Federal
Media &
Marketing
Study 2019

Air Force Edition

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: 252)

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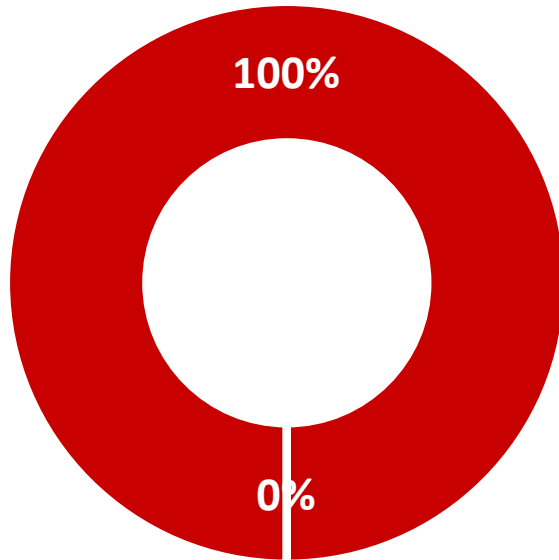- **Day in the Life:** Media exposure throughout a typical day

Demographics

DEMOGRAPHICS
Agency Type & Location

Agency Type
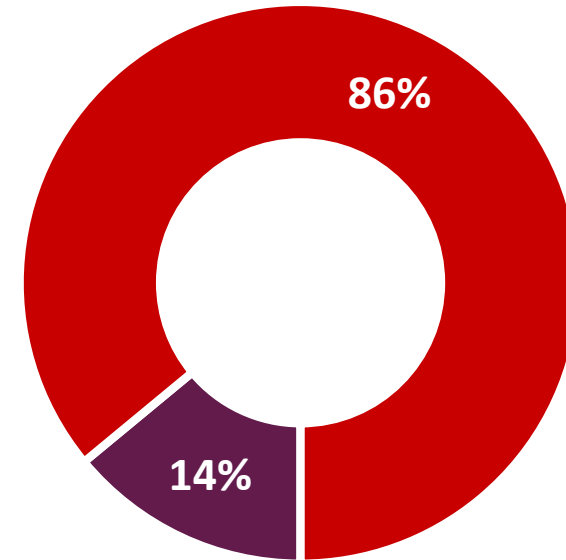
100%

0%

Location

86%

14%

■ 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: 9%, 18%, 37%, 35%
2018: 31%, 20%, 19%, 30%
2019: 11%, 24%, 25%, 33%

What is your age?
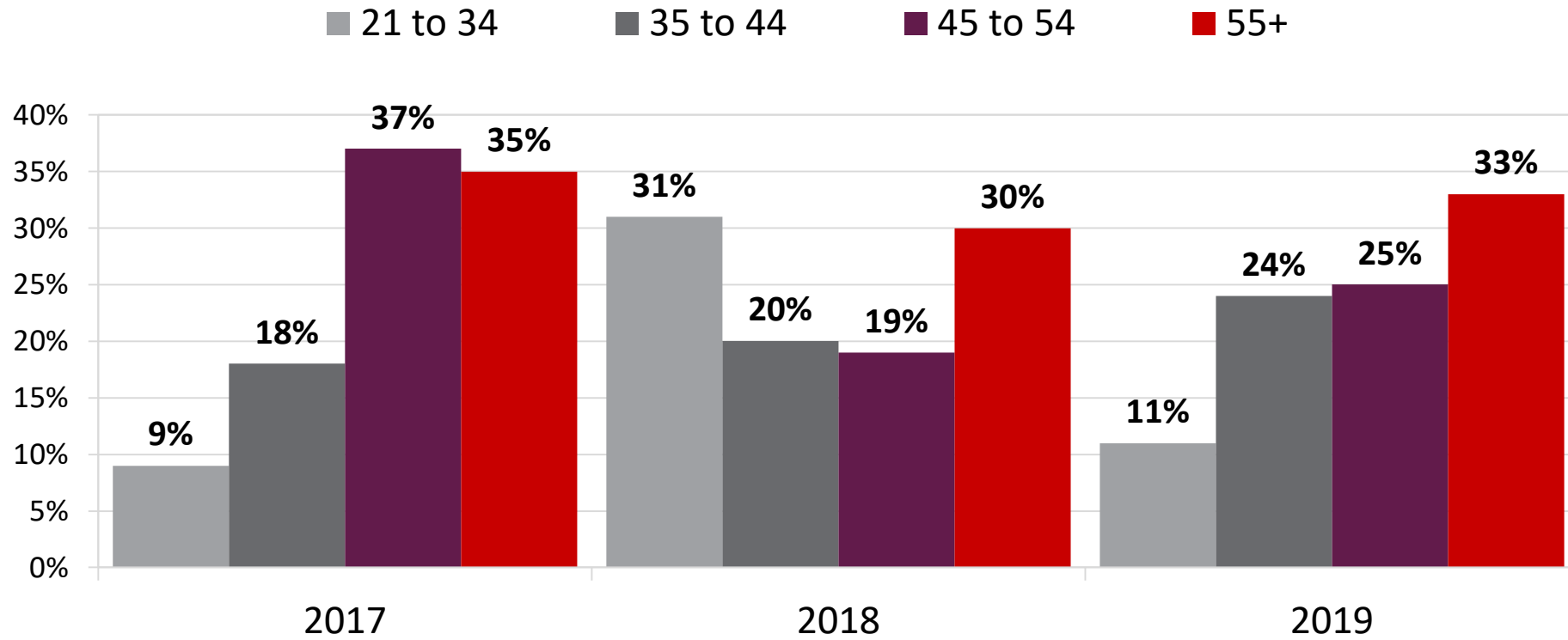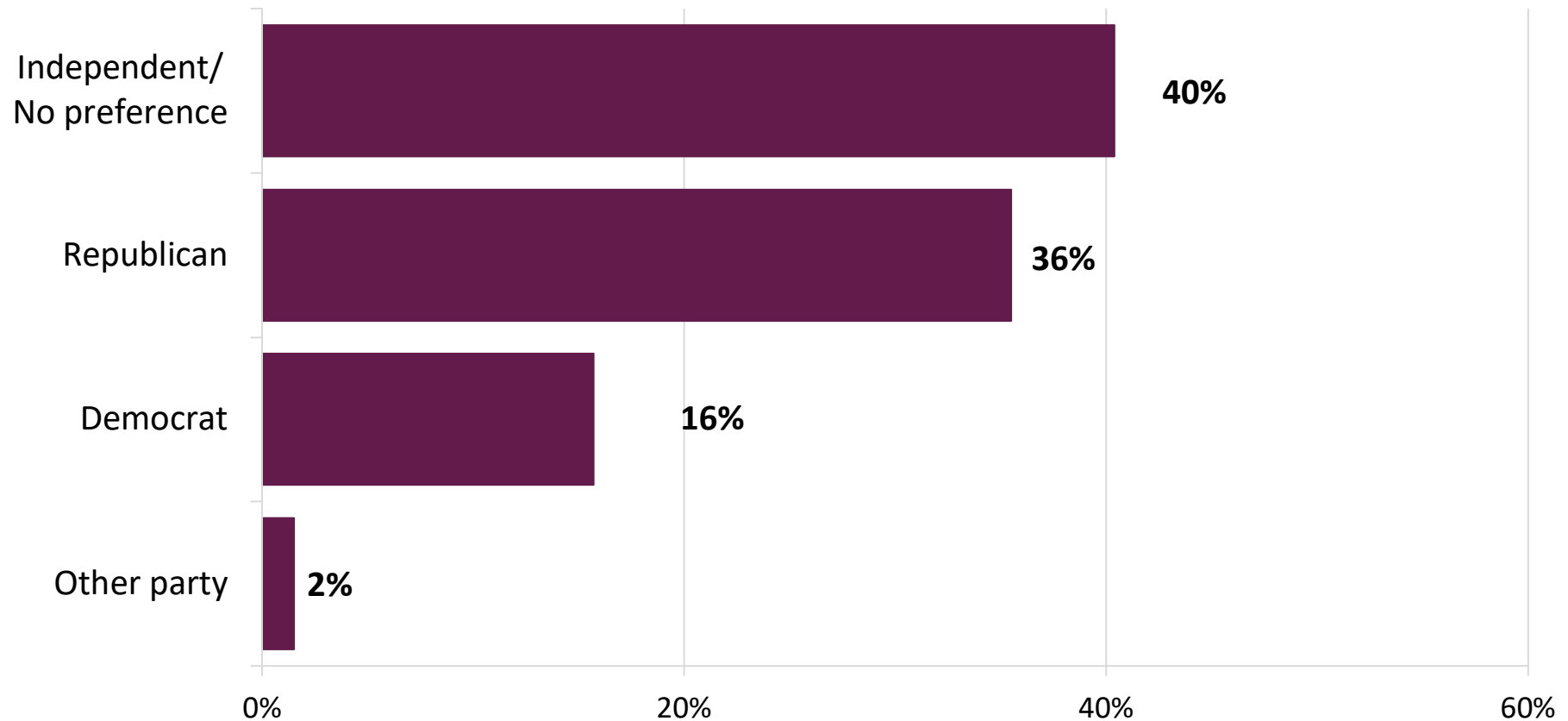
DEMOGRAPHICS
Political Affiliation

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

Top 10 Job Functions & Purchase Categories

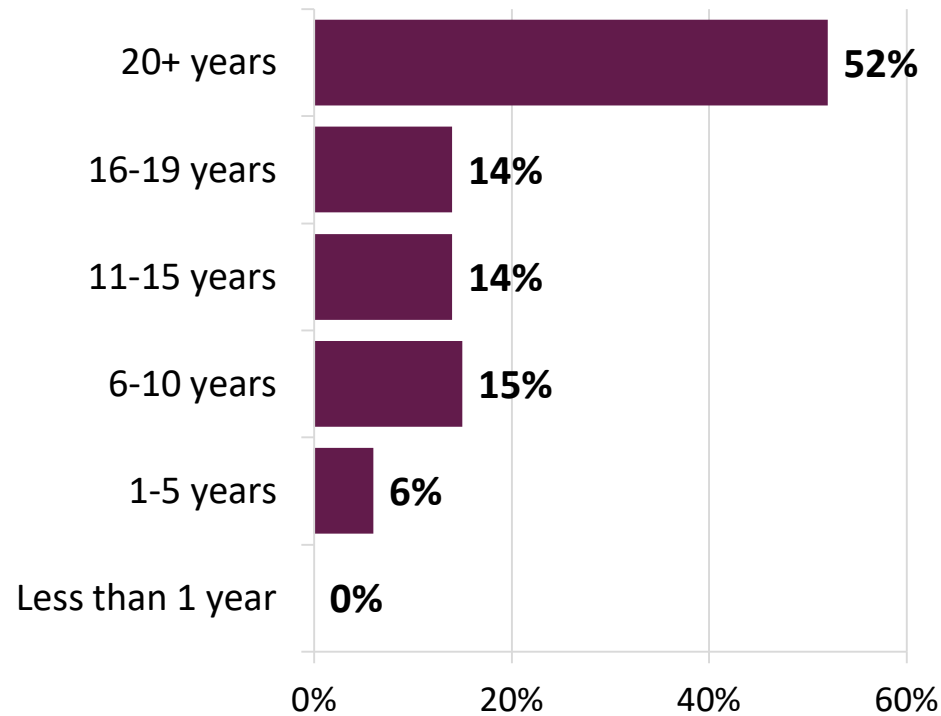| Job Function	Product/Service Purchase Categories
Administration and office services	Computer systems/hardware
Medical, health	Office equipment and supplies
Project/program management and administration	Education/training classes and services
Training, education	Cloud computing services
Purchasing, contracting, procurement	Communications/telecommunications
Logistics	Cybersecurity
Accounting, budget and finance	Weapons/combat systems
Executive and command	Software
Cybersecurity	Command and control systems/C4ISR
Aviation services/operations	Big data/analytics

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

Category	Percent
20+ years	52%
16-19 years	14%
11-15 years	14%
6-10 years	15%
1-5 years	6%
Less than 1 year	0%

Years Until Leaving Federal Employment

Category	Percent
10+ years	8%
6-9 years	27%
3-5 years	30%
1-2 years	22%
Less than 1 year	4%
Don't know/Undecided	9%
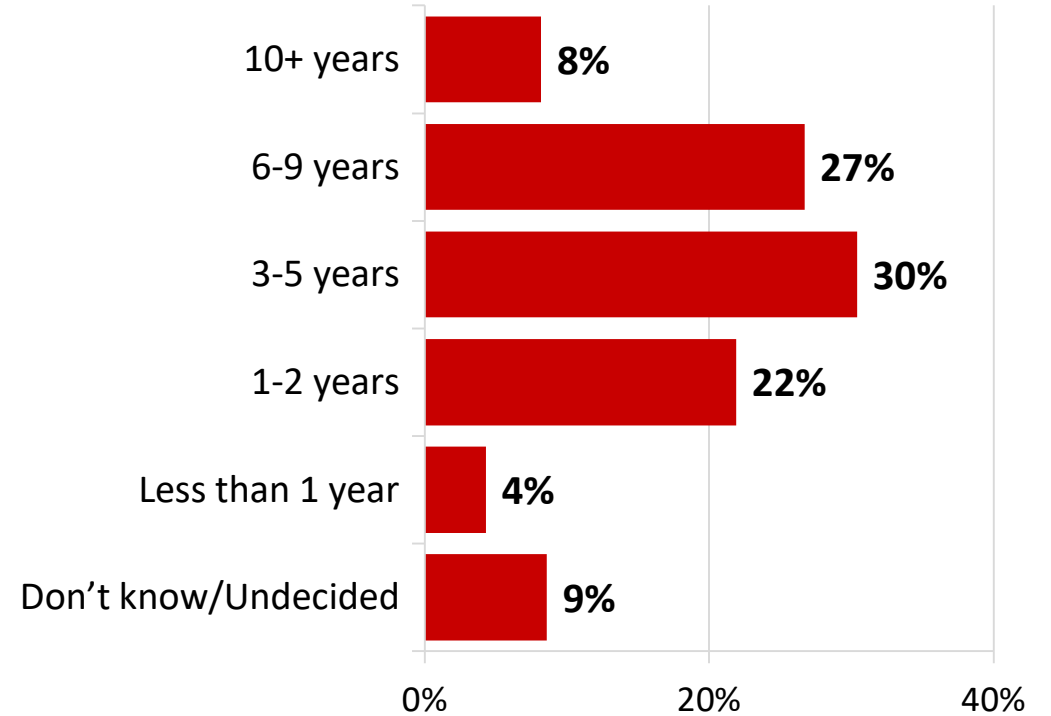
How many years in total have you served as a federal government employee? (Include military service, if applicable.)
In how many years do you plan to leave federal employment?

Future Plans

Plans After Leaving Federal Employment

Retire	47%
Work for a private for-profit business	19%
Work for a private nonprofit organization	18%
Become self-employed	17%
Work for state or local government	13%
Volunteer at an organization without pay	11%

Career Plans for the Next 5 Years

Retire or leave federal government to work elsewhere	47%
Get a promotion	43%
Earn a degree/professional certificate	36%
Move to another federal department/agency	12%
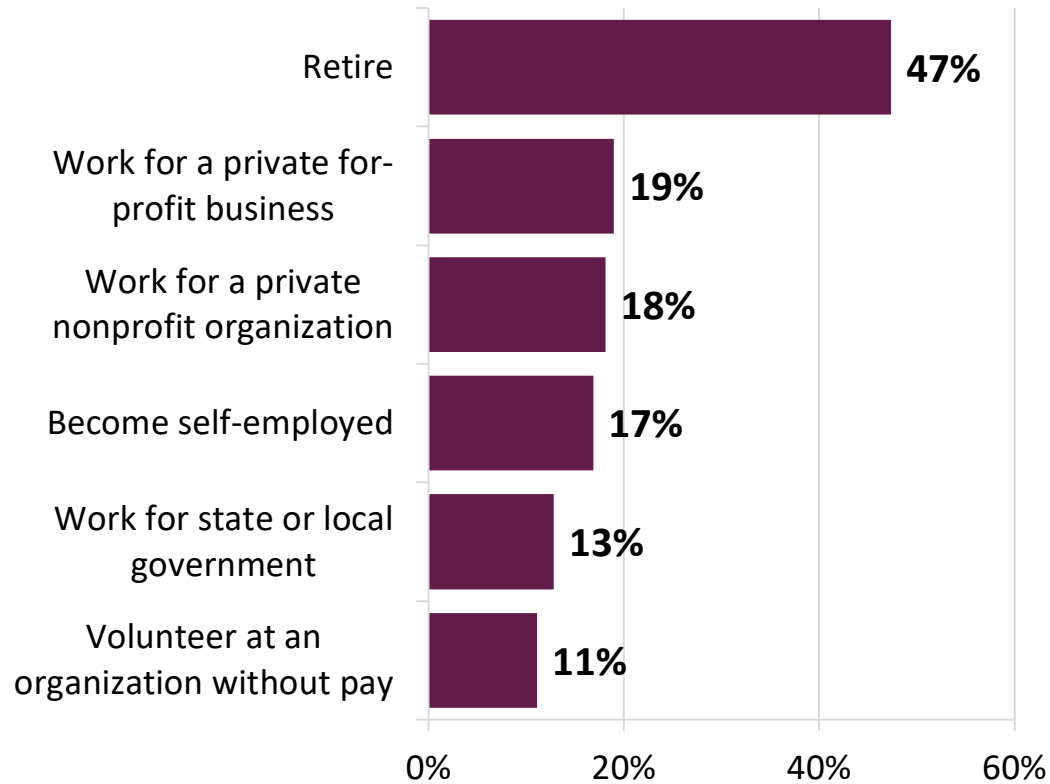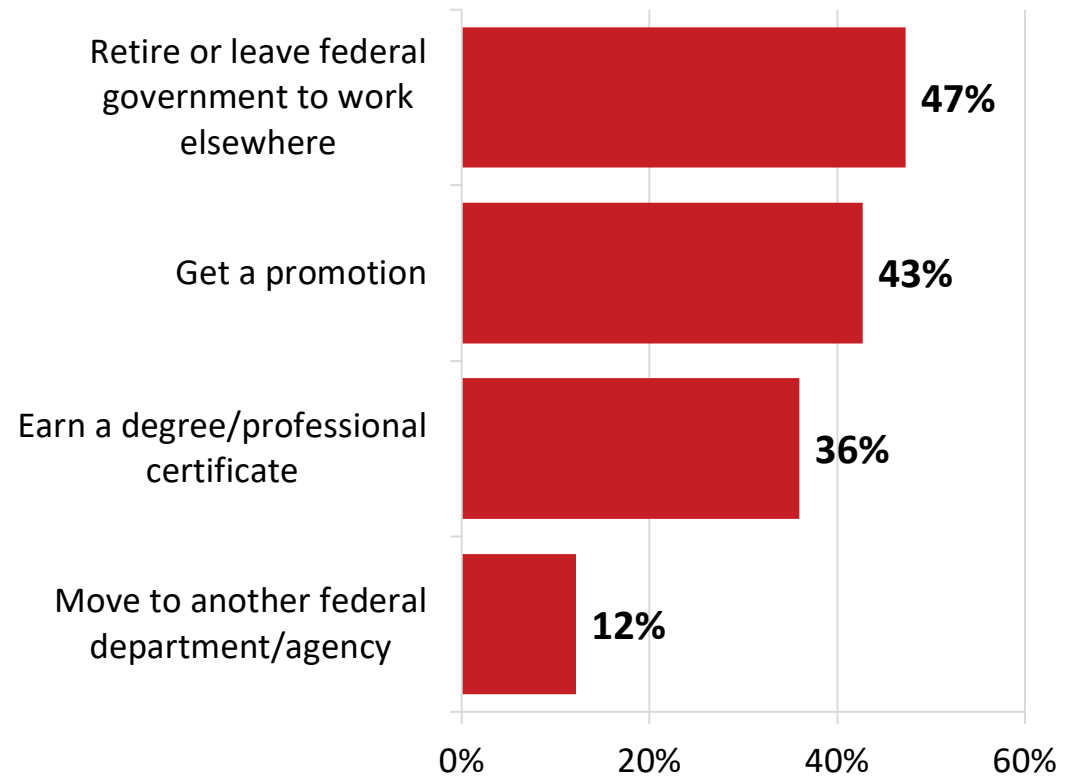
What do you plan to do after you leave federal employment? (select all that apply)
What are your career plans for the next 5 years? (select all that apply)

Top Work-Related Challenges Over Next Year

Challenge	Percentage
Employee morale	48%
Leadership turnover	38%
Funding/budget	37%
Staff recruitment	31%
Changes in government policies	26%
Lack of new technologies/existing or legacy...	21%
Growth and demand for your services	19%
Execution/start-up of new projects	18%
Retirement of current employees	17%
Use of new technologies	17%
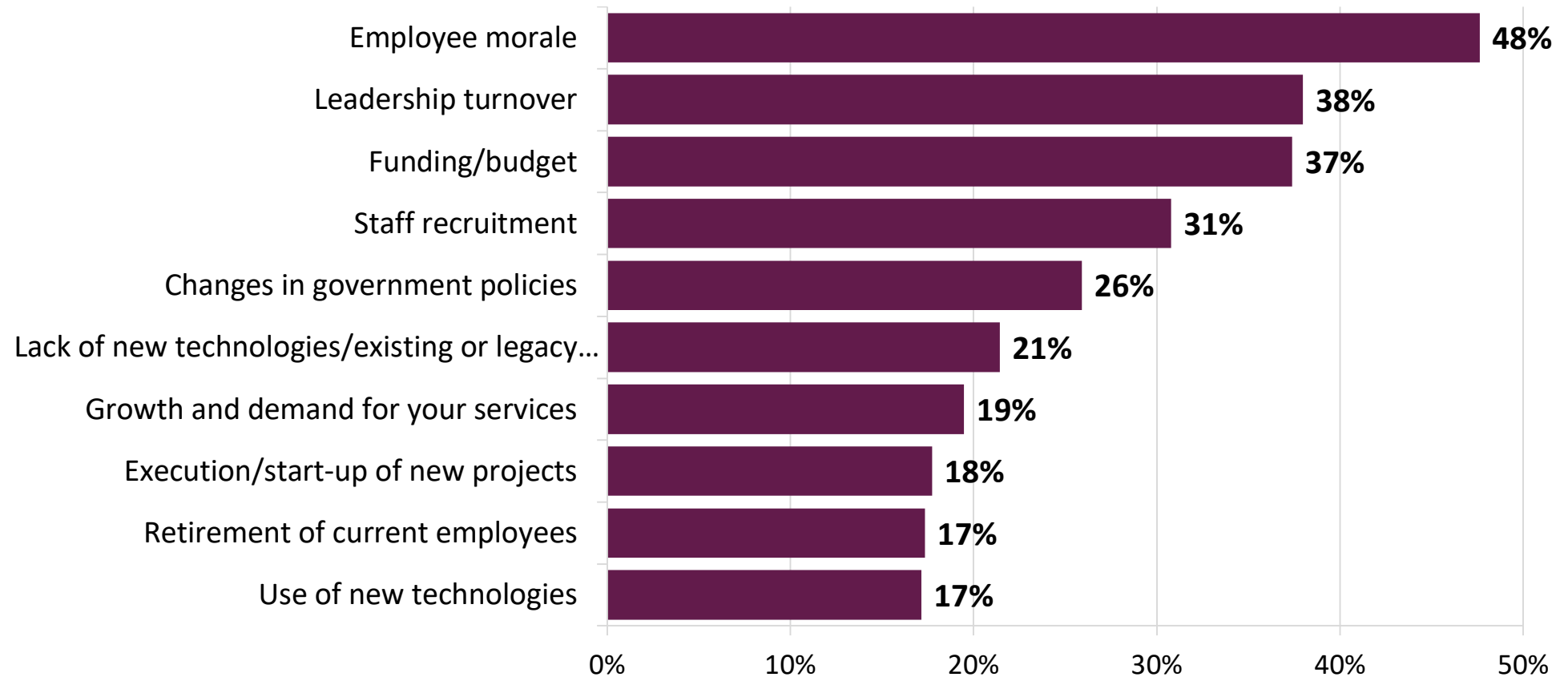
What do you see as the biggest work-related challenges coming over the next year in your agency? (select all that apply)

Mobile Devices in the Workplace

Works in a Secure Space Where Personal Mobile Devices Are Prohibited

66% No
33% Yes

■ Yes   ■ No
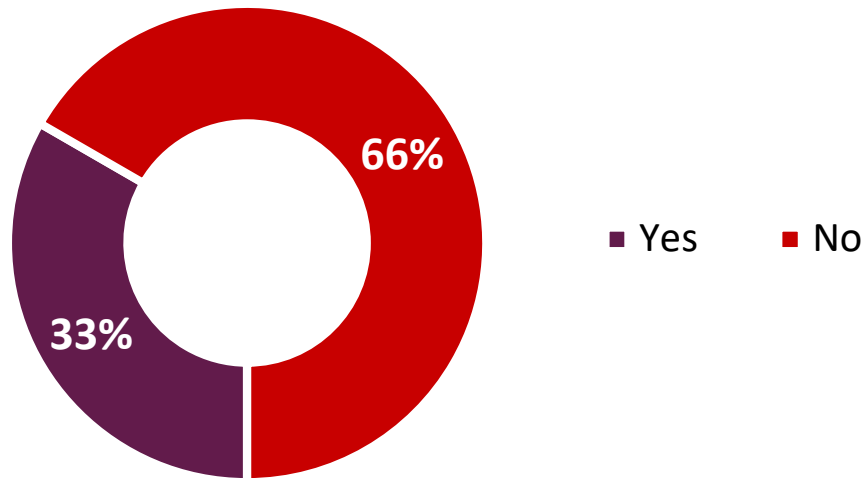
Mobile Device Use in the Workplace

A personal mobile device	30%
Both a work and personal mobile device	12%
A work mobile device	18%
Do not use a mobile device in my workplace	40%

0%   20%   40%   60%
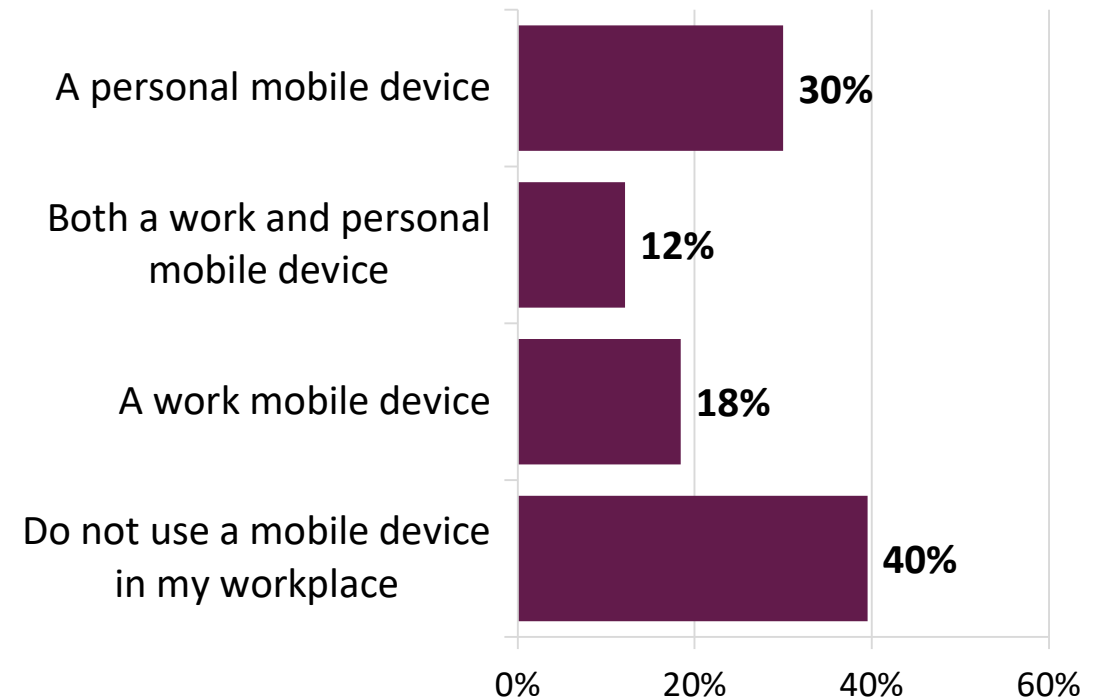
Do you spend the majority of your time at work in a secure space where personal mobile devices are prohibited?
Which of the following do you use while you're at your workplace?

Work Locations

% Always/Often

Location	%
Traditional office space	78%
Shared office space	38%
Telework from home	14%

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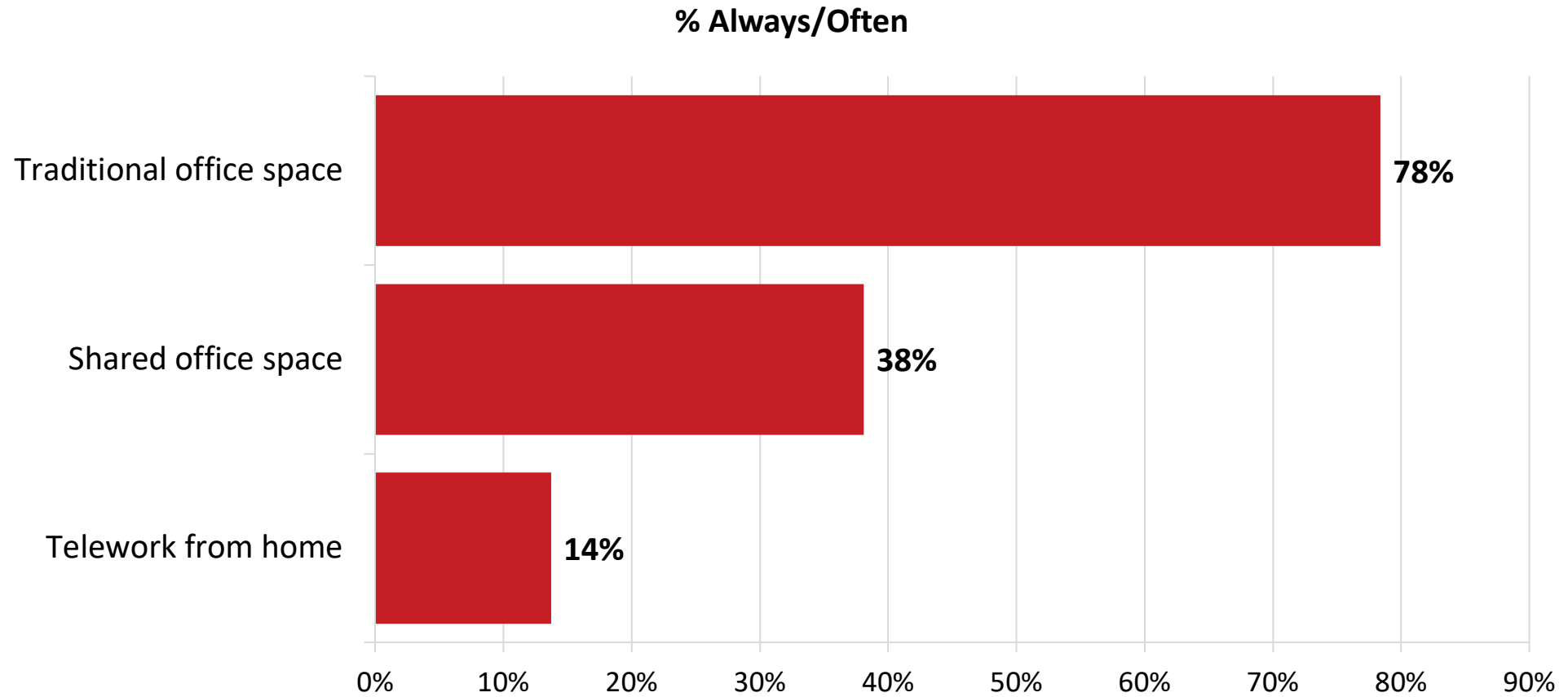
Media Results

Top Print Business & News Publications Read
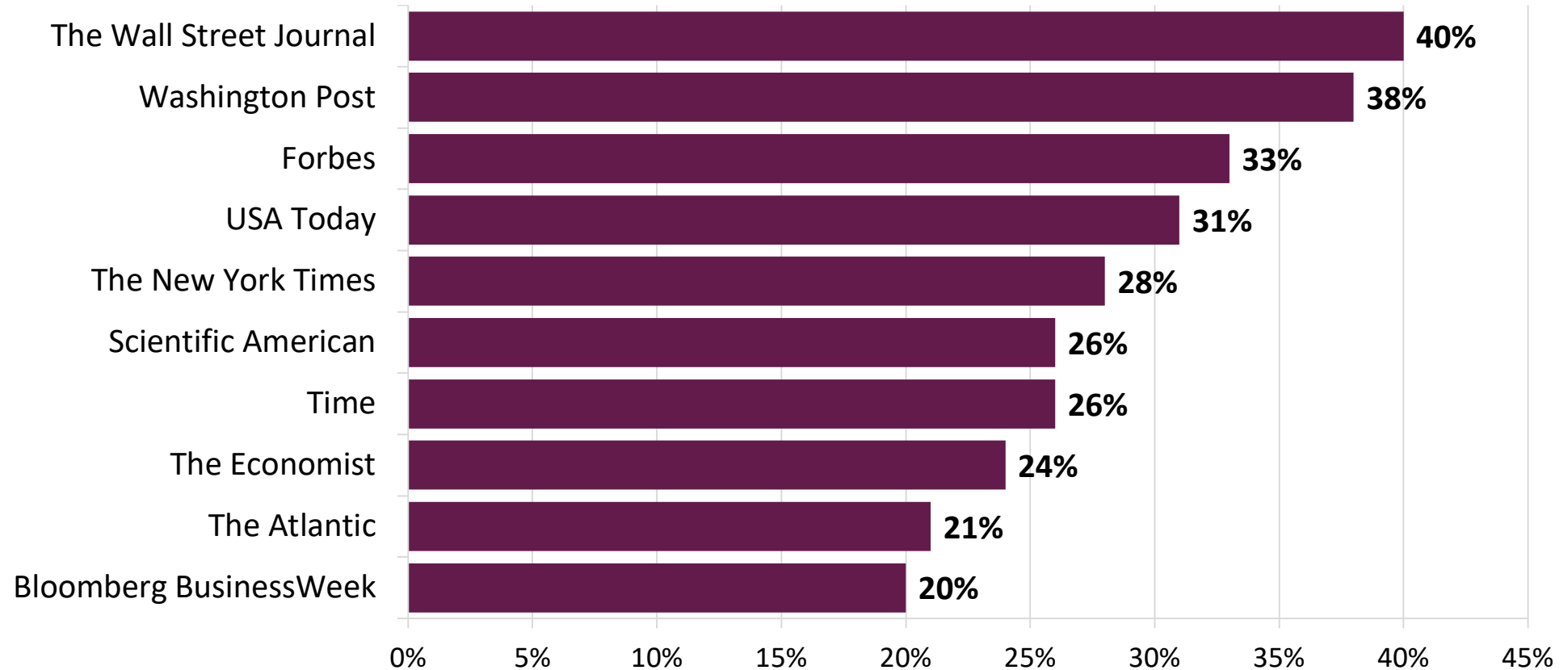
Publication	Percentage
The Wall Street Journal	40%
Washington Post	38%
Forbes	33%
USA Today	31%
The New York Times	28%
Scientific American	26%
Time	26%
The Economist	24%
The Atlantic	21%
Bloomberg BusinessWeek	20%

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
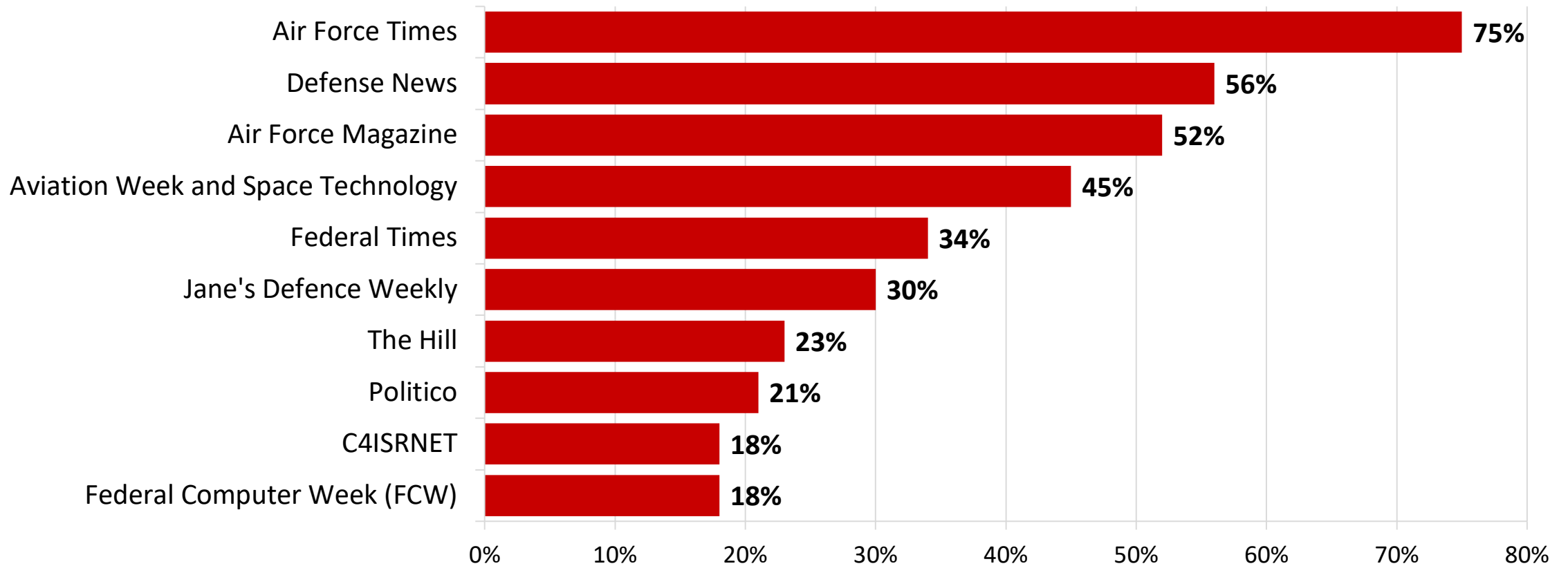
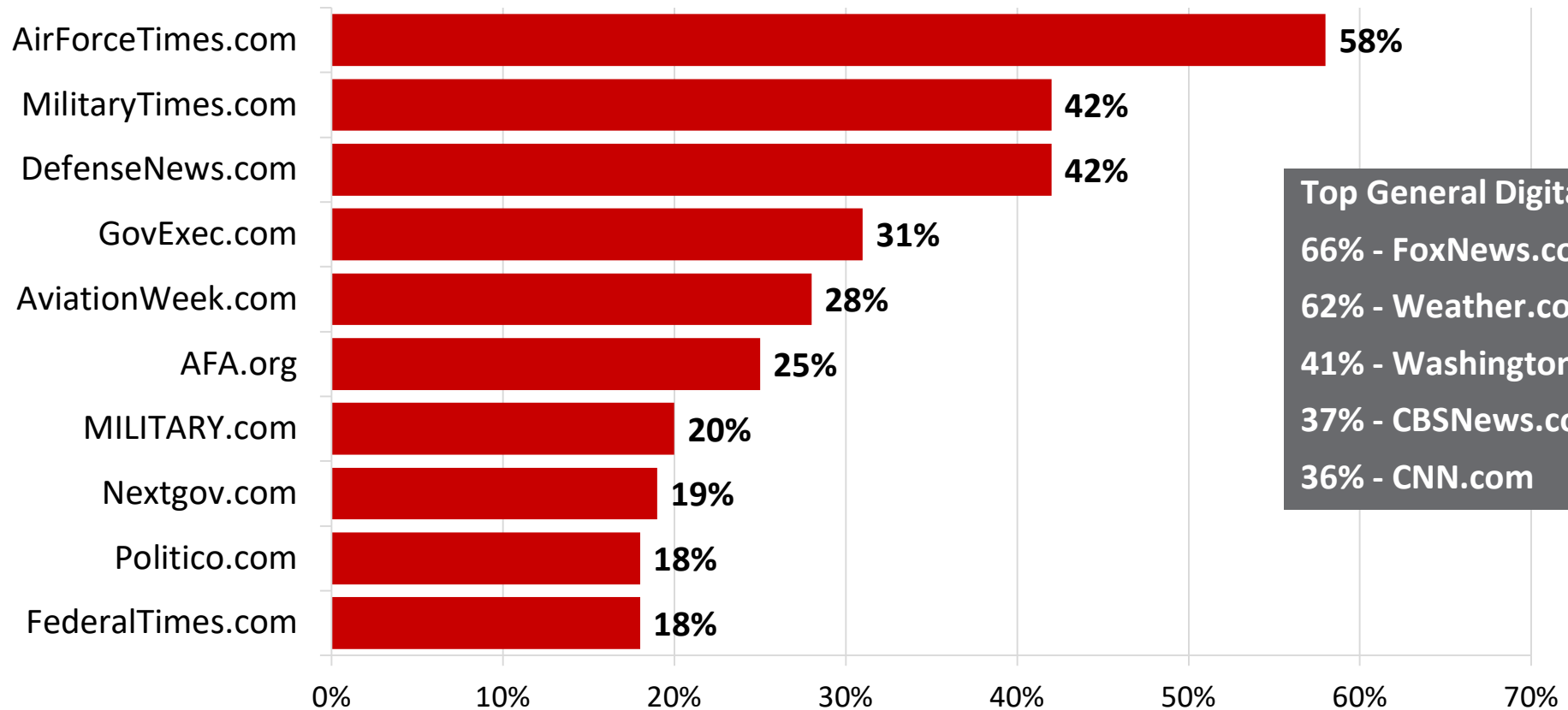| Publication	Percentage
Air Force Times	75%
Defense News	56%
Air Force Magazine	52%
Aviation Week and Space Technology	45%
Federal Times	34%
Jane's Defence Weekly	30%
The Hill	23%
Politico	21%
C4ISRNET	18%
Federal Computer Week (FCW)	18%

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
AirForceTimes.com	58%
MilitaryTimes.com	42%
DefenseNews.com	42%
GovExec.com	31%
AviationWeek.com	28%
AFA.org	25%
MILITARY.com	20%
Nextgov.com	19%
Politico.com	18%
FederalTimes.com	18%

Top General Digital Sites
66% - FoxNews.com
62% - Weather.com
41% - WashingtonPost.com
37% - CBSNews.com
36% - CNN.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
Weather.com	35%
AccuWeather.com	21%
FoxNews.com	21%
WashingtonPost.com	15%
MILITARY.com	8%
WTOP.com	7%
ESPN.com	7%
AirForceTimes.com	6%
CNN.com	5%
CBSNews.com	5%

Which of the following apps do you have downloaded on your mobile device? (select all that apply)
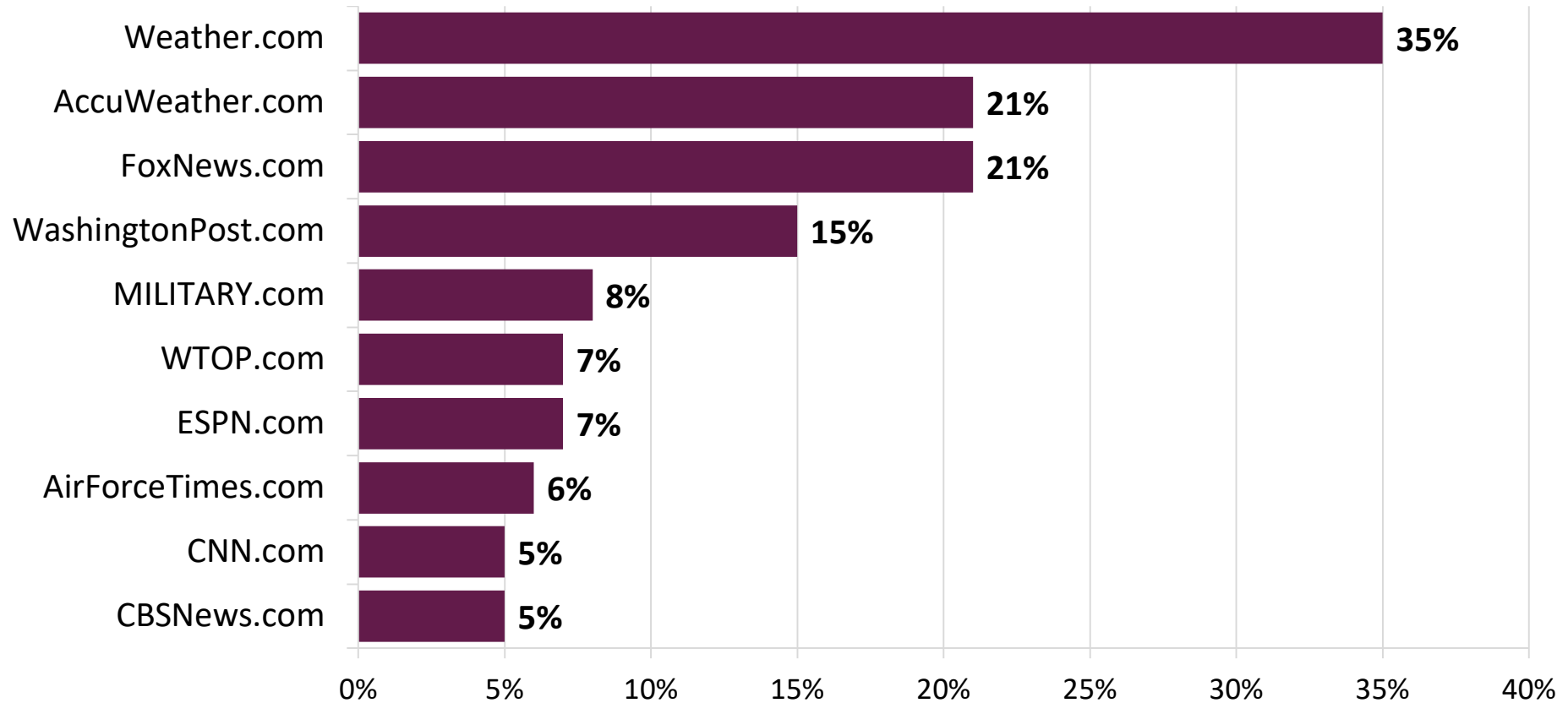
Go-To Print and Digital Media Property for News

Go-To Government-Focused Media Property

■ Digital   ■ Print

Property	Digital	Print
Air Force Times	10%	16%
Defense News	6%	7%
GovExec.com	9%	
WTOP.com	7%	
Aviation Week and…	1%	5%
Politico.com	2%	4%
Janes Defence Weekly	1%	3%
Air Force Magazine		4%
Special Operations Forum		2%
Federal Times	1%	1%

0%   10%   20%   30%

Go-To General Media Property

■ Digital   ■ Print

Property	Digital	Print
FoxNews.com	31%	
The Wall Street Journal	1%	7%
Washington Post	2%	5%
Spacenews.com	7%	
The New York Times	5%	1%
USA Today	2%	2%
CBSNews.com	4%	
The Economist		3%
Scientific American		2%
The Atlantic	2%	

0%   10%   20%   30%   40%

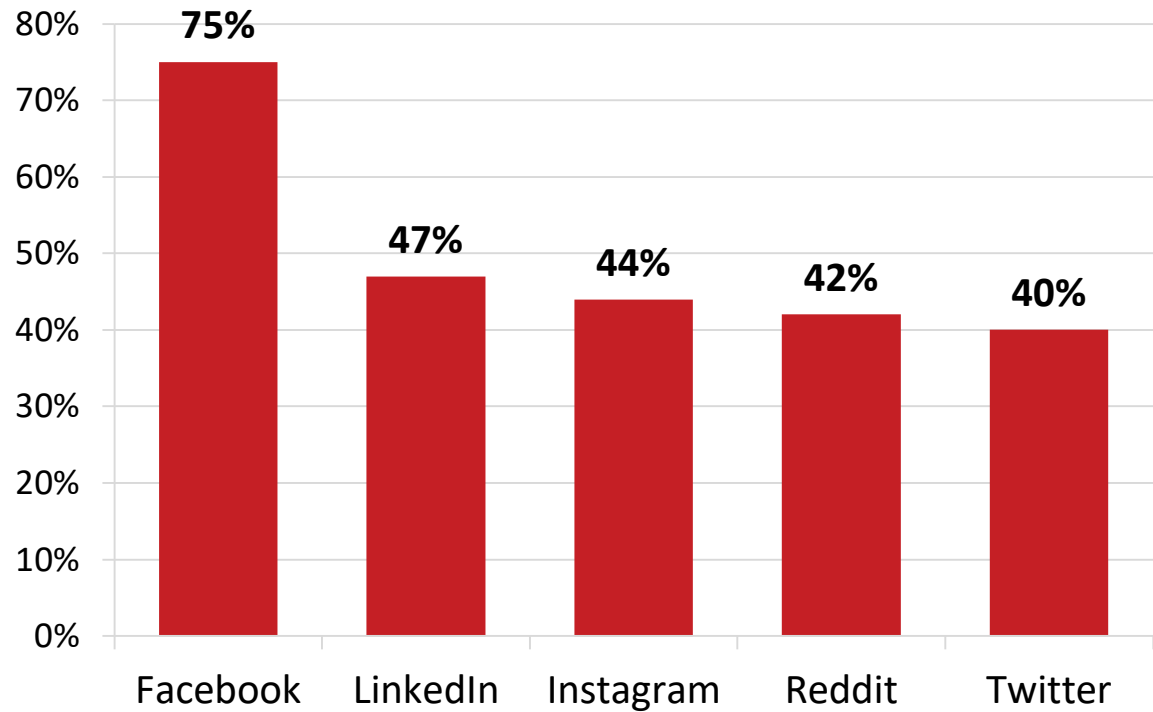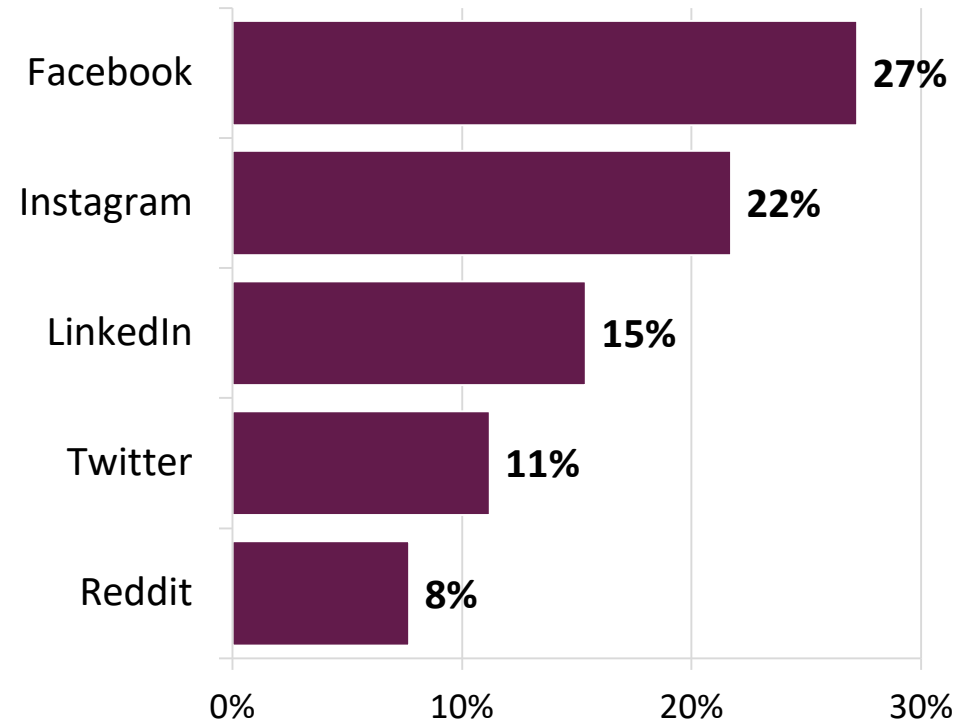*If you could only choose one government-focused media property as your "go-to" source for work-related news, which would you choose?*
If you could only choose one general media property as your "go-to" source for news, which would you choose?

Online Social Sites

Top Online Social Sites Used

Site	%
Facebook	75%
LinkedIn	47%
Instagram	44%
Reddit	42%
Twitter	40%

Daily Online Social Site Use

Site	%
Facebook	27%
Instagram	22%
LinkedIn	15%
Twitter	11%
Reddit	8%

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

Lifestyle Media Streaming Services

Service	Percentage
Amazon Prime Video	57%
Netflix	51%
Hulu	37%
YouTube TV	32%
OnDemand Cable or Satellite TV	28%
Spotify	27%
Pandora	24%
Facebook Watch	15%
SoundCloud	13%
iHeartradio	13%
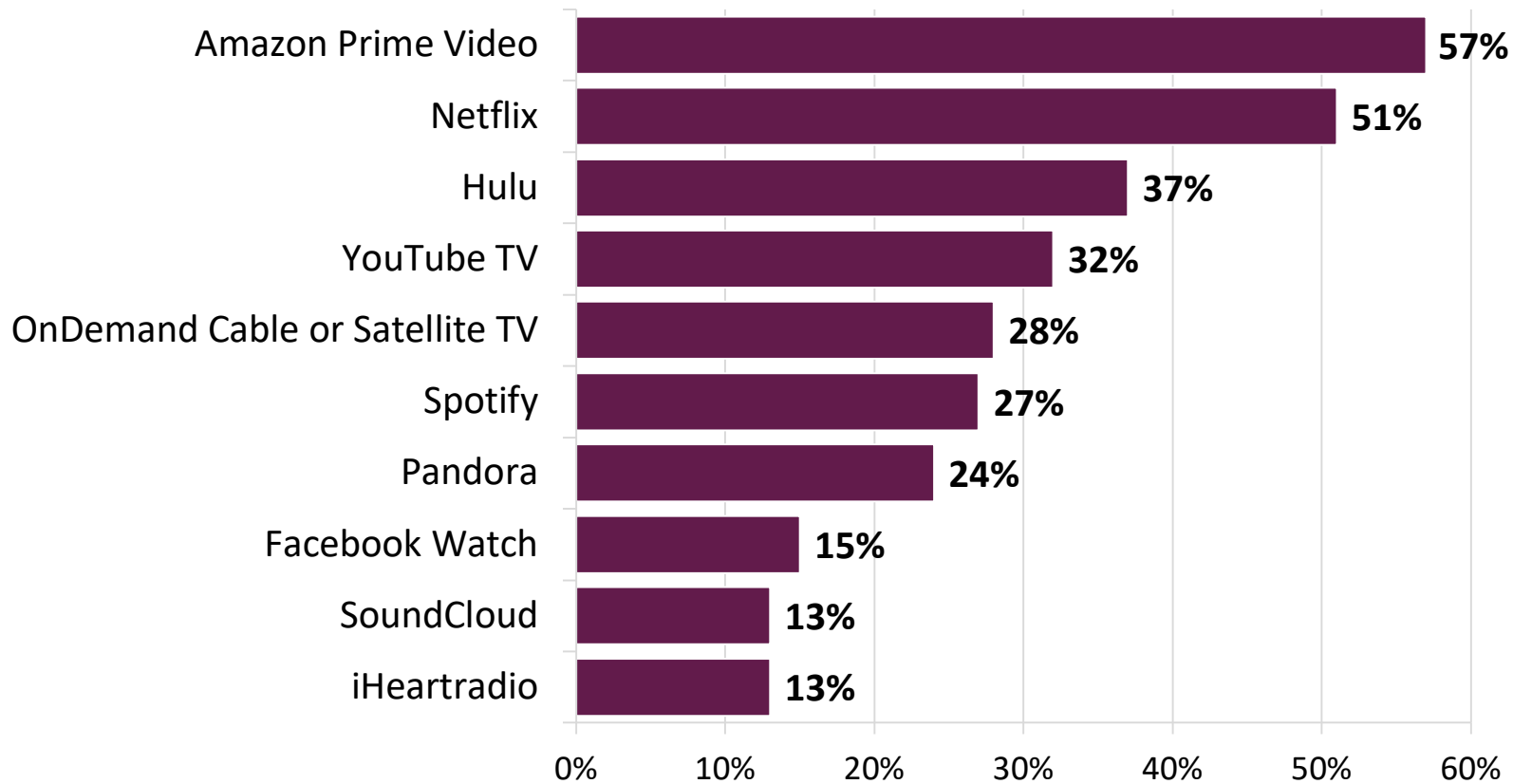
From the list below, please indicate which of the following you access.

DC METRO AREA
TV News Top Five

TV News Channels

Channel	Percentage
7 ABC WJLA	50%
News Channel 8 TBD	50%
WETA	26%
CNN	18%
Fox News	17%

News Programs

Program	Percentage
This Week with George Stephanopoulos (ABC)	68%
Defense News Weekly	67%
Face the Nation (CBS)	59%
State of the Union (CNN)	59%
Government Matters	58%
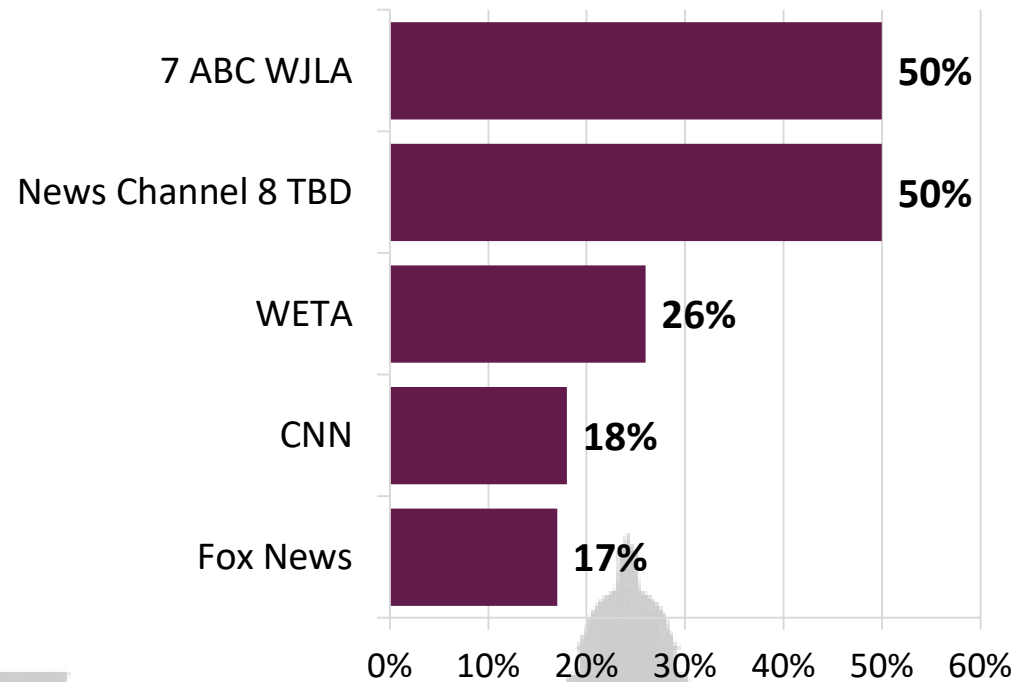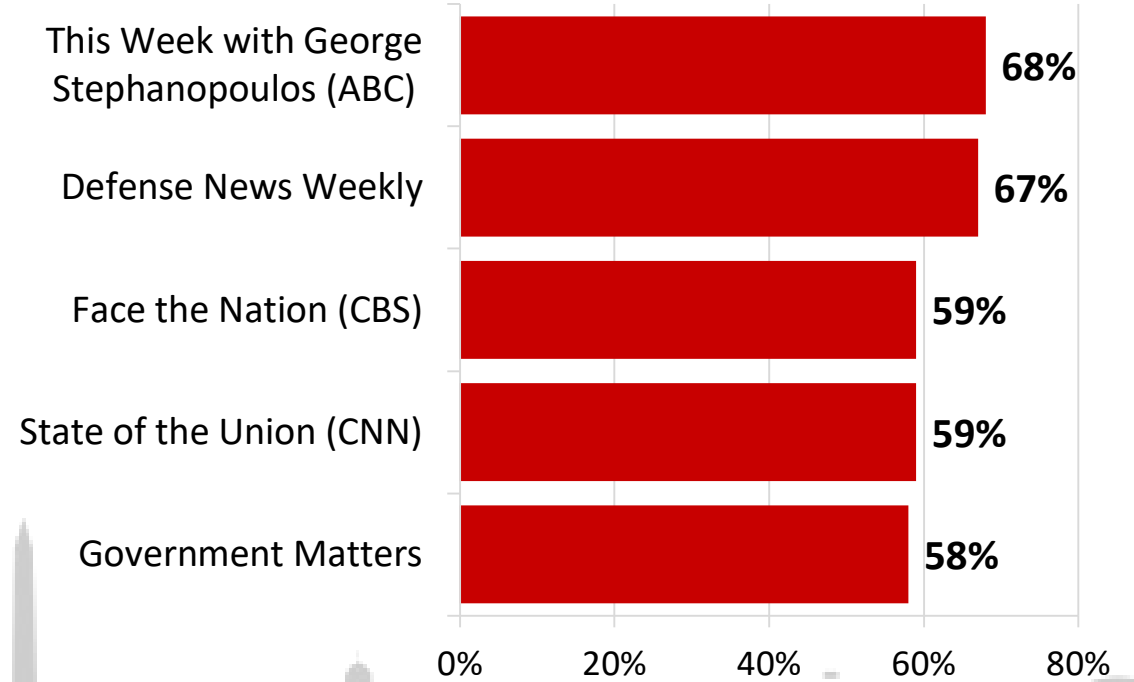
N=35

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

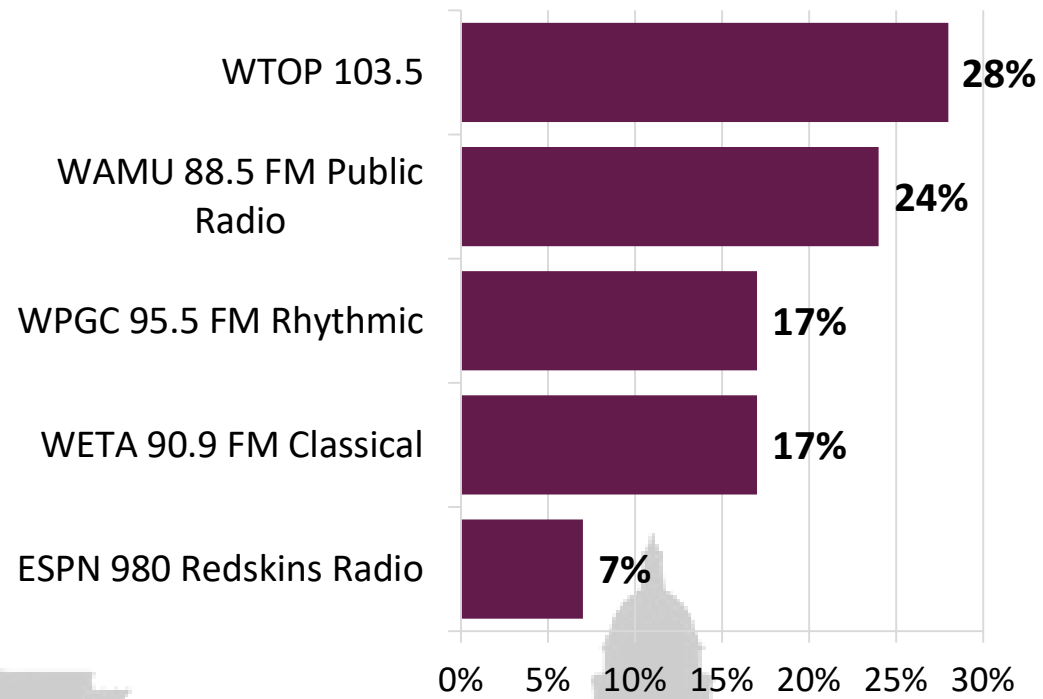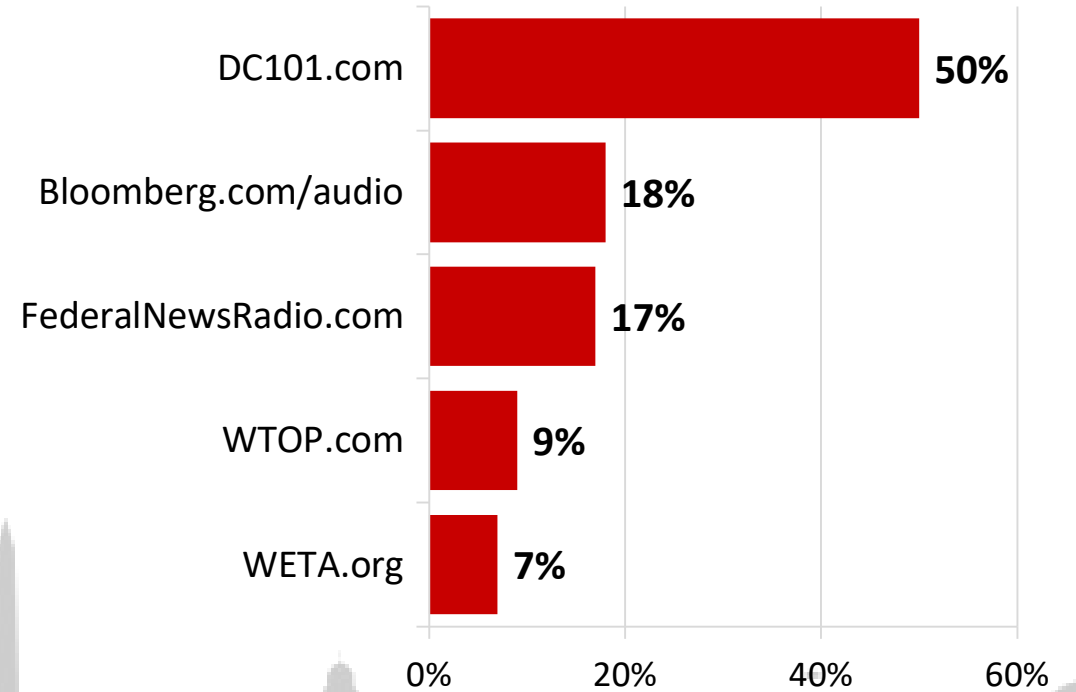| Station	Percentage
WTOP 103.5	28%
WAMU 88.5 FM Public Radio	24%
WPGC 95.5 FM Rhythmic	17%
WETA 90.9 FM Classical	17%
ESPN 980 Redskins Radio	7%

Radio Websites

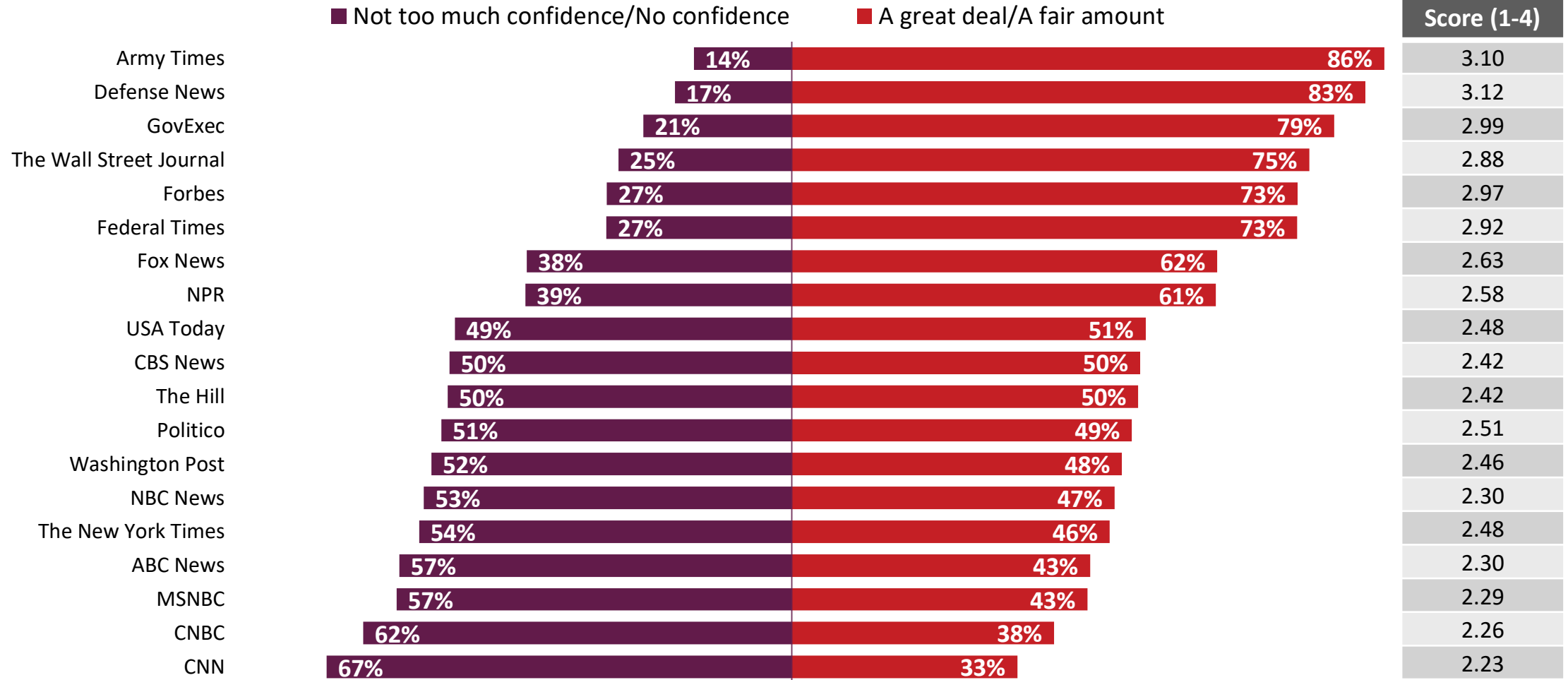| Website	Percentage
DC101.com	50%
Bloomberg.com/audio	18%
FederalNewsRadio.com	17%
WTOP.com	9%
WETA.org	7%

N=35

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

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

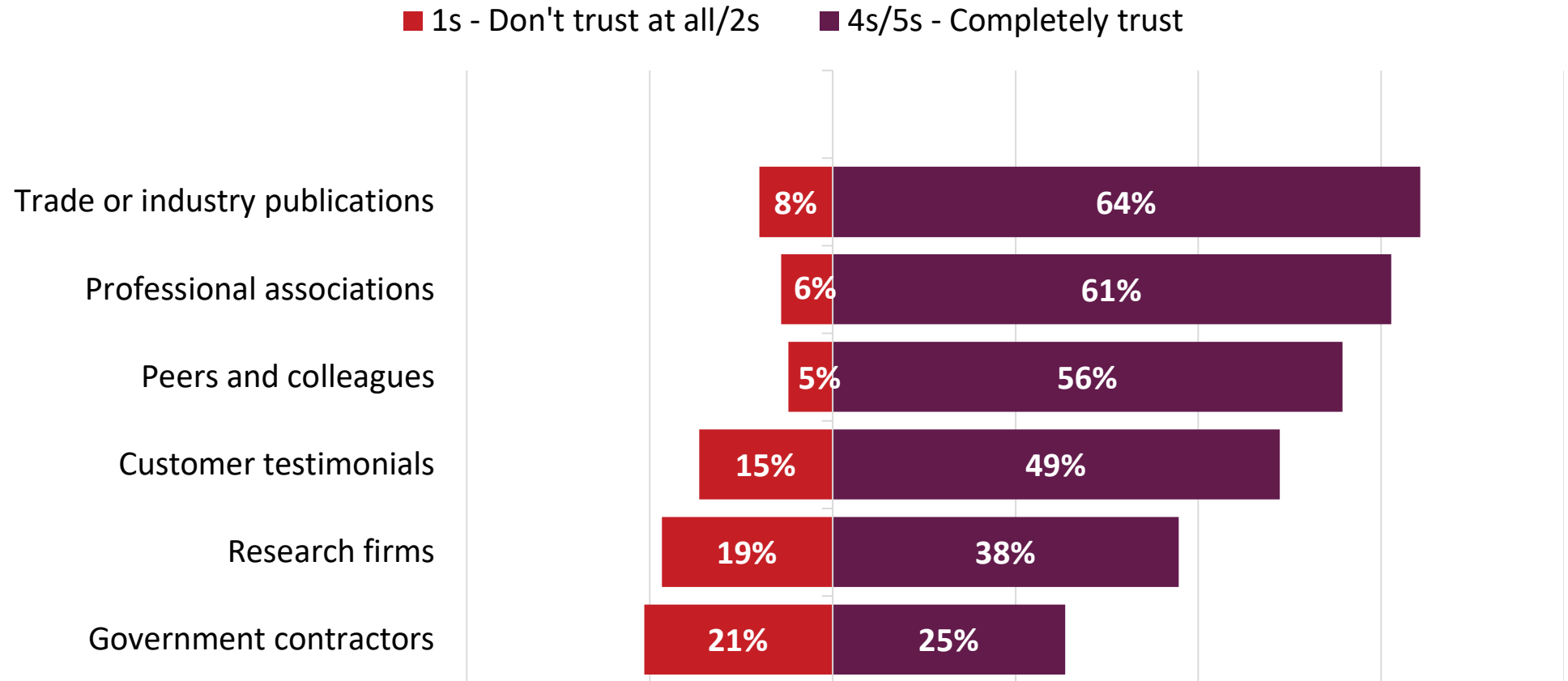|	Not too much confidence/No confidence	A great deal/A fair amount	Confidence Score (1-4)
Army Times	14%	86%	3.10
Defense News	17%	83%	3.12
GovExec	21%	79%	2.99
The Wall Street Journal	25%	75%	2.88
Forbes	27%	73%	2.97
Federal Times	27%	73%	2.92
Fox News	38%	62%	2.63
NPR	39%	61%	2.58
USA Today	49%	51%	2.48
CBS News	50%	50%	2.42
The Hill	50%	50%	2.42
Politico	51%	49%	2.51
Washington Post	52%	48%	2.46
NBC News	53%	47%	2.30
The New York Times	54%	46%	2.48
ABC News	57%	43%	2.30
MSNBC	57%	43%	2.29
CNBC	62%	38%	2.26
CNN	67%	33%	2.23

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

Marketing Tactics

Trusted Sources of Information

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

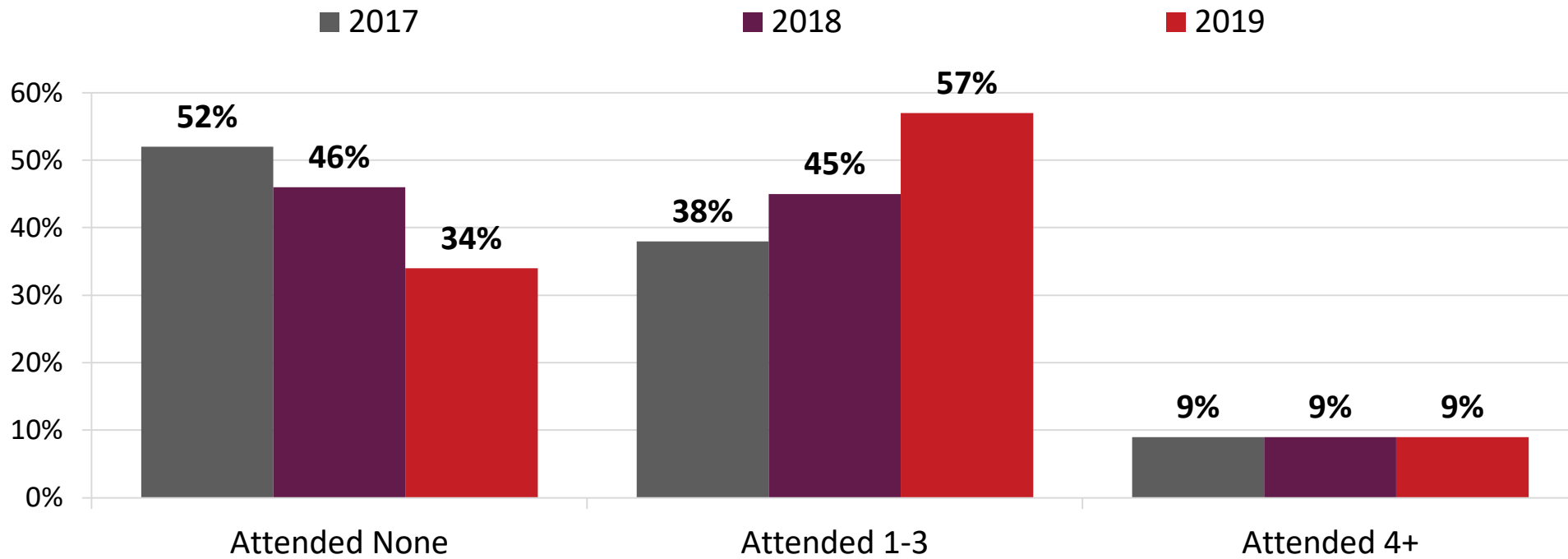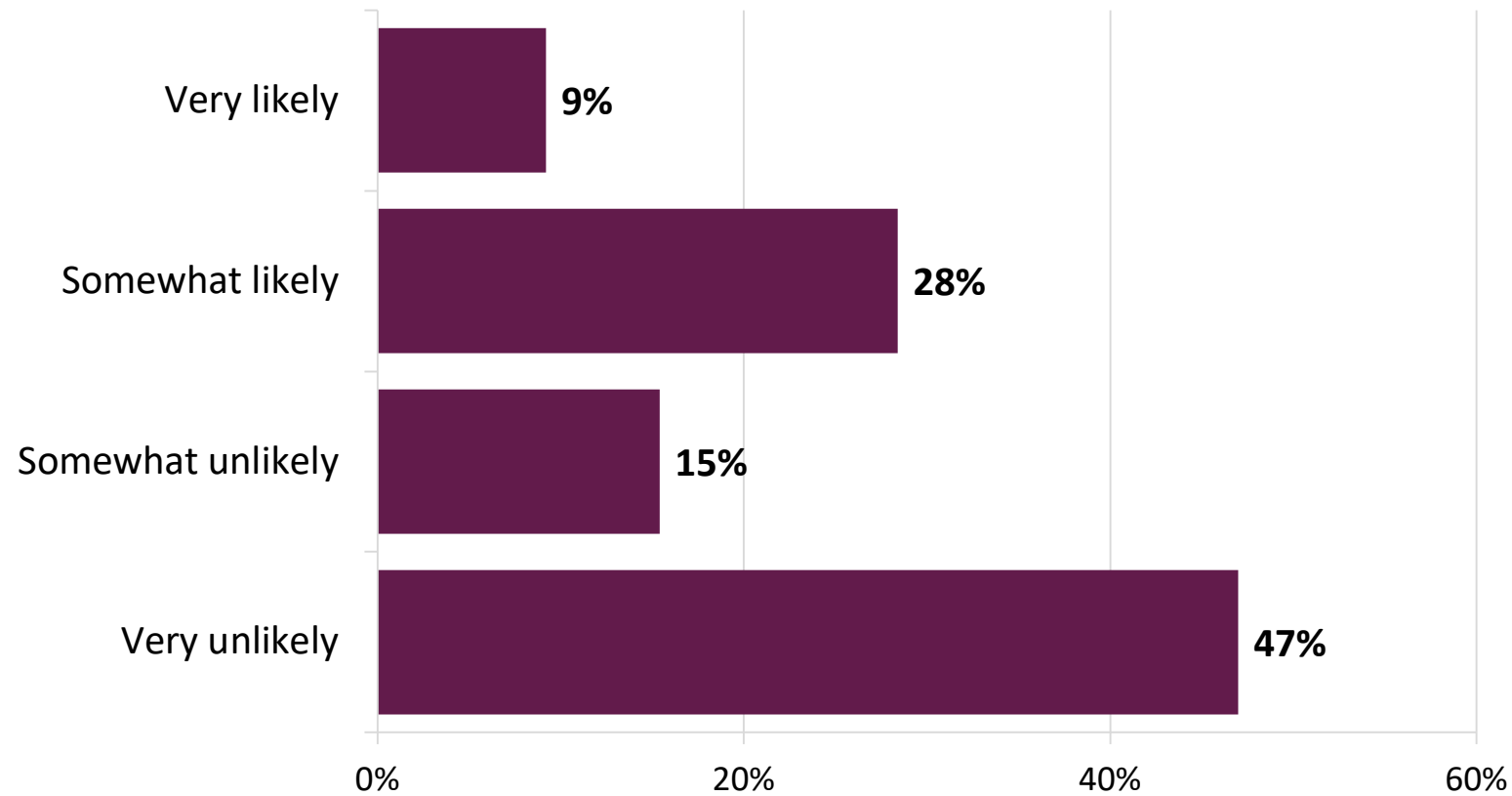| Source	1s - Don't trust at all/2s	4s/5s - Completely trust
Trade or industry publications	8%	64%
Professional associations	6%	61%
Peers and colleagues	5%	56%
Customer testimonials	15%	49%
Research firms	19%	38%
Government contractors	21%	25%

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

■ 2017   ■ 2018   ■ 2019

Attended None: 2017: 52%, 2018: 46%, 2019: 34%
Attended 1-3: 2017: 38%, 2018: 45%, 2019: 57%
Attended 4+: 2017: 9%, 2018: 9%, 2019: 9%

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

Likelihood to Attend Work Events on the Weekend

Category	Percentage
Very likely	9%
Somewhat likely	28%
Somewhat unlikely	15%
Very unlikely	47%

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

■ 2017　　　　■ 2018　　　　■ 2019

Participated in None
- 2017: 42%
- 2018: 48%
- 2019: 35%

Participated in 1-3
- 2017: 40%
- 2018: 43%
- 2019: 50%

Participated in 4+
- 2017: 18%
- 2018: 9%
- 2019: 15%

Q *In how many webinars (seminars over the Internet) have you participated in the last year?*
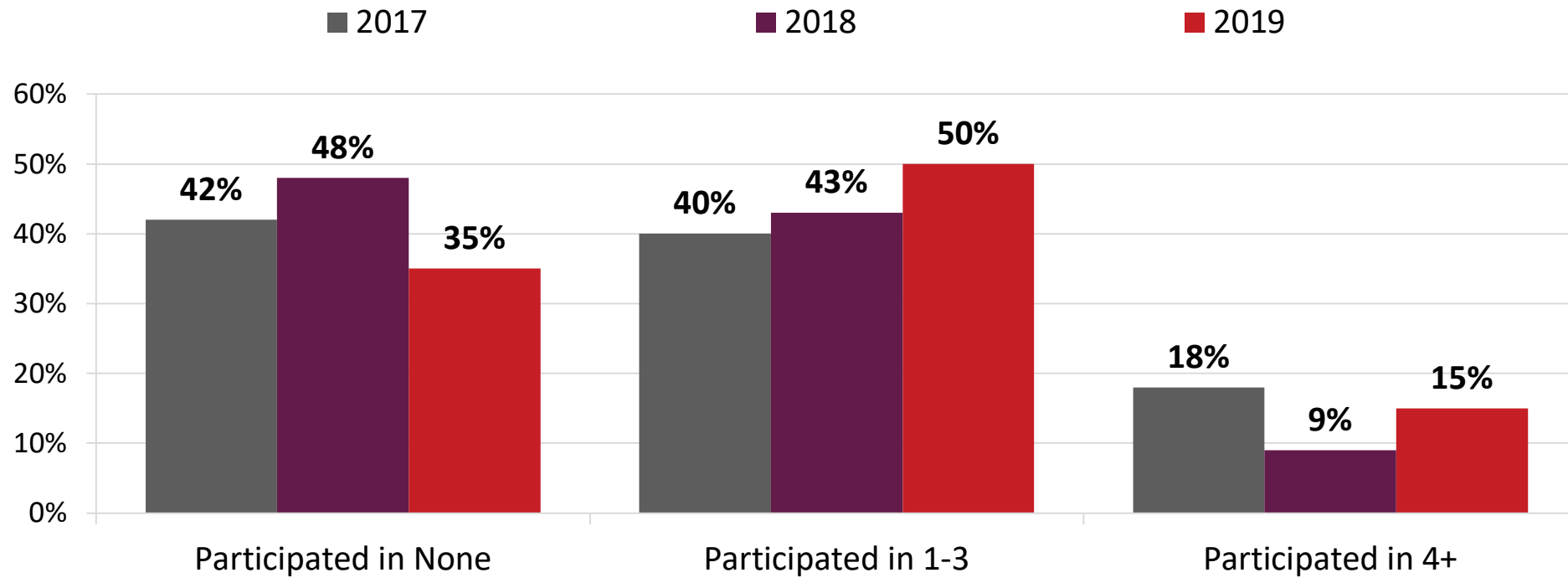
Participating in Webinars

Ways of Participating in Webinars

Watch live webinars during the workday	76%
Watch recorded webinars during the workday	27%
Watch recorded webinars on a weeknight	31%
Watch recorded webinars on the weekend	29%
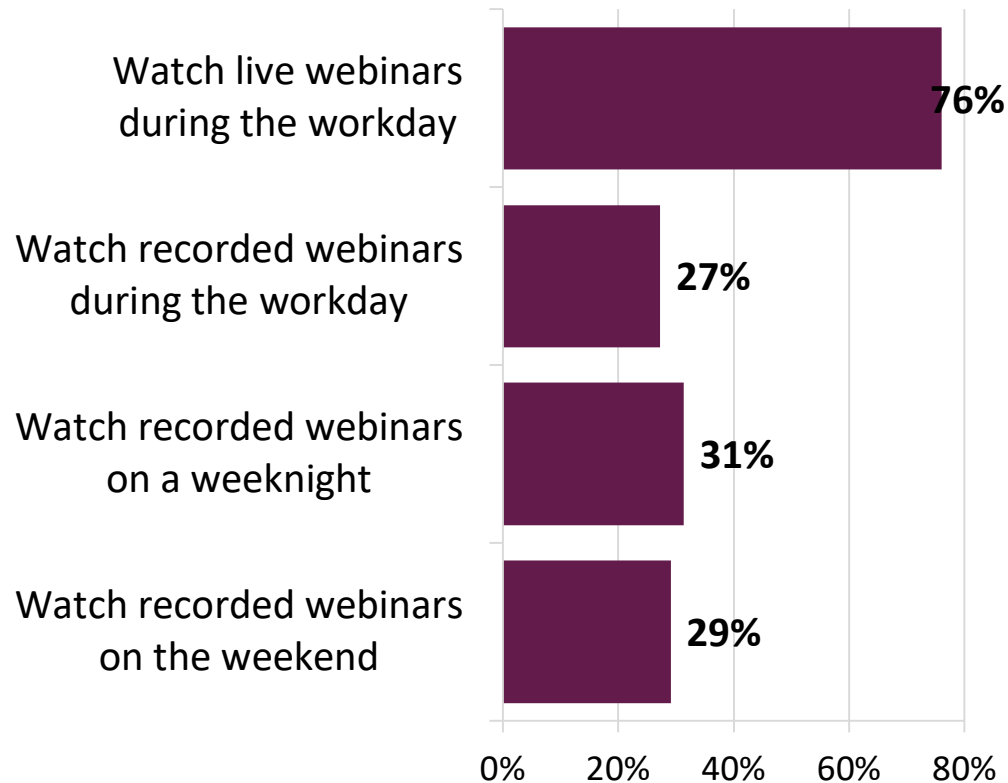
Preferred Time to Participate

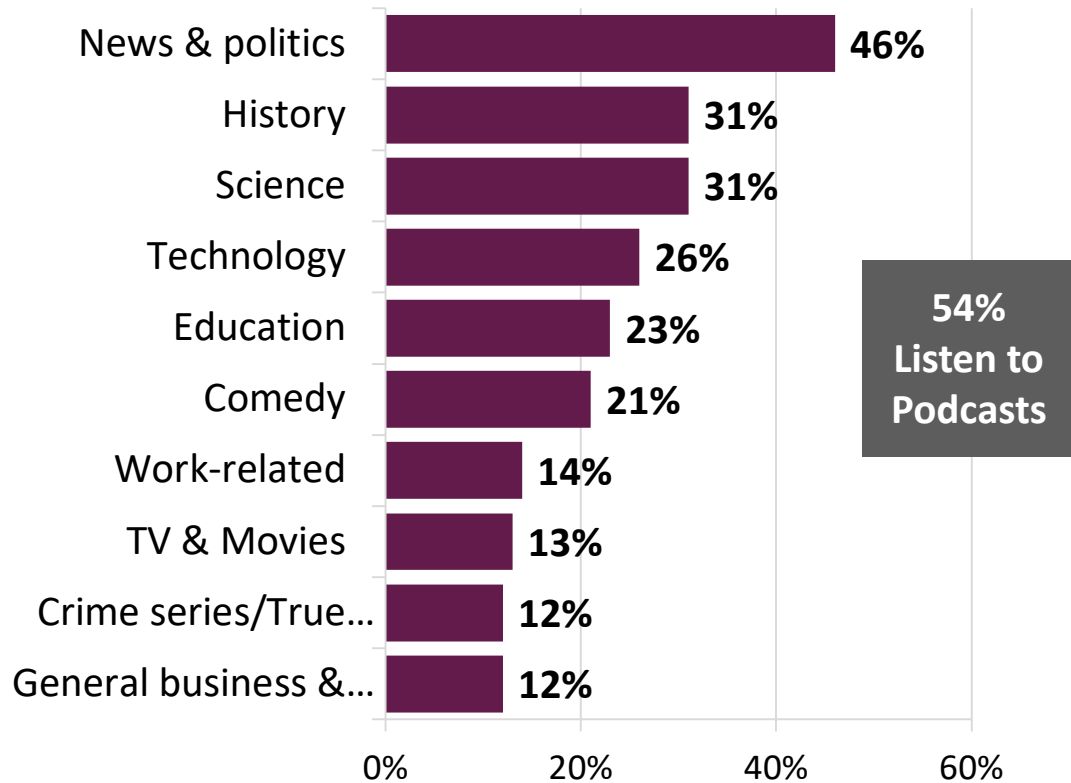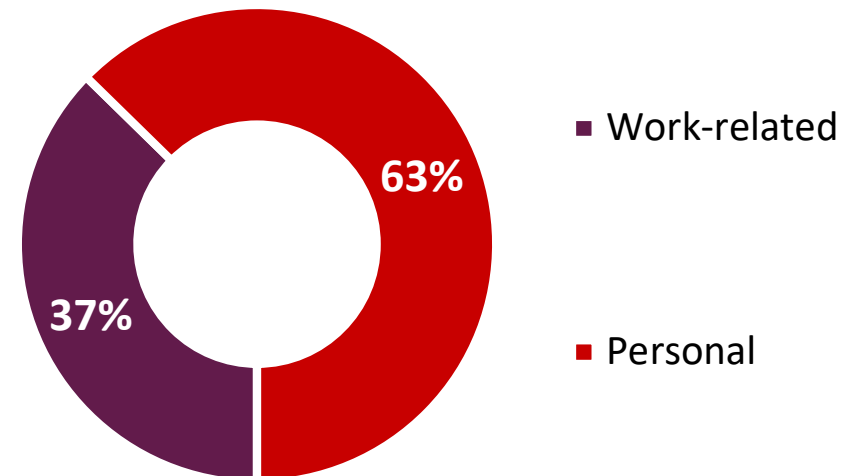|	
Before 11am	60%
11am-2pm	32%
After 2pm	21%
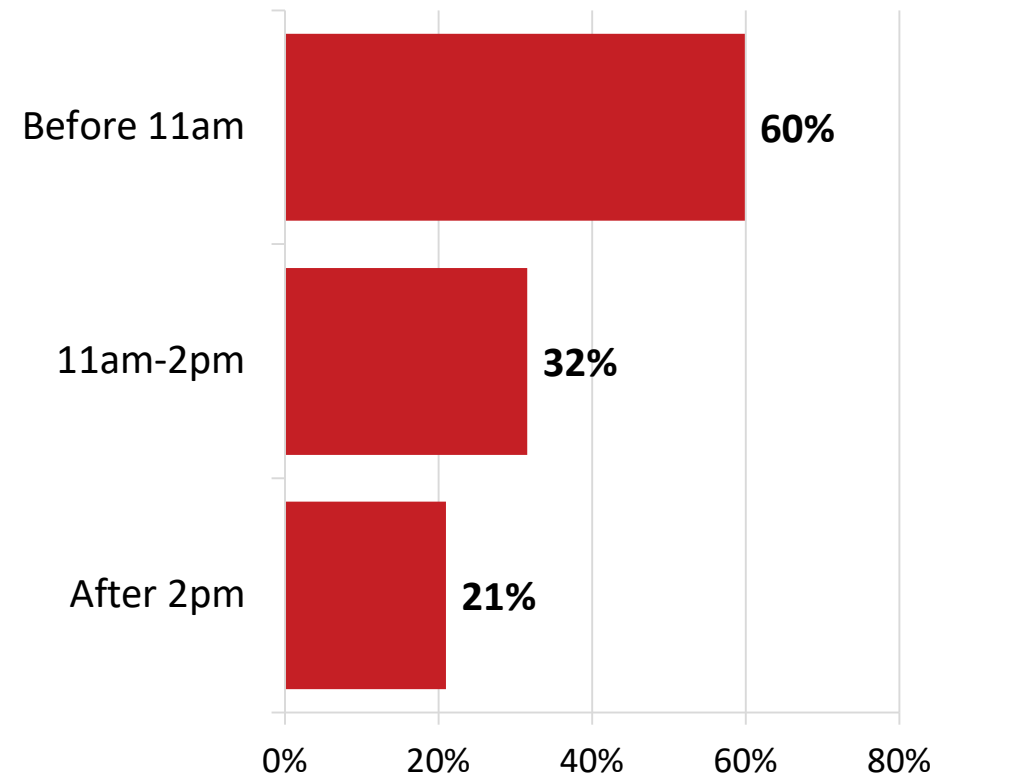
In which of the following ways do you participate in webinars? (select all that apply)
During what time in your typical workday do you prefer to participate in live webinars? (select all that apply)

Listening to Audio Podcasts

Top Types of Audio Podcasts Listened To

Type	Percentage
News & politics	46%
History	31%
Science	31%
Technology	26%
Education	23%
Comedy	21%
Work-related	14%
TV & Movies	13%
Crime series/True…	12%
General business &…	12%

54% Listen to Podcasts

Average Percentage of Time Spent Listening to Podcasts

- Work-related: 37%
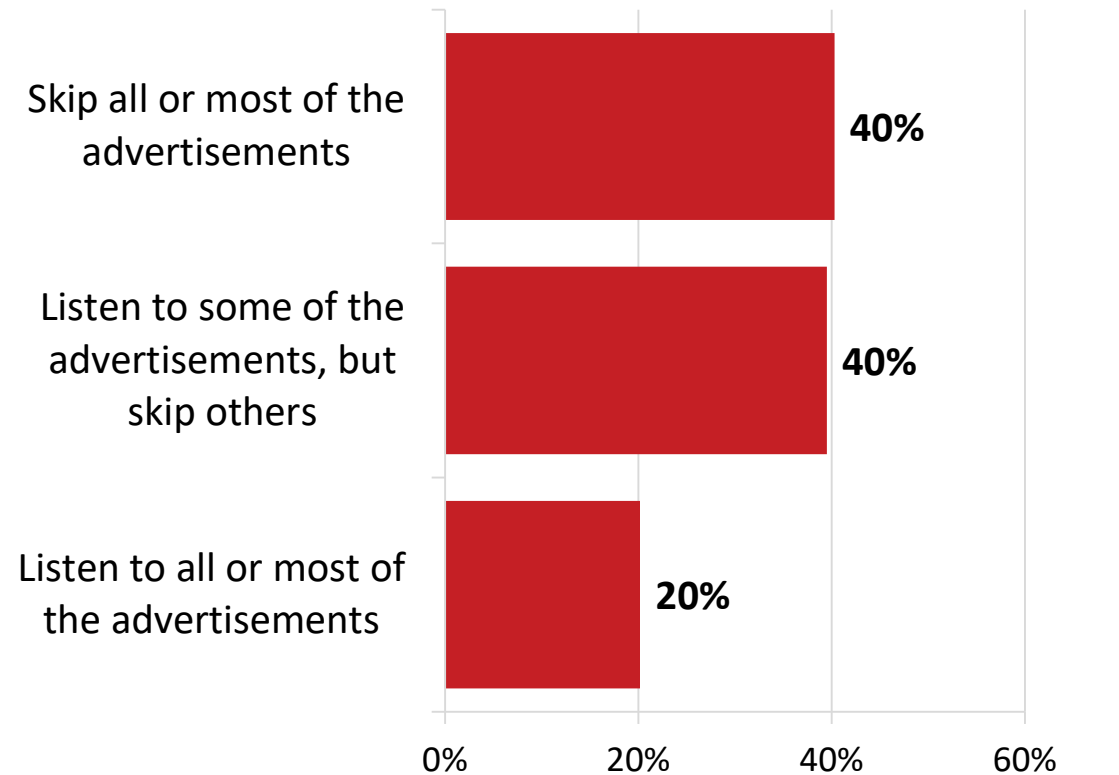- Personal: 63%

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

43% No
33% Don't know
23% Yes

- Yes
- No
- Don't know
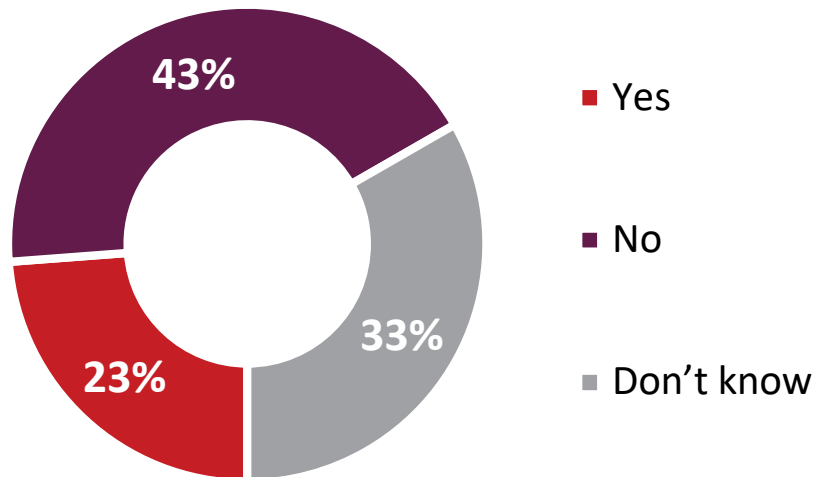
Listening to or Skipping Ads in Podcasts

Skip all or most of the advertisements — 40%

Listen to some of the advertisements, but skip others — 40%

Listen to all or most of the advertisements — 20%
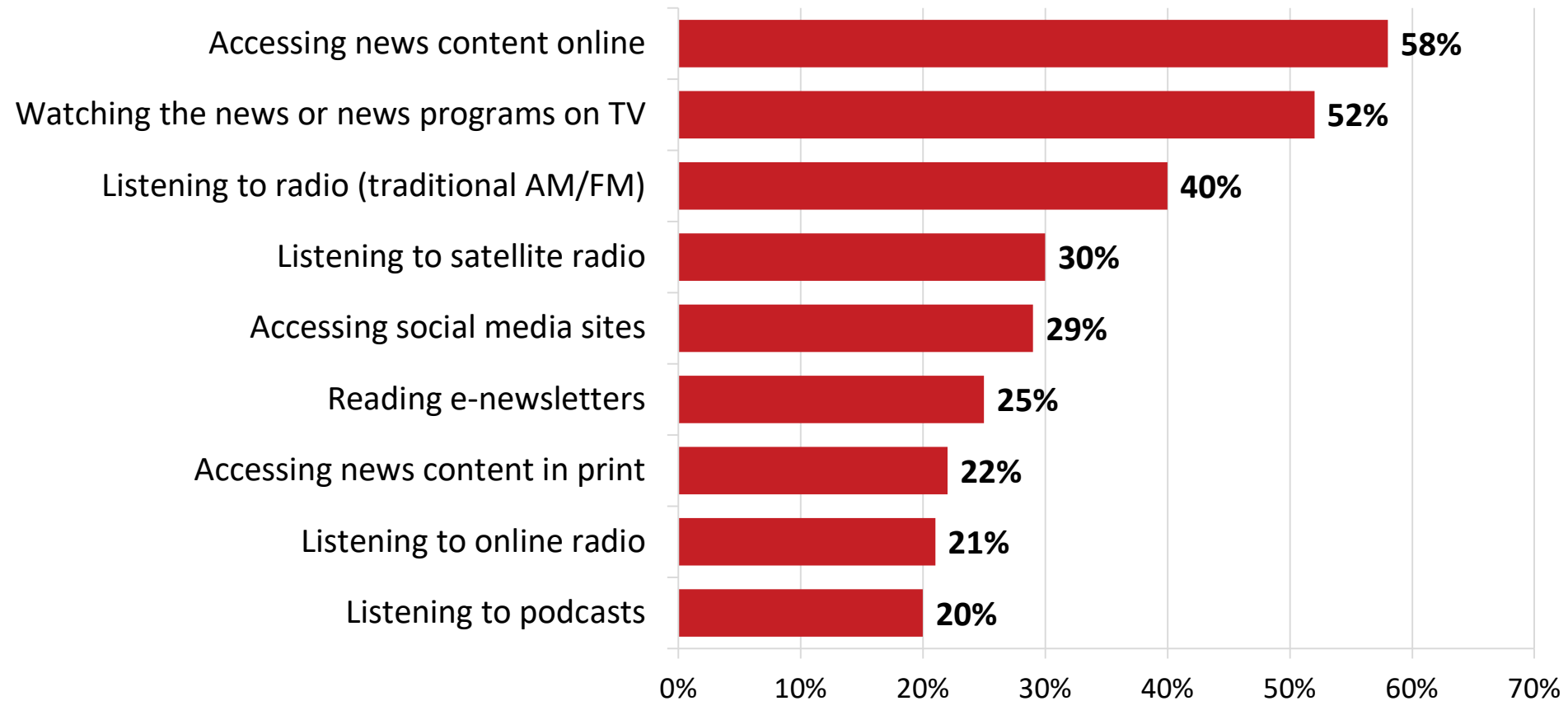
Have you heard a work-related advertisement during a podcast?
When you listen to podcasts, do you generally…?

Top App Types with Push Notifications Allowed

App Type	Percentage
Weather	54%
Personal Email/Communications	47%
Games	32%
Social Networking	29%
News	28%
Navigation & Mapping	27%
Work Email/Communications	25%
Health & Fitness	25%
Music & Audio	18%
Finance & Banking	16%

0%   10%   20%   30%   40%   50%   60%
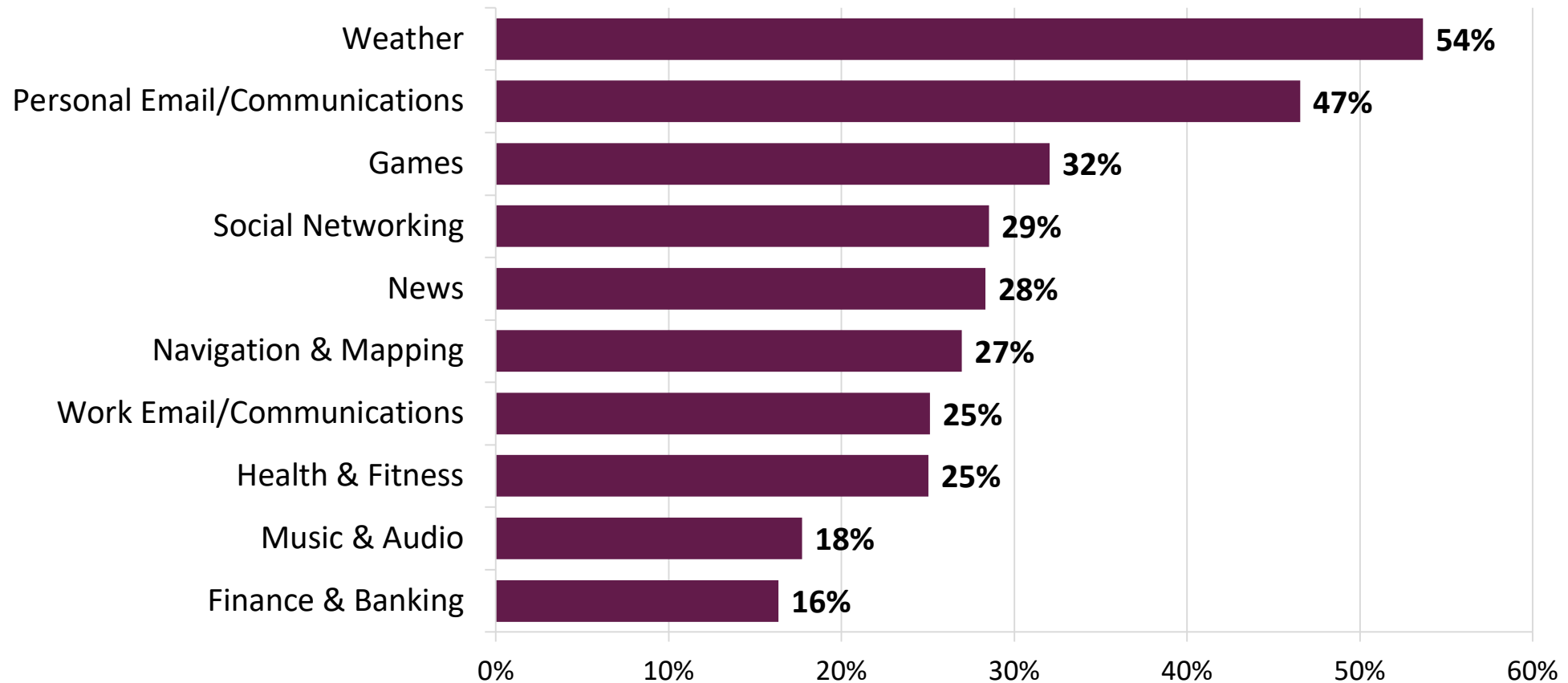
Which of the following app types, if any, do you allow push notifications from on your mobile device? (select all that apply)

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

Category	Percentage
Accessing news content online	58%
Watching the news or news programs on TV	52%
Listening to radio (traditional AM/FM)	40%
Listening to satellite radio	30%
Accessing social media sites	29%
Reading e-newsletters	25%
Accessing news content in print	22%
Listening to online radio	21%
Listening to podcasts	20%

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	35%	1%	4%	15%	0%	54%
	Online streaming video	5%	1%	3%	1%	3%	40%
Listening	AM/FM radio	16%	60%	9%	10%	43%	10%
	Satellite radio	14%	29%	8%	5%	27%	8%
	Podcasts	7%	10%	8%	12%	13%	17%
Reading	National print newspaper or magazine	17%	3%	11%	17%	4%	16%
	Local print newspaper or magazine	17%	7%	8%	13%	6%	21%
	Digital newspaper or magazine	21%	3%	20%	29%	4%	19%
	Social media sites	20%	12%	15%	25%	12%	39%

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)*
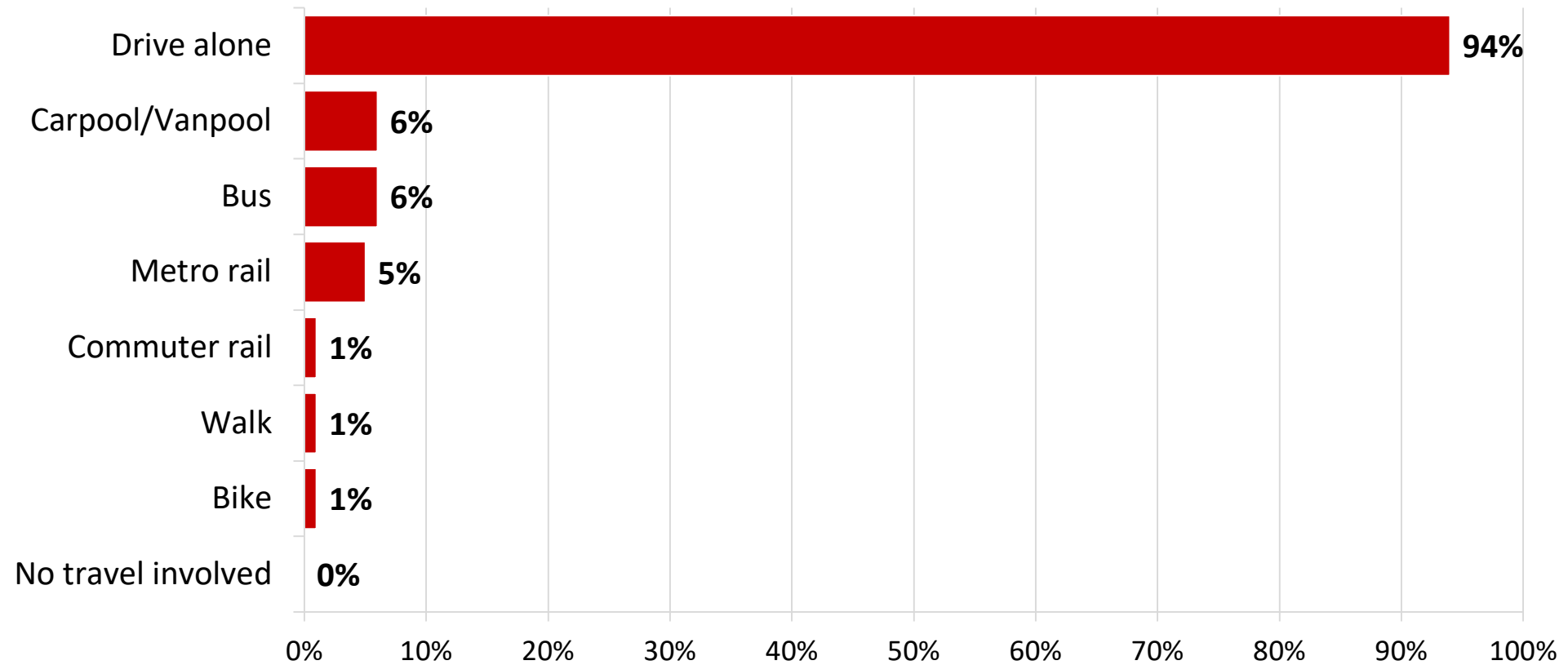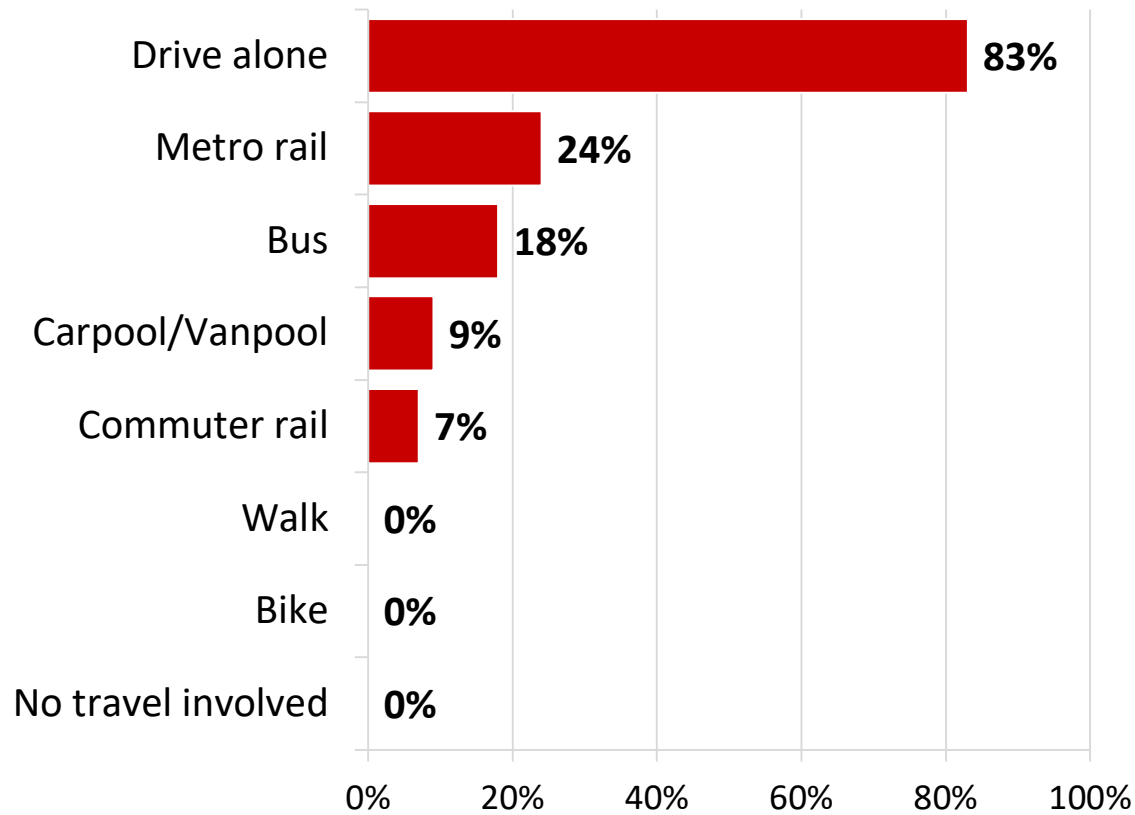
Primary Transportation

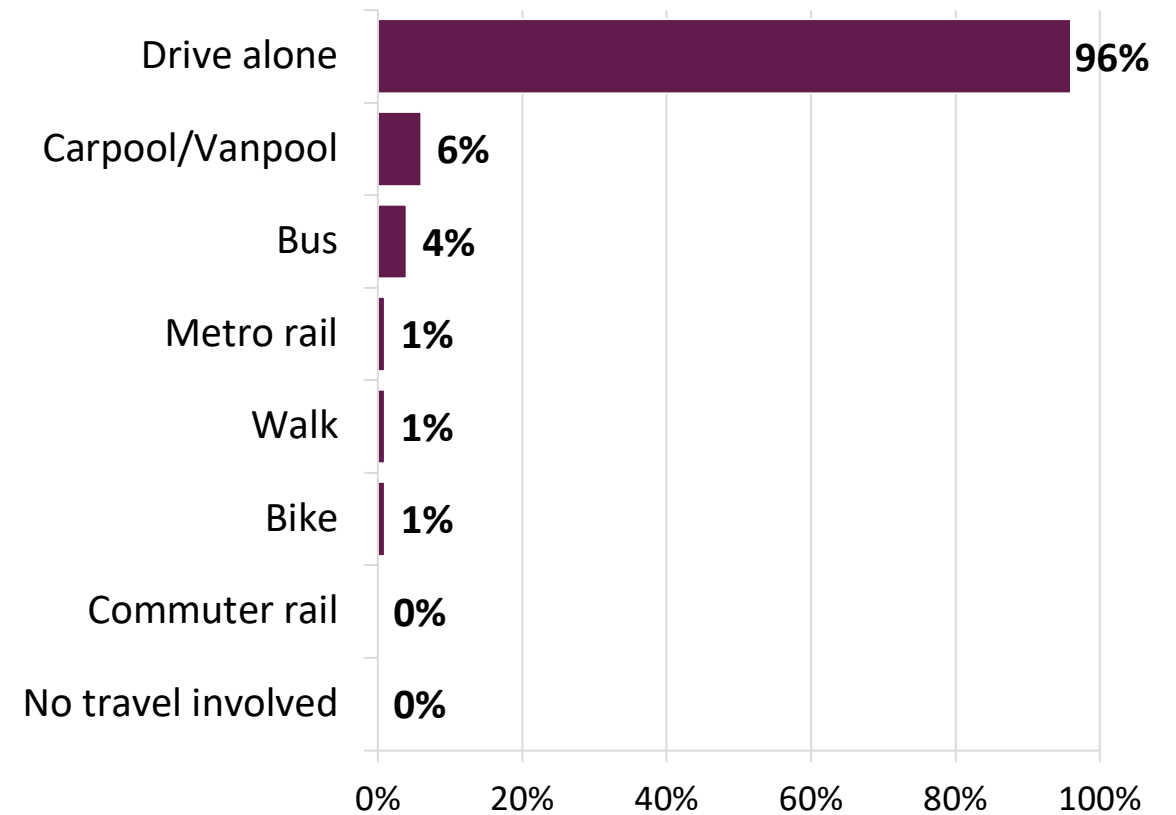| Mode	Percentage
Drive alone	94%
Carpool/Vanpool	6%
Bus	6%
Metro rail	5%
Commuter rail	1%
Walk	1%
Bike	1%
No travel involved	0%

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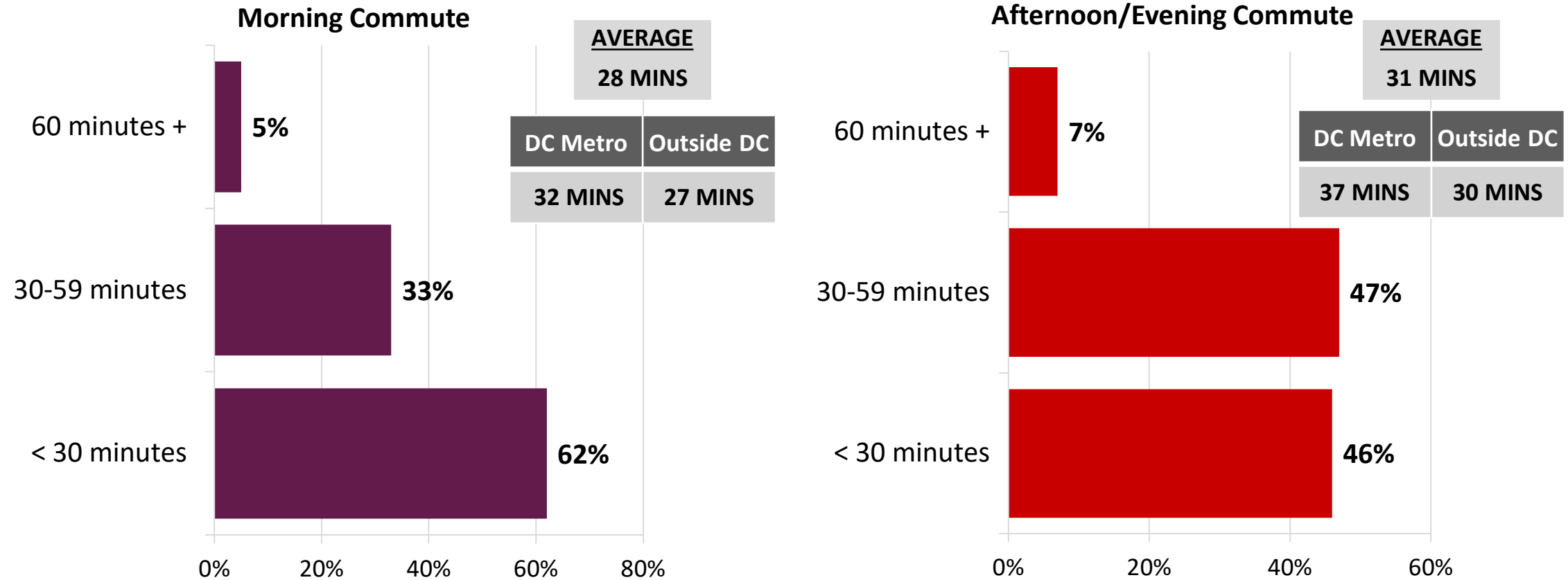
Primary Transportation

Washington DC Metro Area

Mode	Percentage
Drive alone	83%
Metro rail	24%
Bus	18%
Carpool/Vanpool	9%
Commuter rail	7%
Walk	0%
Bike	0%
No travel involved	0%

Outside Washington DC Metro Area

| Mode	Percentage
Drive alone	96%
Carpool/Vanpool	6%
Bus	4%
Metro rail	1%
Walk	1%
Bike	1%
Commuter rail	0%
No travel involved	0%

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

Commute Time

Morning Commute

	AVERAGE
	28 MINS

DC Metro	Outside DC
32 MINS	27 MINS

- 60 minutes + **5%**
- 30-59 minutes **33%**
- < 30 minutes **62%**

0% 20% 40% 60% 80%

Afternoon/Evening Commute

	AVERAGE
	31 MINS

DC Metro	Outside DC
37 MINS	30 MINS

- 60 minutes + **7%**
- 30-59 minutes **47%**
- < 30 minutes **46%**

0% 20% 40% 60%

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)
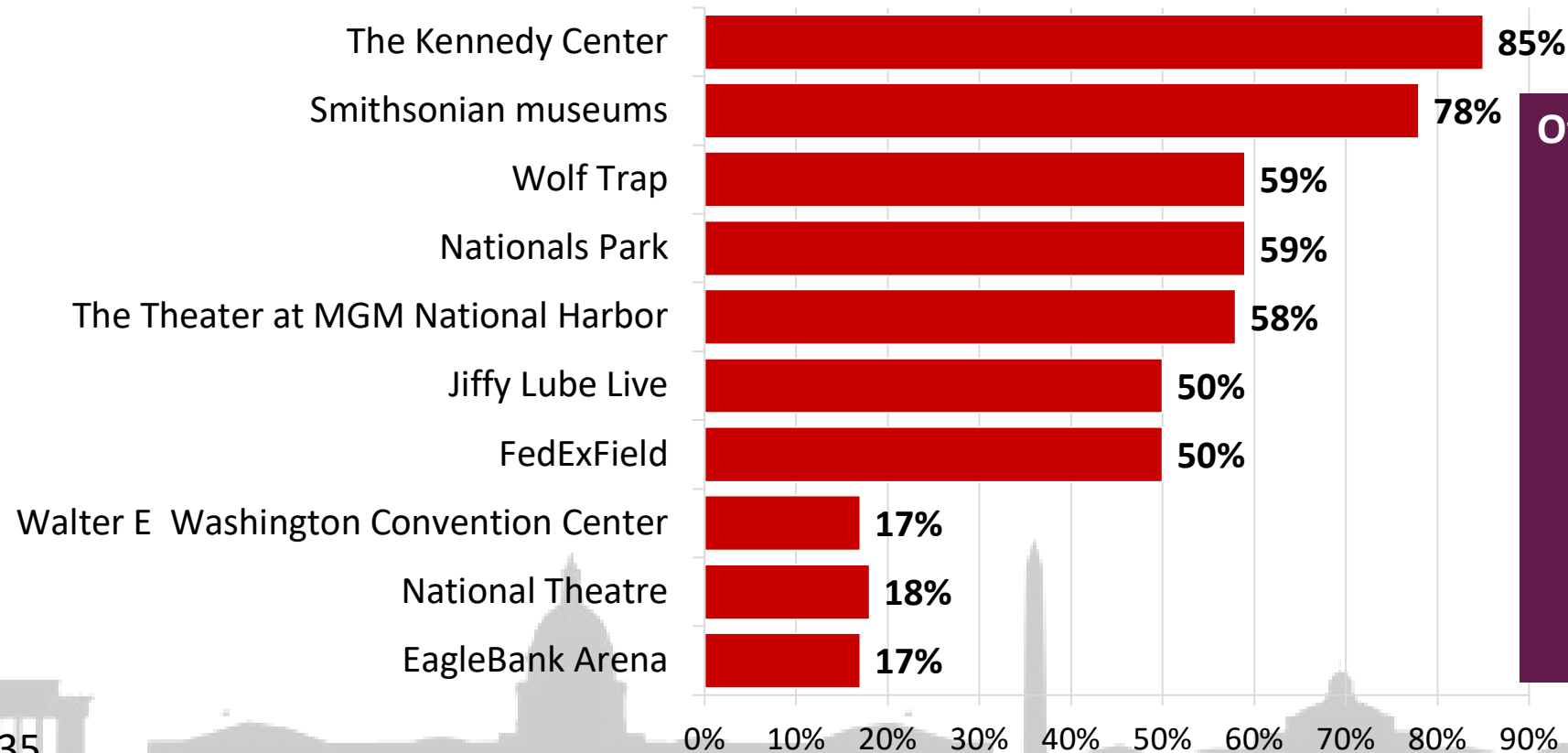
DC METRO AREA
Airport Trips
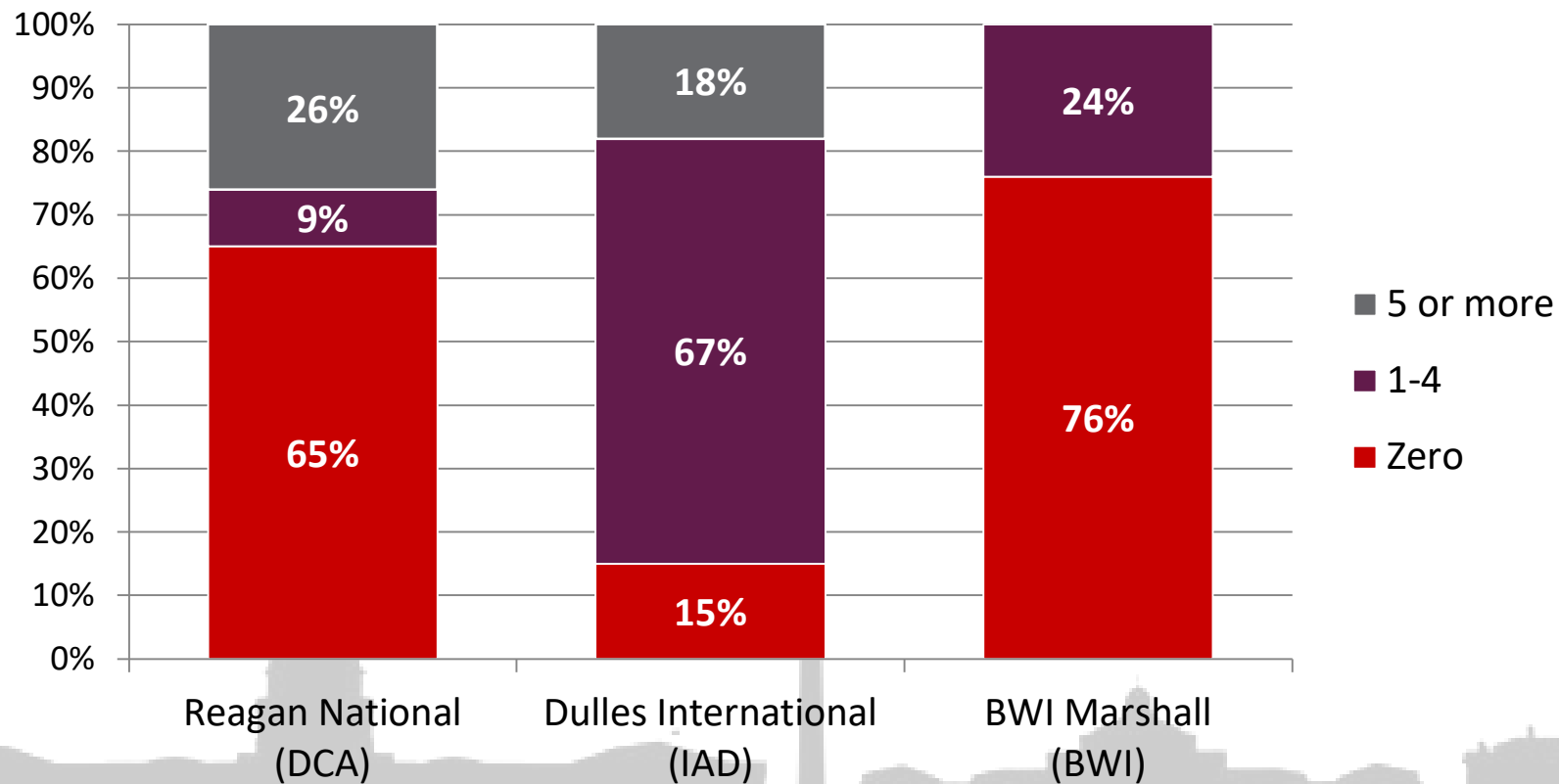
N=35

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
The Kennedy Center	85%
Smithsonian museums	78%
Wolf Trap	59%
Nationals Park	59%
The Theater at MGM National Harbor	58%
Jiffy Lube Live	50%
FedExField	50%
Walter E Washington Convention Center	17%
National Theatre	18%
EagleBank Arena	17%

Other venues in survey:
- Audi Field
- Merriweather Post Pavilion
- RFK Stadium
- The Fillmore Silver Spring
- Warner Theatre
- DAR Constitution Hall
- Folger Theatre
- Strathmore
- The Anthem
- Arena Stage
- Capital One Arena

N=35

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**
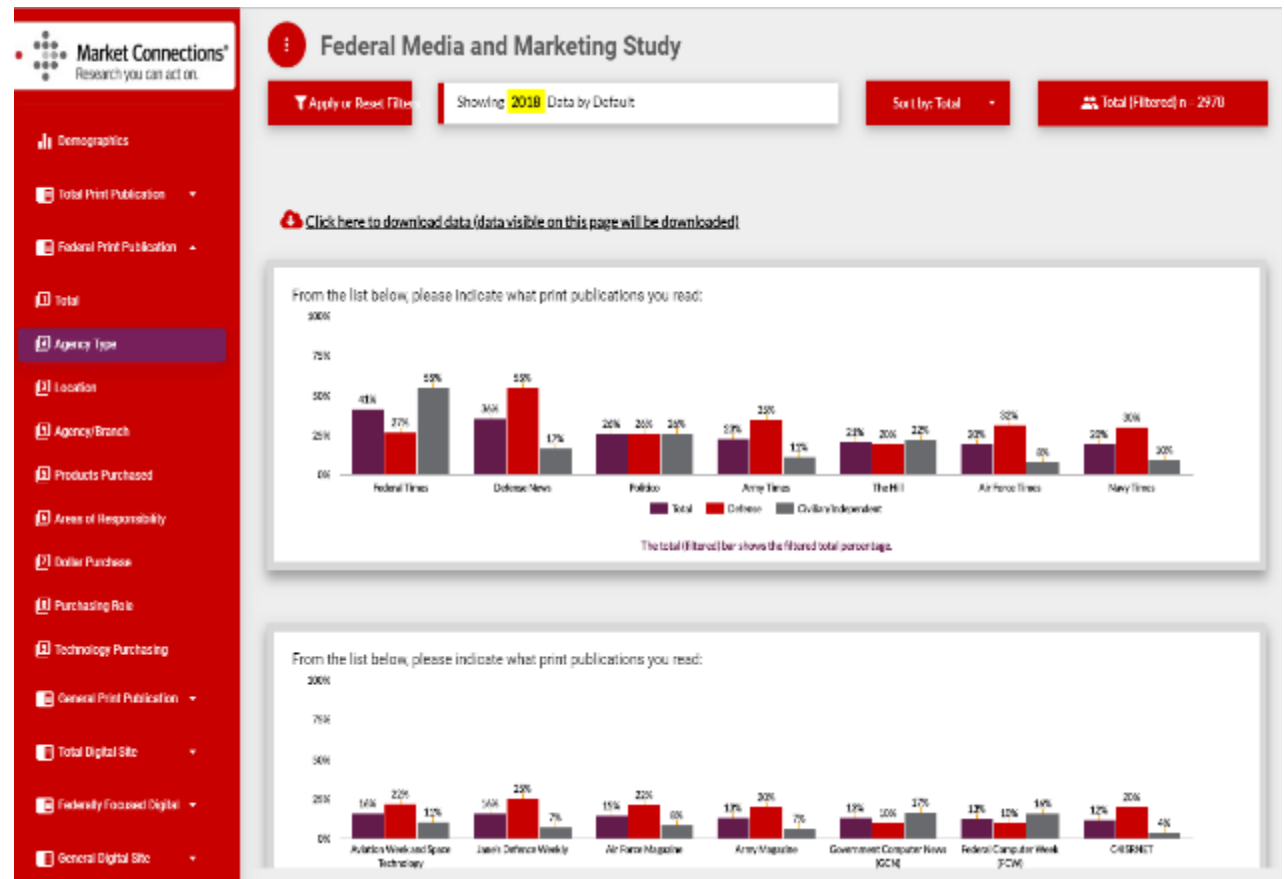
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