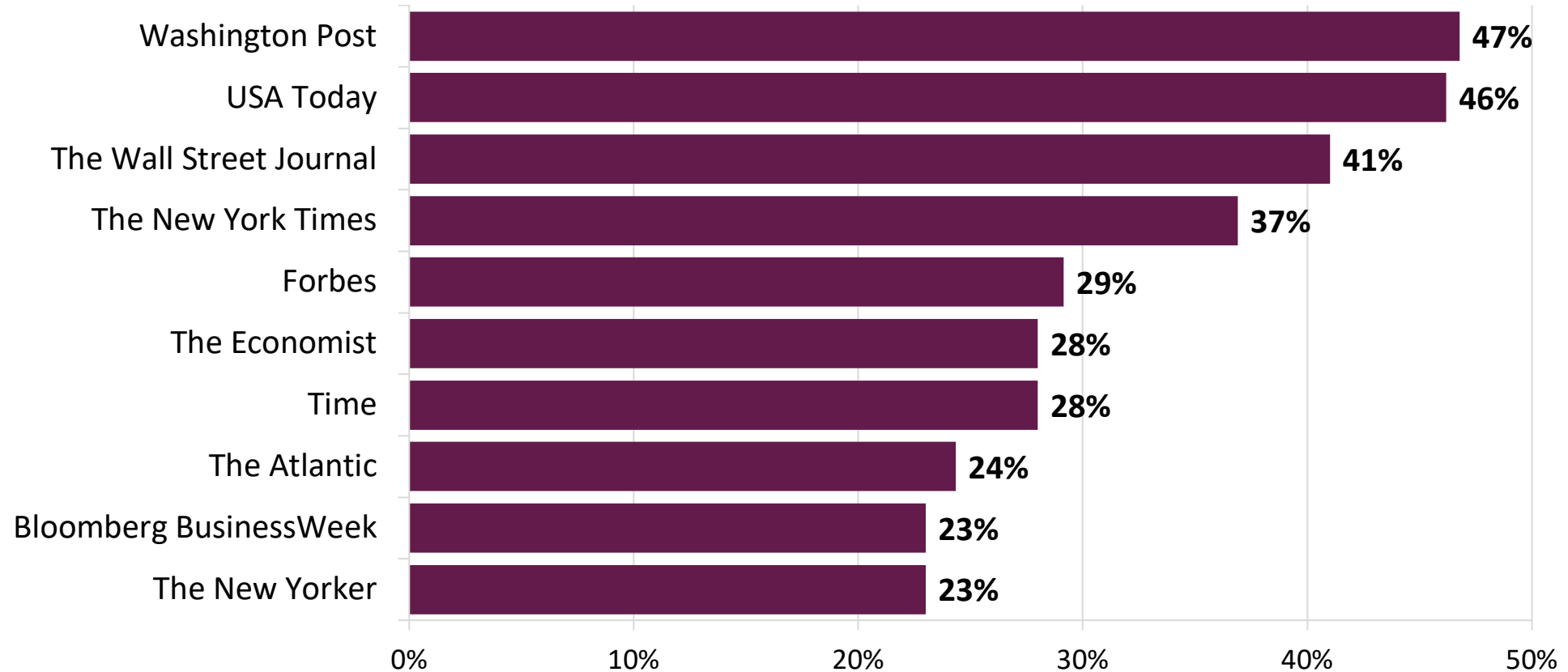
Publication	Percentage
Washington Post	47%
USA Today	46%
The Wall Street Journal	41%
The New York Times	37%
Forbes	29%
The Economist	28%
Time	28%
The Atlantic	24%
Bloomberg BusinessWeek	23%
The New Yorker	23%

From the list below, please indicate what print publications you read on a regular basis (3 of 4 issues) and which you occasionally read.

Top Print Federal & Congressional Publications Read
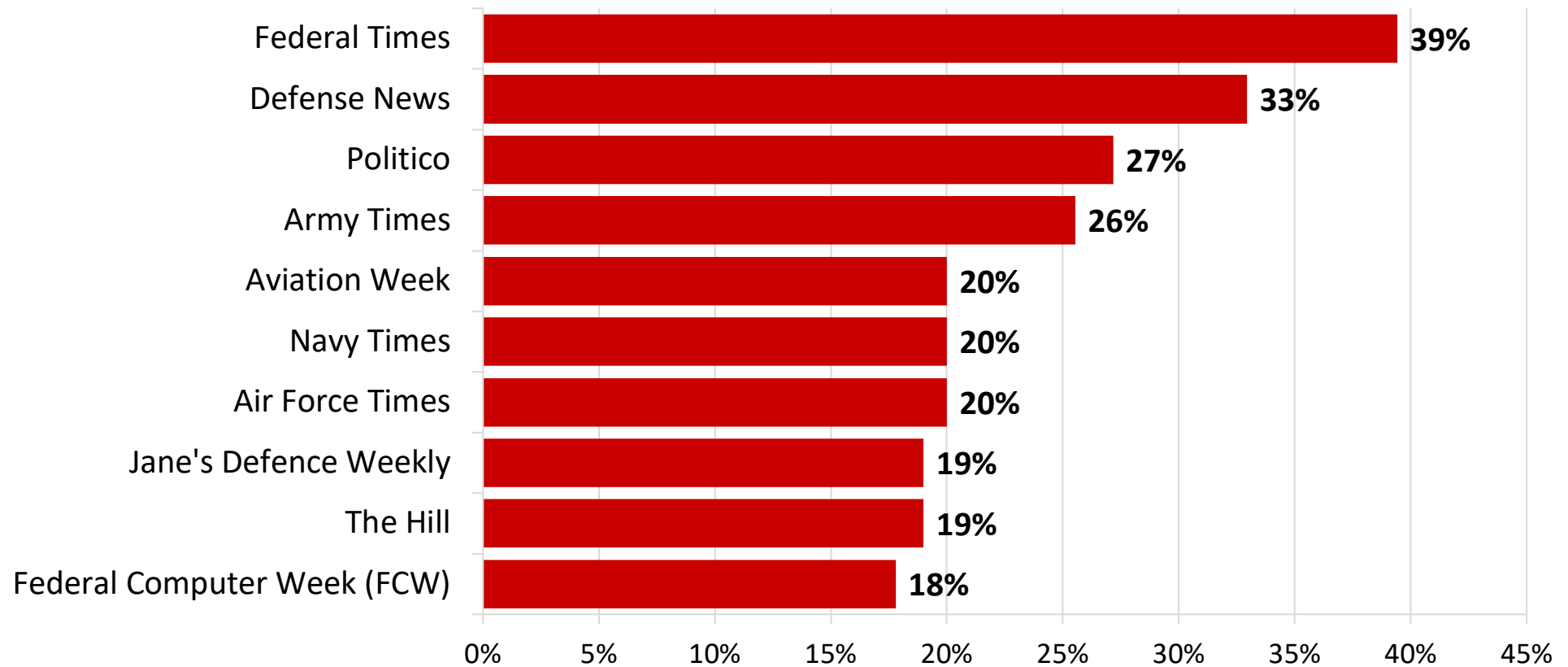
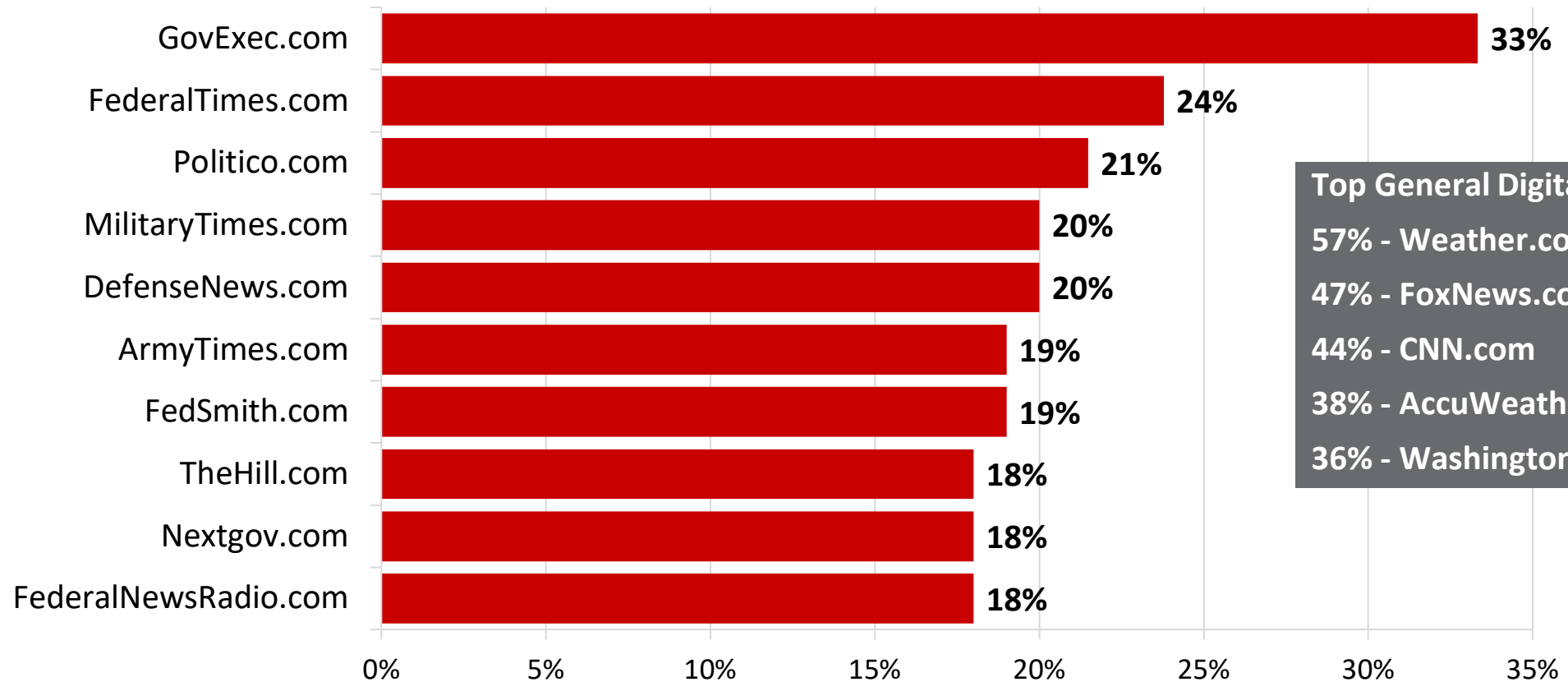| Publication	Percentage
Federal Times	39%
Defense News	33%
Politico	27%
Army Times	26%
Aviation Week	20%
Navy Times	20%
Air Force Times	20%
Jane's Defence Weekly	19%
The Hill	19%
Federal Computer Week (FCW)	18%

From the list below, please indicate what print publications you read on a regular basis (3 of 4 issues) and which you occasionally read.
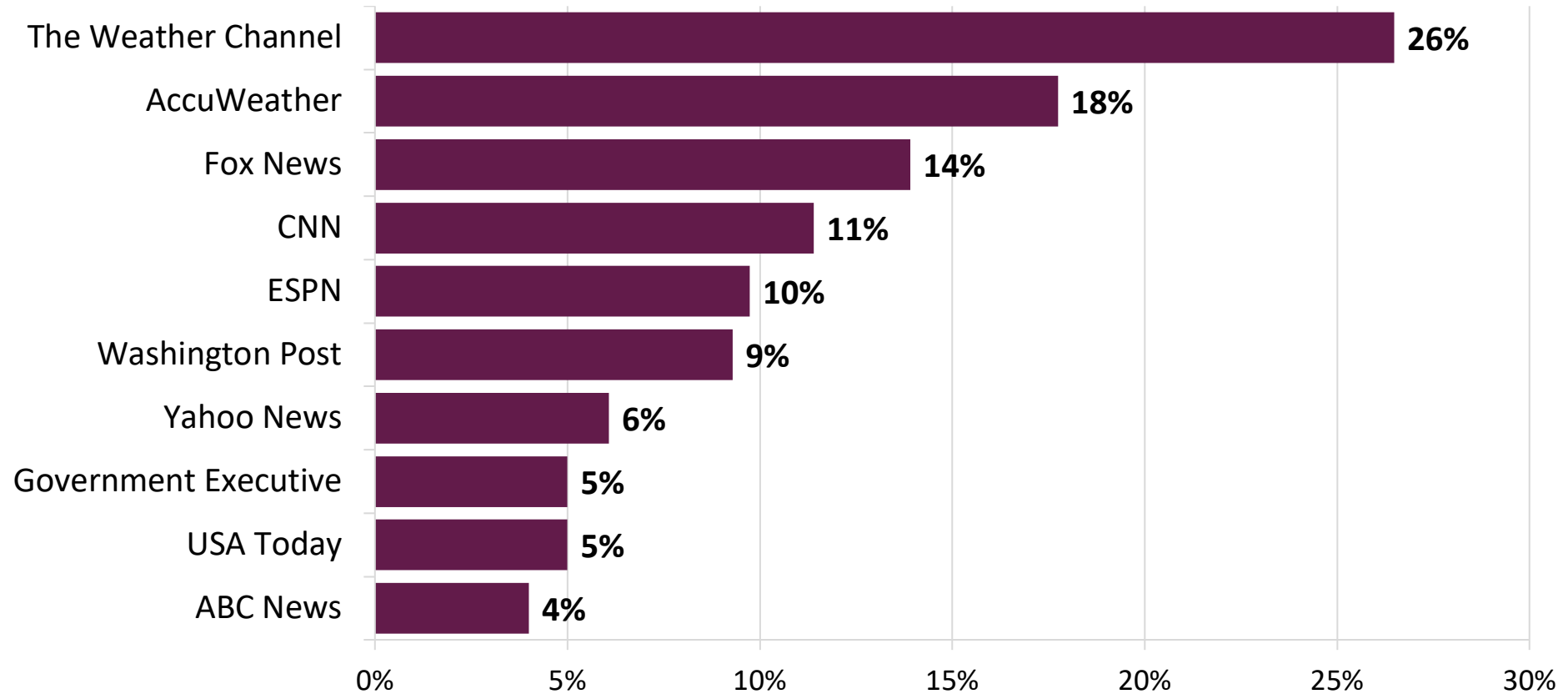
Top Federally Focused Digital Sites Visited

Site	Percentage
GovExec.com	33%
FederalTimes.com	24%
Politico.com	21%
MilitaryTimes.com	20%
DefenseNews.com	20%
ArmyTimes.com	19%
FedSmith.com	19%
TheHill.com	18%
Nextgov.com	18%
FederalNewsRadio.com	18%

Top General Digital Sites
57% - Weather.com
47% - FoxNews.com
44% - CNN.com
38% - AccuWeather.com
36% - WashingtonPost.com

From the list below, please indicate which of the following you access digitally (i.e. websites, mobile sites, apps) for news or information.

Top Apps Downloaded on Mobile Device

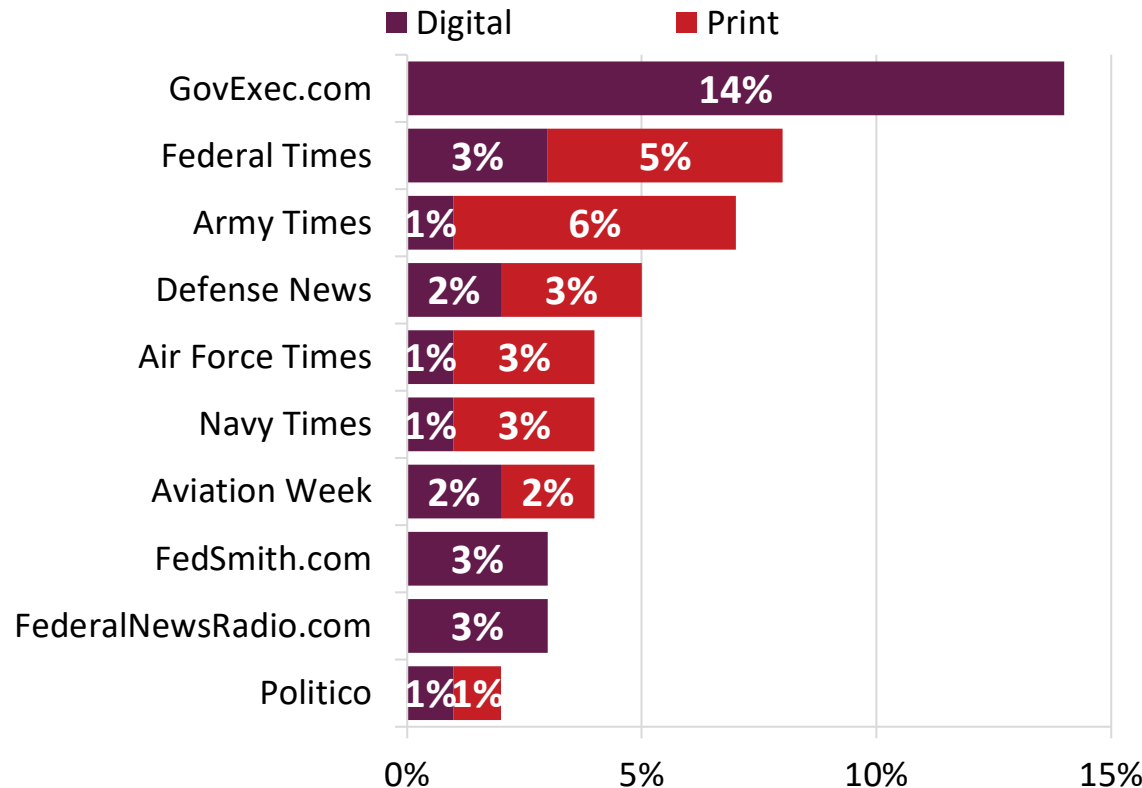| App	Percentage
The Weather Channel	26%
AccuWeather	18%
Fox News	14%
CNN	11%
ESPN	10%
Washington Post	9%
Yahoo News	6%
Government Executive	5%
USA Today	5%
ABC News	4%

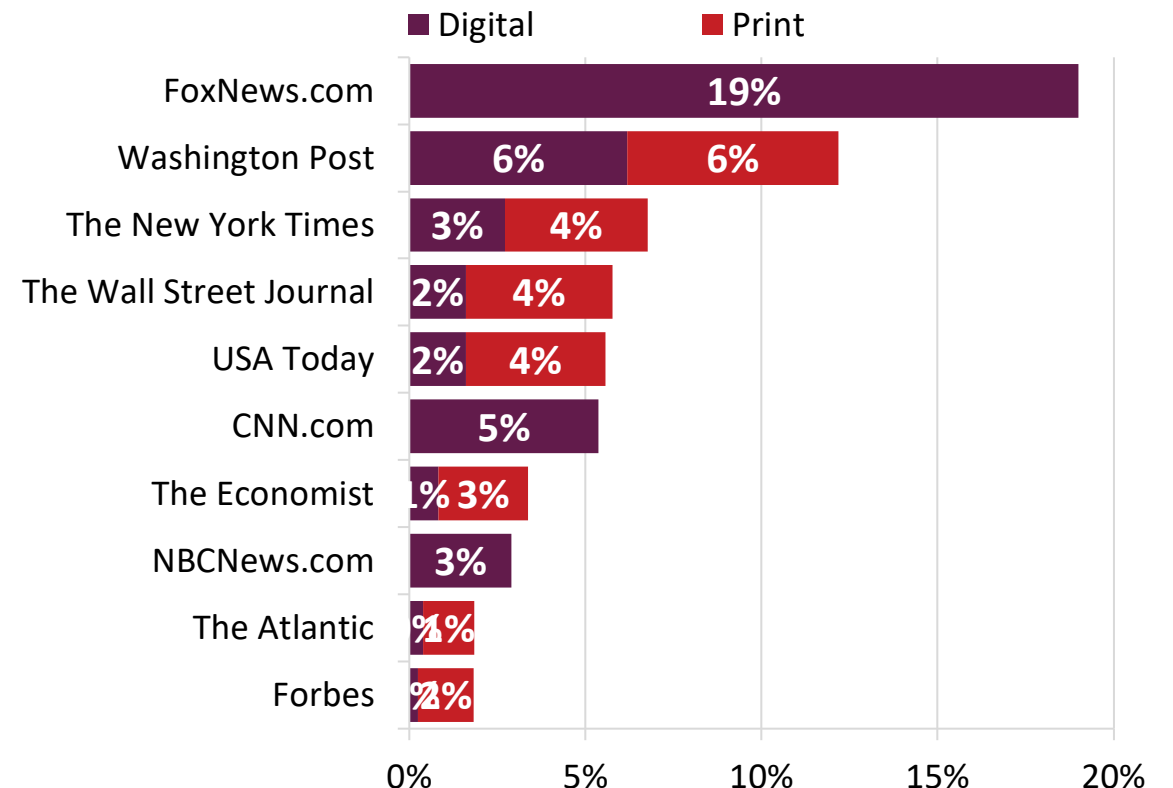*Which of the following apps do you have downloaded on your mobile device? (select all that apply)*

Go-To Print and Digital Media Property for News

## Go-To Government-Focused Media Property

■ Digital   ■ Print

Property	Digital	Print
GovExec.com	14%	
Federal Times	3%	5%
Army Times	1%	6%
Defense News	2%	3%
Air Force Times	1%	3%
Navy Times	1%	3%
Aviation Week	2%	2%
FedSmith.com	3%	
FederalNewsRadio.com	3%	
Politico	1%	1%

0%   5%   10%   15%

Go-To General Media Property

■ Digital   ■ Print

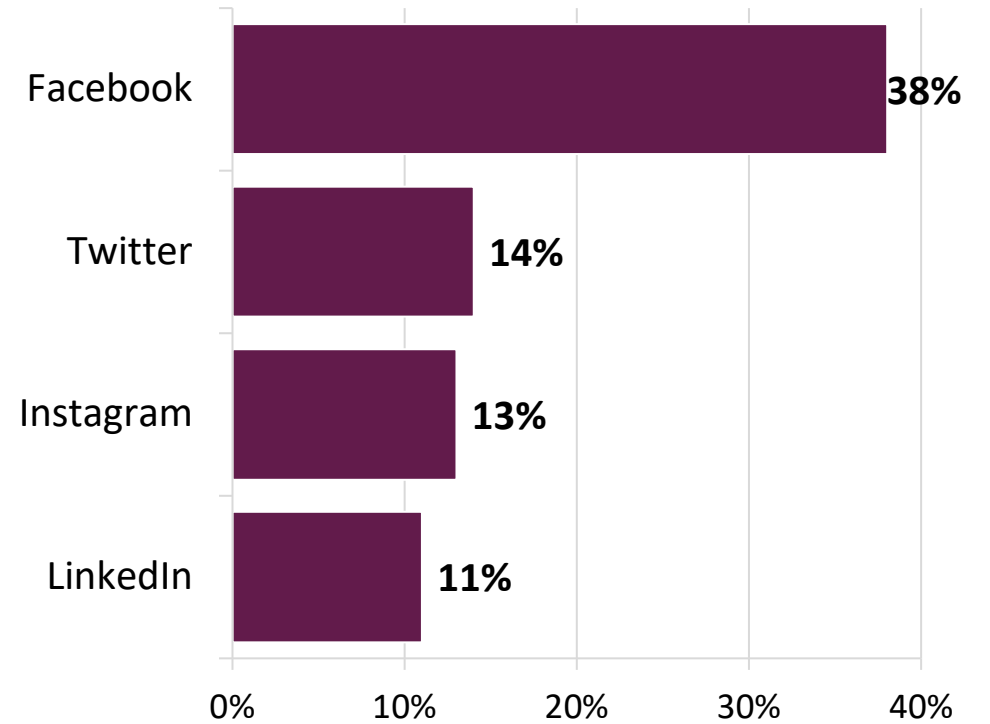| Property	Digital	Print
FoxNews.com	19%	
Washington Post	6%	6%
The New York Times	3%	4%
The Wall Street Journal	2%	4%
USA Today	2%	4%
CNN.com	5%	
The Economist	1%	3%
NBCNews.com	3%	
The Atlantic	1%	1%
Forbes	1%	1%

0%   5%   10%   15%   20%

If you could only choose one government-focused media property as your "go-to" source for work-related news, which would you choose?
If you could only choose one general media property as your "go-to" source for news, which would you choose?

Online Social Sites

Top Online Social Sites Used
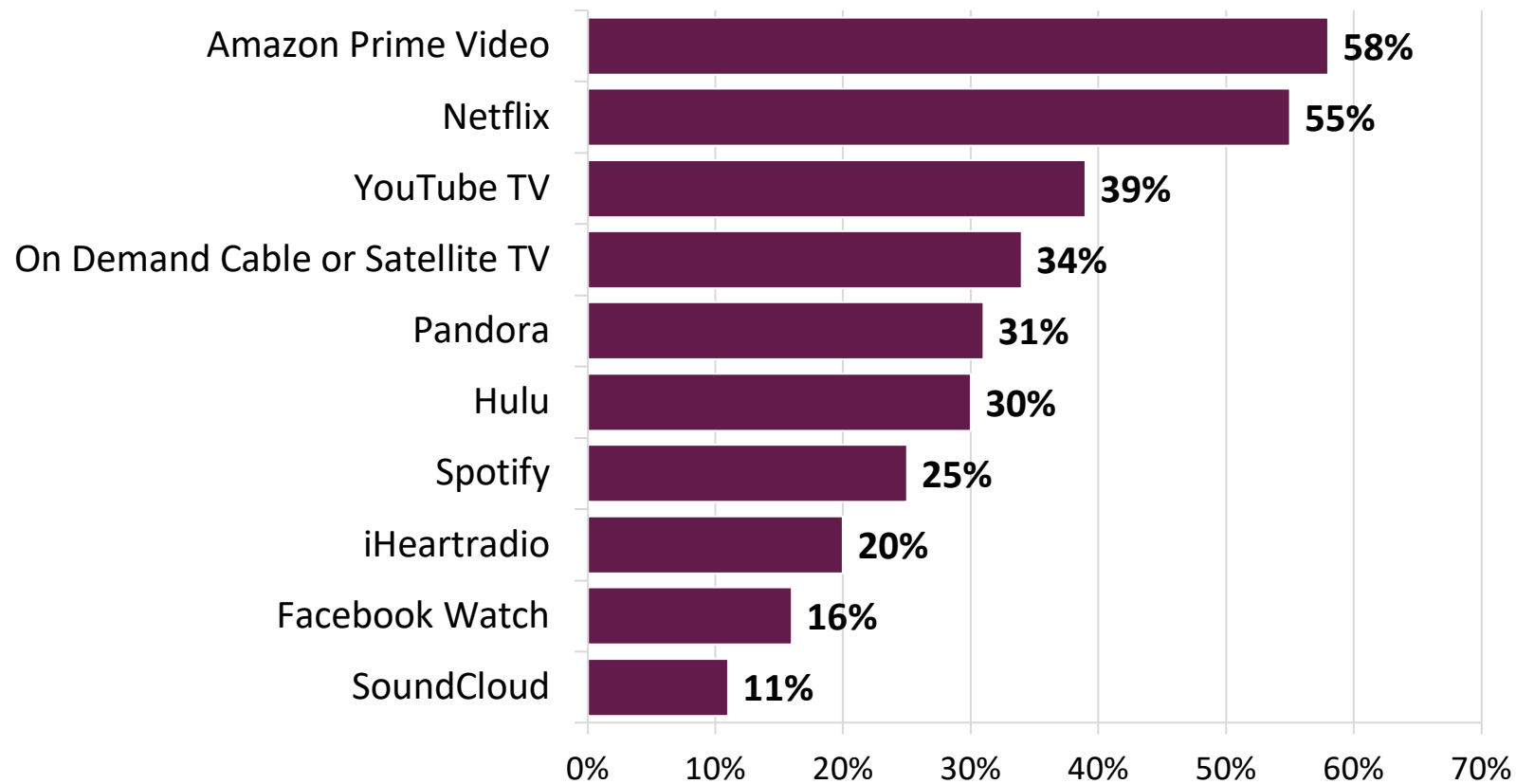

- Facebook: 76%
- LinkedIn: 56%
- Instagram: 42%
- Twitter: 42%
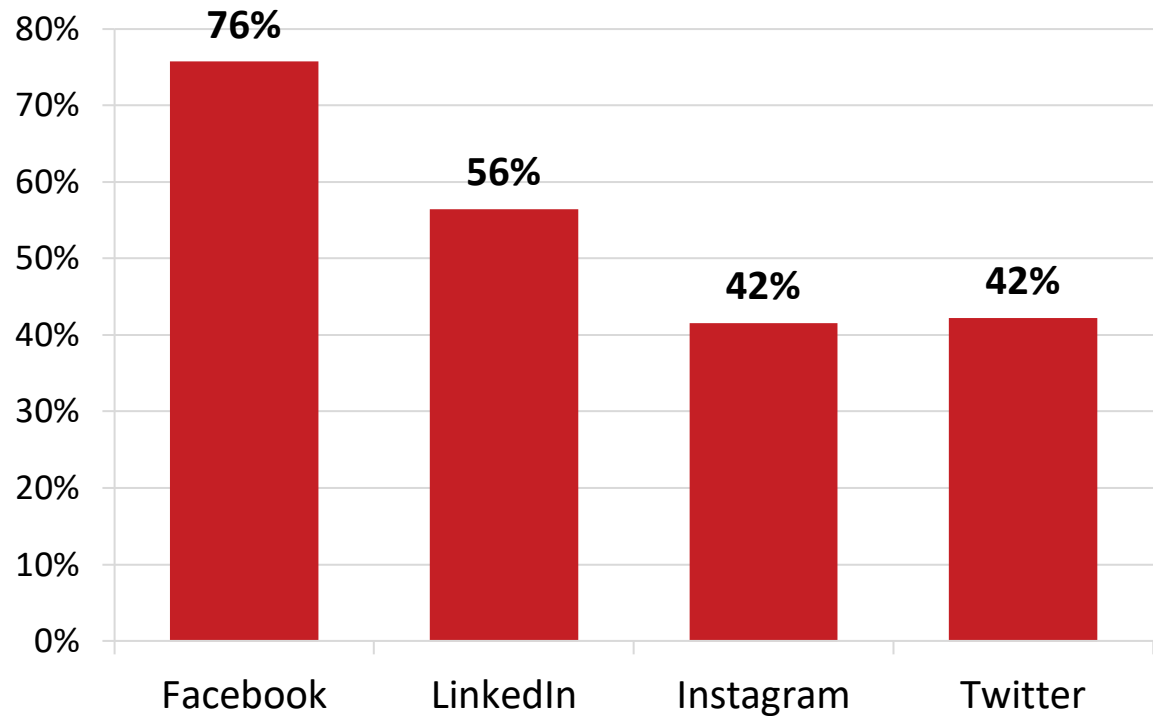
Daily Online Social Site Use

- Facebook: 38%
- Twitter: 14%
- Instagram: 13%
- LinkedIn: 11%

Please indicate how often you visit the following social networking sites:.

Lifestyle Media Streaming Services

Service	Percentage
Amazon Prime Video	58%
Netflix	55%
YouTube TV	39%
On Demand Cable or Satellite TV	34%
Pandora	31%
Hulu	30%
Spotify	25%
iHeartradio	20%
Facebook Watch	16%
SoundCloud	11%

From the list below, please indicate which of the following you access.

DC METRO AREA
TV News Top Five

TV News Channels

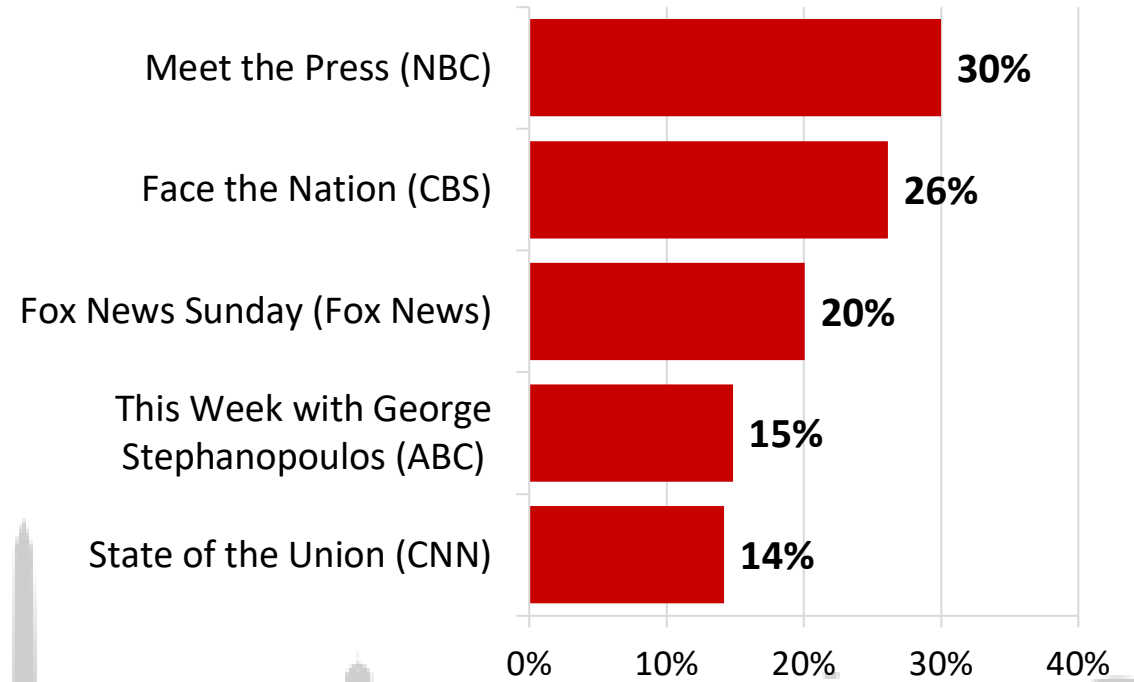| Channel	Percentage
CNN	35%
Fox News	33%
4 NBC WRC	32%
7 ABC WJLA	23%
9 CBS WUSA	19%

News Programs

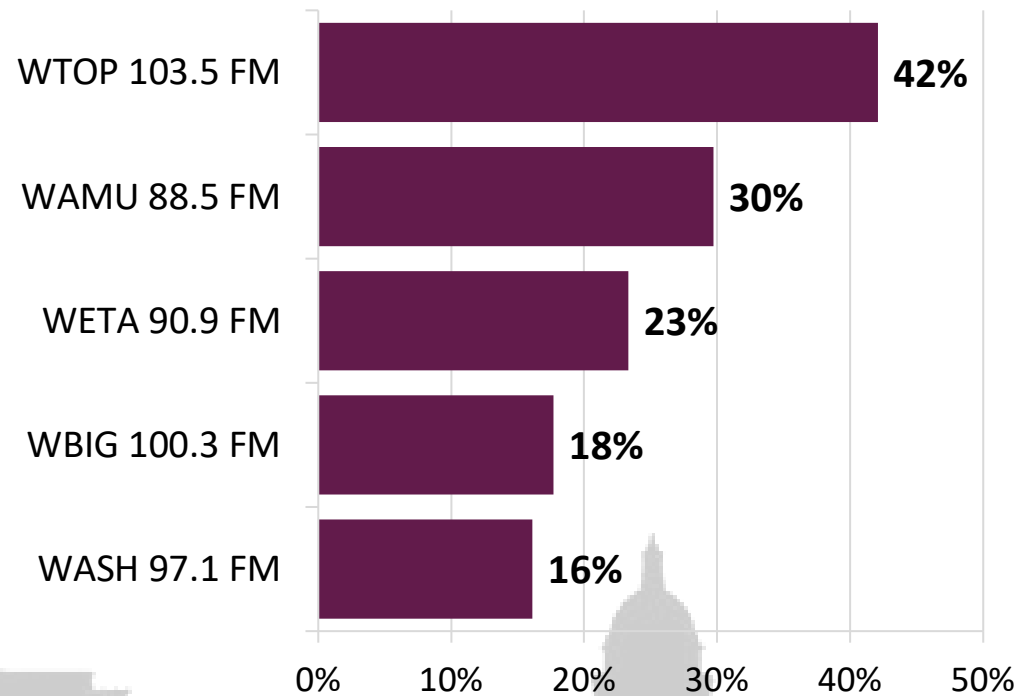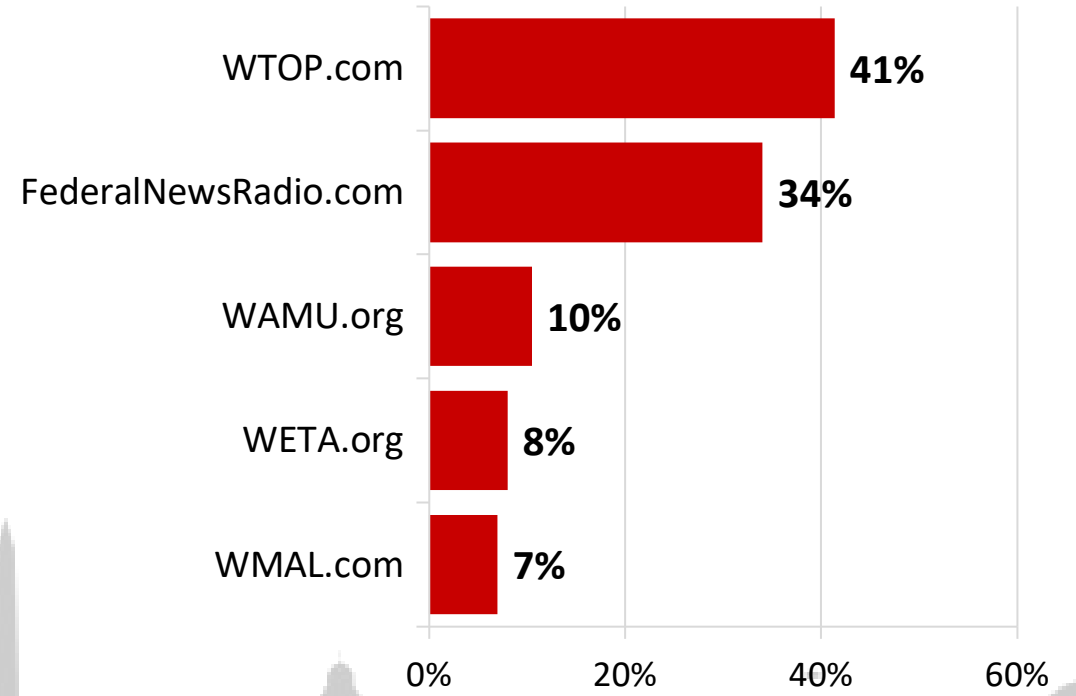| Program	Percentage
Meet the Press (NBC)	30%
Face the Nation (CBS)	26%
Fox News Sunday (Fox News)	20%
This Week with George Stephanopoulos (ABC)	15%
State of the Union (CNN)	14%
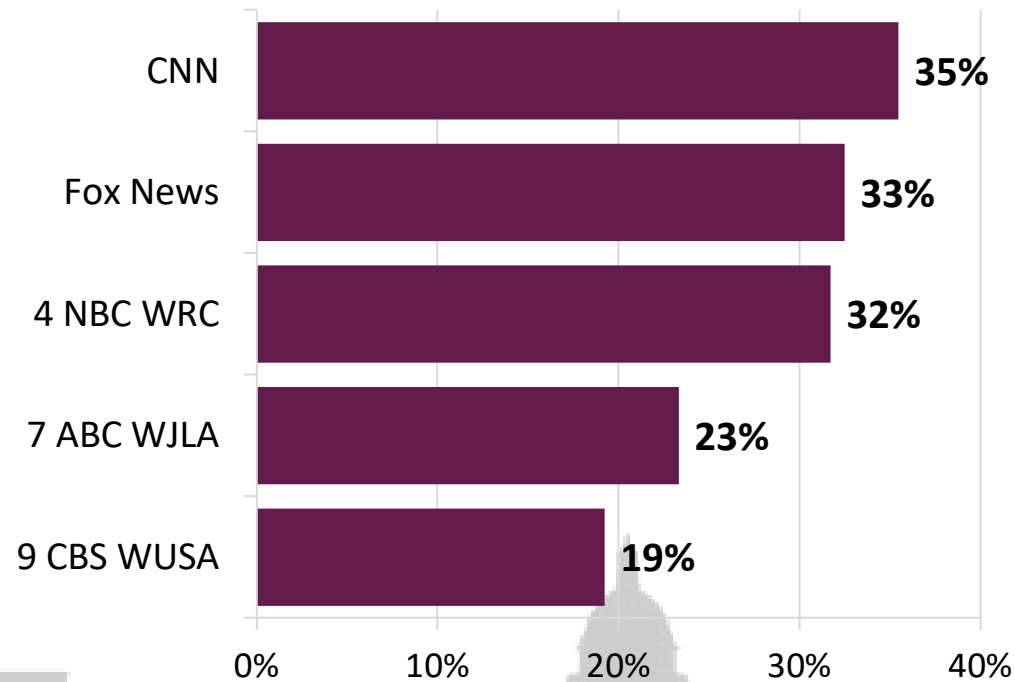
Which of the following television channels do you turn to most often for news? (select all that apply)
Please indicate which of the following news programs you watch. (select all that apply)

DC METRO AREA
Radio Top Five

Radio Stations

Station	%
WTOP 103.5 FM	42%
WAMU 88.5 FM	30%
WETA 90.9 FM	23%
WBIG 100.3 FM	18%
WASH 97.1 FM	16%

Radio Websites

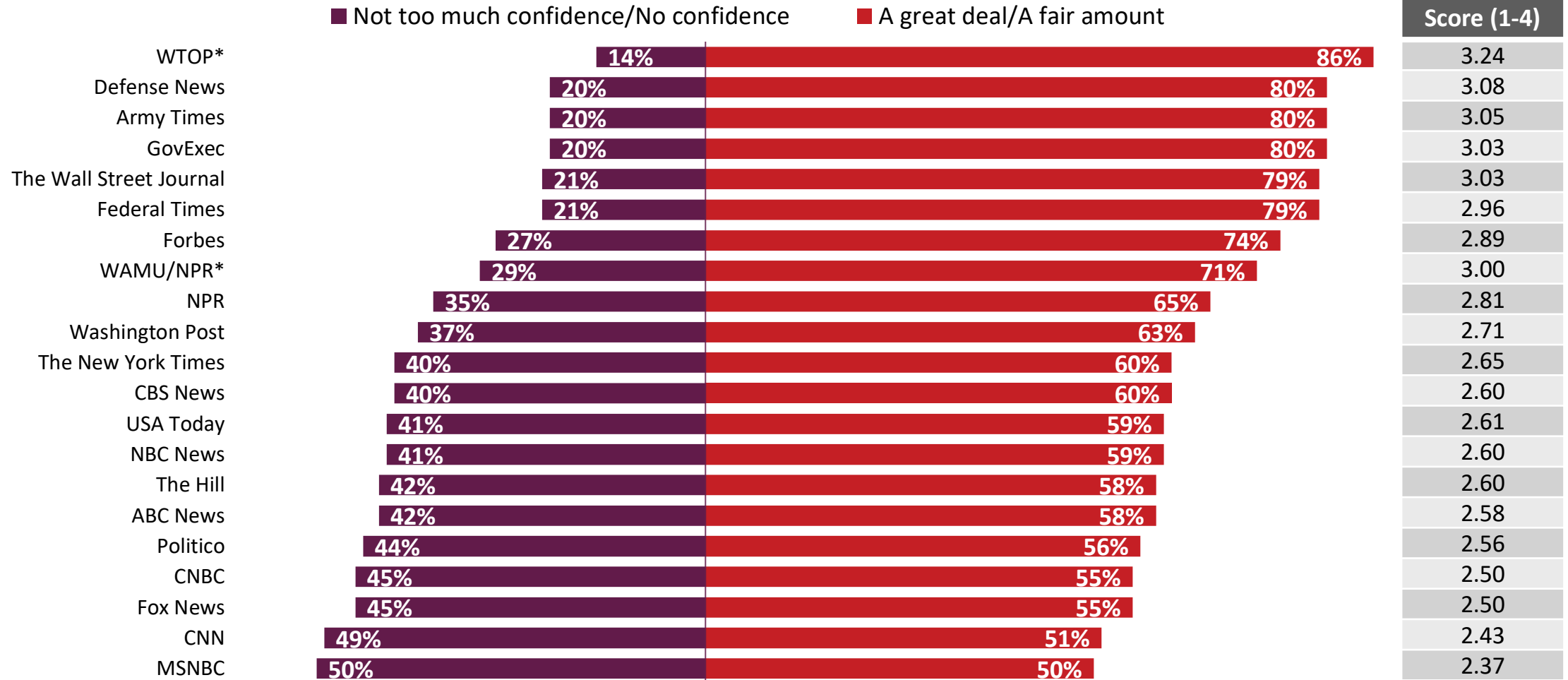| Website	%
WTOP.com	41%
FederalNewsRadio.com	34%
WAMU.org	10%
WETA.org	8%
WMAL.com	7%

Please indicate which of the following radio stations you listen to. (select all that apply)
Please indicate which of the radio station websites you visit. (select all that apply)
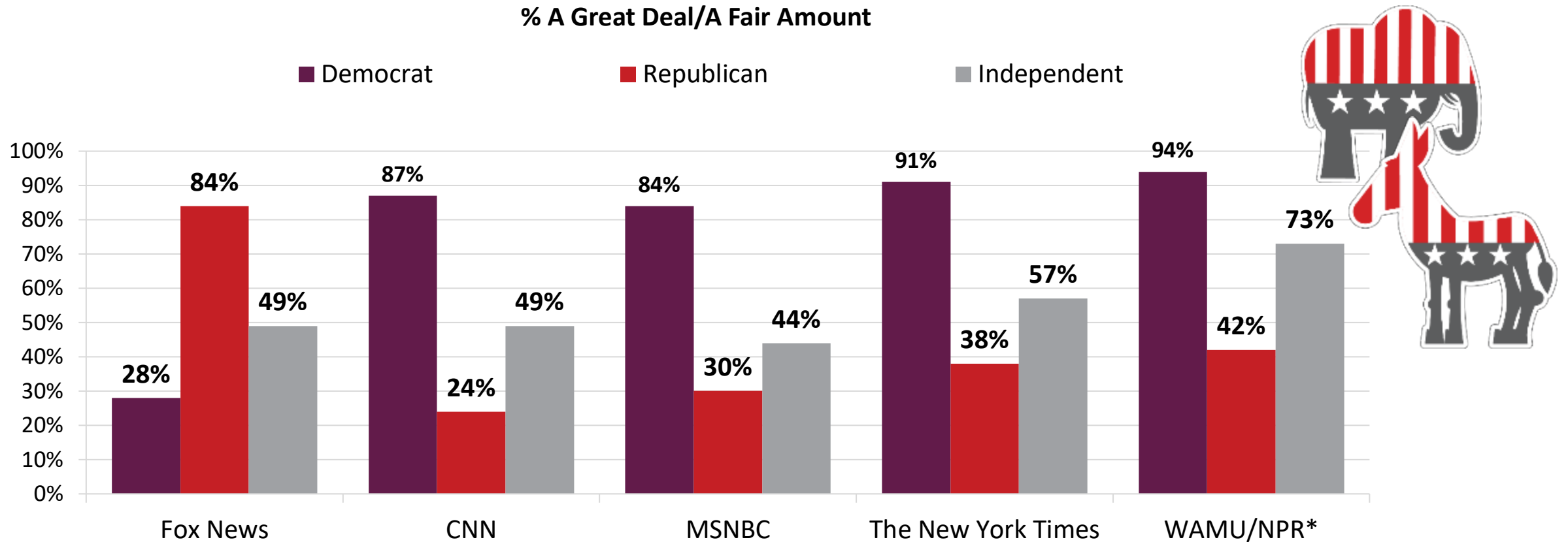
Confidence &
Marketing Impact Index

Confidence in News

■ Not too much confidence/No confidence   ■ A great deal/A fair amount

	Not too much confidence/No confidence	A great deal/A fair amount	Confidence Score (1-4)
WTOP*	14%	86%	3.24
Defense News	20%	80%	3.08
Army Times	20%	80%	3.05
GovExec	20%	80%	3.03
The Wall Street Journal	21%	79%	3.03
Federal Times	21%	79%	2.96
Forbes	27%	74%	2.89
WAMU/NPR*	29%	71%	3.00
NPR	35%	65%	2.81
Washington Post	37%	63%	2.71
The New York Times	40%	60%	2.65
CBS News	40%	60%	2.60
USA Today	41%	59%	2.61
NBC News	41%	59%	2.60
The Hill	42%	58%	2.60
ABC News	42%	58%	2.58
Politico	44%	56%	2.56
CNBC	45%	55%	2.50
Fox News	45%	55%	2.50
CNN	49%	51%	2.43
MSNBC	50%	50%	2.37

How much confidence do you have in the following sources in the news that they report?

*Asked only in DC metro area

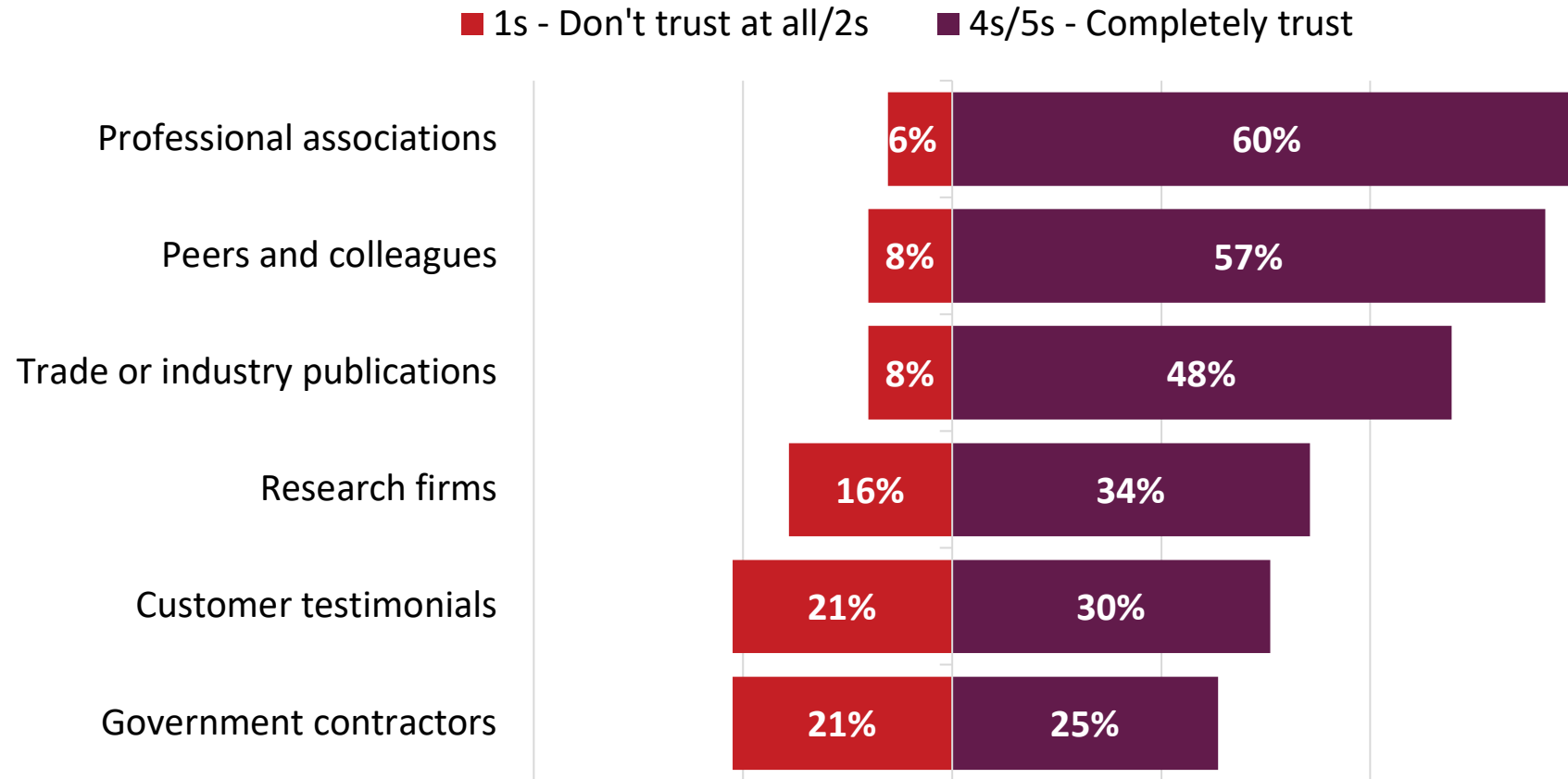# Confidence in News by Political Party: Top Five Gaps

% A Great Deal/A Fair Amount

■ Democrat ■ Republican ■ Independent

	Fox News	CNN	MSNBC	The New York Times	WAMU/NPR*
Democrat	28%	87%	84%	91%	94%
Republican	84%	24%	30%	38%	42%
Independent	49%	49%	44%	57%	73%

Q *How much confidence do you have in the following sources in the news that they report?*
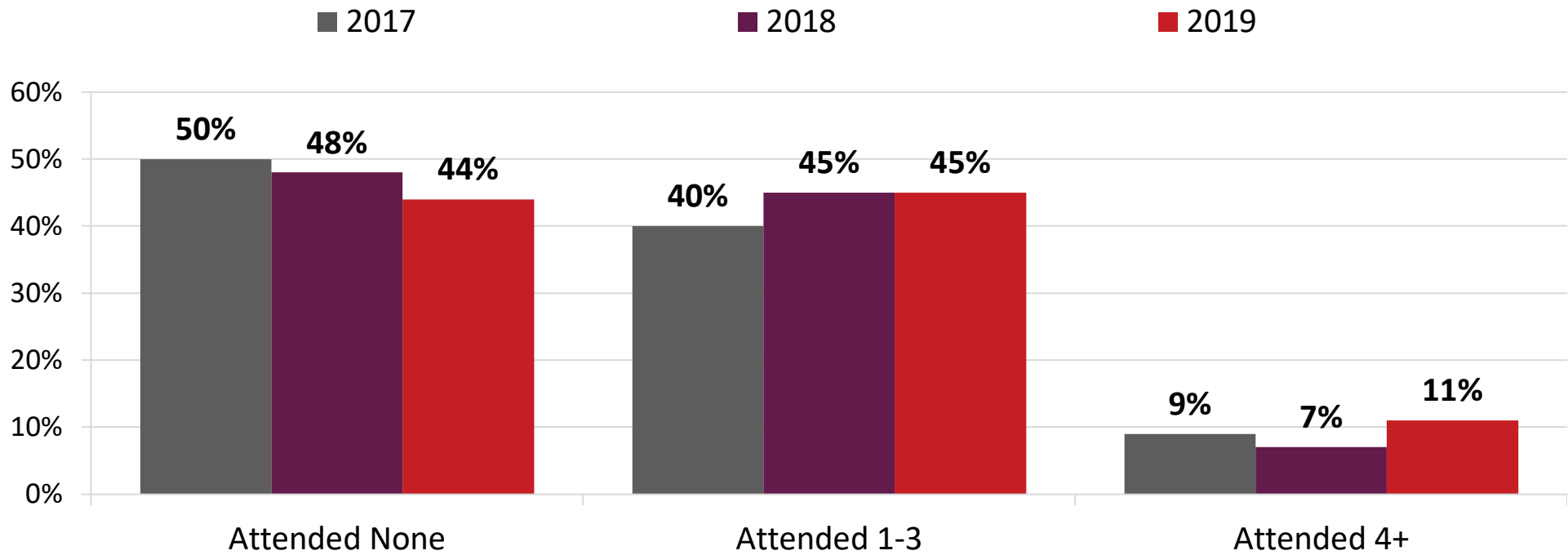
*Asked only in DC metro area

Marketing Tactics
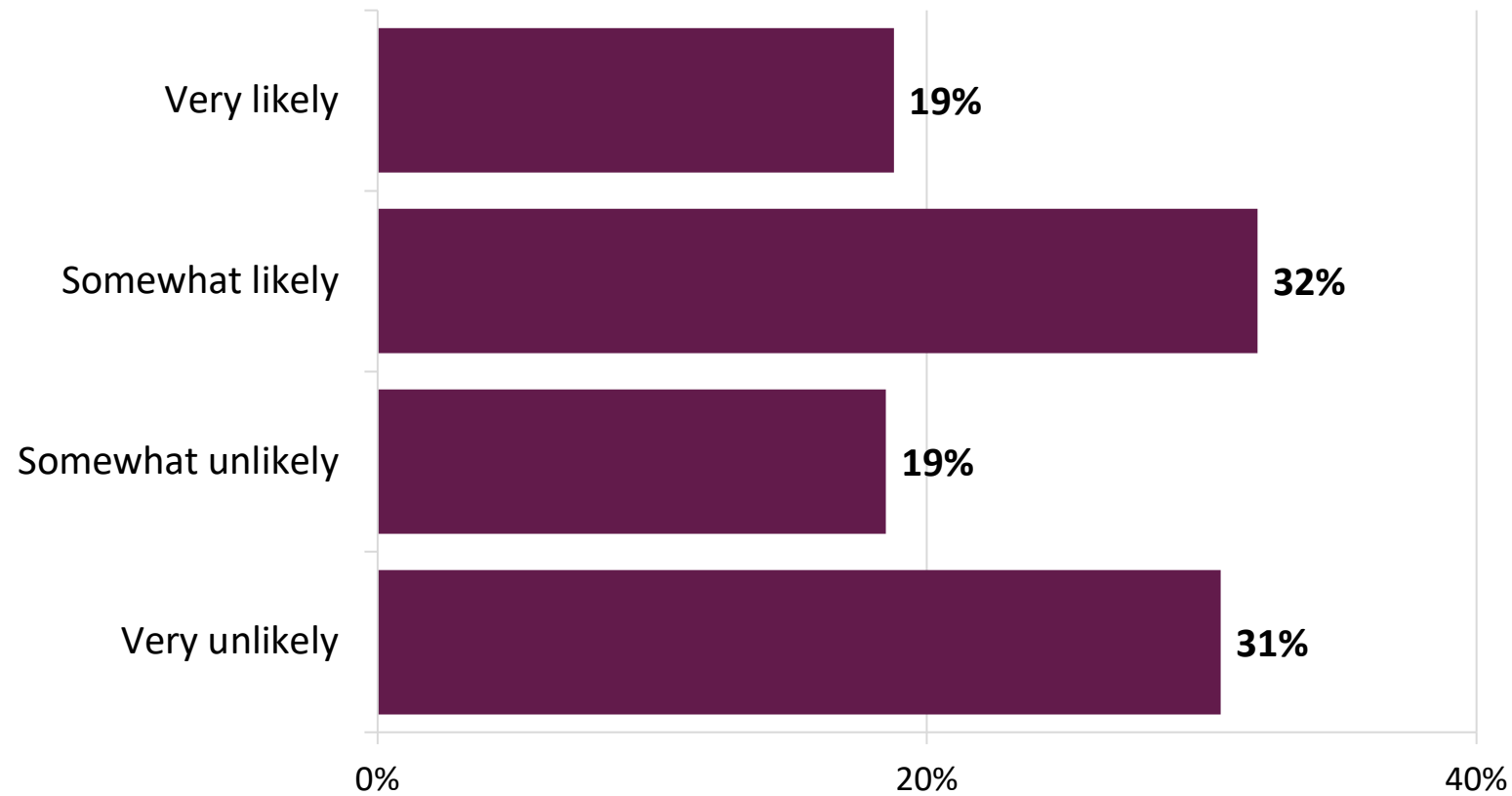
Trusted Sources of Information

■ 1s - Don't trust at all/2s   ■ 4s/5s - Completely trust

	1s - Don't trust at all/2s	4s/5s - Completely trust
Professional associations	6%	60%
Peers and colleagues	8%	57%
Trade or industry publications	8%	48%
Research firms	16%	34%
Customer testimonials	21%	30%
Government contractors	21%	25%

Generally, to what extent do you trust news and information you seek for your job from each of the following?

TREND 2017-2019
Event Attendance in Past 12 Months

Legend: ■ 2017 ■ 2018 ■ 2019

Attended None
- 2017: 50%
- 2018: 48%
- 2019: 44%

Attended 1-3
- 2017: 40%
- 2018: 45%
- 2019: 45%

Attended 4+
- 2017: 9%
- 2018: 7%
- 2019: 11%

Approximately how many trade shows, conferences, or industry events have you attended in the past year?

Likelihood to Attend Work Events on the Weekend

How likely are you to attend a work-related trade show, conference, or industry event on the weekend?
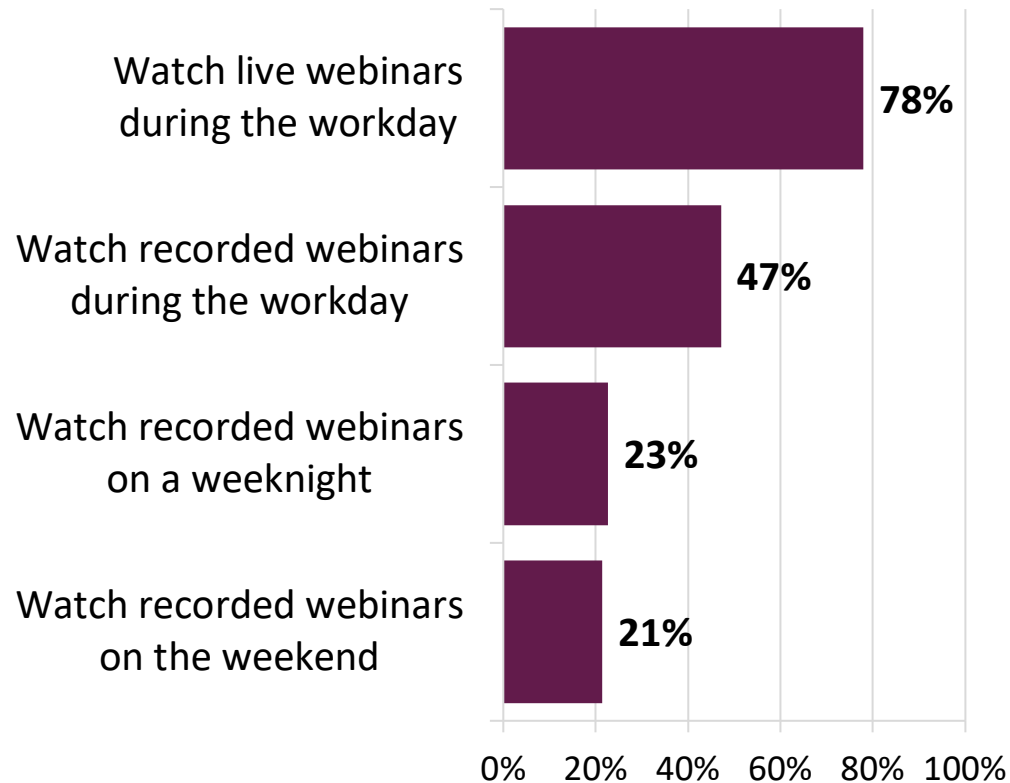
TREND 2017-2019
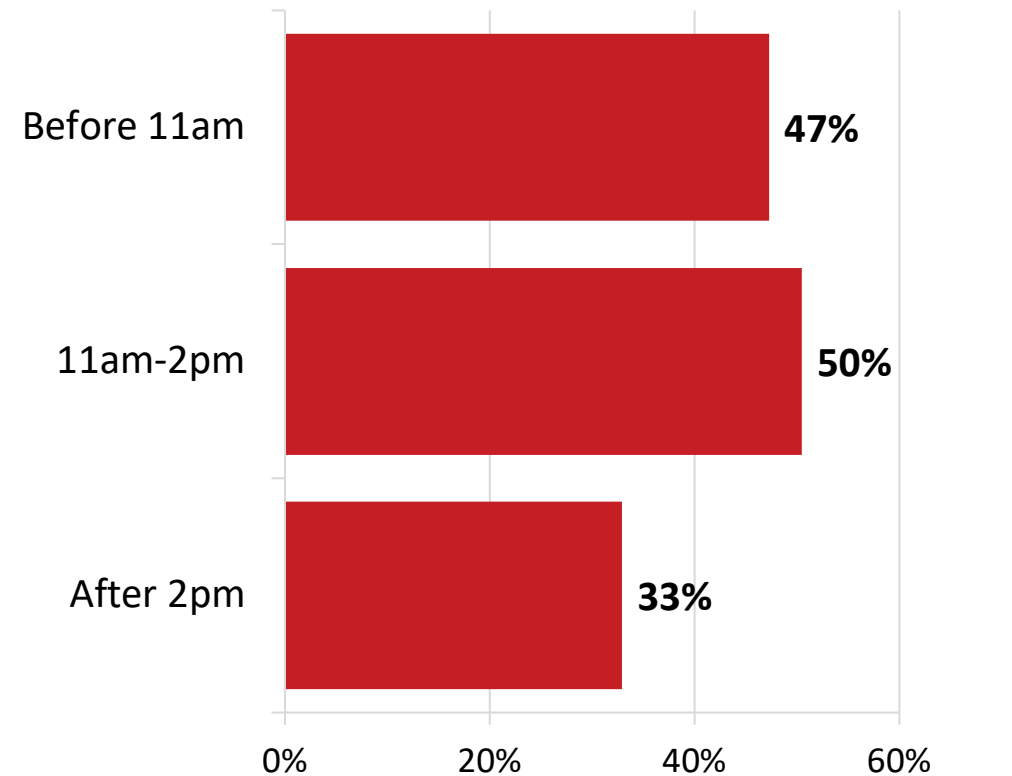# Webinar Participation in Past 12 Months
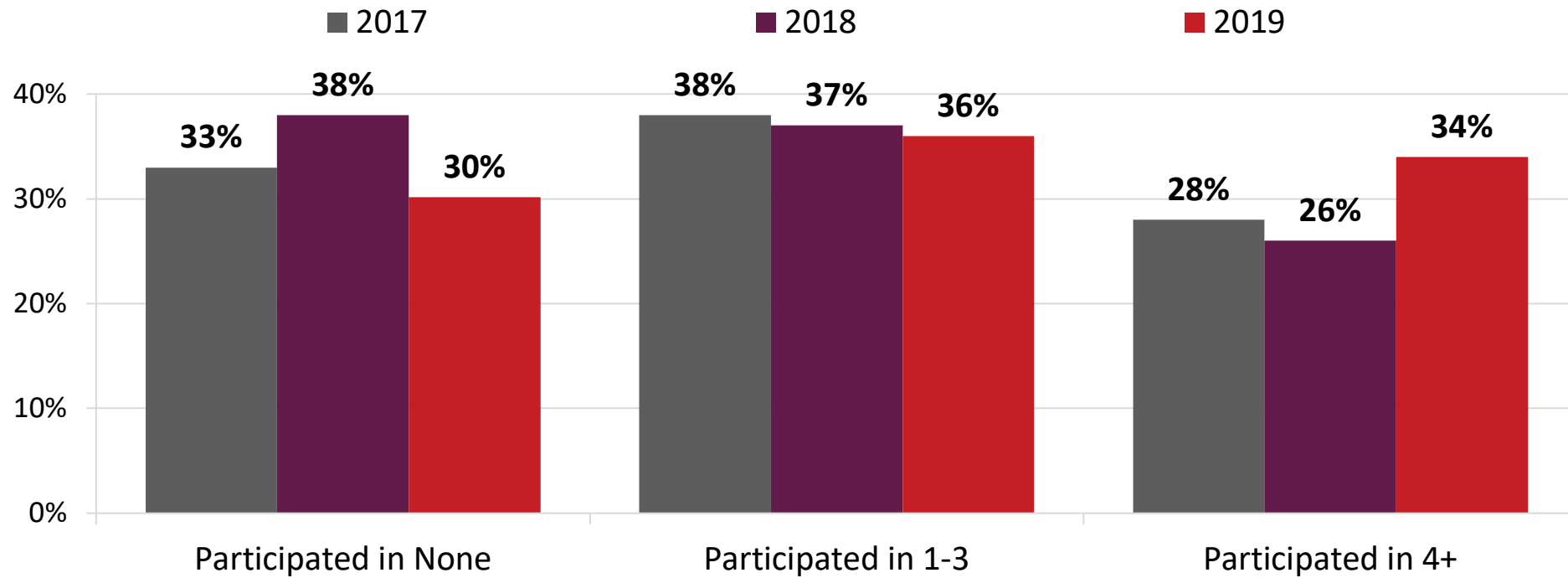
In how many webinars (seminars over the Internet) have you participated in the last year?

Participating in Webinars
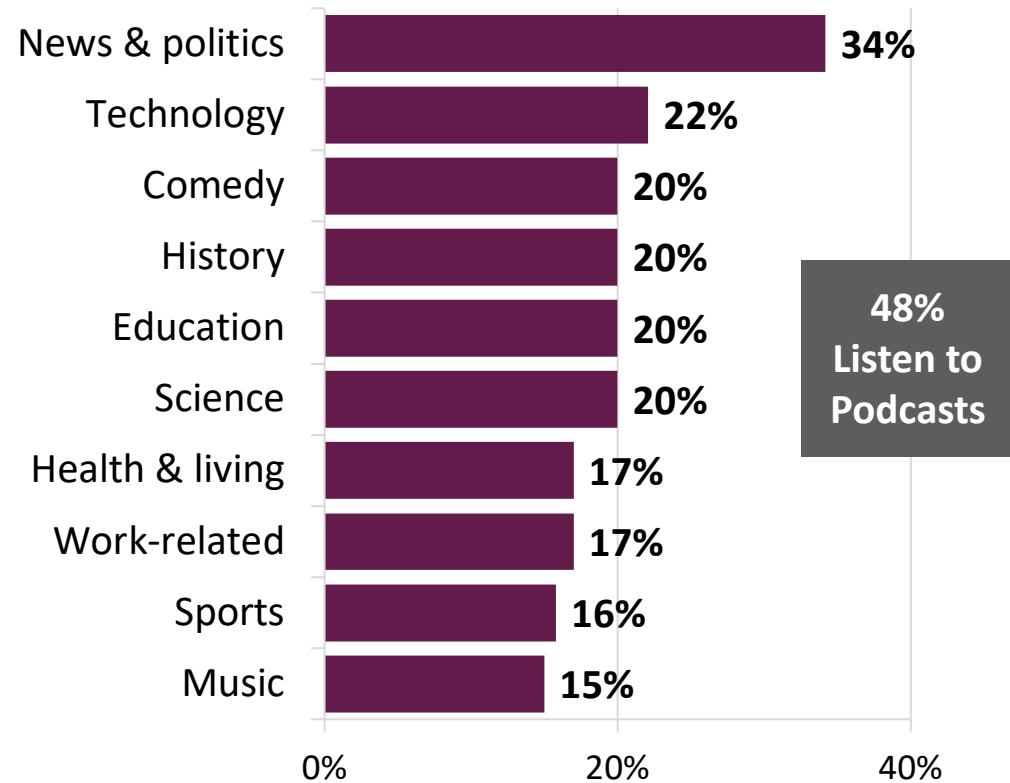
Ways of Participating in Webinars

- Watch live webinars during the workday — **78%**
- Watch recorded webinars during the workday — **47%**
- Watch recorded webinars on a weeknight — **23%**
- Watch recorded webinars on the weekend — **21%**

Preferred Time to Participate

- Before 11am — **47%**
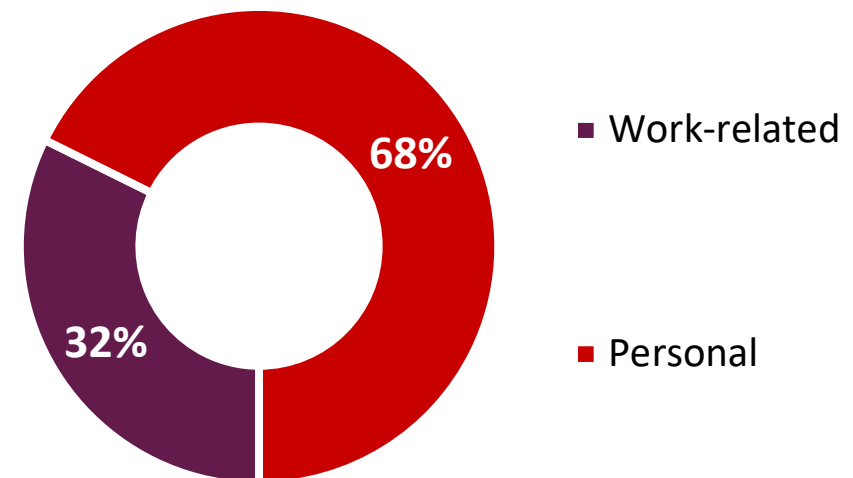- 11am-2pm — **50%**
- After 2pm — **33%**

In which of the following ways do you participate in webinars? (select all that apply)
During what time in your typical workday do you prefer to participate in live webinars? (select all that apply)

Listening to Audio Podcasts
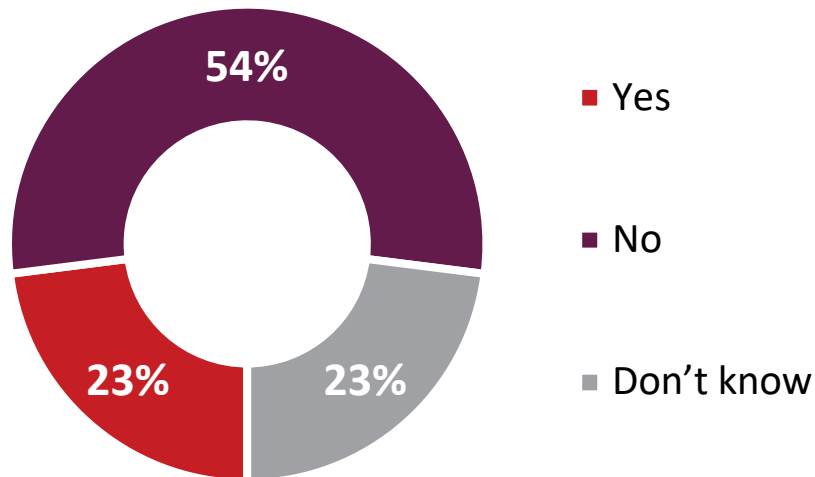
Top Types of Audio Podcasts Listened To

Type	Percentage
News & politics	34%
Technology	22%
Comedy	20%
History	20%
Education	20%
Science	20%
Health & living	17%
Work-related	17%
Sports	16%
Music	15%

48% Listen to Podcasts

Average Percentage of Time Spent Listening to Podcasts
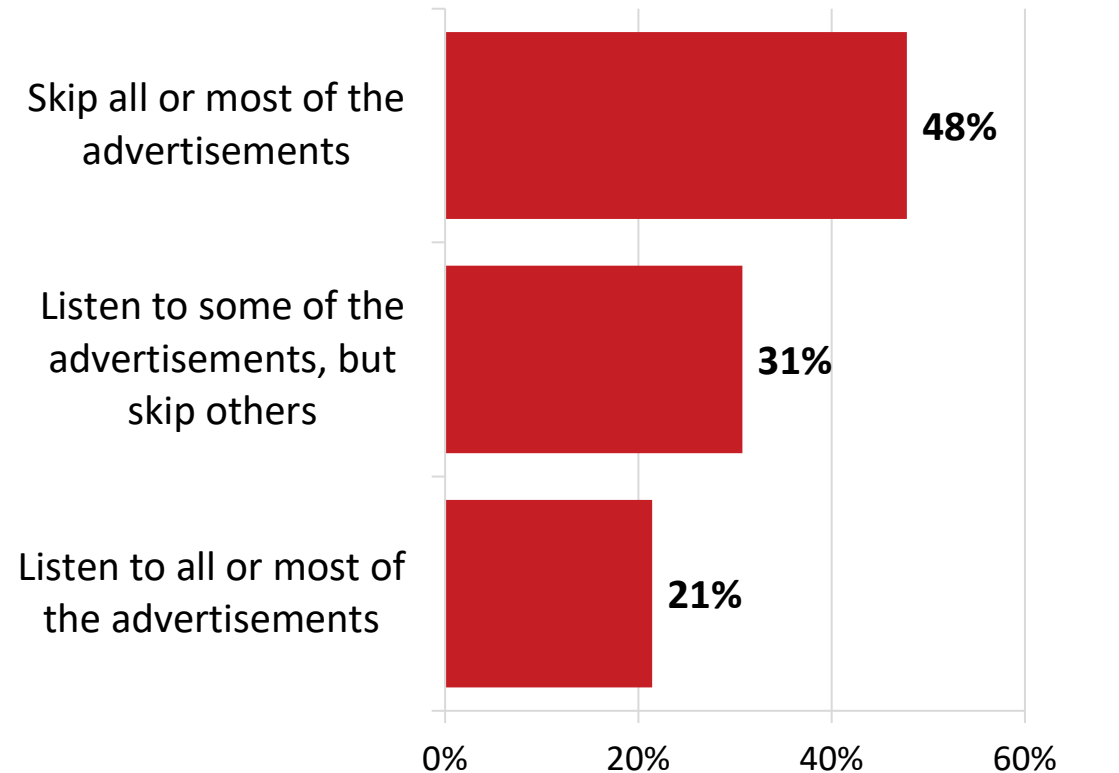
- Work-related: 32%
- Personal: 68%

Which of the following, if any, types of audio podcasts do you listen/subscribe to? (select all that apply)
What percentage of the time you spend listening to podcasts is work-related vs. personal?

Advertisements in Podcasts

Have Heard a Work-Related Ad During a Podcast

54%
23%
23%

- Yes
- No
- Don't know

Listening to or Skipping Ads in Podcasts

Skip all or most of the advertisements — 48%

Listen to some of the advertisements, but skip others — 31%

Listen to all or most of the advertisements — 21%
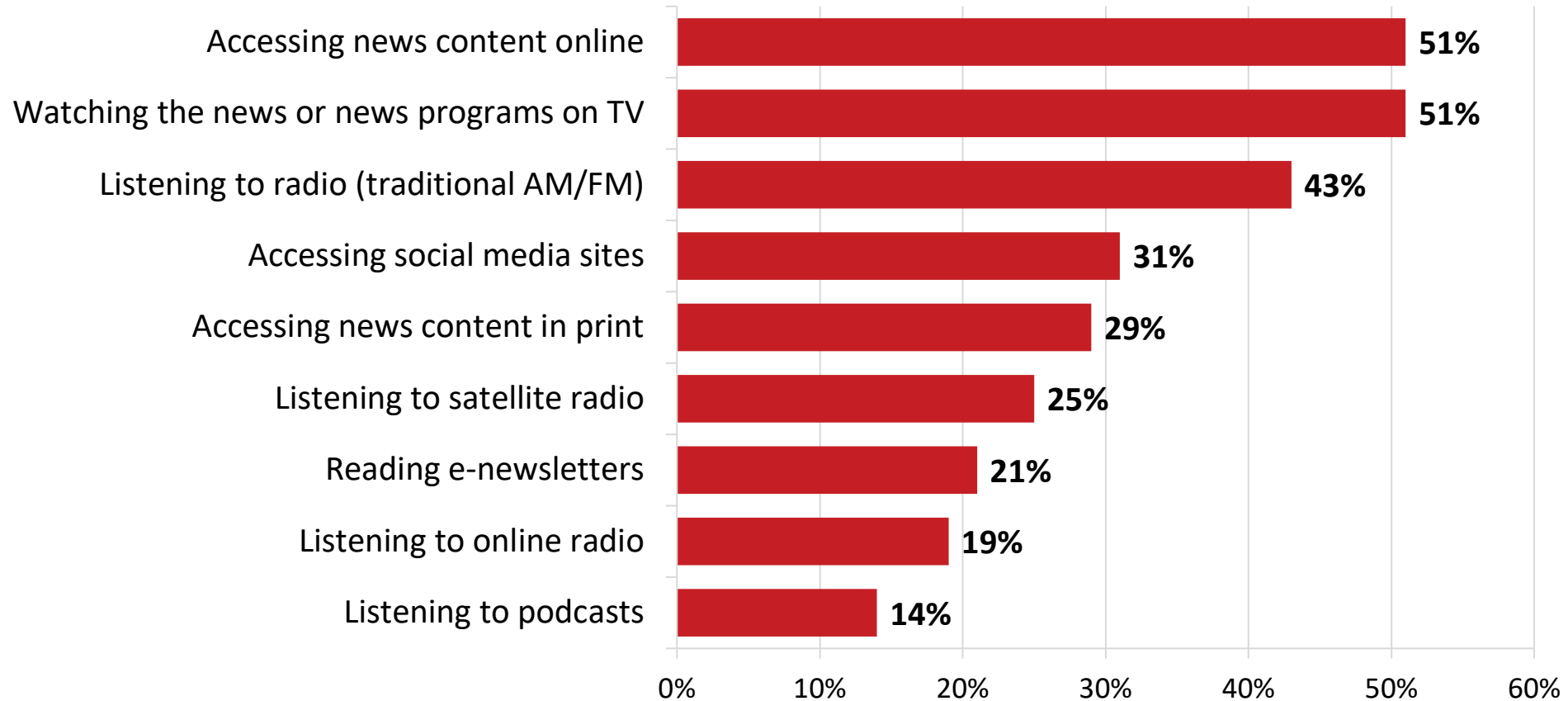
0%   20%   40%   60%

Have you heard a work-related advertisement during a podcast?
When you listen to podcasts, do you generally...?

Top App Types with Push Notifications Allowed

App Type	Percentage
Weather	43%
Personal Email/Communications	42%
News	30%
Work Email/Communications	28%
Finance & Banking	20%
Social Networking	18%
Navigation & Mapping	18%
Sports	16%
Events	15%
Music & Audio	14%
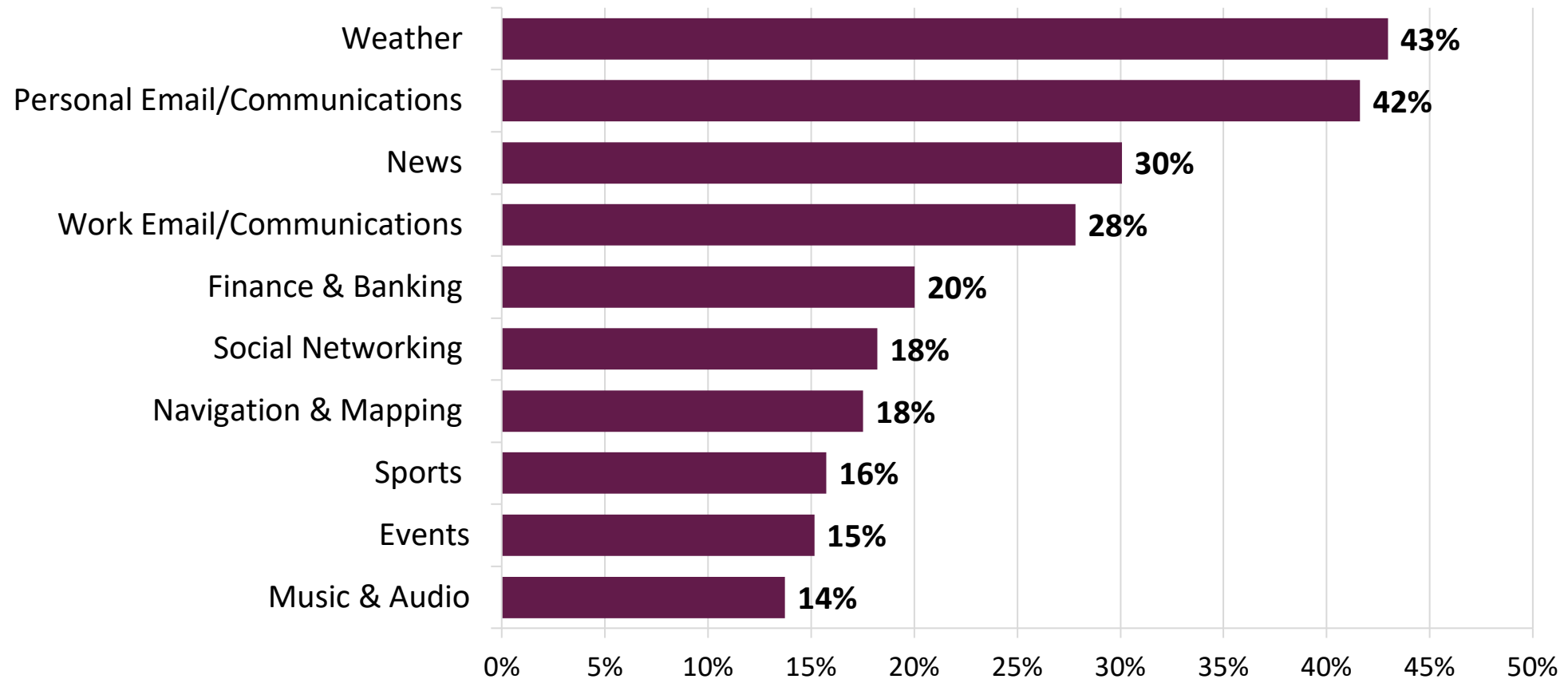
Which of the following app types, if any, do you allow push notifications from on your mobile device? (select all that apply)

Time Spent on an Average Workday: 15+ Minutes Per Day

Category	Percentage
Accessing news content online	51%
Watching the news or news programs on TV	51%
Listening to radio (traditional AM/FM)	43%
Accessing social media sites	31%
Accessing news content in print	29%
Listening to satellite radio	25%
Reading e-newsletters	21%
Listening to online radio	19%
Listening to podcasts	14%

On an average workday, how much time do you spend...

Media Consumed During the Workday

		Wake Up	Morning Commute	During the Workday	Lunch Break	Evening Commute	After Work
Watching	Broadcast/cable TV	20%	3%	4%	6%	3%	55%
	Online streaming video	4%	3%	3%	4%	4%	45%
Listening	AM/FM radio	15%	47%	10%	7%	37%	11%
	Satellite radio	6%	24%	5%	4%	20%	9%
	Podcasts	5%	11%	9%	7%	10%	14%
Reading	National print newspaper or magazine	13%	7%	11%	12%	4%	23%
	Local print newspaper or magazine	13%	7%	10%	11%	3%	25%
	Digital newspaper or magazine	12%	8%	24%	19%	6%	23%
	Social media sites	14%	8%	11%	22%	8%	42%

Q *Which of the following types of media do you regularly consume during each of the following parts of a typical workday? (select all that apply)*
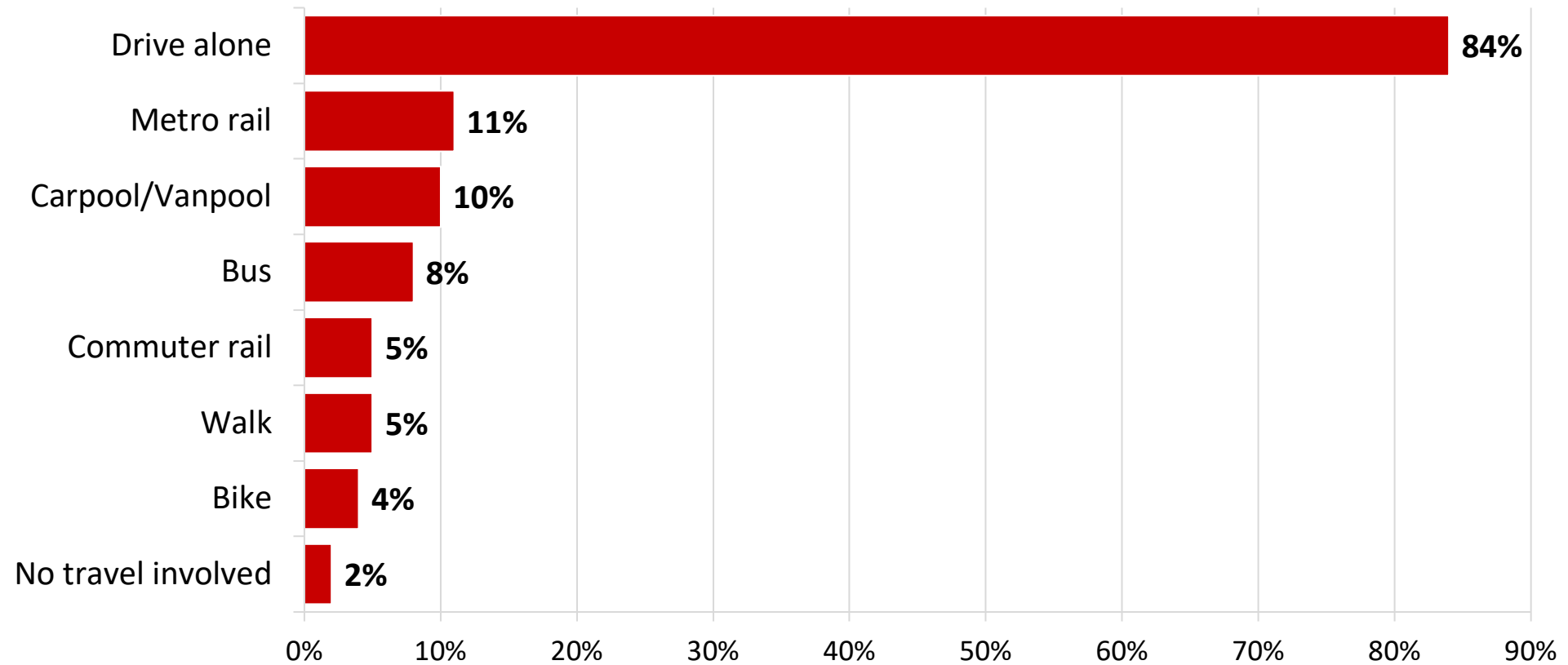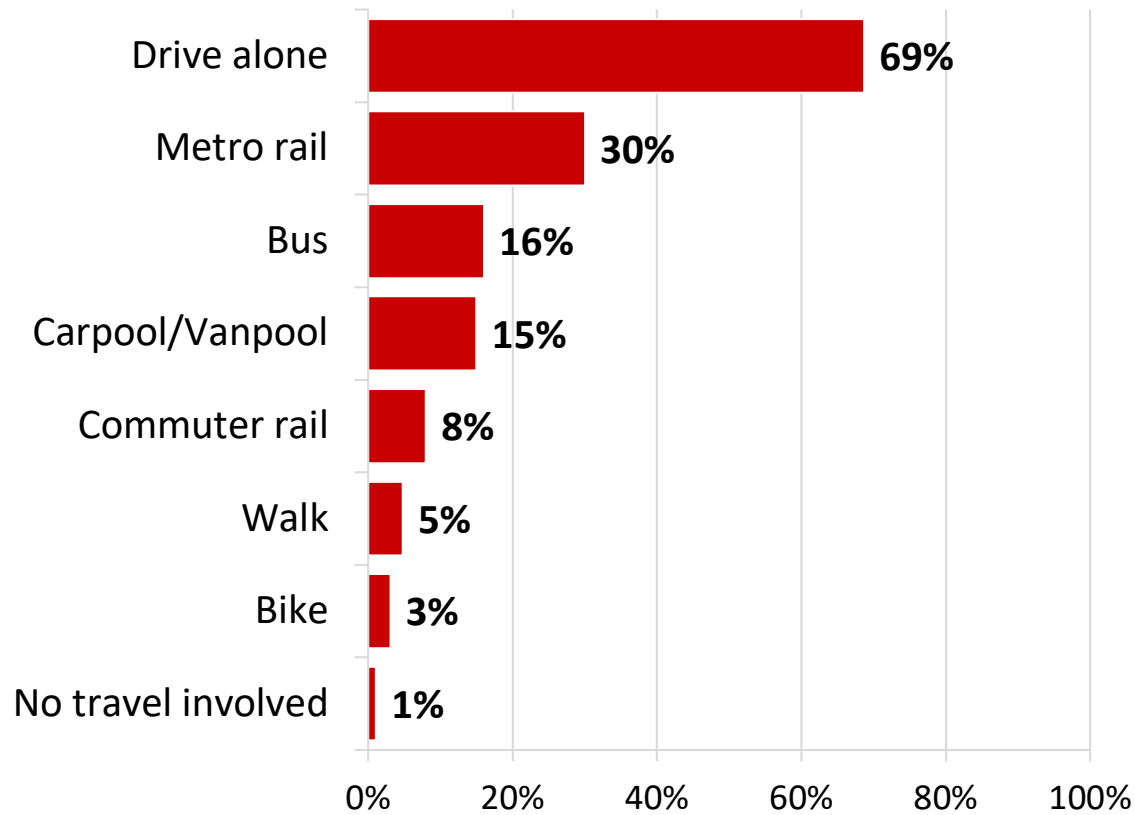
Primary Transportation

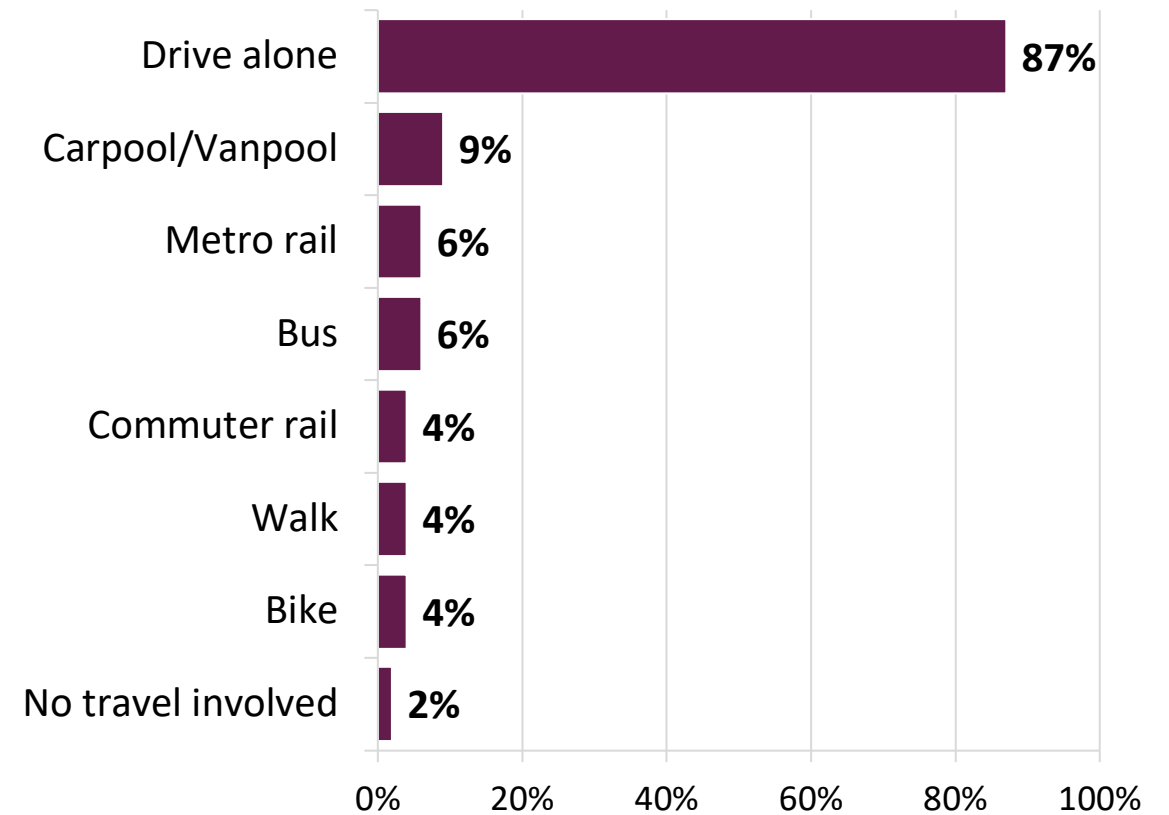| Transportation	Percentage
Drive alone	84%
Metro rail	11%
Carpool/Vanpool	10%
Bus	8%
Commuter rail	5%
Walk	5%
Bike	4%
No travel involved	2%

Which of the following are your primary modes of transportation to get to work? (select all that apply)
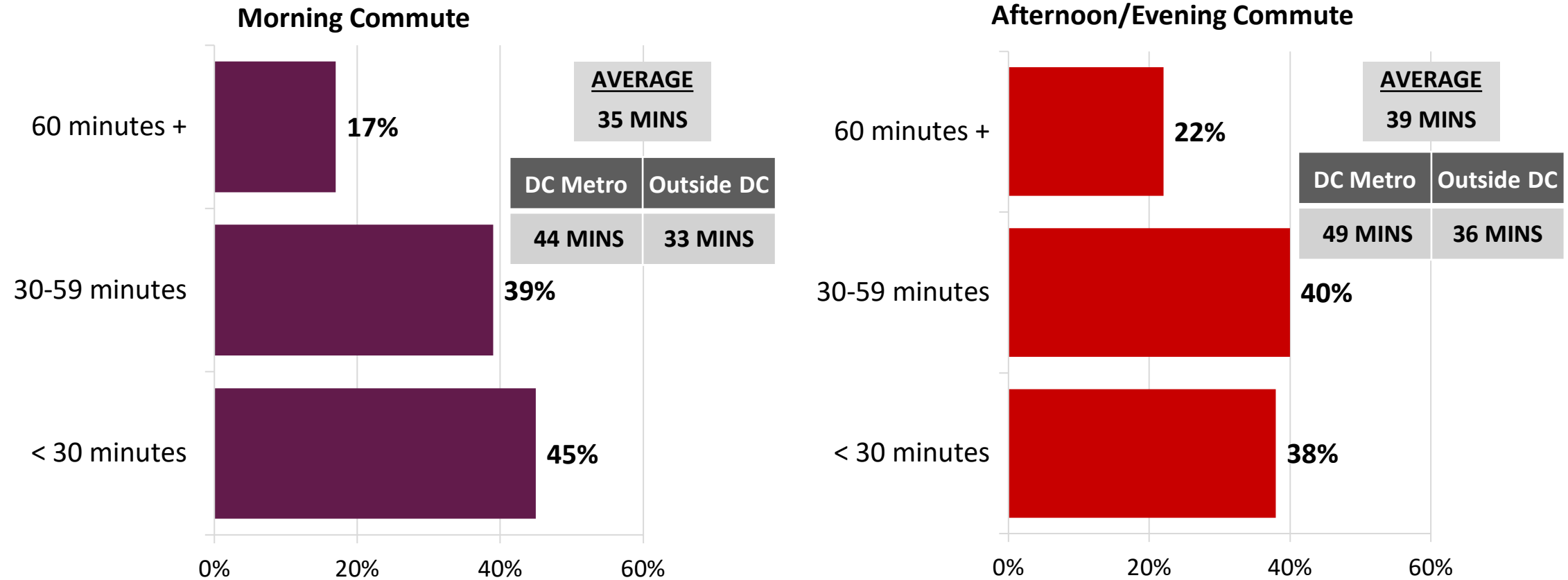
Primary Transportation

Washington DC Metro Area

Mode	Percentage
Drive alone	69%
Metro rail	30%
Bus	16%
Carpool/Vanpool	15%
Commuter rail	8%
Walk	5%
Bike	3%
No travel involved	1%

Outside Washington DC Metro Area

| Mode	Percentage
Drive alone	87%
Carpool/Vanpool	9%
Metro rail	6%
Bus	6%
Commuter rail	4%
Walk	4%
Bike	4%
No travel involved	2%

Which of the following are your primary modes of transportation to get to work? (select all that apply)

Commute Time

Morning Commute

	AVERAGE 35 MINS	
	DC Metro	Outside DC
	44 MINS	33 MINS

- 60 minutes + : **17%**
- 30-59 minutes : **39%**
- < 30 minutes : **45%**

Afternoon/Evening Commute

	AVERAGE 39 MINS	
	DC Metro	Outside DC
	49 MINS	36 MINS

- 60 minutes + : **22%**
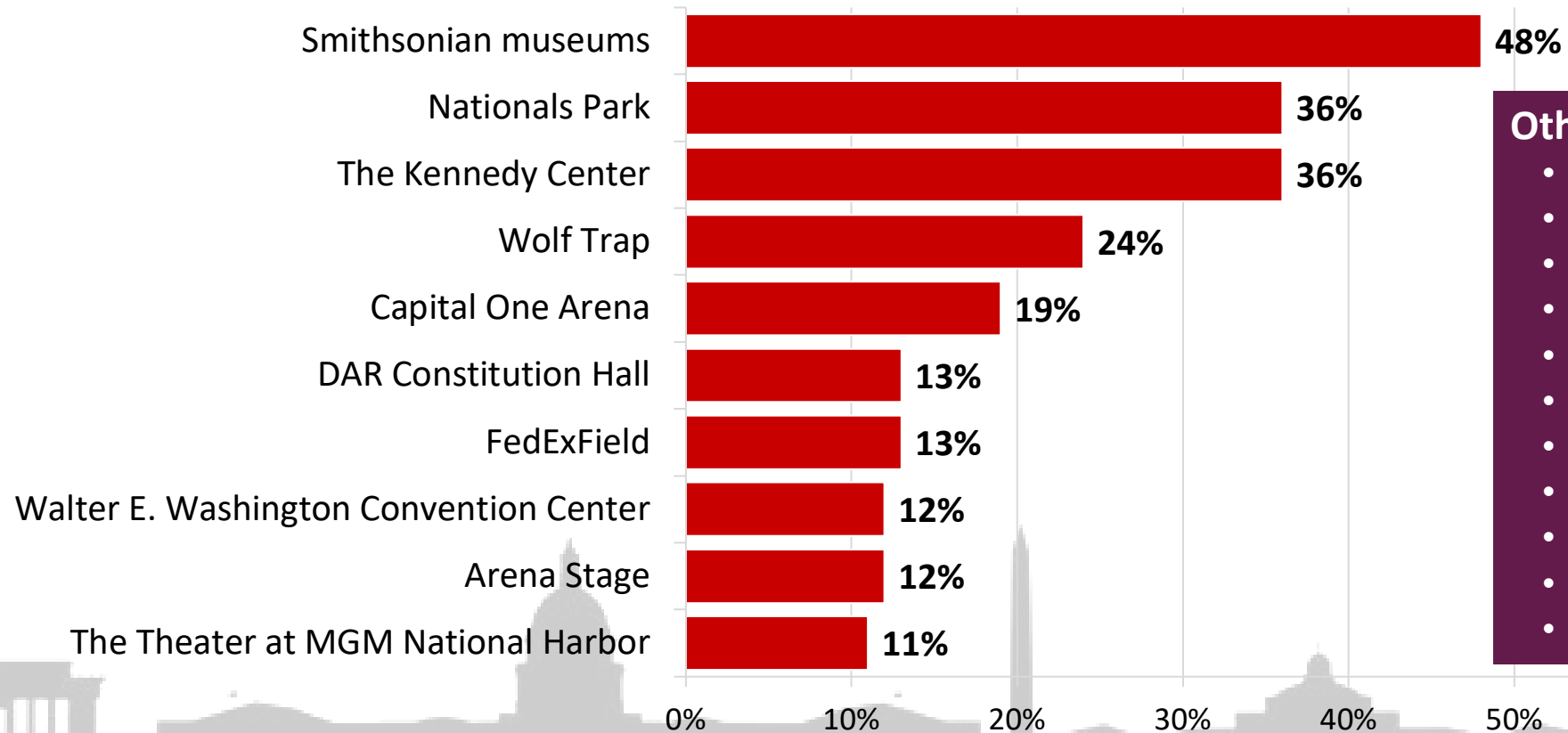- 30-59 minutes : **40%**
- < 30 minutes : **38%**

On average, how long is your morning commute to work? (open end)
On average, how long is your afternoon/evening commute from work? (open end)

DC METRO AREA
Airport Trips
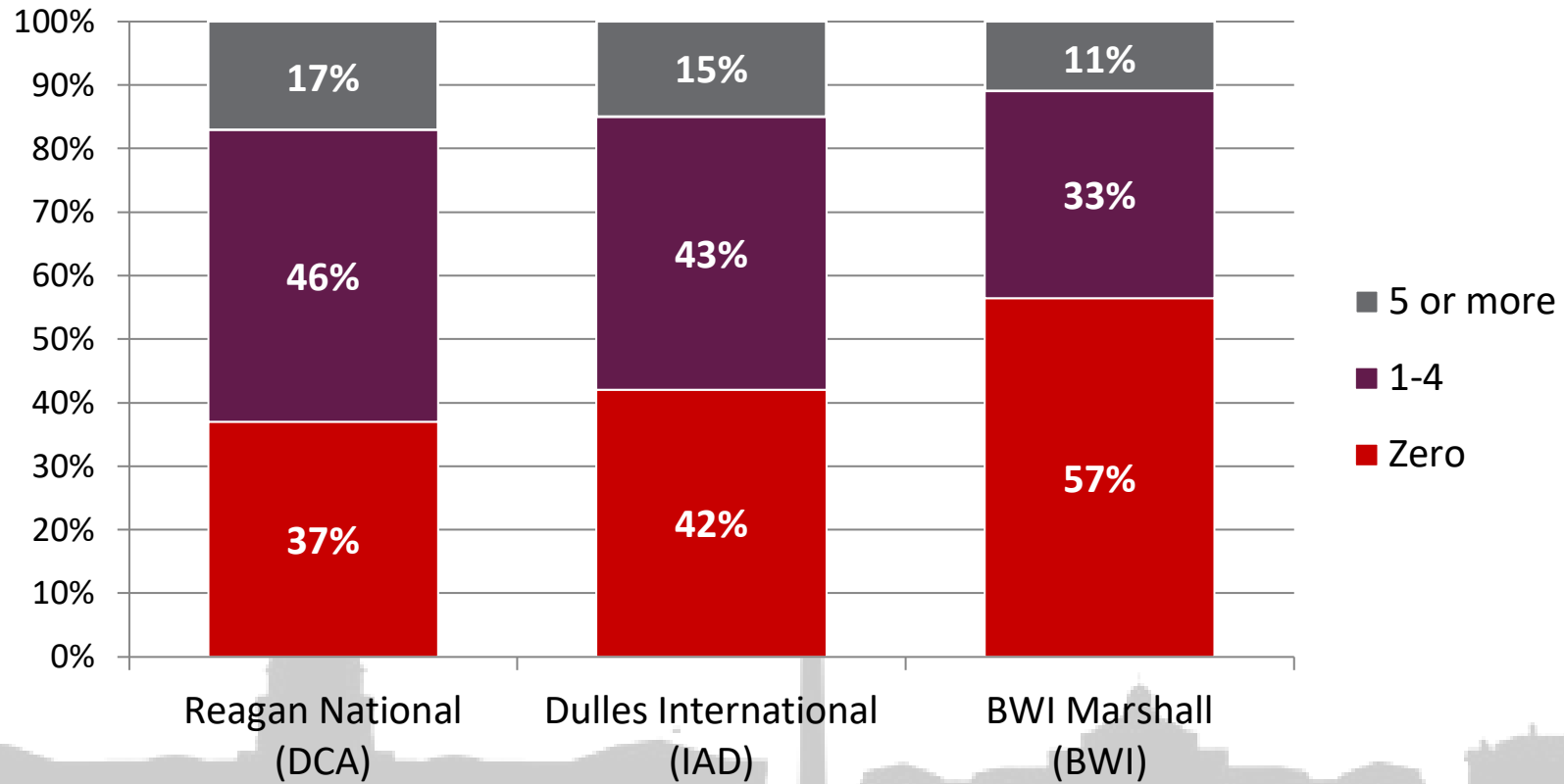
How many trips have you taken out of the following airports in the past 12 months (business and/or personal)?

DC METRO AREA
Top Venues Visited

Venue	Percentage
Smithsonian museums	48%
Nationals Park	36%
The Kennedy Center	36%
Wolf Trap	24%
Capital One Arena	19%
DAR Constitution Hall	13%
FedExField	13%
Walter E. Washington Convention Center	12%
Arena Stage	12%
The Theater at MGM National Harbor	11%

Other venues in survey:
- National Theater
- Warner Theater
- Folger Theater
- Strathmore
- The Fillmore
- RFK Stadium
- Audi Field
- Eagle Bank Arena
- Jiffy Lube Live
- Merriweather Post Pavilion
- The Anthem

Q *Which of the following event venues have you visited in the past 12 months? (select all that apply)*

Federal Media & Marketing Dashboard

# Federal Media & Marketing Dashboard

For more information and specific cuts in the data, an annual subscription helps plan your media strategy.

- Dynamic and visual user interface

- Your favorite FMMS reports ready and available for immediate use

- The ability to run unique reports, based on your agency, location or product-based needs

- Updated data, when available

- Access to three years of data

PURCHASE ONLINE:
marketconnectionsinc.com/fmm2019study
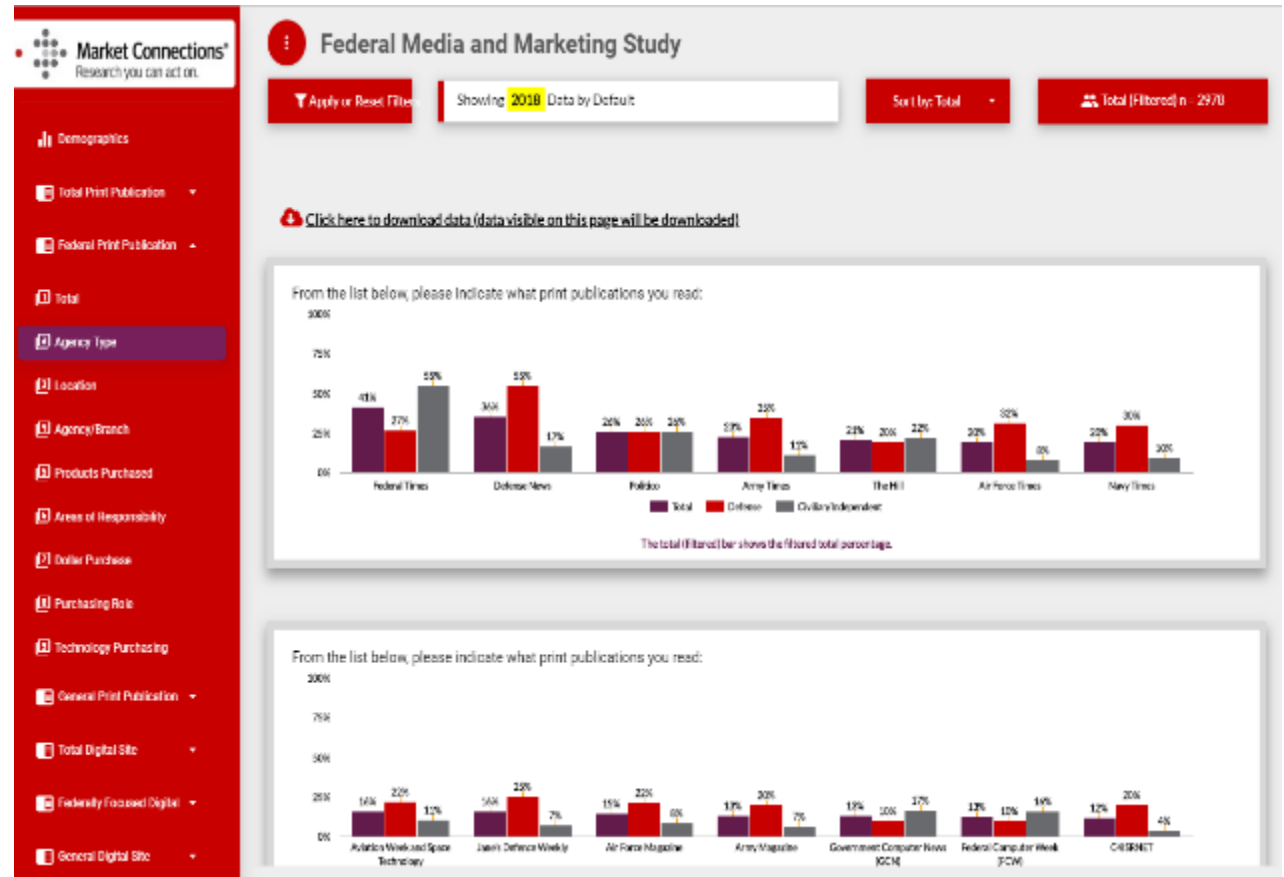
Contact Information

Aaron J. Heffron, *President*

703.966.1706
aaronh@marketconnectionsinc.com

Laurie Morrow, *Vice President, Research Strategy*

571.257.3845
lauriem@marketconnectionsinc.com

Market Connections®
Research you can act on.