Federal
Media &
Marketing
Study 2019

Procurement Professionals 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: 273)

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

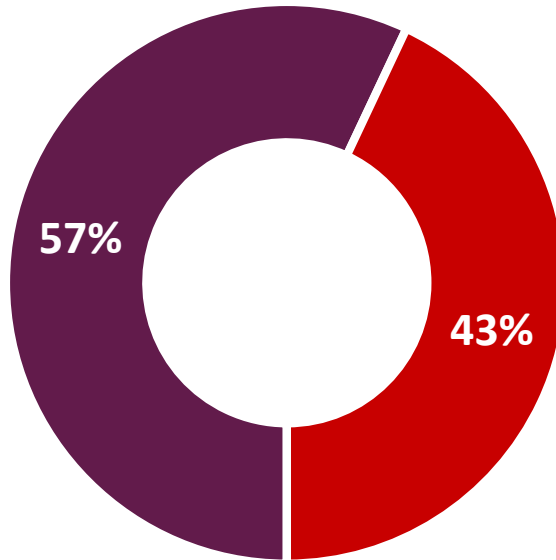- **Day in the Life:** Media exposure throughout a typical day
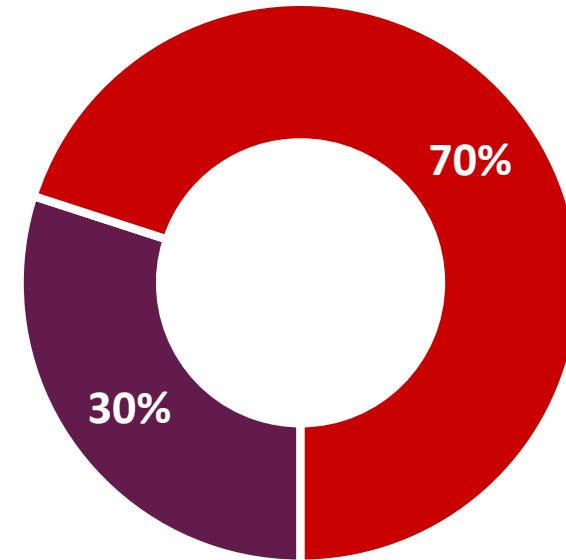
Demographics

DEMOGRAPHICS
Agency Type & Location

Agency Type

57% Civilian or Independent
43% Defense or Military

■ Civilian or Independent   ■ Defense or Military

Location

70% Outside the Beltway
30% Inside the Beltway

■ 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%, 15%, 26%, 55%
2018: 9%, 9%, 28%, 52%
2019: 7%, 12%, 30%, 45%

What is your age?
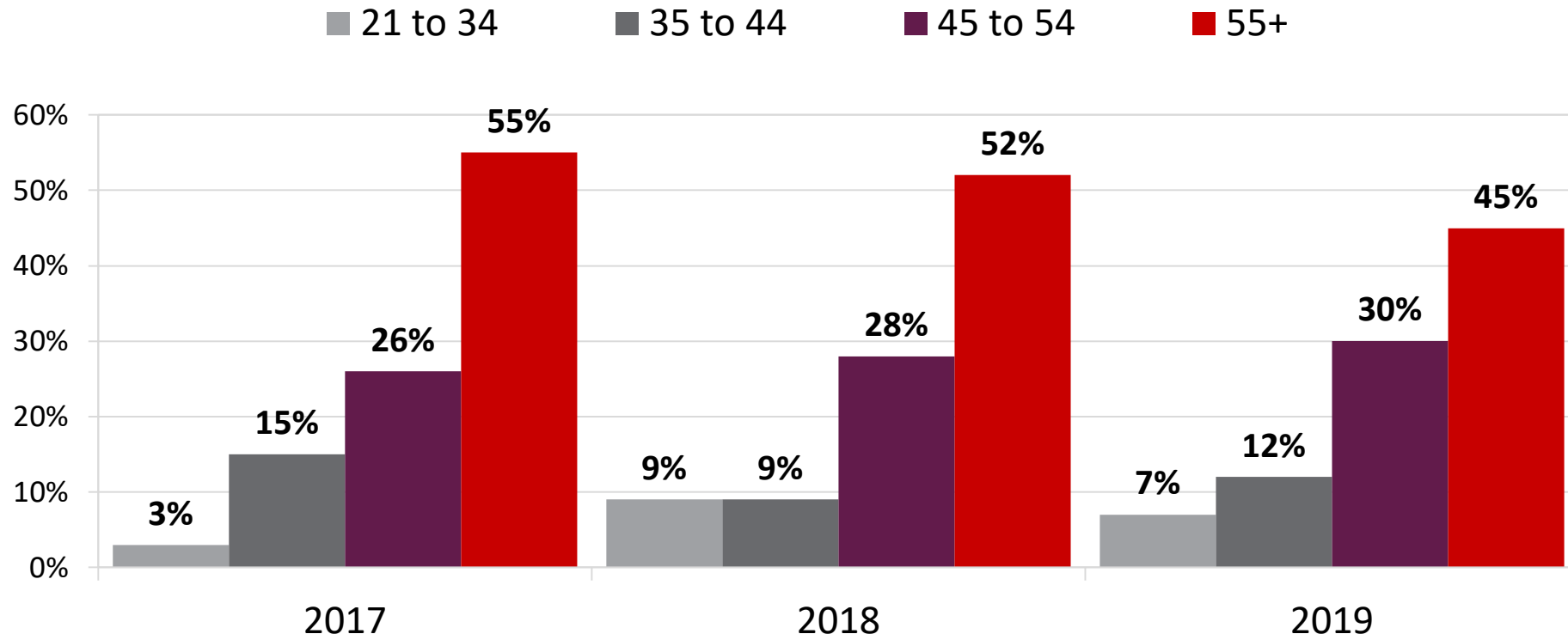
DEMOGRAPHICS
Political Affiliation

Republican — 45%
Democrat — 19%
Independent/ No preference — 19%
Other party — 4%

0% 20% 40% 60%
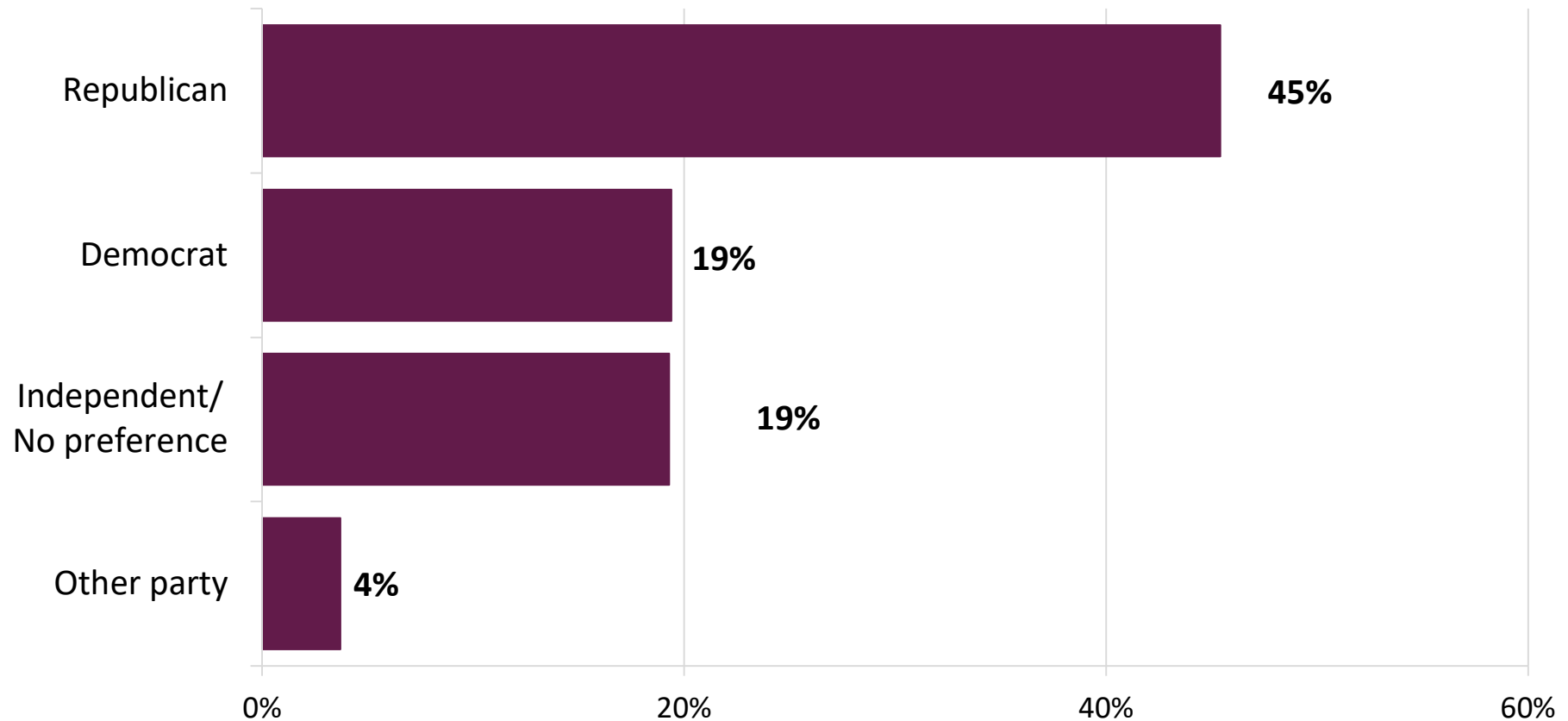
In politics today, do you consider yourself a Republican, a Democrat, or an Independent?

Top 10 Job Functions & Purchase Categories

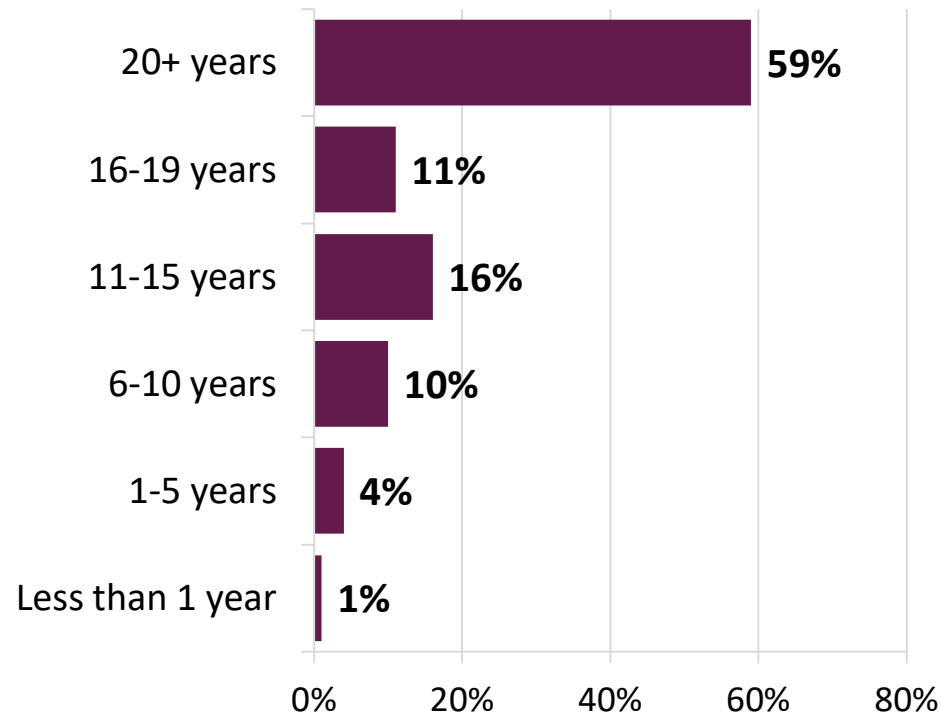| Job Function	Product/Service Purchase Categories
Purchasing, contracting, procurement	Office equipment and supplies
Accounting, budget and finance	Computer systems/hardware
Project/program management and administration	Communications/telecommunications
Administration and office services	Furniture/furnishings
Records management	Software
Informational technology, computers, systems	Building/facilities/real estate/office space
Training, education	Consulting services
Communications/telecommunications	Cloud computing services
Human resources, personnel, benefits	IT services
Facilities, real estate	IT security

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)
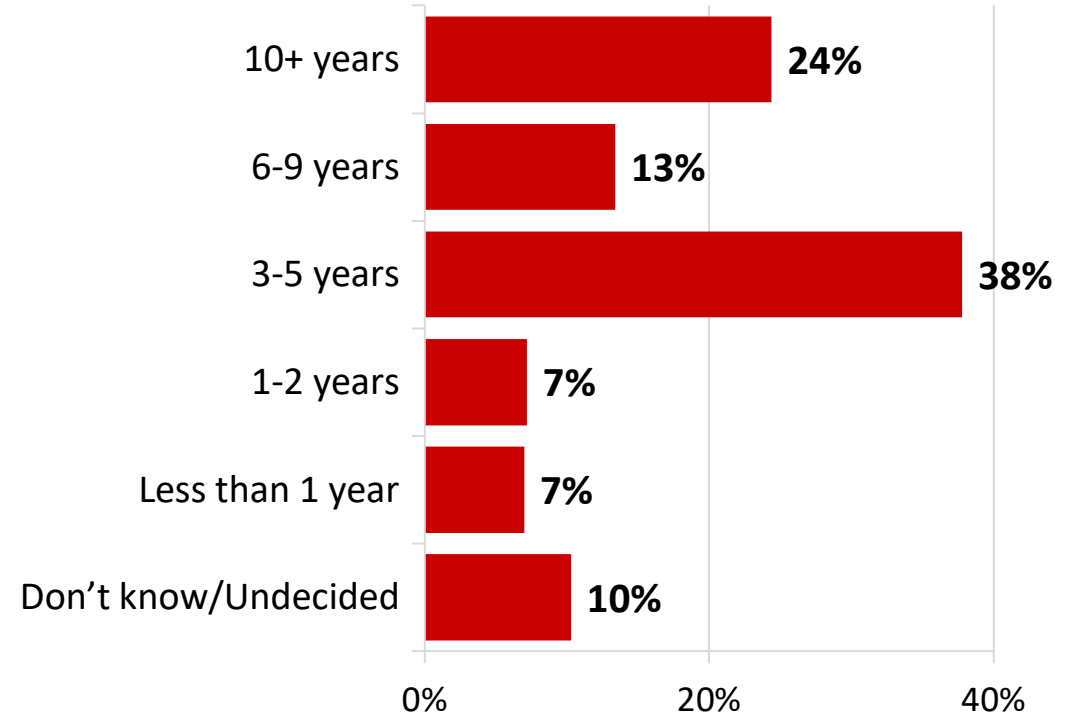
Federal Environment

Tenure & Time Remaining in Federal Employment

Total Years as a Federal Employee

20+ years	59%
16-19 years	11%
11-15 years	16%
6-10 years	10%
1-5 years	4%
Less than 1 year	1%

Years Until Leaving Federal Employment

10+ years	24%
6-9 years	13%
3-5 years	38%
1-2 years	7%
Less than 1 year	7%
Don't know/Undecided	10%

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 — **59%**
- Work for a private for-profit business — **24%**
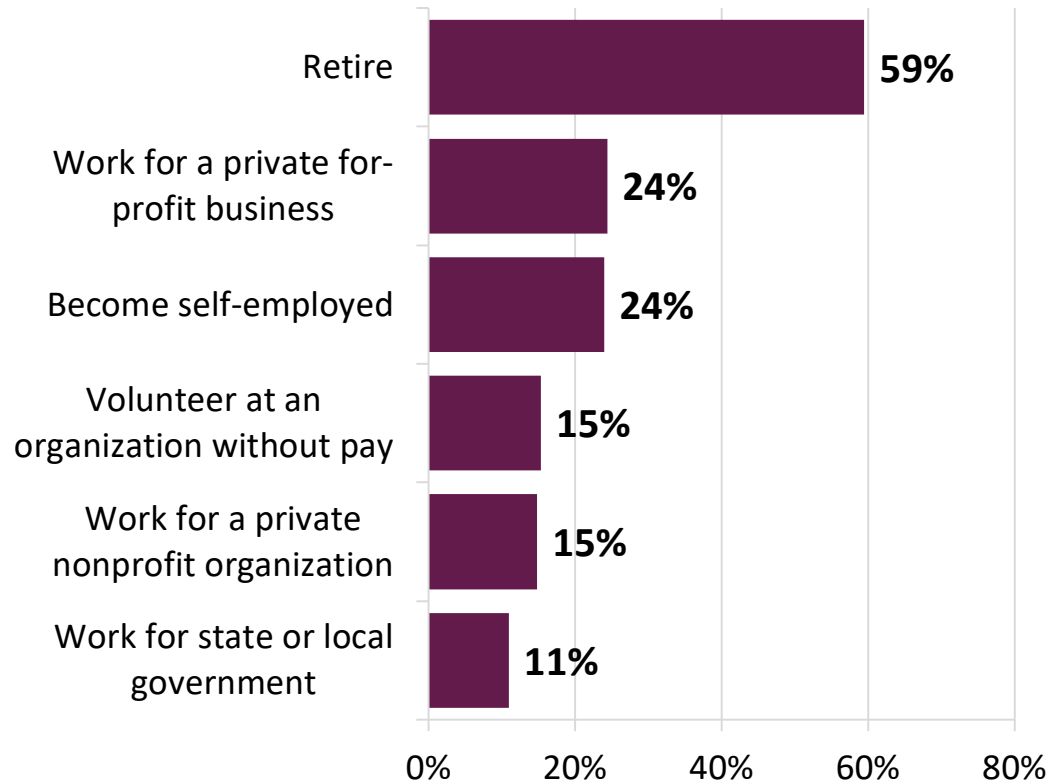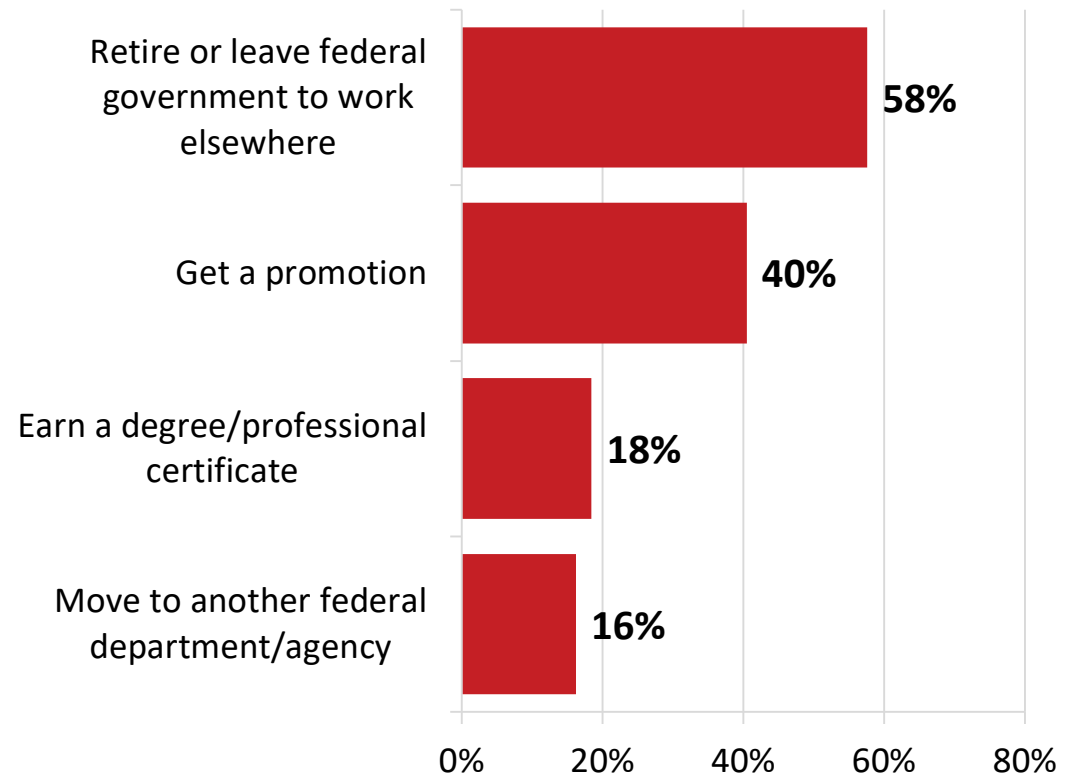- Become self-employed — **24%**
- Volunteer at an organization without pay — **15%**
- Work for a private nonprofit organization — **15%**
- Work for state or local government — **11%**

Career Plans for the Next 5 Years

- Retire or leave federal government to work elsewhere — **58%**
- Get a promotion — **40%**
- Earn a degree/professional certificate — **18%**
- Move to another federal department/agency — **16%**

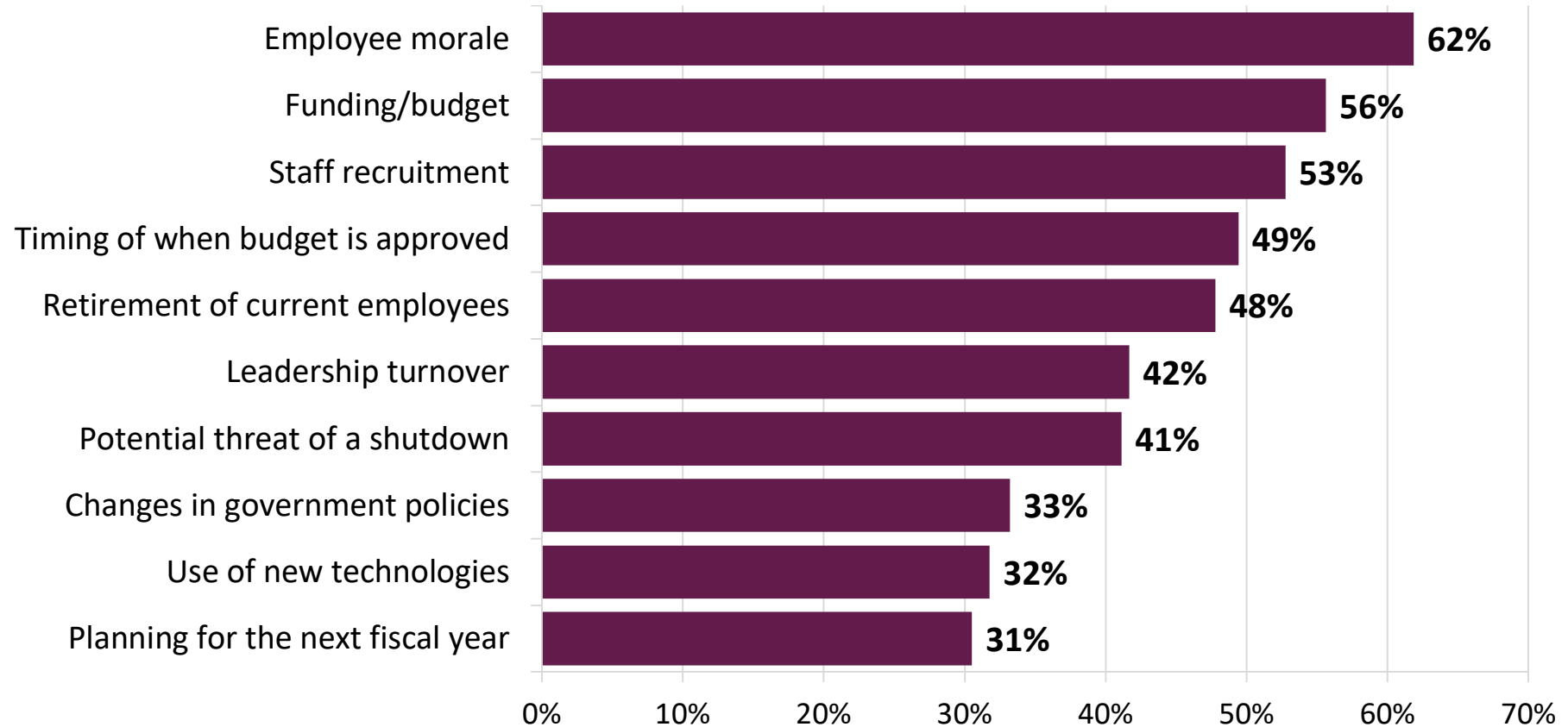*What do you plan to do after you leave federal employment? (select all that apply)*
What are your career plans for the next 5 years? (select all that apply)

Top Work-Related Challenges Over Next Year

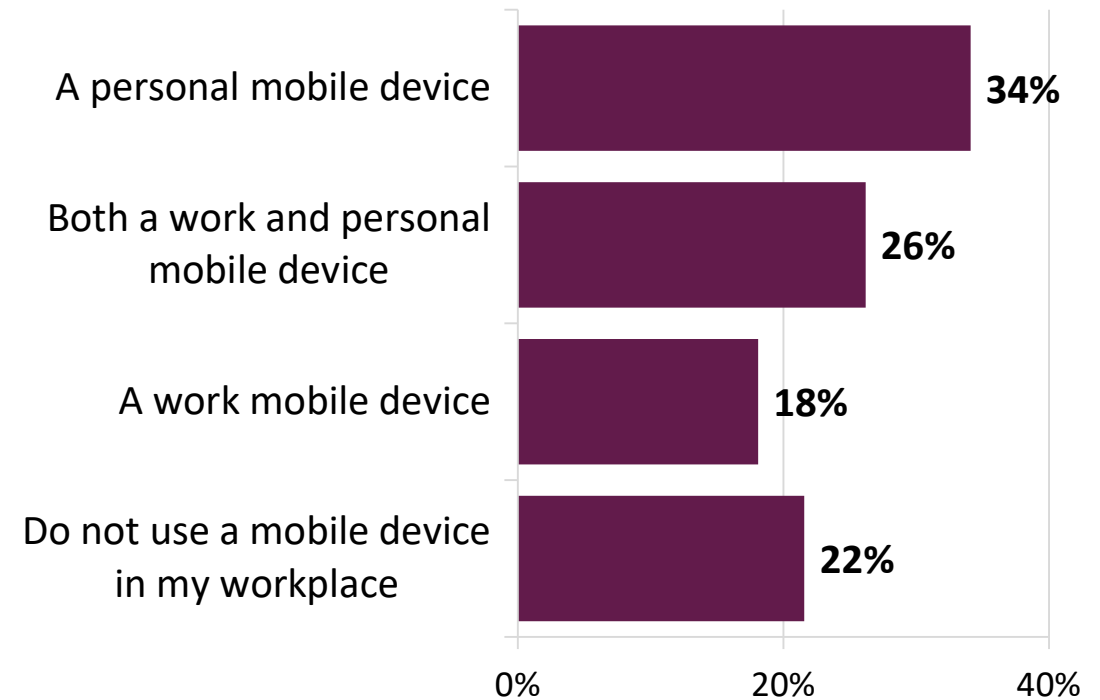| Challenge	Percentage
Employee morale	62%
Funding/budget	56%
Staff recruitment	53%
Timing of when budget is approved	49%
Retirement of current employees	48%
Leadership turnover	42%
Potential threat of a shutdown	41%
Changes in government policies	33%
Use of new technologies	32%
Planning for the next fiscal year	31%

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

72% No
28% Yes

■ Yes   ■ No
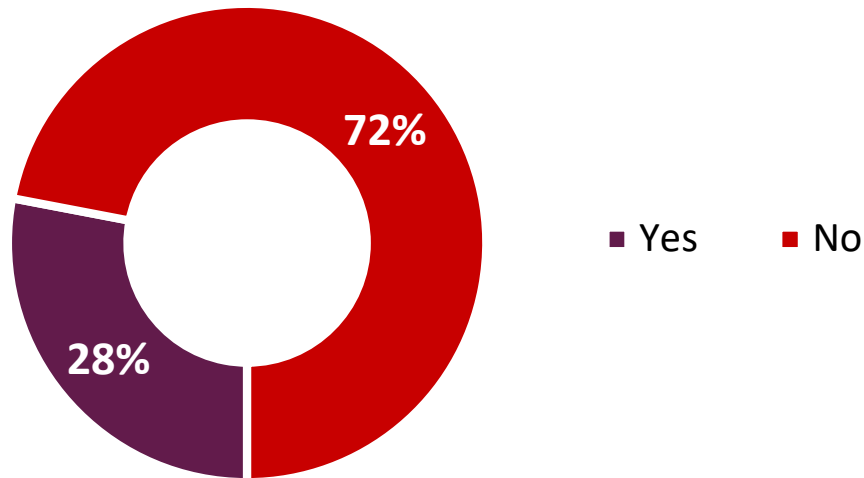
Mobile Device Use in the Workplace

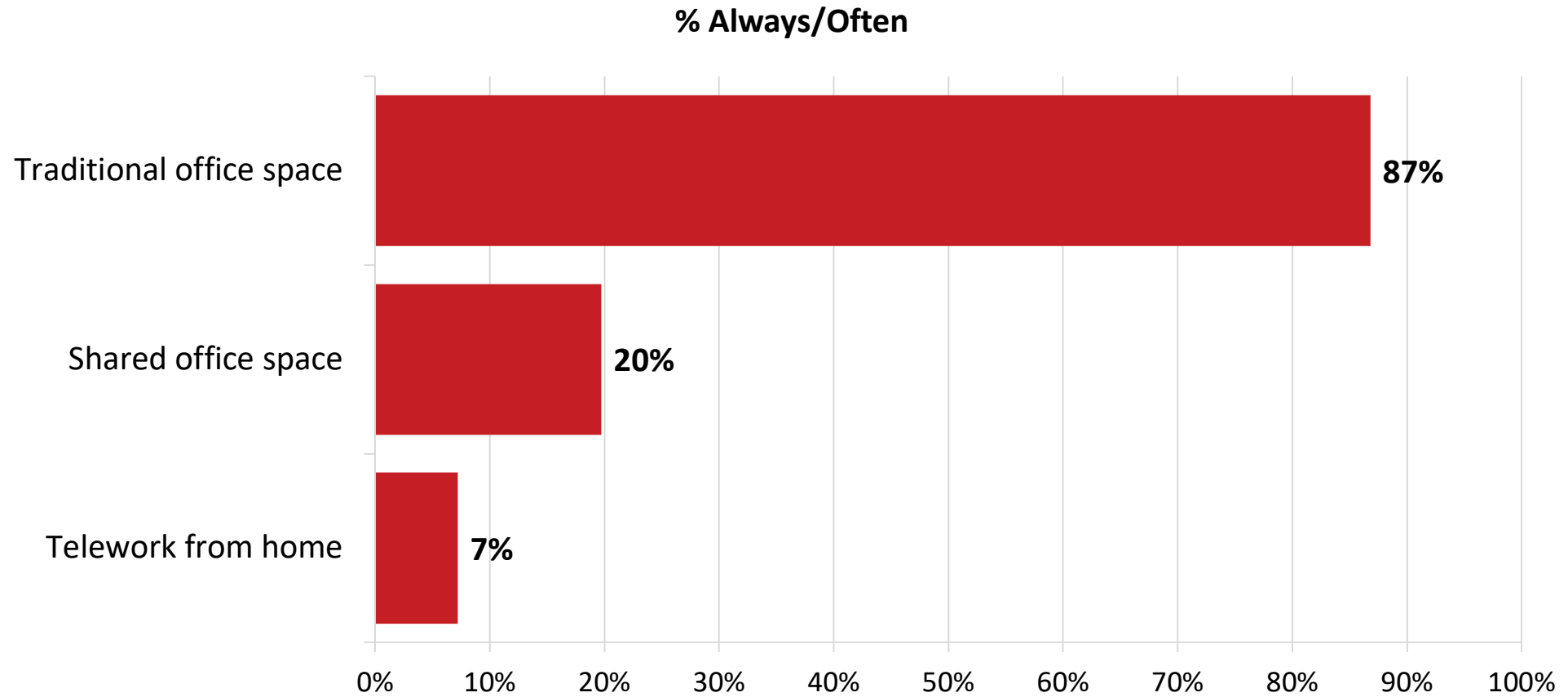| Category	Value
A personal mobile device	34%
Both a work and personal mobile device	26%
A work mobile device	18%
Do not use a mobile device in my workplace	22%

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

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

Media Results

Top Print Business & News Publications Read
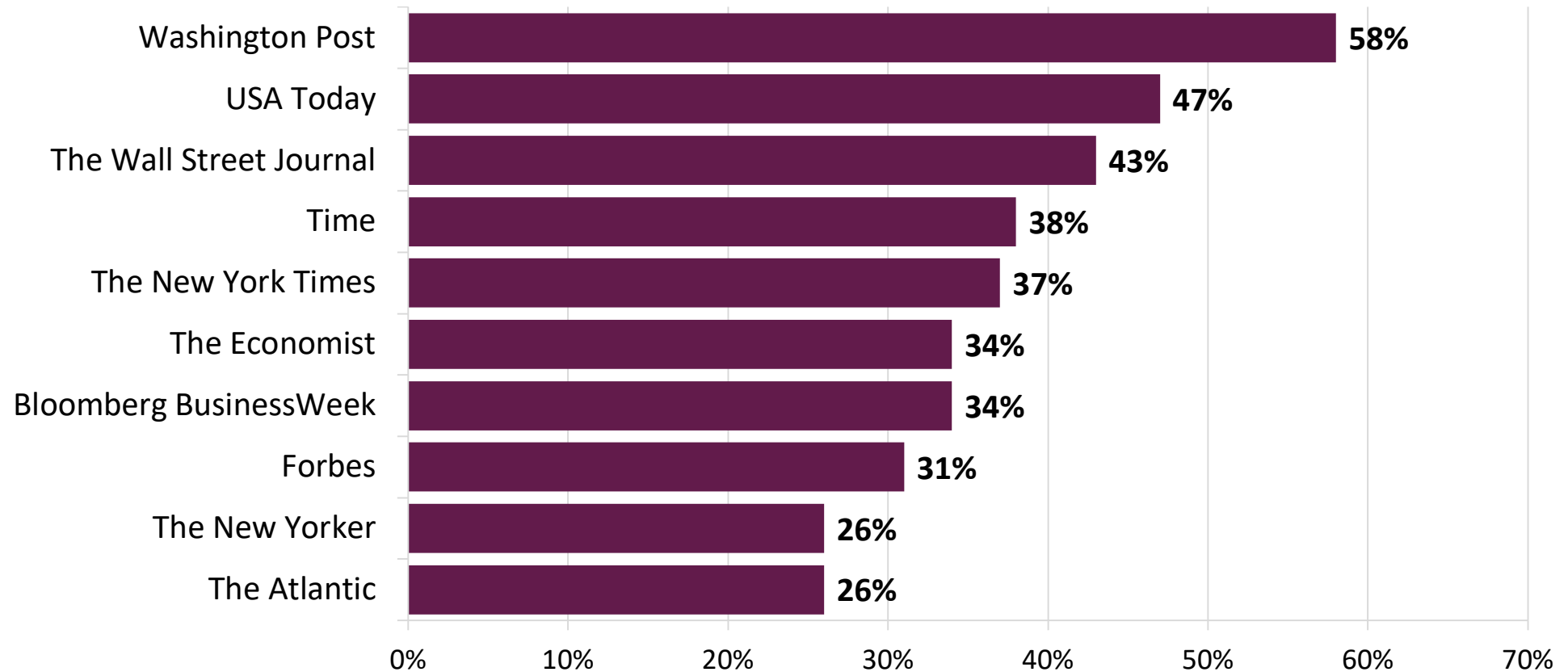
Publication	Percentage
Washington Post	58%
USA Today	47%
The Wall Street Journal	43%
Time	38%
The New York Times	37%
The Economist	34%
Bloomberg BusinessWeek	34%
Forbes	31%
The New Yorker	26%
The Atlantic	26%

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
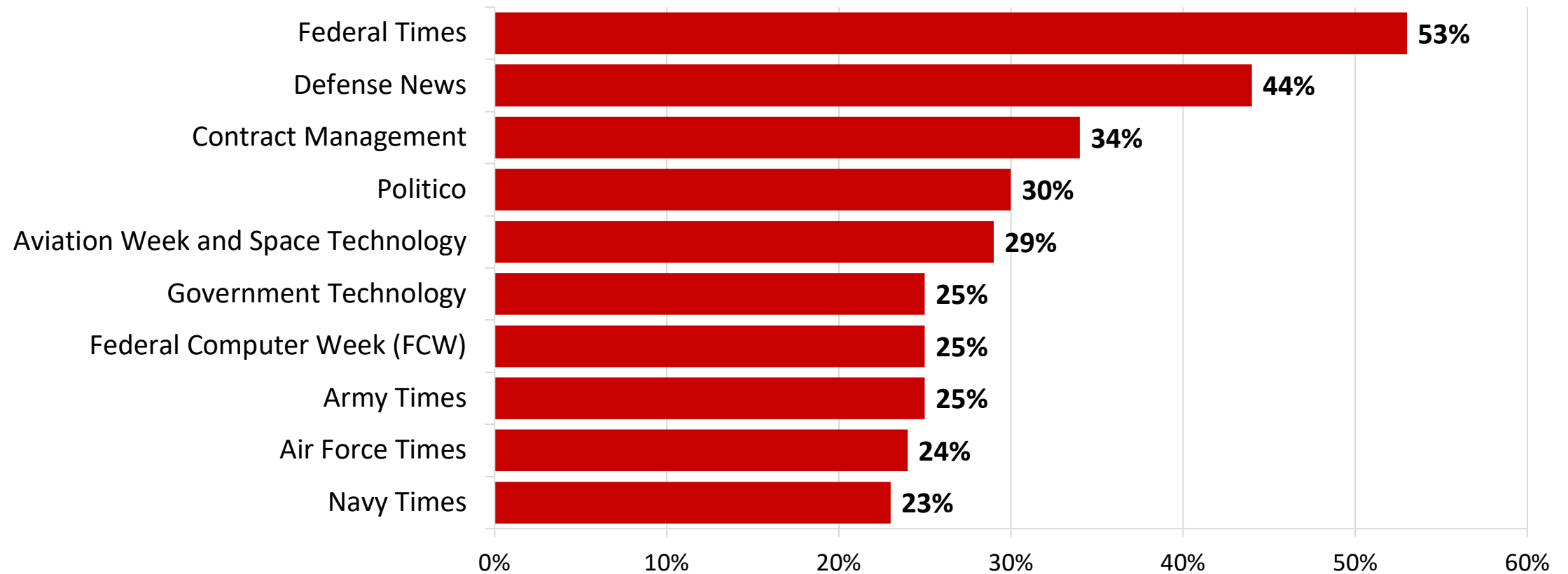
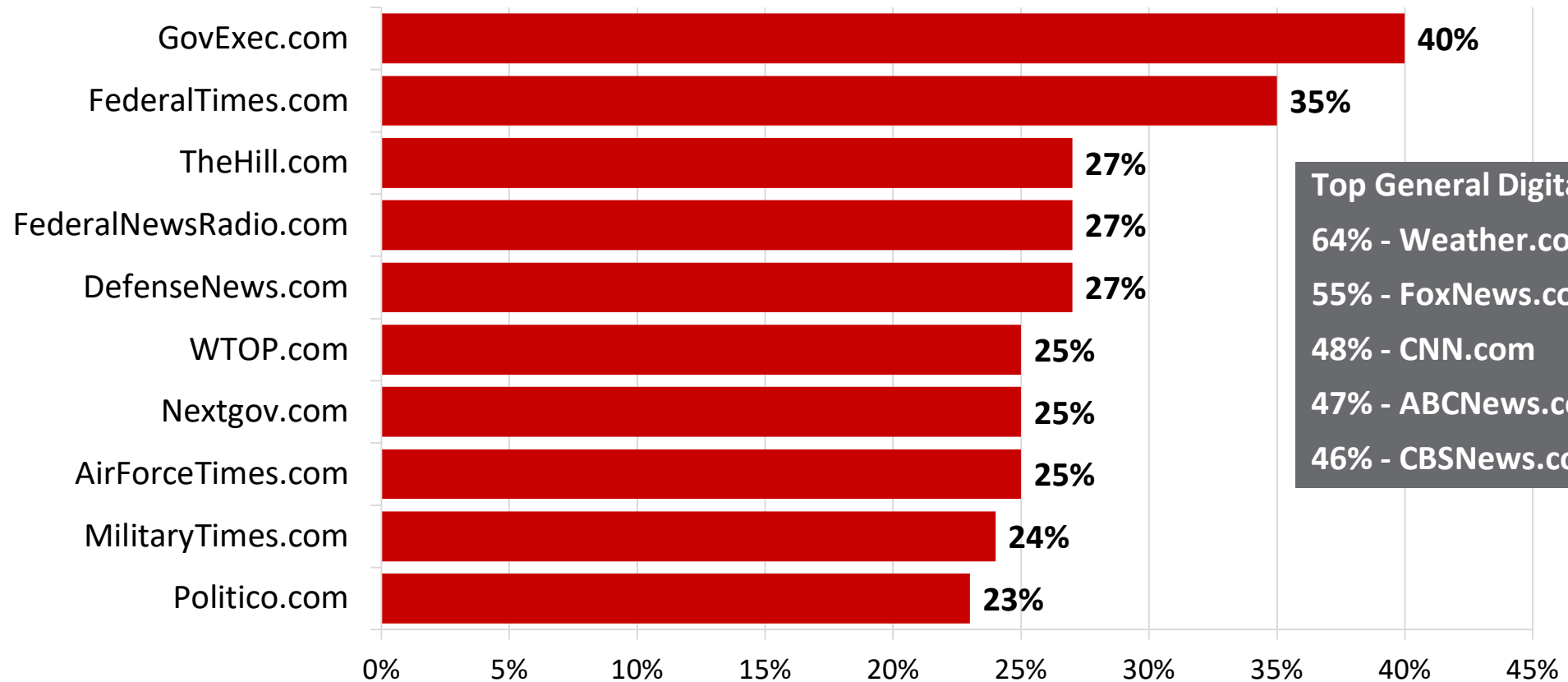| Publication	Percentage
Federal Times	53%
Defense News	44%
Contract Management	34%
Politico	30%
Aviation Week and Space Technology	29%
Government Technology	25%
Federal Computer Week (FCW)	25%
Army Times	25%
Air Force Times	24%
Navy Times	23%

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 Federally Focused Digital Sites Visited

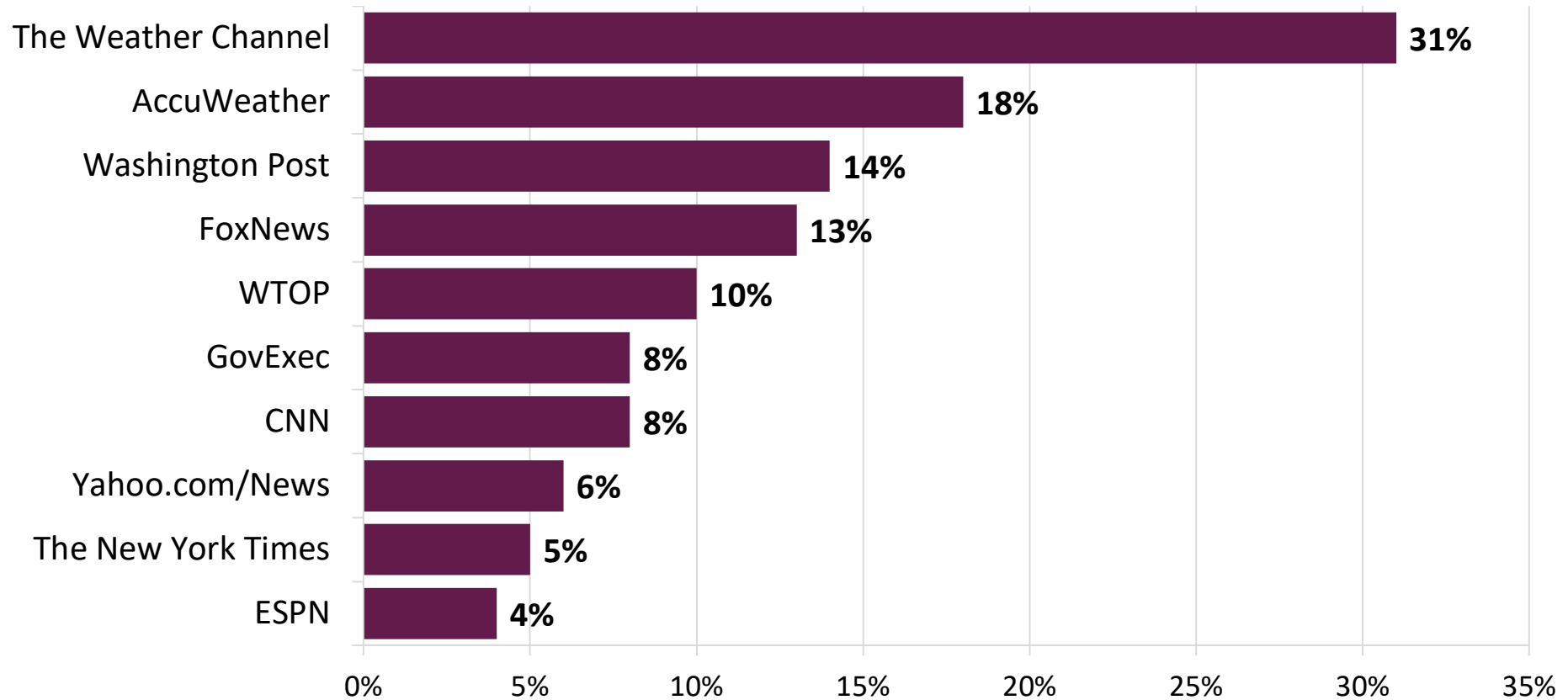| Site	%
GovExec.com	40%
FederalTimes.com	35%
TheHill.com	27%
FederalNewsRadio.com	27%
DefenseNews.com	27%
WTOP.com	25%
Nextgov.com	25%
AirForceTimes.com	25%
MilitaryTimes.com	24%
Politico.com	23%

Top General Digital Sites
64% - Weather.com
55% - FoxNews.com
48% - CNN.com
47% - ABCNews.com
46% - CBSNews.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

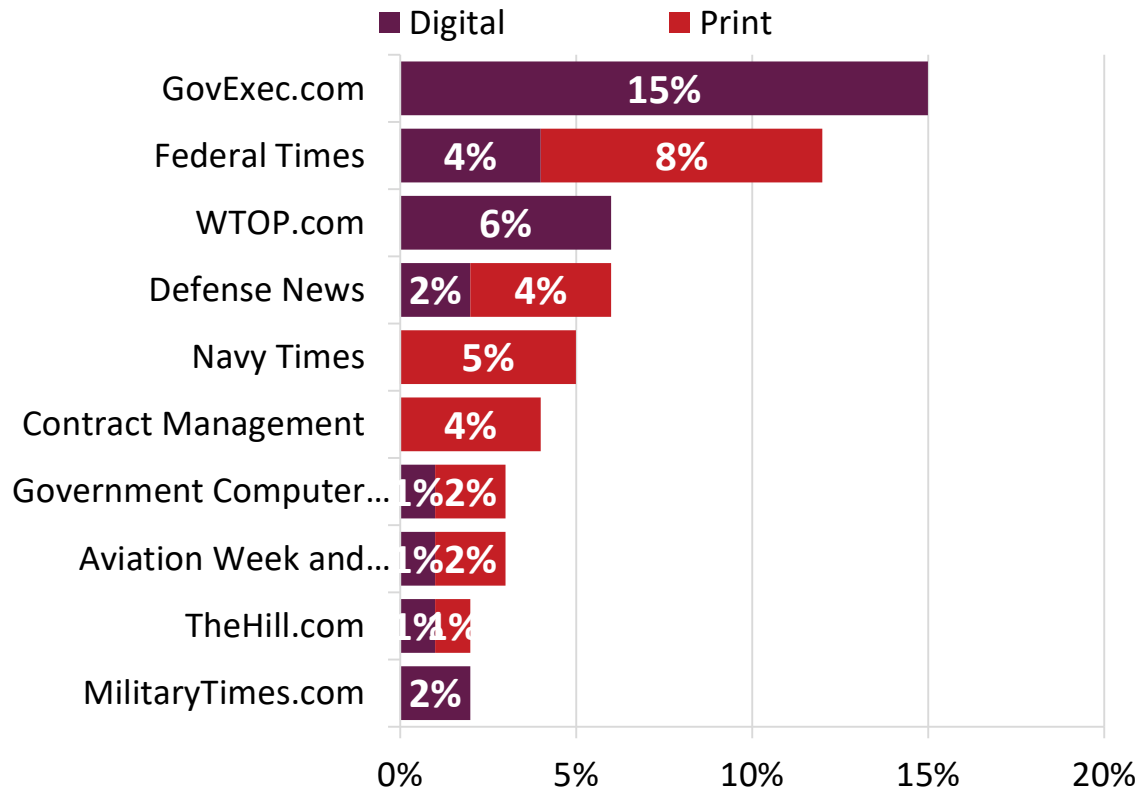| App	%
The Weather Channel	31%
AccuWeather	18%
Washington Post	14%
FoxNews	13%
WTOP	10%
GovExec	8%
CNN	8%
Yahoo.com/News	6%
The New York Times	5%
ESPN	4%

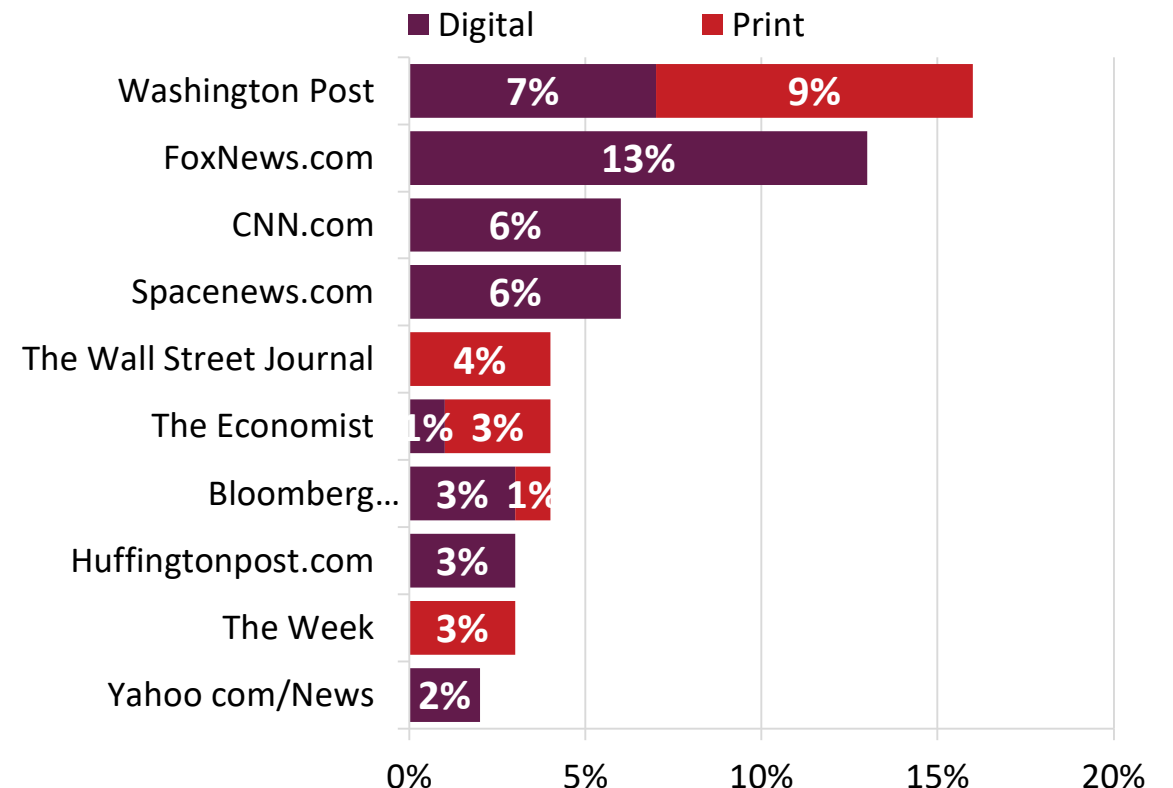*Which of the following apps do you have downloaded on your mobile device? (select all that apply)*

Go-To Print and Digital Media Property for News

**Go-To Government-Focused Media Property**

- Digital
- Print

Property	Value
GovExec.com	15%
Federal Times	4% / 8%
WTOP.com	6%
Defense News	2% / 4%
Navy Times	5%
Contract Management	4%
Government Computer...	1% / 2%
Aviation Week and...	1% / 2%
TheHill.com	1% / 1%
MilitaryTimes.com	2%

Go-To General Media Property

- Digital
- Print

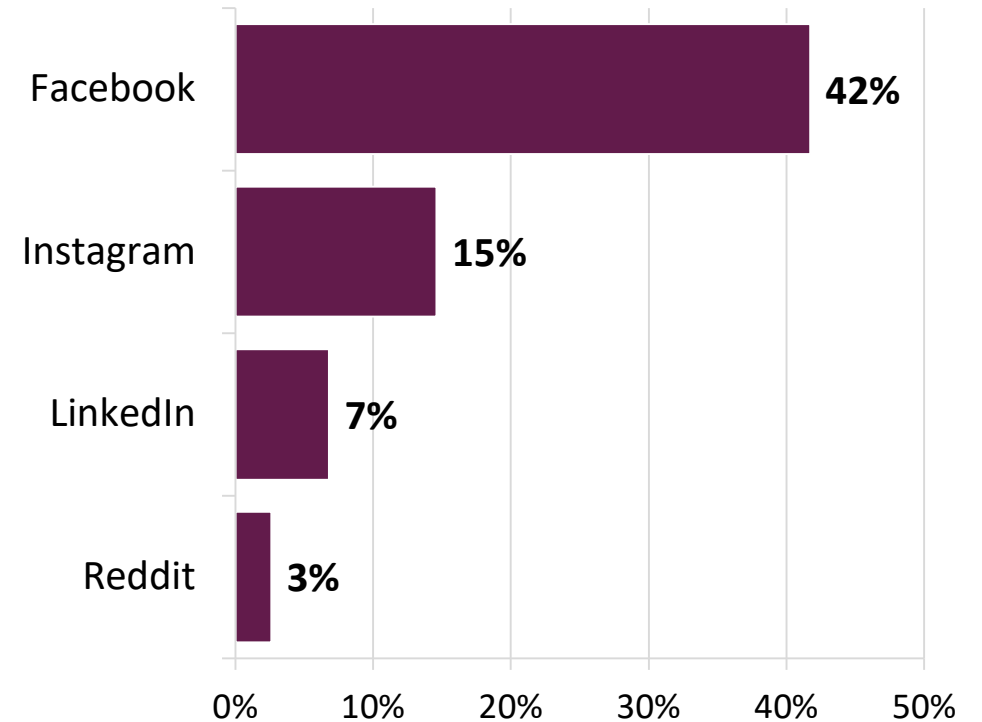| Property	Value
Washington Post	7% / 9%
FoxNews.com	13%
CNN.com	6%
Spacenews.com	6%
The Wall Street Journal	4%
The Economist	1% / 3%
Bloomberg...	3% / 1%
Huffingtonpost.com	3%
The Week	3%
Yahoo com/News	2%

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

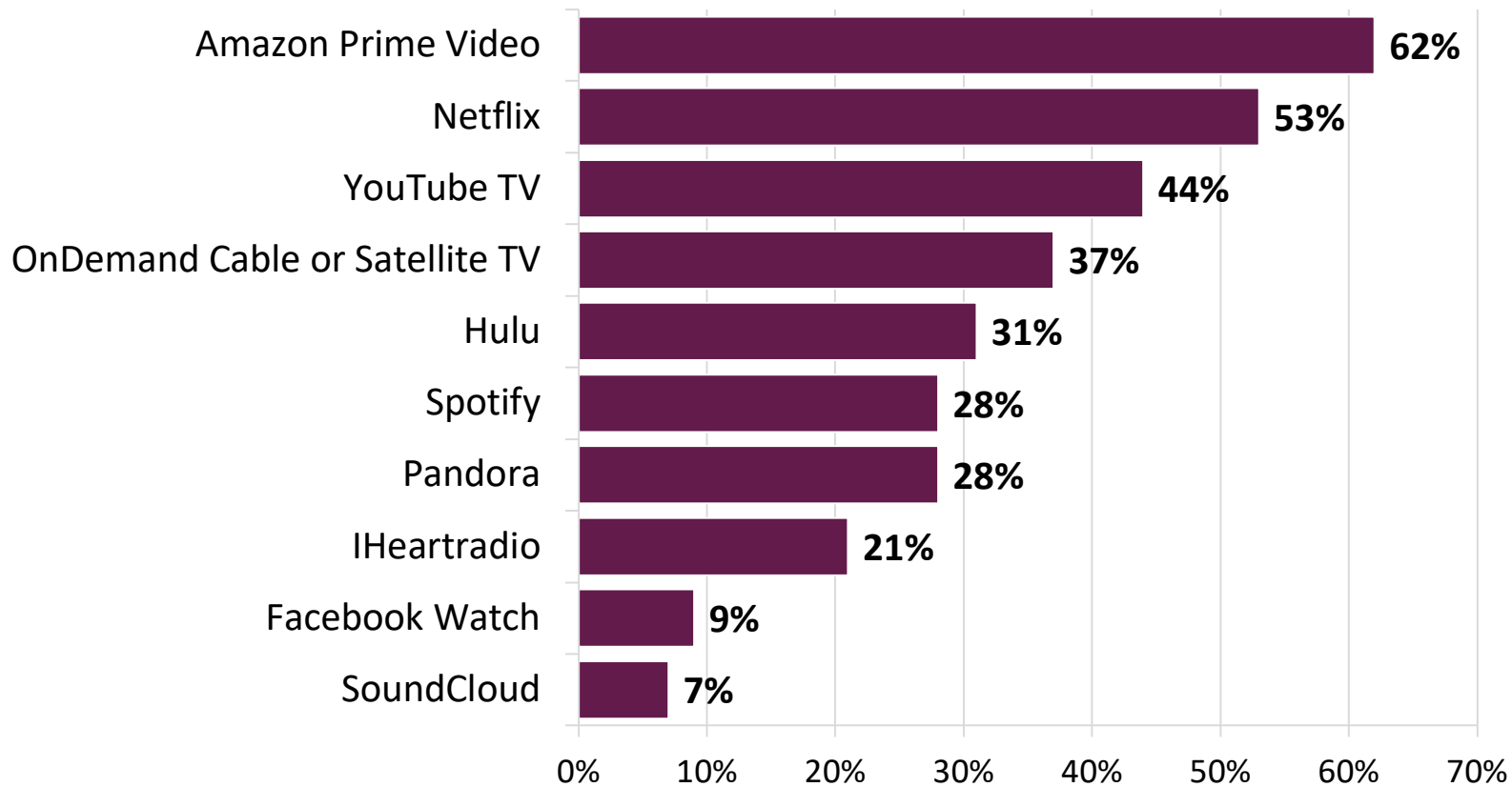## Top Online Social Sites Used

Facebook 80%
LinkedIn 67%
Instagram 51%
Reddit 49%
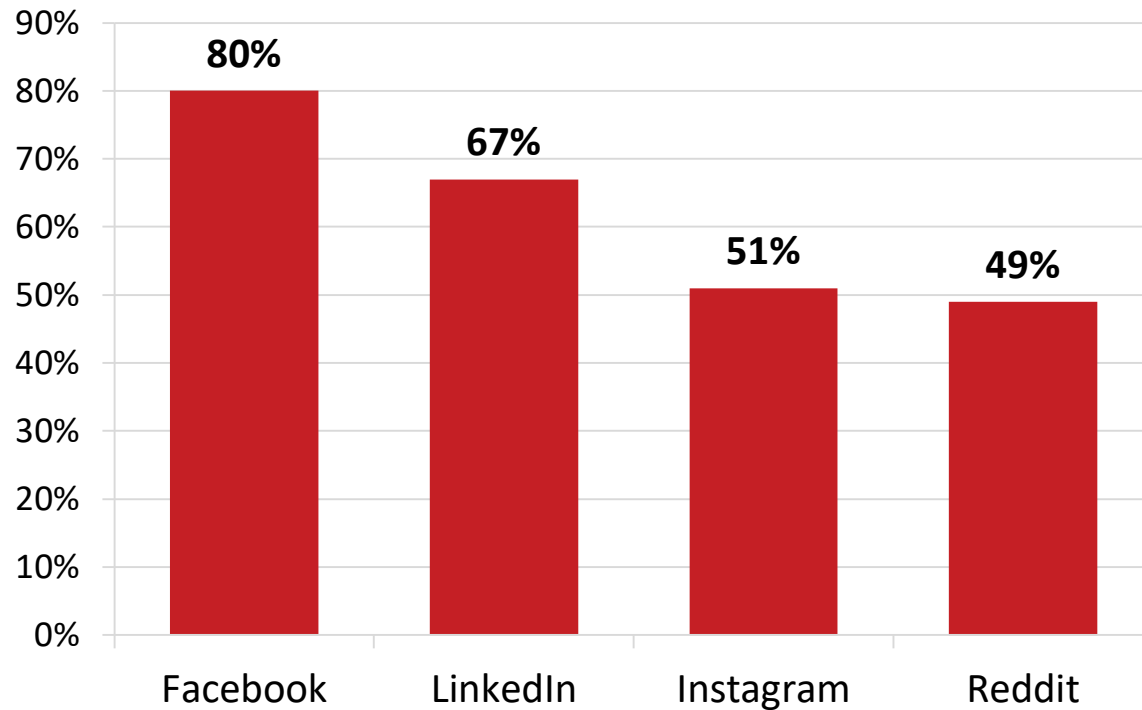
Daily Online Social Site Use

Facebook 42%
Instagram 15%
LinkedIn 7%
Reddit 3%

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

Lifestyle Media Streaming Services

Service	Percentage
Amazon Prime Video	62%
Netflix	53%
YouTube TV	44%
OnDemand Cable or Satellite TV	37%
Hulu	31%
Spotify	28%
Pandora	28%
IHeartradio	21%
Facebook Watch	9%
SoundCloud	7%

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

DC METRO AREA
TV News Top Five

TV News Channels

Channel	%
7 ABC WJLA	37%
CNN	31%
4 NBC WRC	30%
News Channel 8 TBD	26%
Fox News	25%

News Programs

Program	%
Face the Nation (CBS)	41%
Meet the Press (NBC)	37%
This Week with George Stephanopoulos (ABC)	34%
Government Matters	32%
Defense News Weekly	29%
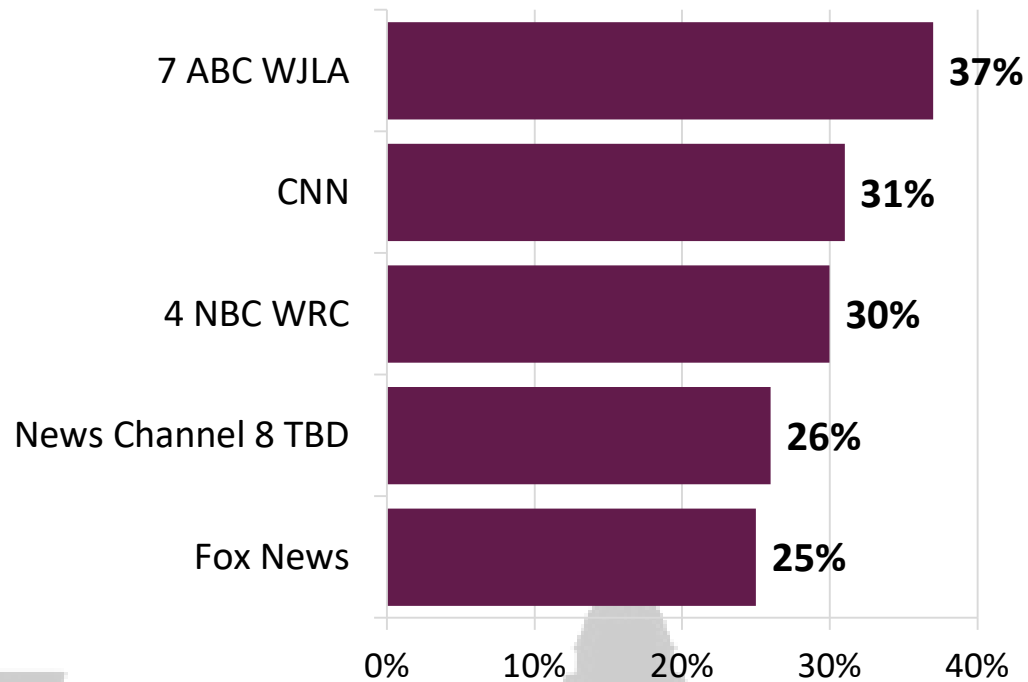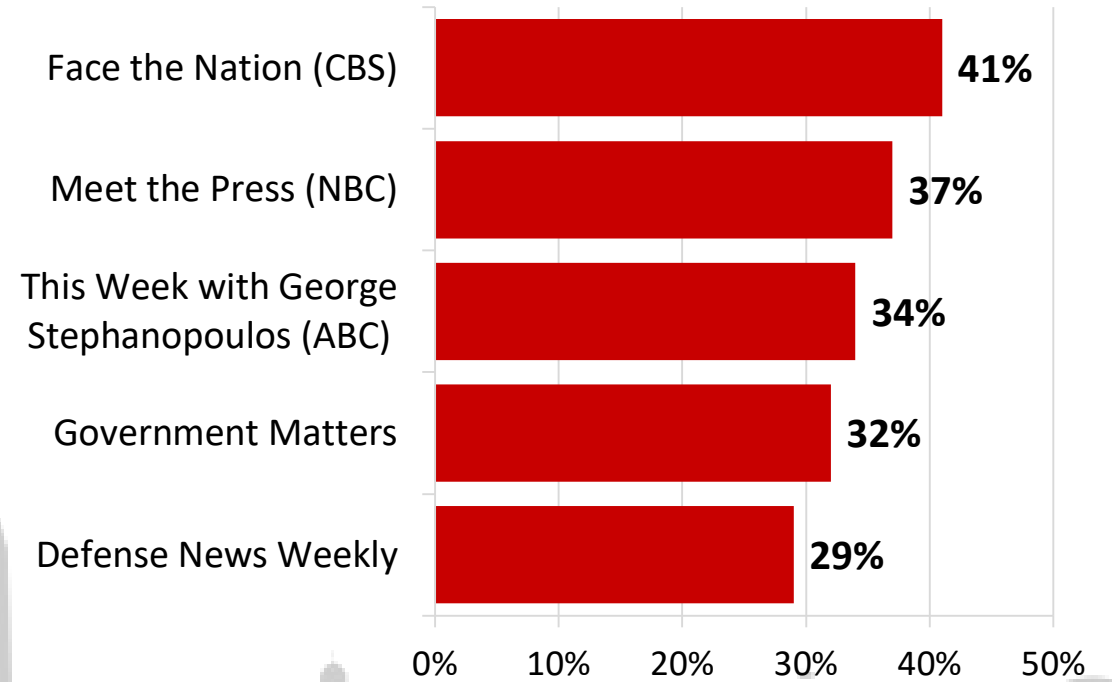
N=82

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

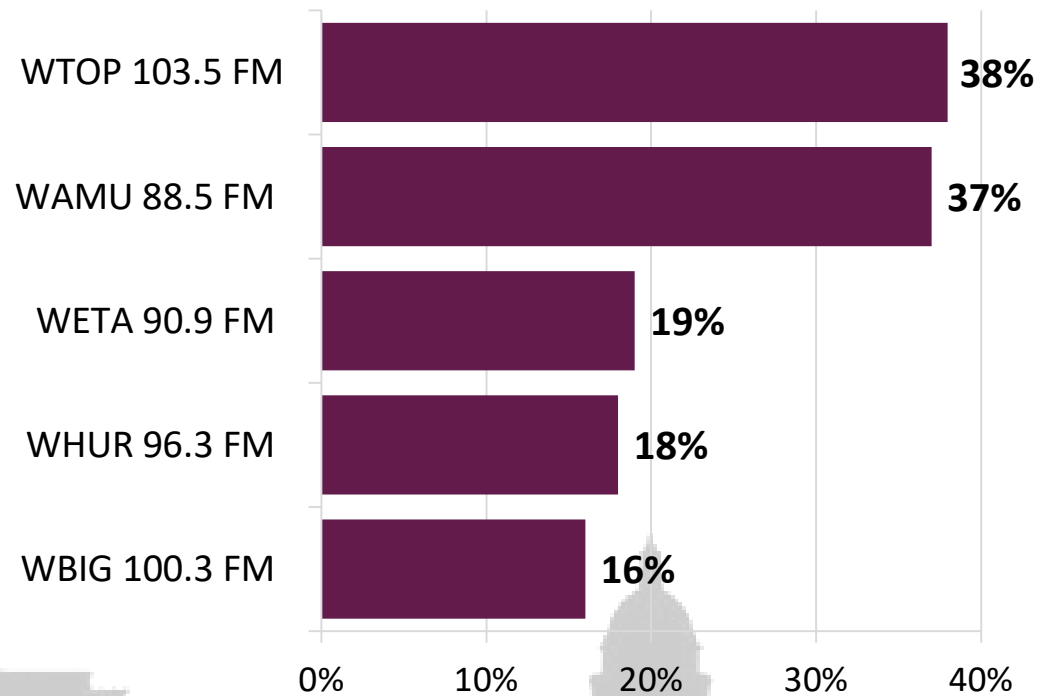| Station	%
WTOP 103.5 FM	38%
WAMU 88.5 FM	37%
WETA 90.9 FM	19%
WHUR 96.3 FM	18%
WBIG 100.3 FM	16%

Radio Websites

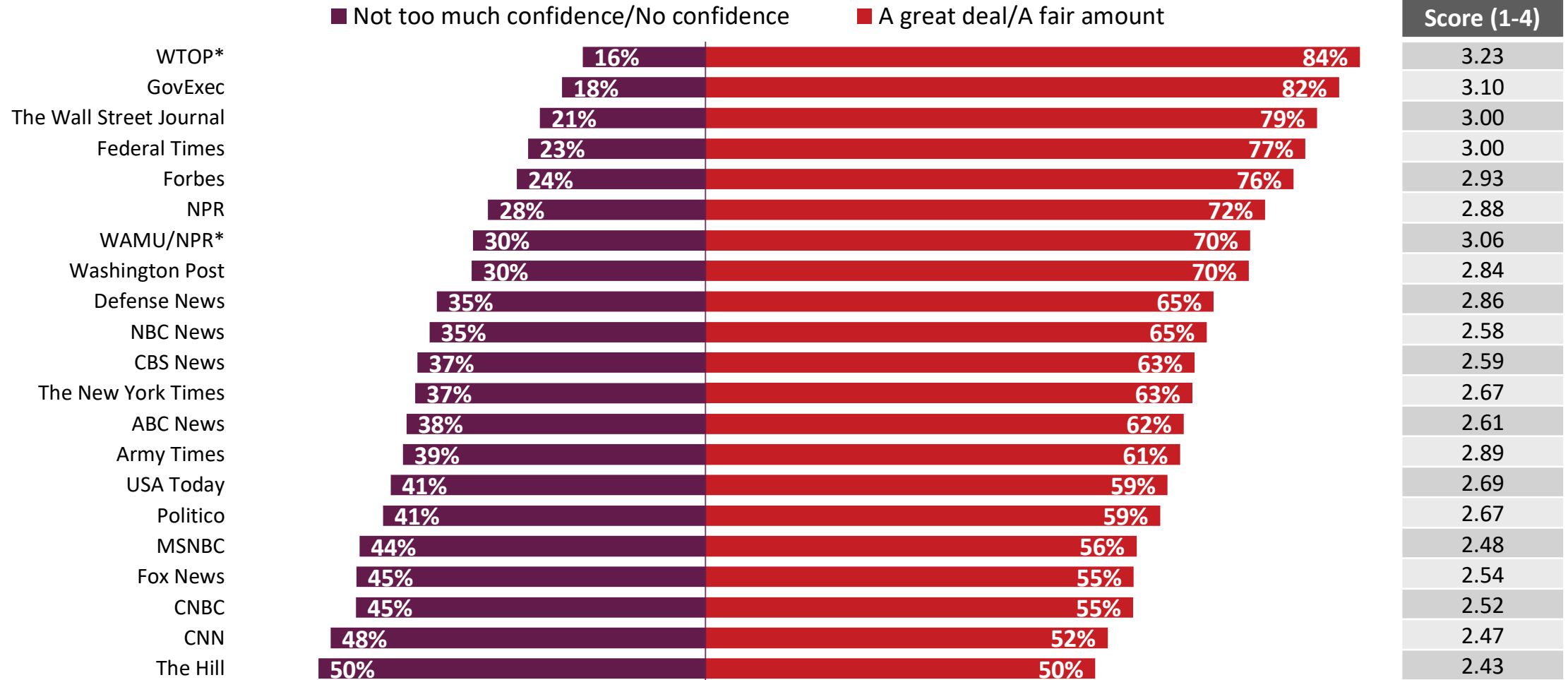| Website	%
WTOP.com	44%
FederalNewsRadio.com	36%
DC101.com	24%
WAMU.org	16%
WMAL.com	10%
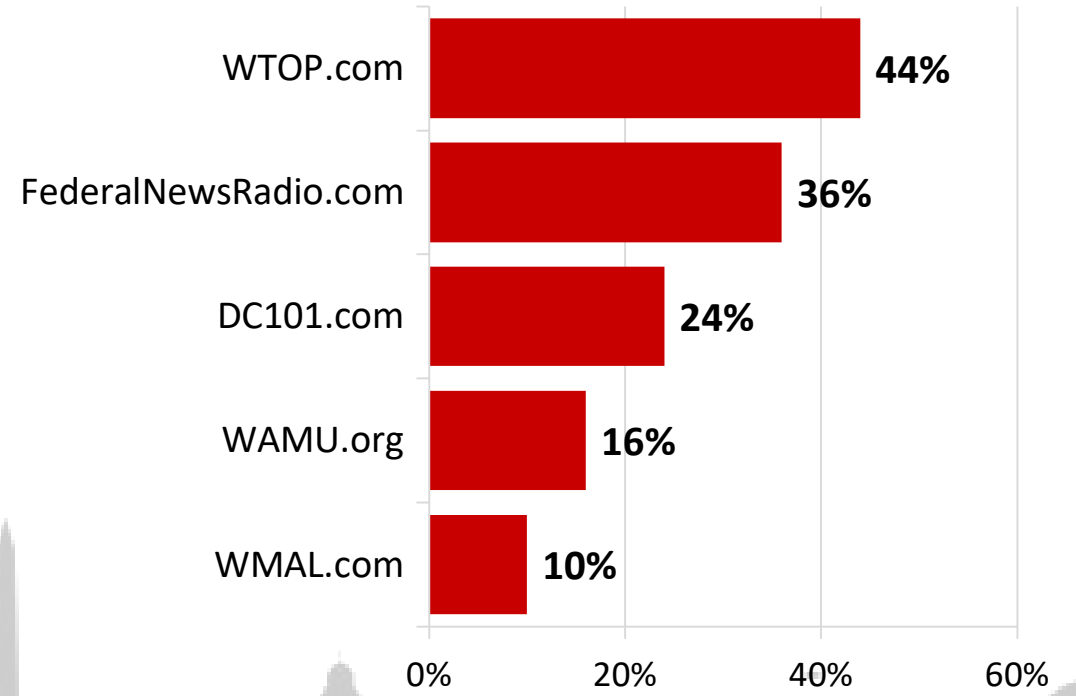
N=82

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

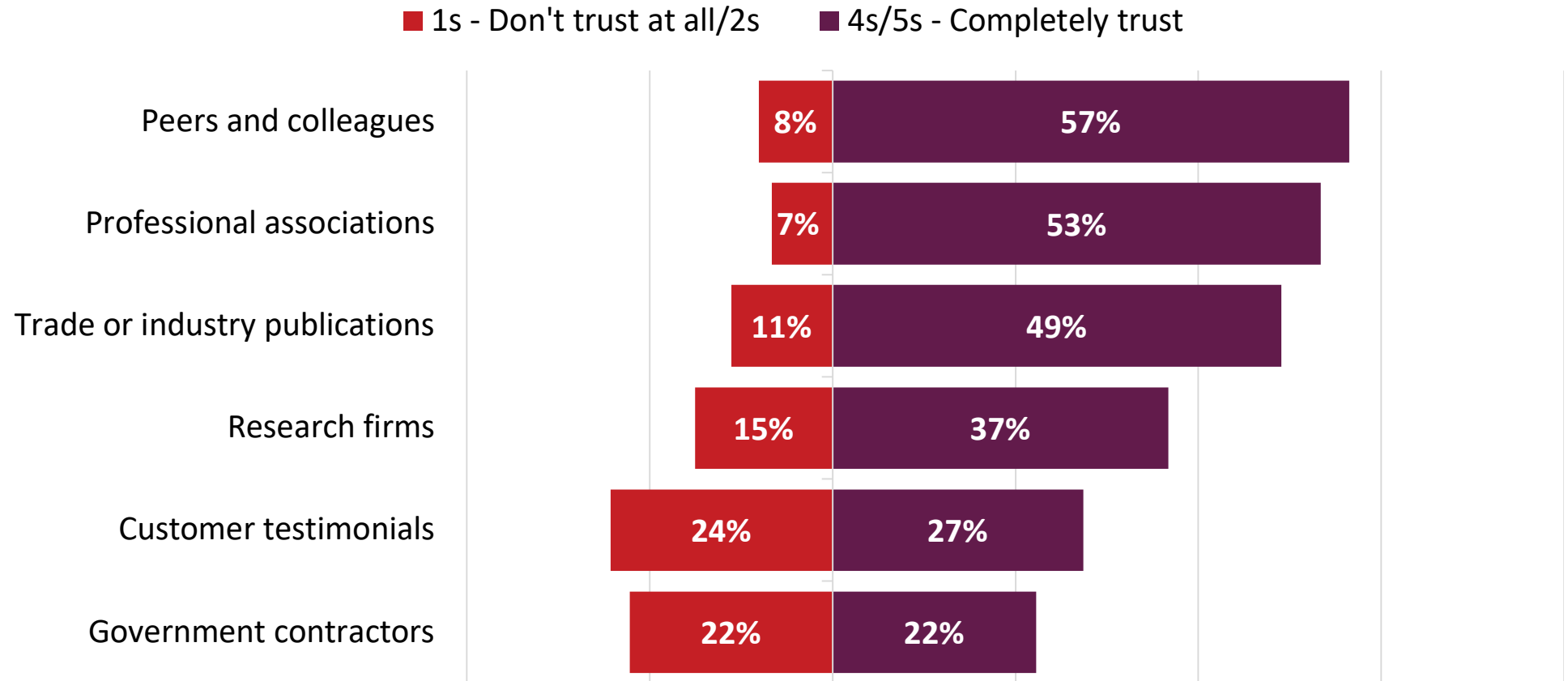|	Not too much confidence/No confidence	A great deal/A fair amount	Confidence Score (1-4)
WTOP*	16%	84%	3.23
GovExec	18%	82%	3.10
The Wall Street Journal	21%	79%	3.00
Federal Times	23%	77%	3.00
Forbes	24%	76%	2.93
NPR	28%	72%	2.88
WAMU/NPR*	30%	70%	3.06
Washington Post	30%	70%	2.84
Defense News	35%	65%	2.86
NBC News	35%	65%	2.58
CBS News	37%	63%	2.59
The New York Times	37%	63%	2.67
ABC News	38%	62%	2.61
Army Times	39%	61%	2.89
USA Today	41%	59%	2.69
Politico	41%	59%	2.67
MSNBC	44%	56%	2.48
Fox News	45%	55%	2.54
CNBC	45%	55%	2.52
CNN	48%	52%	2.47
The Hill	50%	50%	2.43

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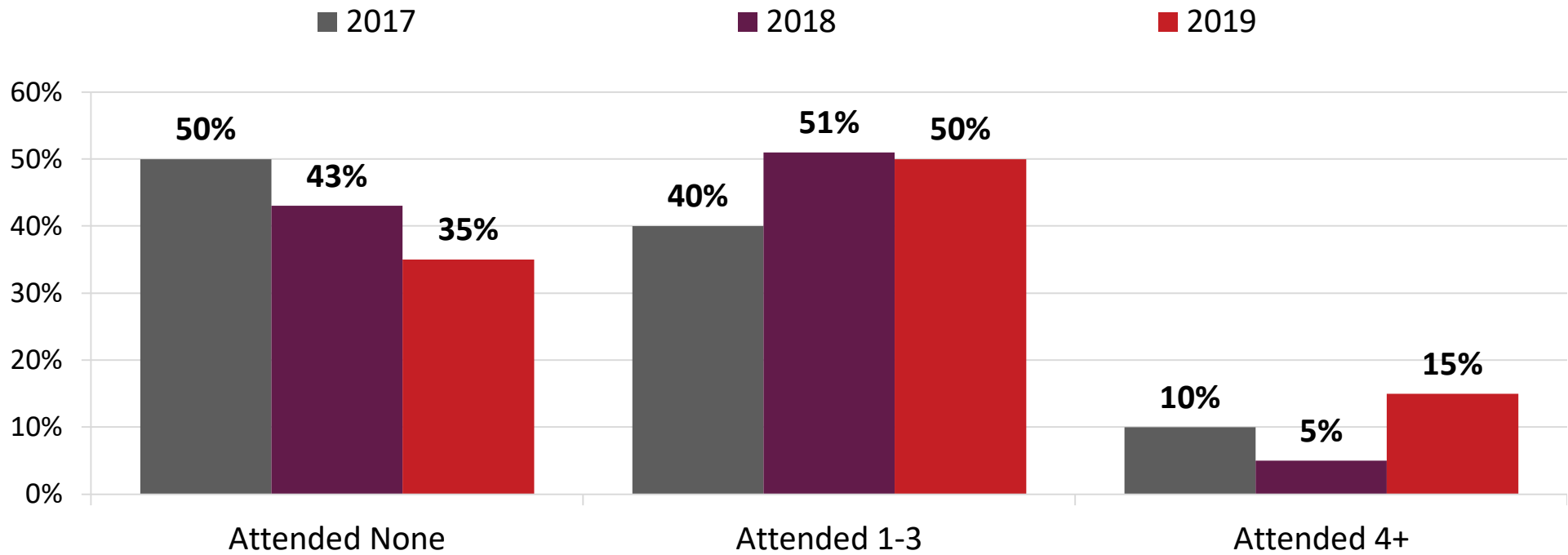
*Asked only in DC metro area

Marketing Tactics

Trusted Sources of Information

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

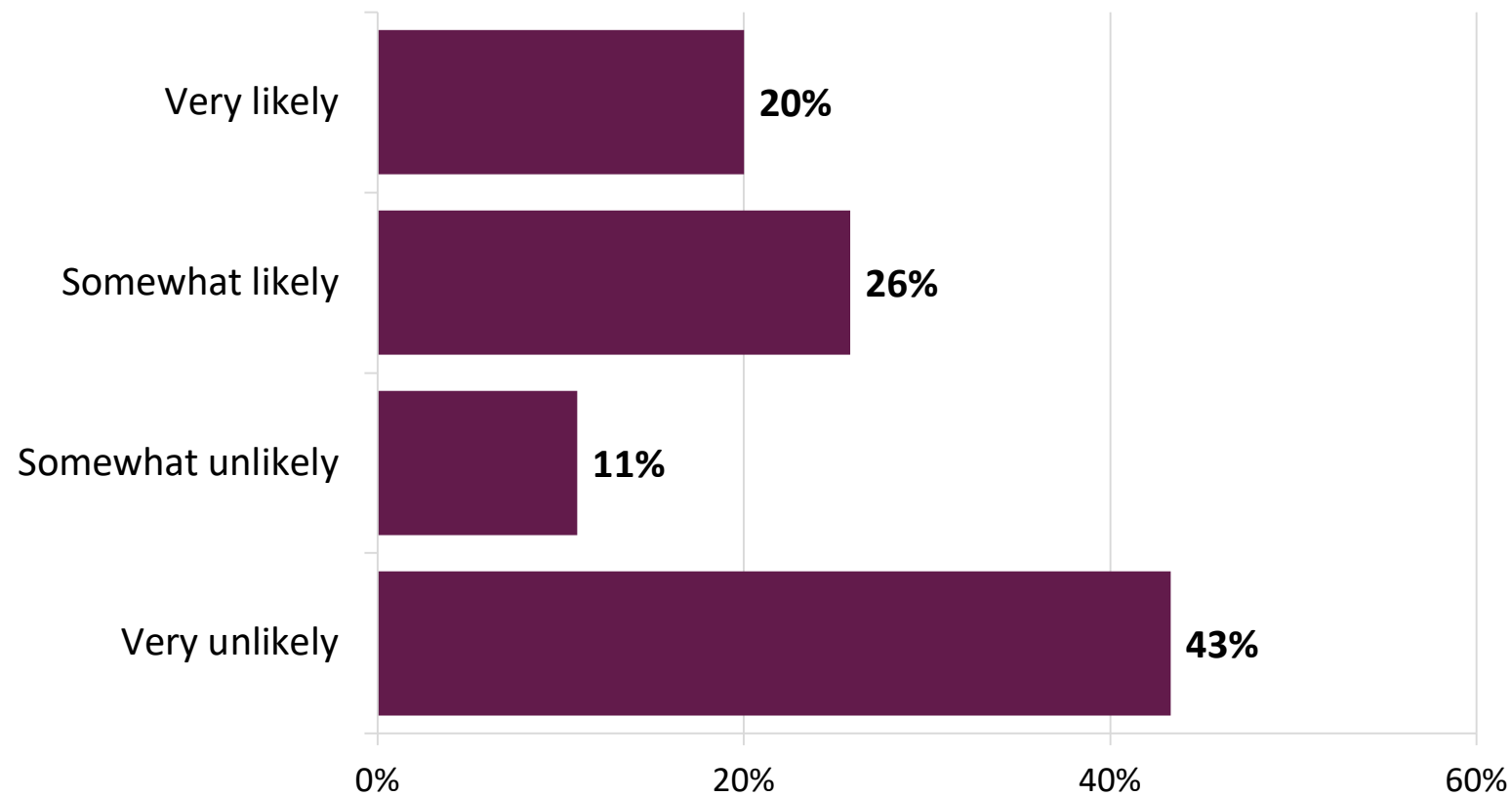|	1s - Don't trust at all/2s	4s/5s - Completely trust
Peers and colleagues	8%	57%
Professional associations	7%	53%
Trade or industry publications	11%	49%
Research firms	15%	37%
Customer testimonials	24%	27%
Government contractors	22%	22%

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: 50%
- 2018: 43%
- 2019: 35%

Attended 1-3
- 2017: 40%
- 2018: 51%
- 2019: 50%

Attended 4+
- 2017: 10%
- 2018: 5%
- 2019: 15%

Q *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	20%
Somewhat likely	26%
Somewhat unlikely	11%
Very unlikely	43%

How likely are you to attend a work-related trade show, conference, or industry event on the weekend?
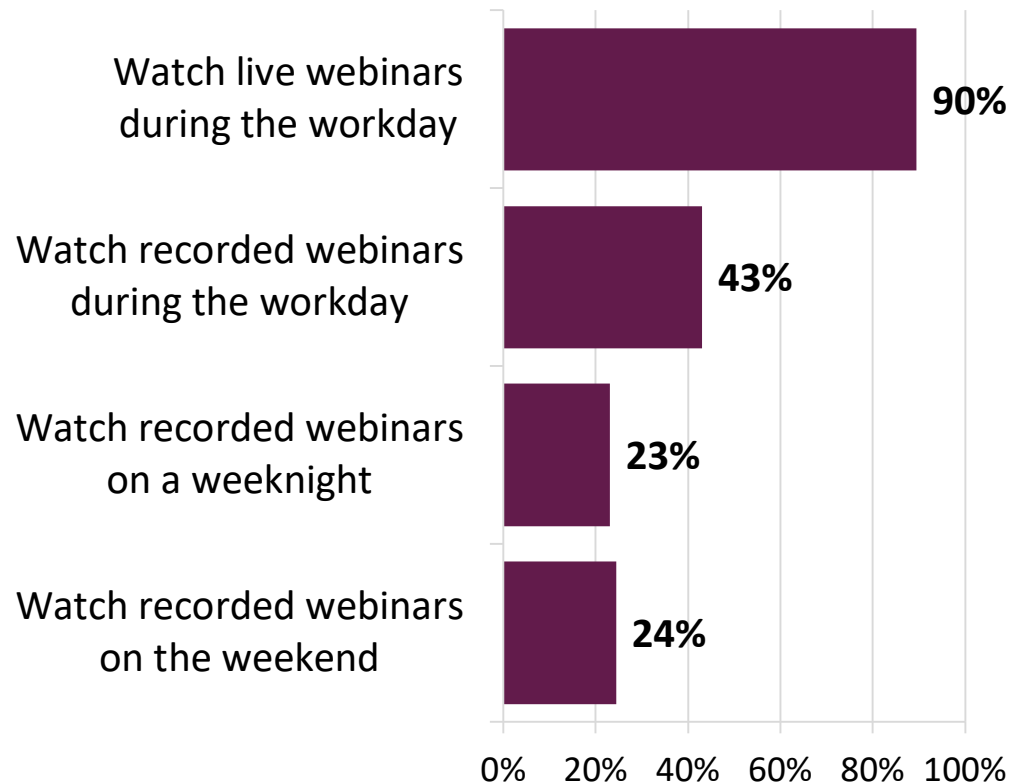
TREND 2017-2019
Webinar Participation in Past 12 Months

■ 2017　　　　■ 2018　　　　■ 2019

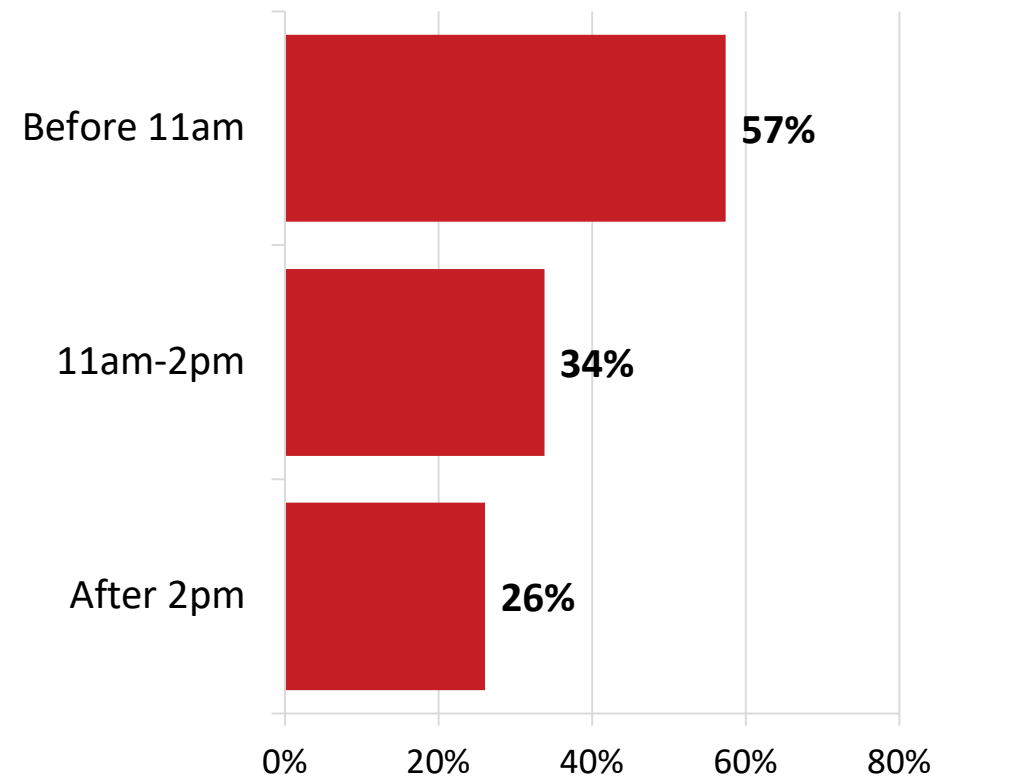|	2017	2018	2019
Participated in None	24%	32%	16%
Participated in 1-3	38%	34%	39%
Participated in 4+	38%	34%	45%
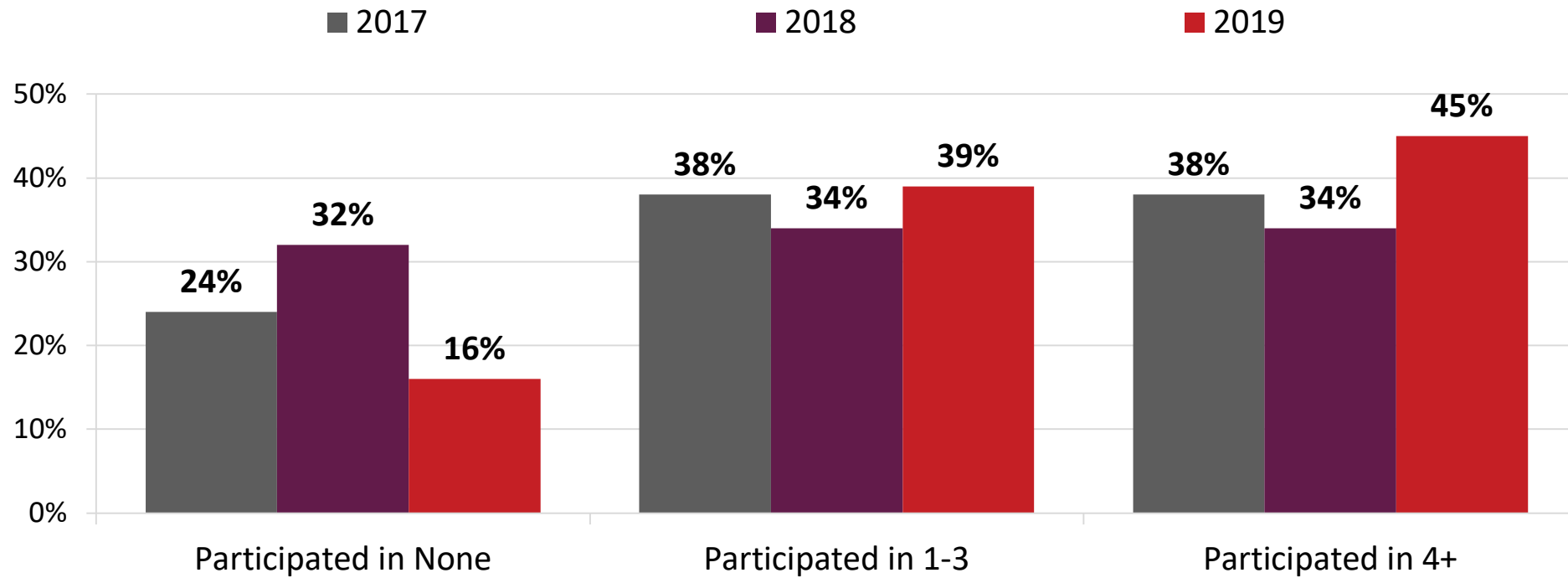
In how many webinars (seminars over the Internet) have you participated in the last year?

Participating in Webinars

Ways of Participating in Webinars

Watch live webinars during the workday	90%
Watch recorded webinars during the workday	43%
Watch recorded webinars on a weeknight	23%
Watch recorded webinars on the weekend	24%

Preferred Time to Participate

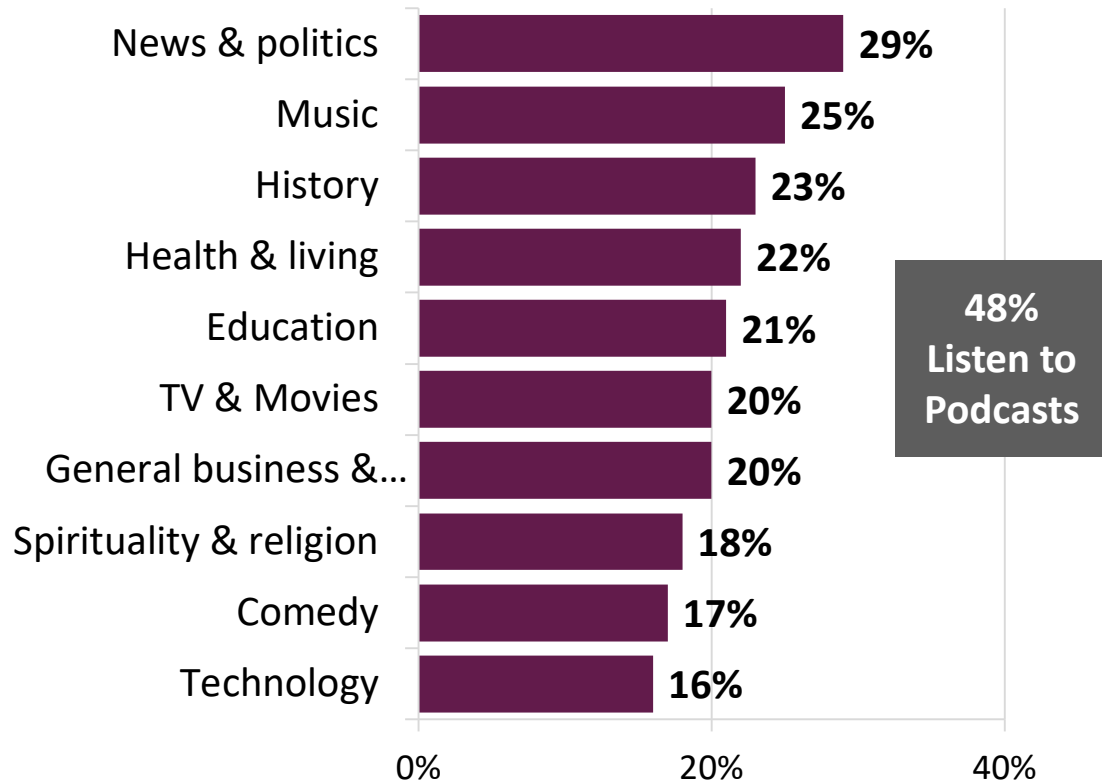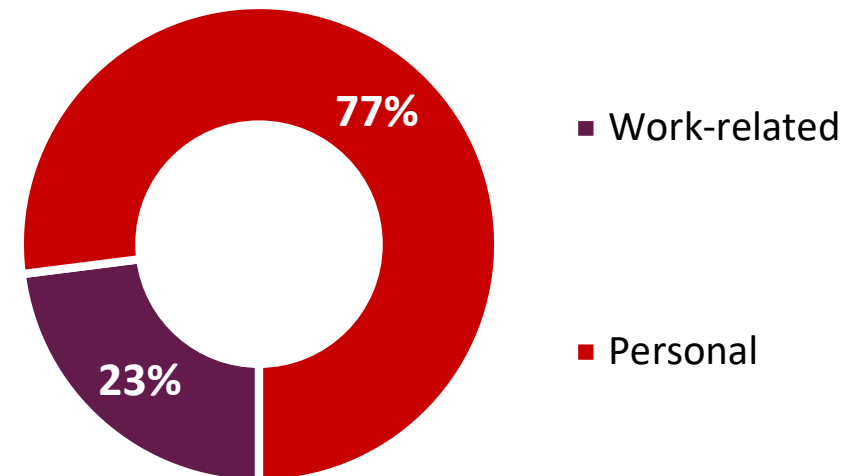|	
Before 11am	57%
11am-2pm	34%
After 2pm	26%

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	29%
Music	25%
History	23%
Health & living	22%
Education	21%
TV & Movies	20%
General business &...	20%
Spirituality & religion	18%
Comedy	17%
Technology	16%

48% Listen to Podcasts

Average Percentage of Time Spent Listening to Podcasts

- 77% ■ Personal
- 23% ■ Work-related
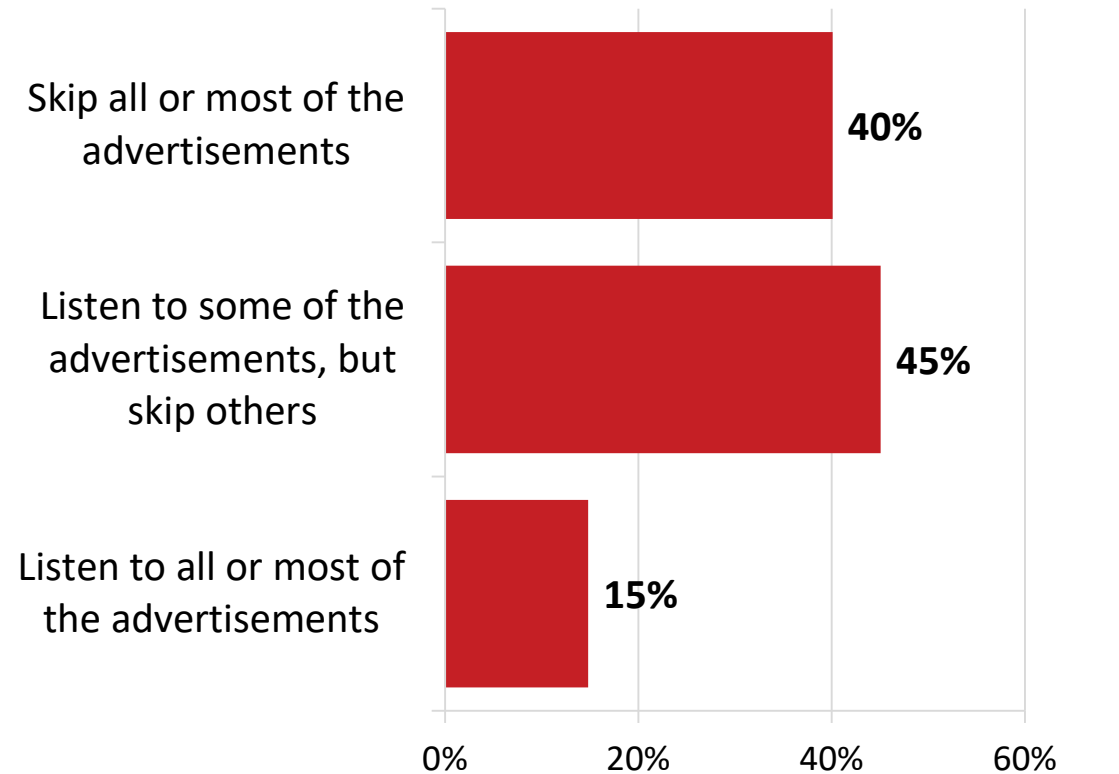
Q *Which of the following, if any, types of audio podcasts do you listen/subscribe to? (select all that apply)*
What percentage of the time you spend listening to podcasts is work-related vs. personal?

Advertisements in Podcasts

Have Heard a Work-Related Ad During a Podcast

- 66%
- 20%
- 14%

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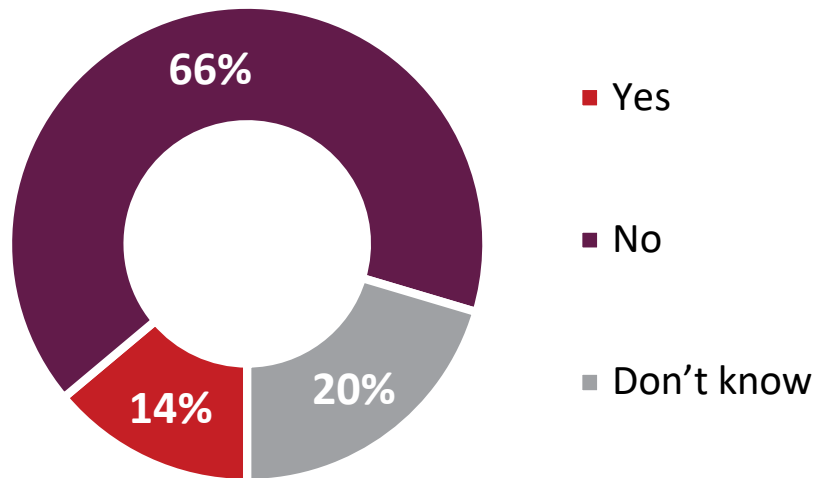
Listening to or Skipping Ads in Podcasts

Skip all or most of the advertisements — **40%**

Listen to some of the advertisements, but skip others — **45%**

Listen to all or most of the advertisements — **15%**

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
Personal Email/Communications	43%
Weather	36%
News	24%
Work Email/Communications	19%
Finance & Banking	16%
Events	15%
Social Networking	12%
Music & Audio	11%
Sports	10%
Navigation & Mapping	9%
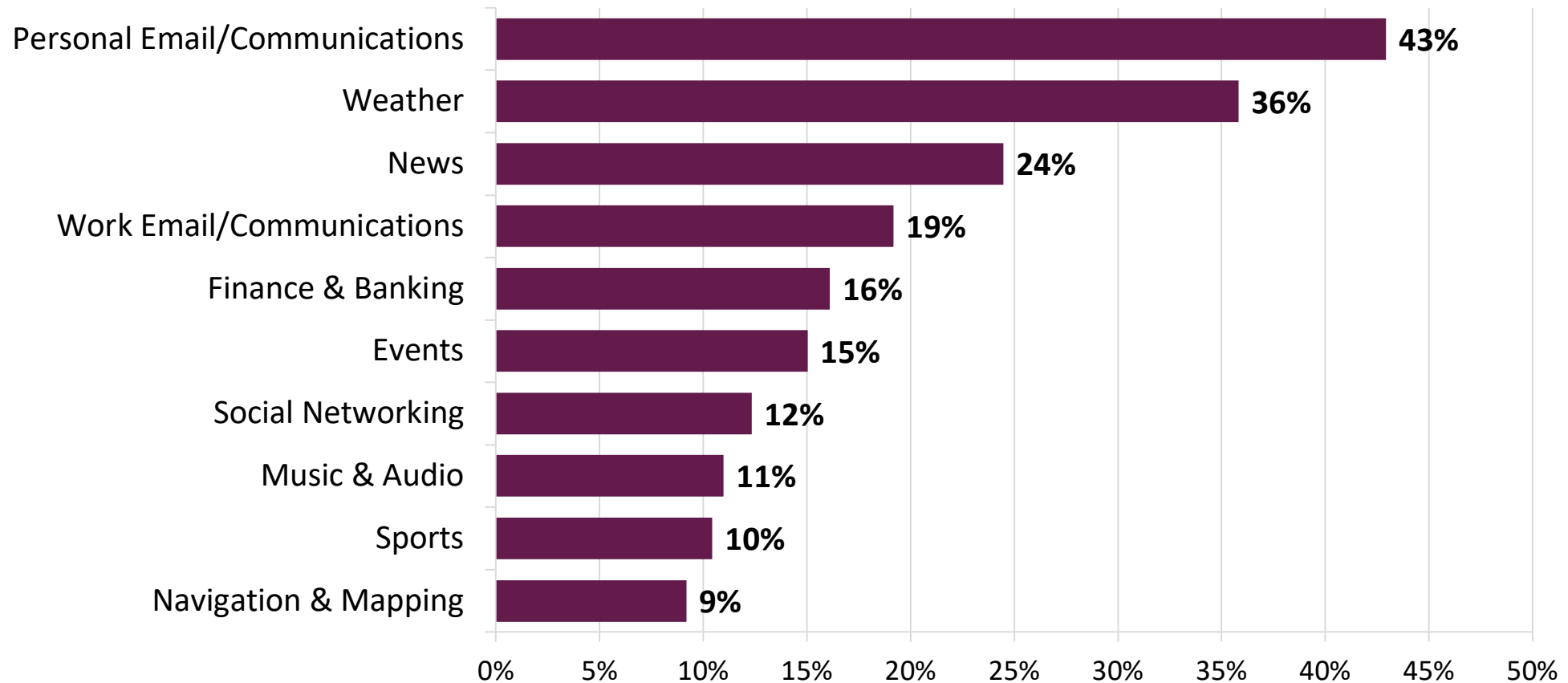
Which of the following app types, if any, do you allow push notifications from on your mobile device? (select all that apply)

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

Category	Percentage
Watching the news or news programs on TV	59%
Accessing news content online	57%
Listening to radio (traditional AM/FM)	45%
Accessing social media sites	29%
Accessing news content in print	28%
Reading e-newsletters	25%
Listening to satellite radio	21%
Listening to online radio	15%
Listening to podcasts	13%
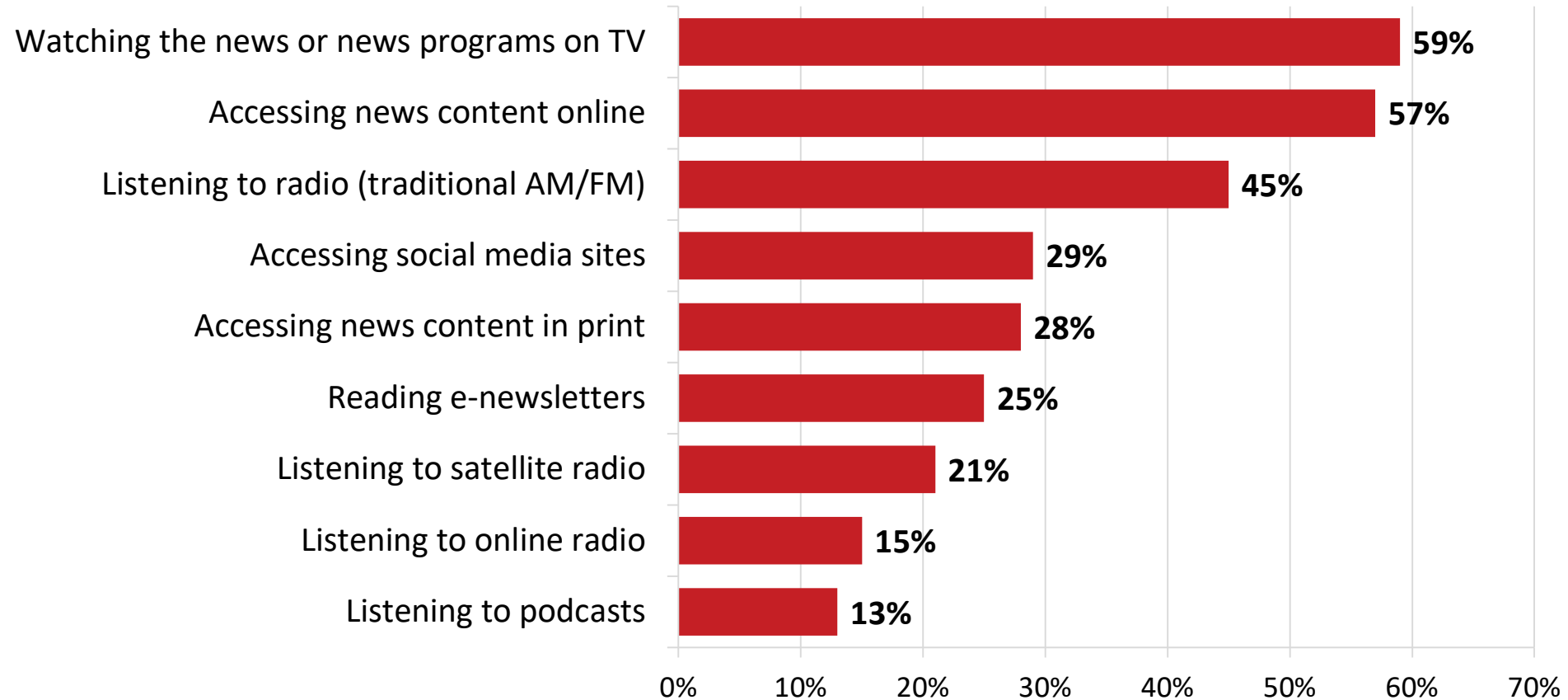
On an average workday, how much time do you spend…

Media Consumed During the Workday

		Wake Up	Morning Commute	During the Workday	Lunch Break	Evening Commute	After Work
Watching	Broadcast/cable TV	26%	2%	2%	2%	2%	51%
	Online streaming video	1%	1%	4%	3%	1%	47%
Listening	AM/FM radio	14%	48%	10%	8%	39%	14%
	Satellite radio	2%	21%	1%	3%	18%	11%
	Podcasts	4%	12%	6%	5%	11%	11%
Reading	National print newspaper or magazine	18%	10%	11%	13%	2%	24%
	Local print newspaper or magazine	16%	4%	5%	9%	1%	19%
	Digital newspaper or magazine	13%	11%	19%	19%	6%	25%
	Social media sites	13%	13%	10%	19%	10%	47%

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)*
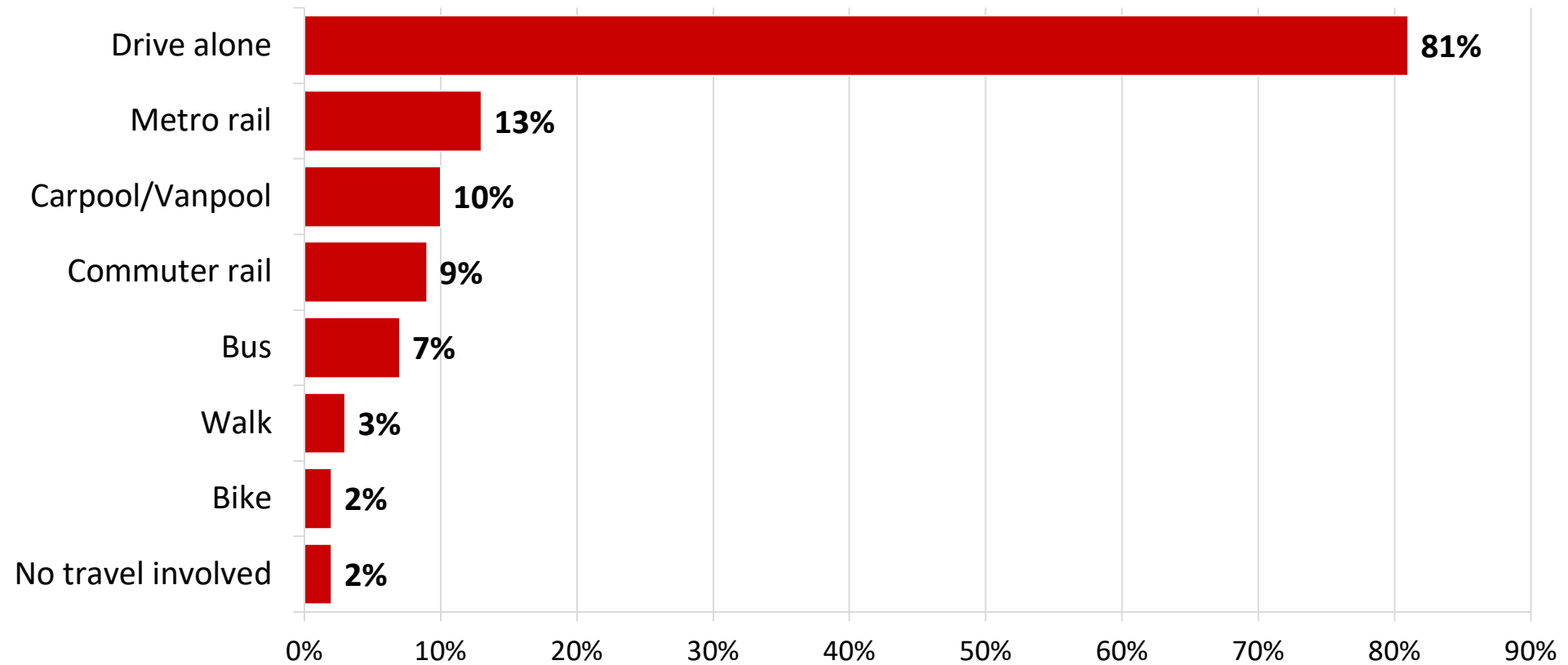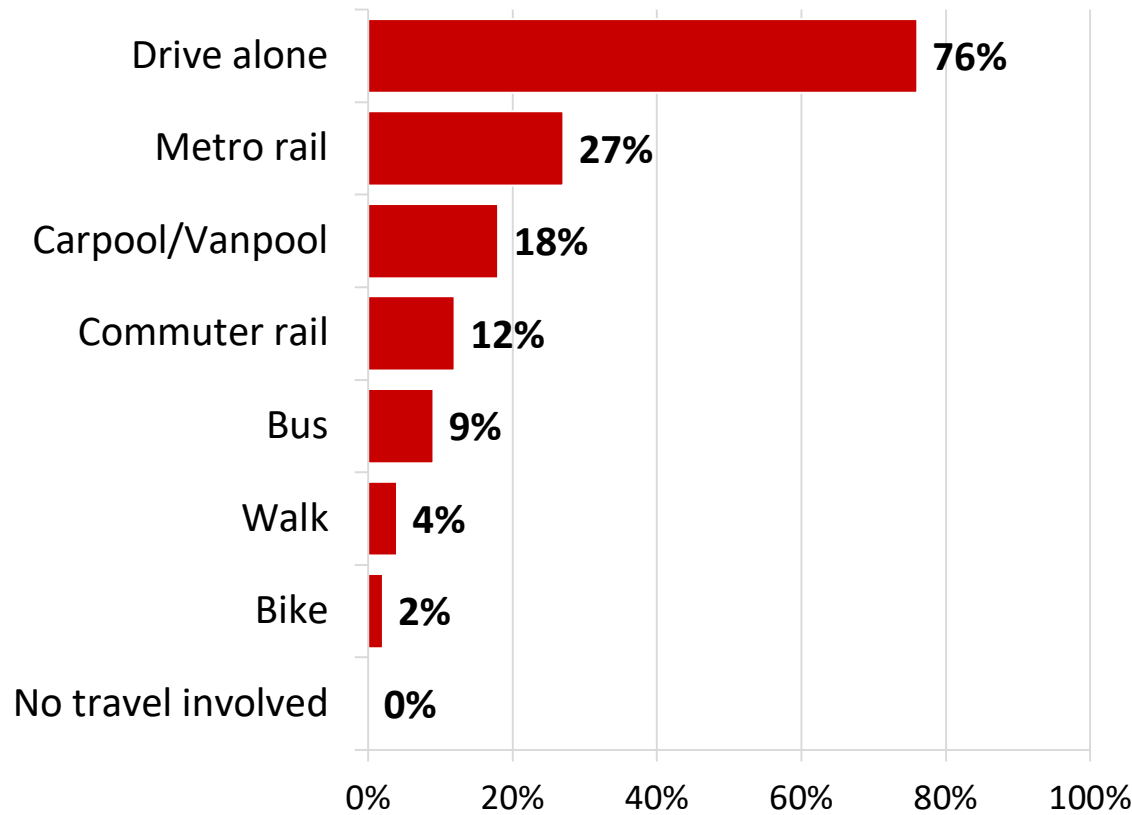
Primary Transportation

Drive alone **81%**
Metro rail **13%**
Carpool/Vanpool **10%**
Commuter rail **9%**
Bus **7%**
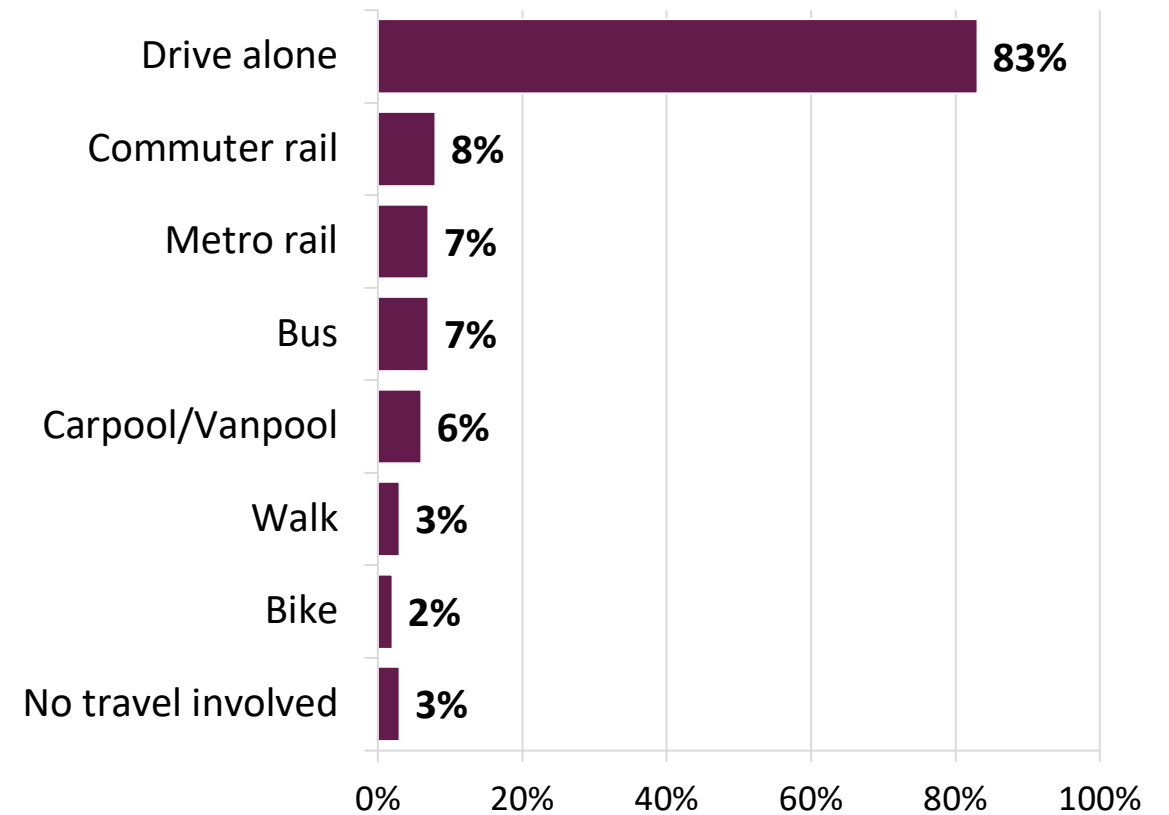Walk **3%**
Bike **2%**
No travel involved **2%**

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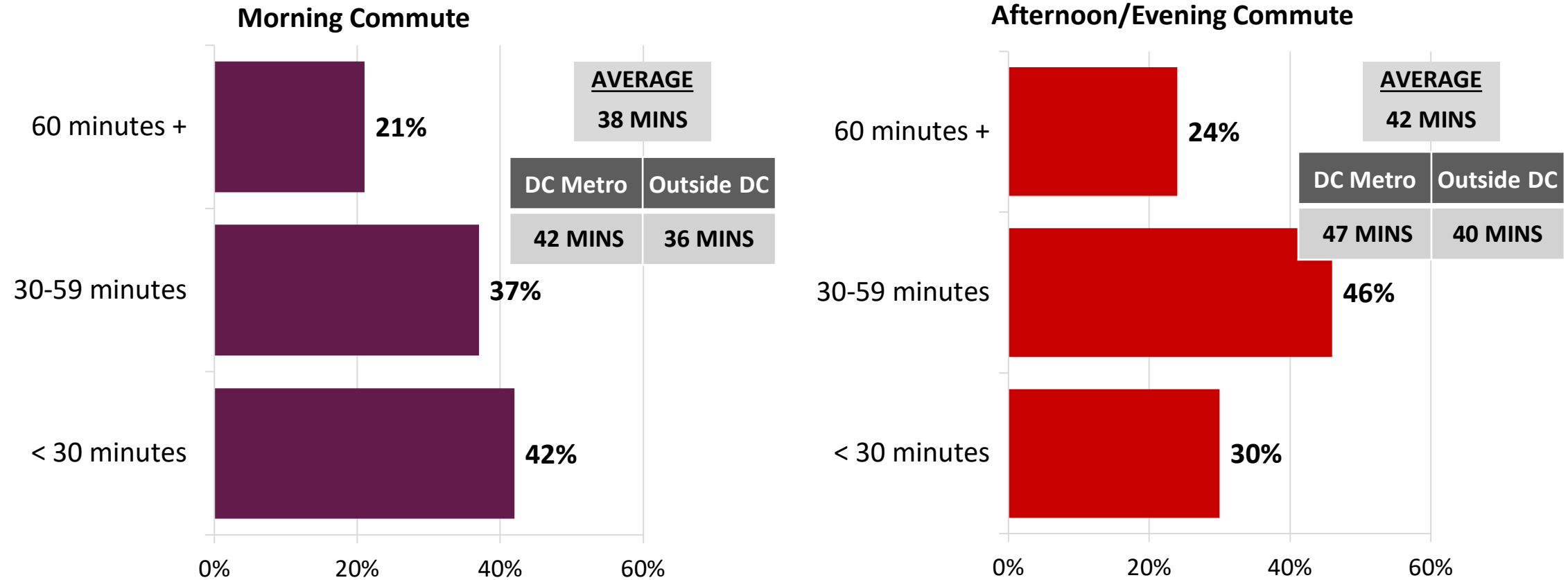
Primary Transportation

Washington DC Metro Area

Mode	%
Drive alone	76%
Metro rail	27%
Carpool/Vanpool	18%
Commuter rail	12%
Bus	9%
Walk	4%
Bike	2%
No travel involved	0%

Outside Washington DC Metro Area

| Mode	%
Drive alone	83%
Commuter rail	8%
Metro rail	7%
Bus	7%
Carpool/Vanpool	6%
Walk	3%
Bike	2%
No travel involved	3%

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

Commute Time

Morning Commute

	DC Metro	Outside DC
AVERAGE **38 MINS**	42 MINS	36 MINS

60 minutes + — **21%**

30-59 minutes — **37%**

< 30 minutes — **42%**

Afternoon/Evening Commute

	DC Metro	Outside DC
AVERAGE **42 MINS**	47 MINS	40 MINS

60 minutes + — **24%**

30-59 minutes — **46%**

< 30 minutes — **30%**

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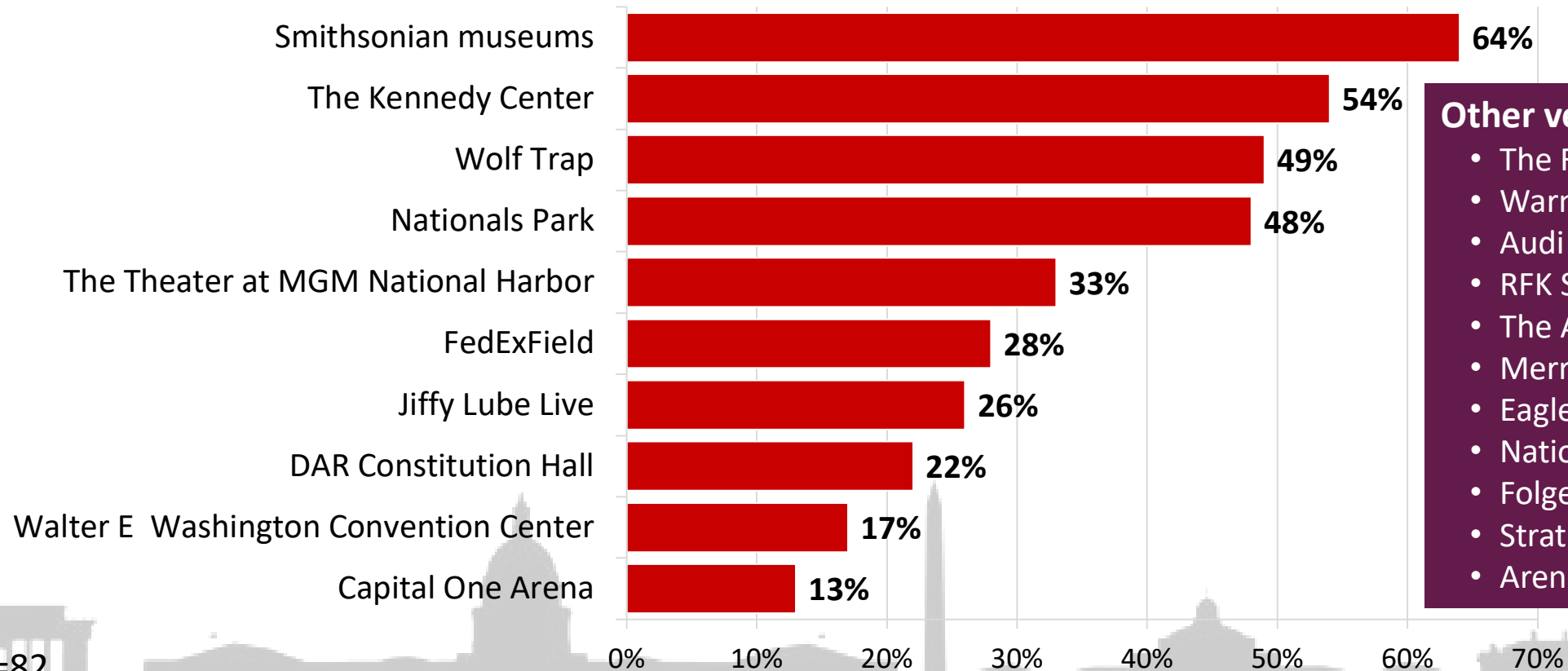*On average, how long is your afternoon/evening commute from work? (open end)*

DC METRO AREA
Airport Trips
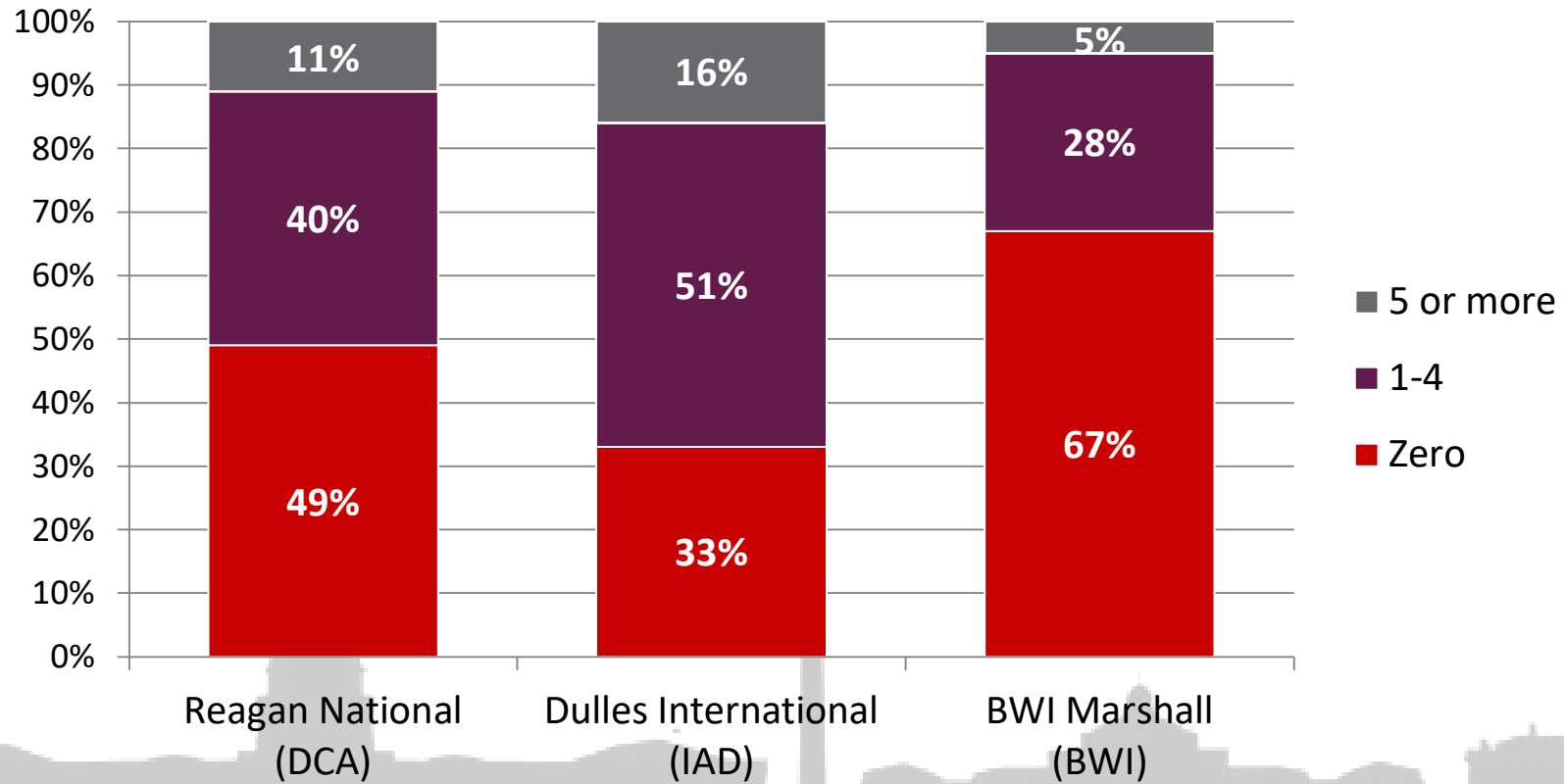
N=82

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	%
Smithsonian museums	64%
The Kennedy Center	54%
Wolf Trap	49%
Nationals Park	48%
The Theater at MGM National Harbor	33%
FedExField	28%
Jiffy Lube Live	26%
DAR Constitution Hall	22%
Walter E Washington Convention Center	17%
Capital One Arena	13%

Other venues in survey:
- The Fillmore Silver Spring
- Warner Theatre
- Audi Field
- RFK Stadium
- The Anthem
- Merriweather Post Pavilion
- EagleBank Arena
- National Theatre
- Folger Theatre
- Strathmore
- Arena Stage

N=82

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

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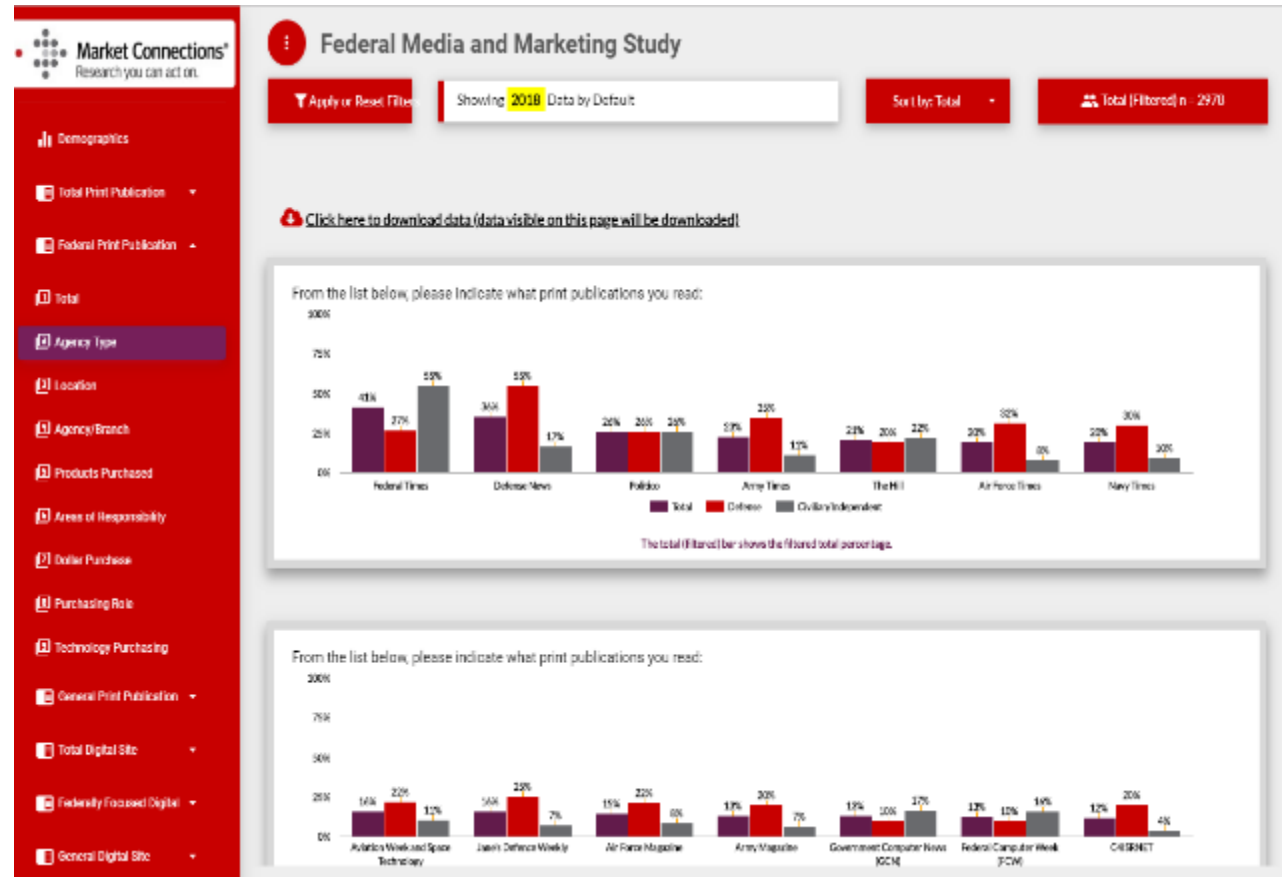
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