



Federal Media & Marketing Study 2019



Market Connections®

Research you can act on.



Background and 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 Summer 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 DC 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

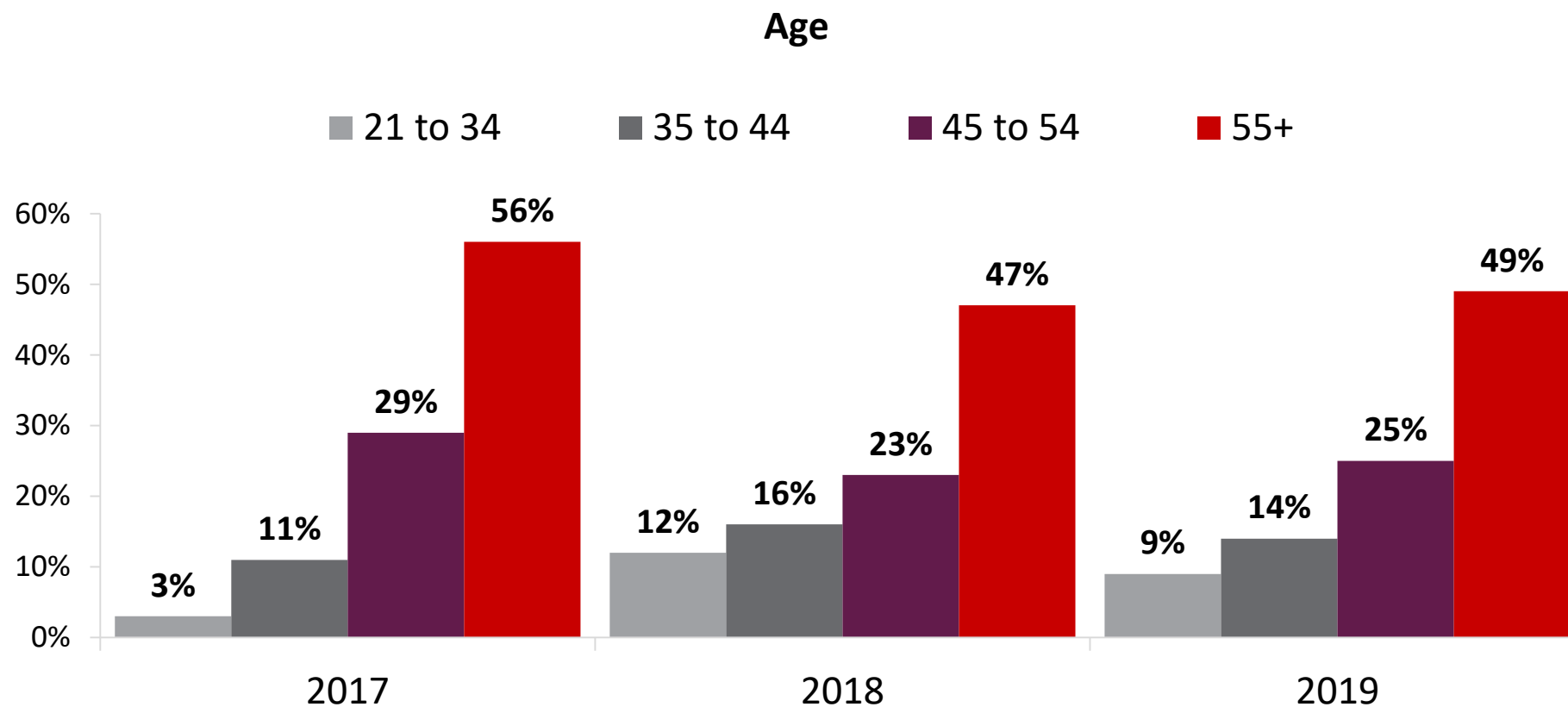




2019 Federal Media and Marketing Survey

DEMOGRAPHICS

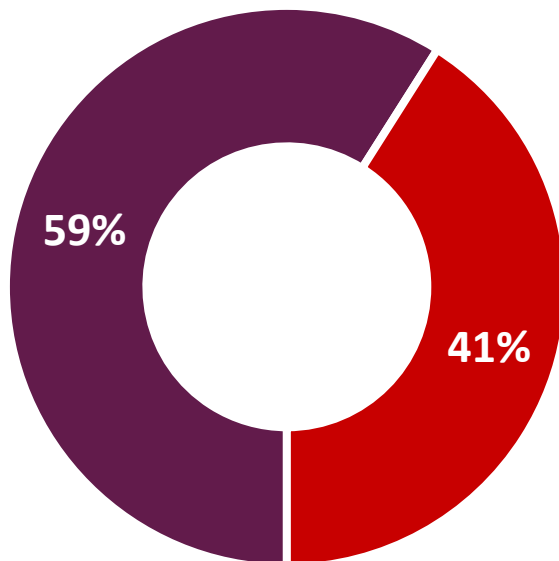
Age: Trend 2017-2019



DEMOGRAPHICS

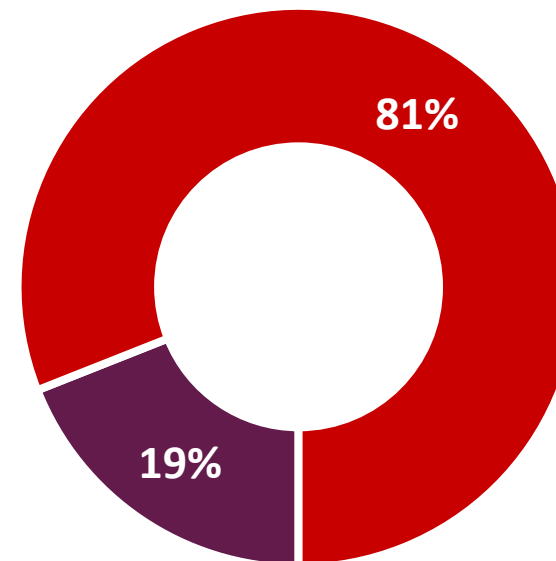
Agency Type & Location

Agency Type



■ Civilian or Independent ■ Defense or Military

Location

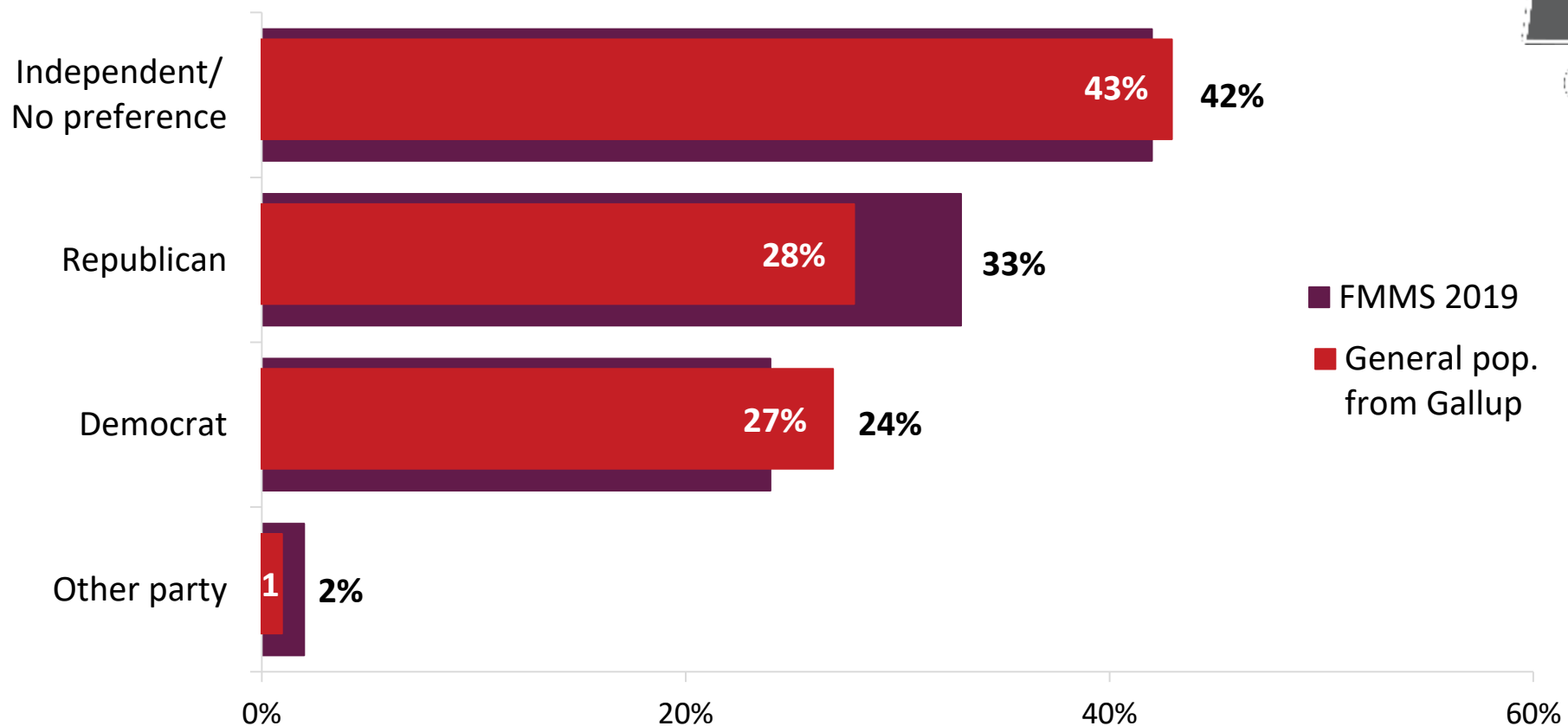


■ Inside the Beltway ■ Outside the Beltway



DEMOGRAPHICS

Political Affiliation

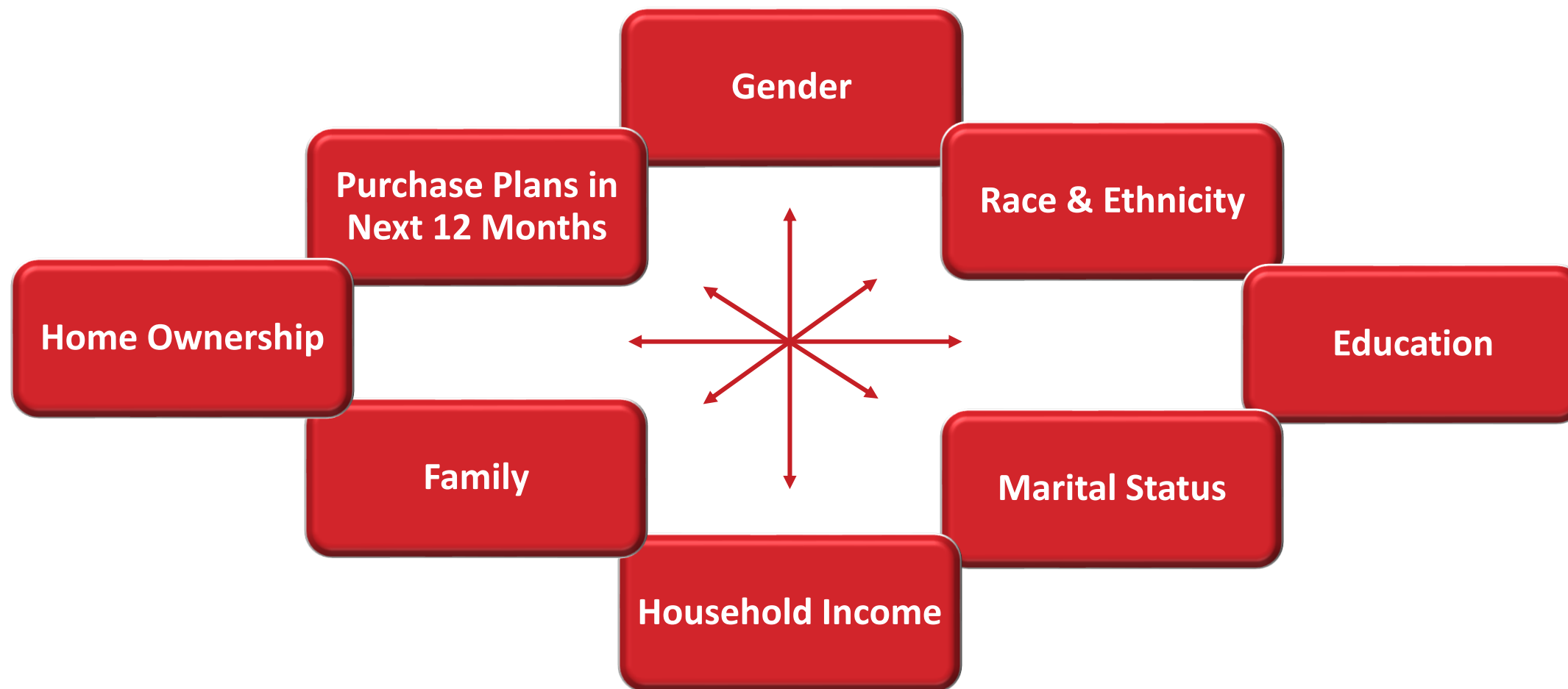



Top 10 Job Functions & Purchase Categories

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



Other Demographics





Media Habits: A Day in the Life

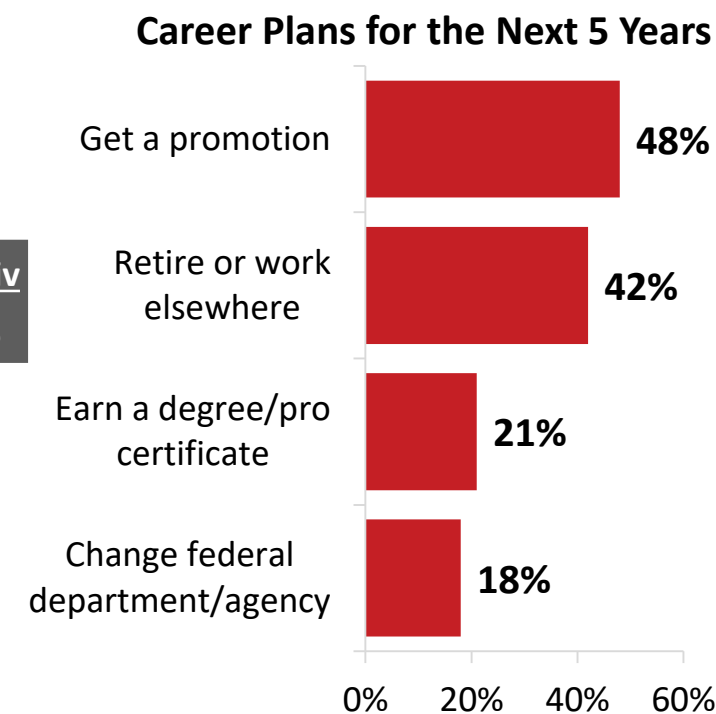
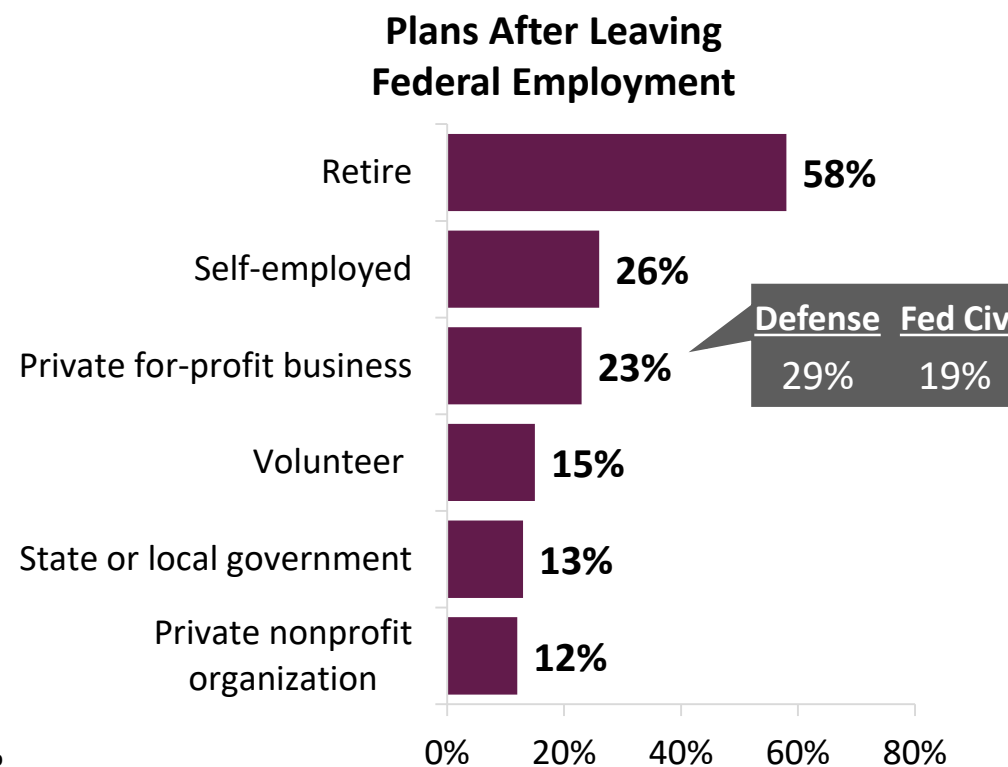
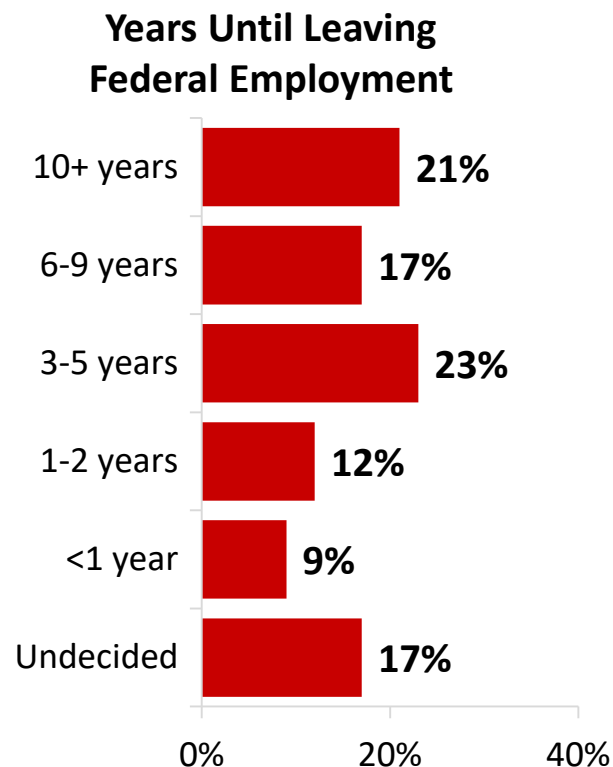
Media Consumed During the Workday

		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%



Before the Day Begins: Their Hopes & Dreams

FUTURE WORK PLANS

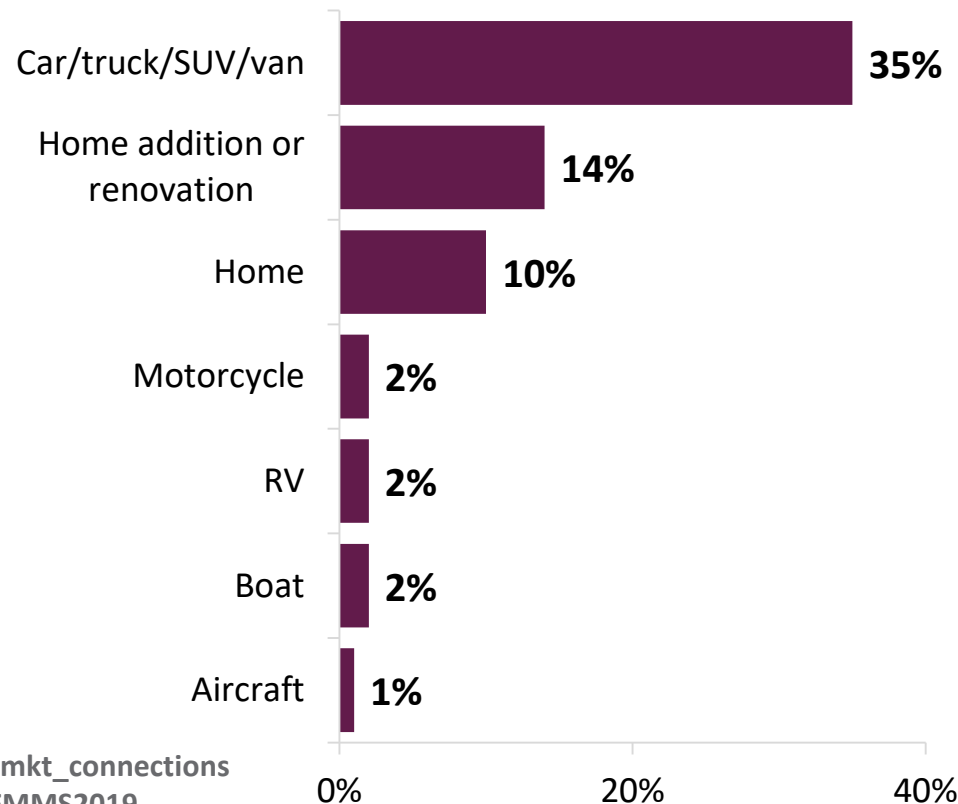


Before the Day Begins: Their Hopes & Dreams

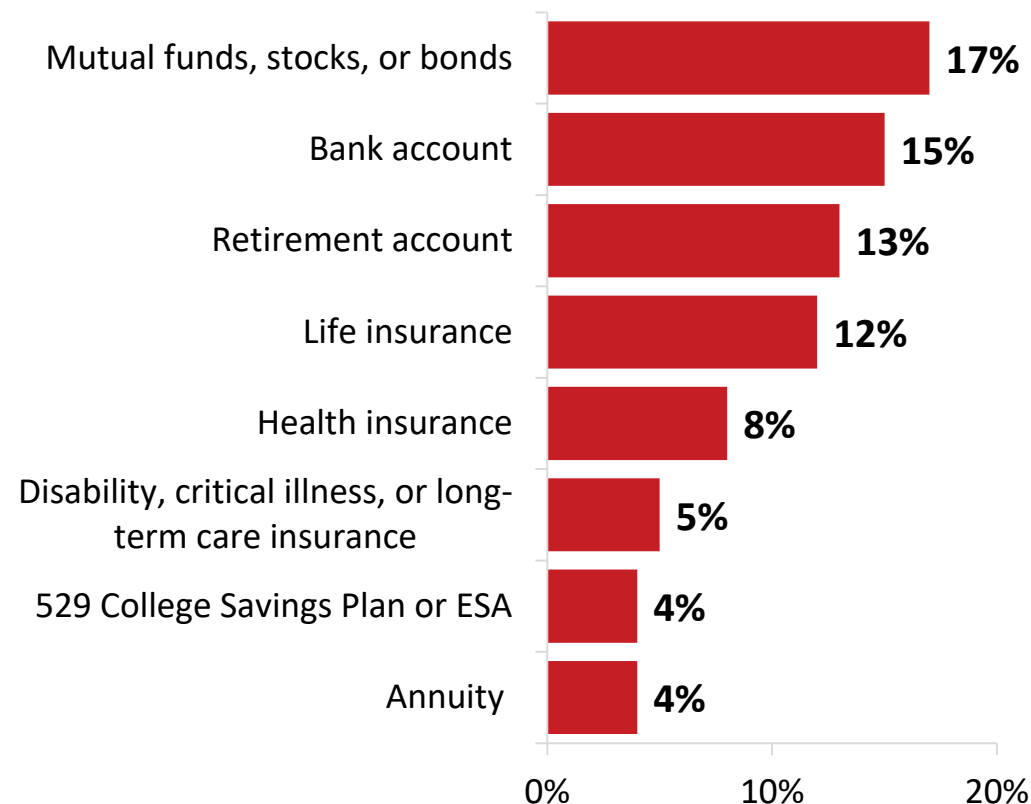
MAJOR PURCHASE PLANS



Major Purchase Plans

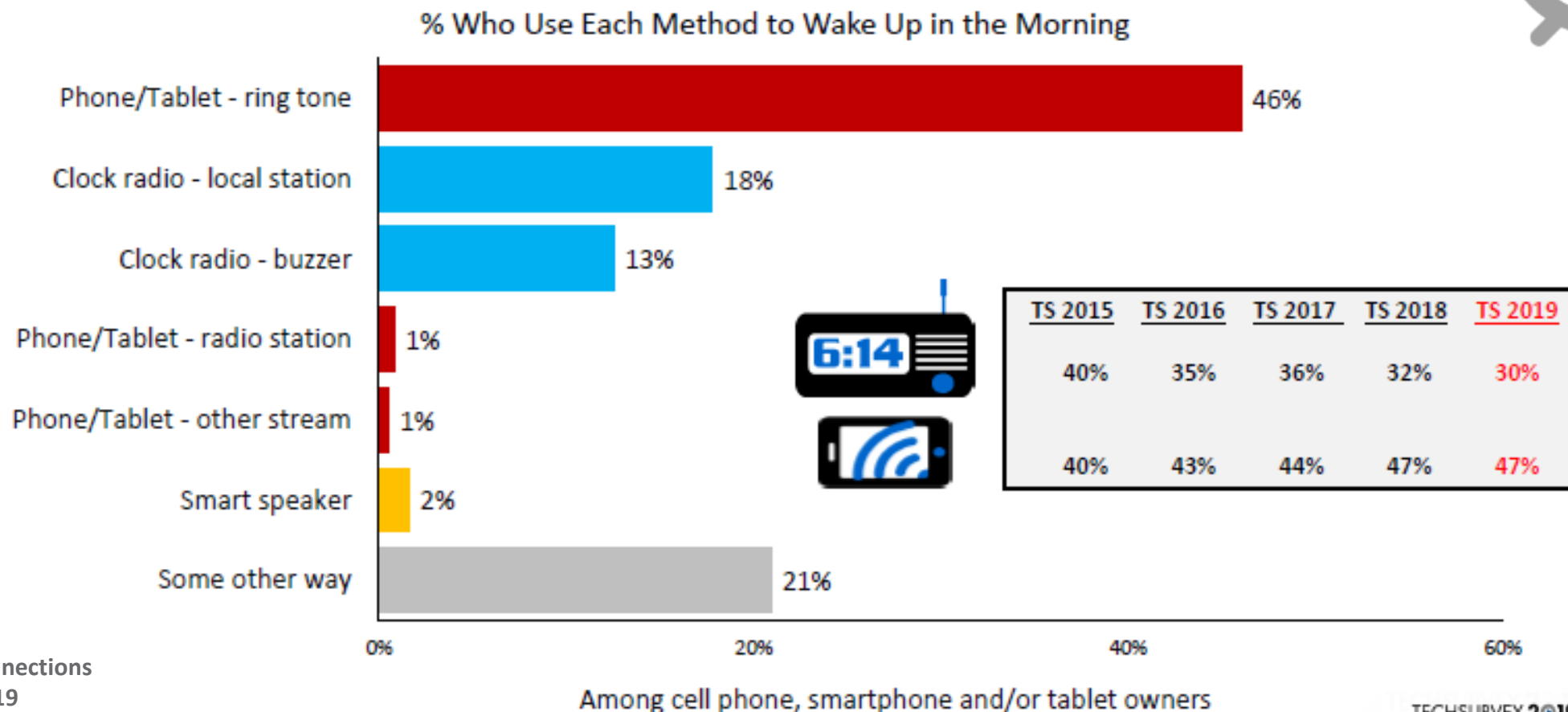


Financial Product Purchase/Open Plans



The Alarm Goes Off & the Day Begins

Using a mobile device to wake up is increasing in popularity, specifically with a ring tone, according to TECHSURVEY 2019.



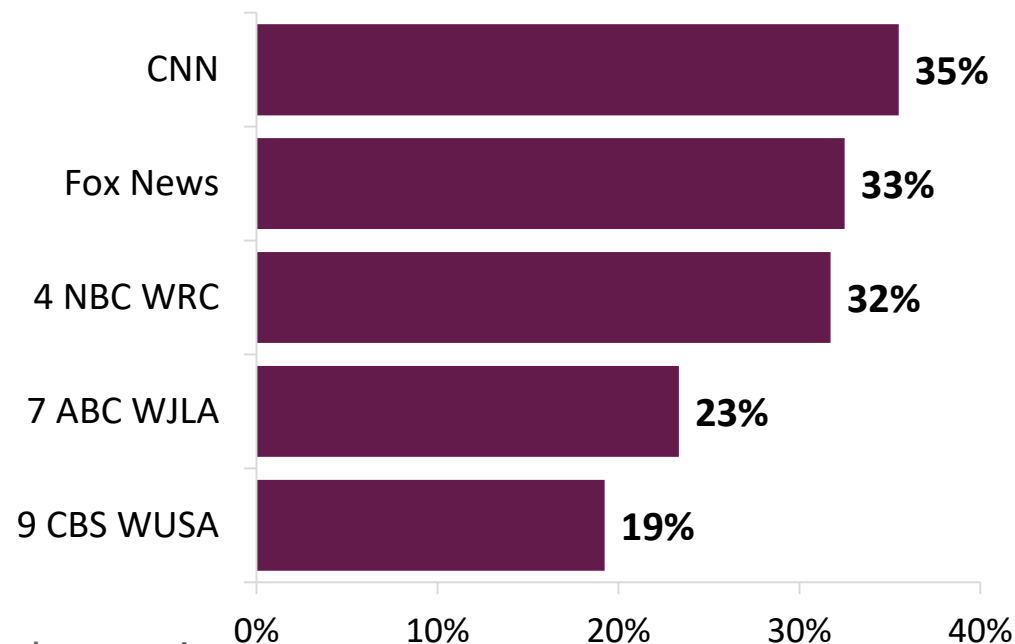
Good Morning DC! Starting Their Day

One in five federal employees start their day with broadcast/cable TV.

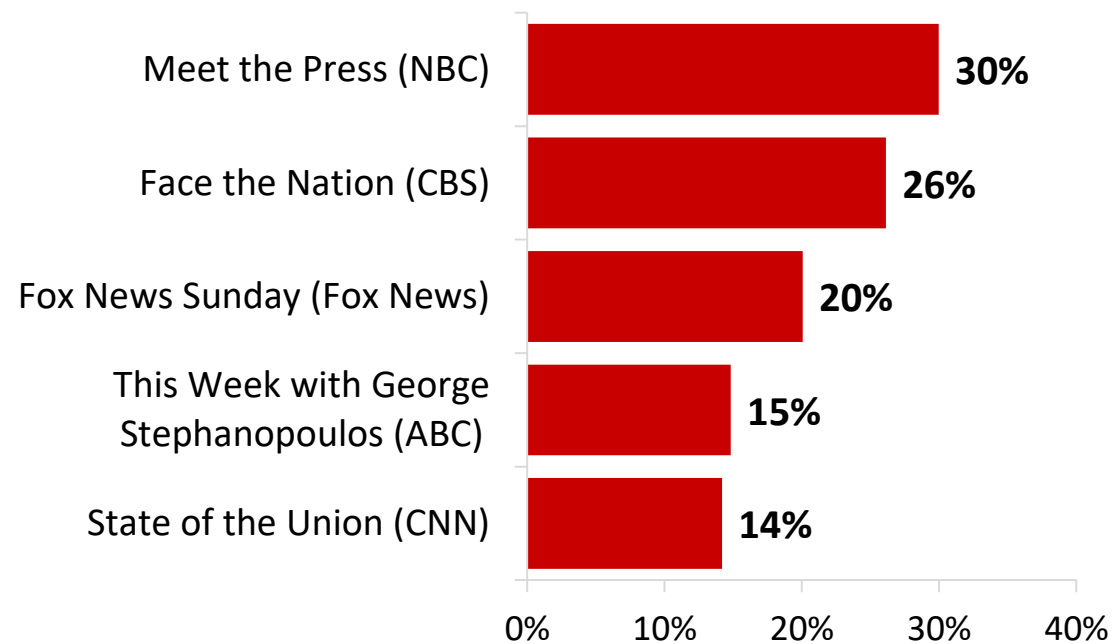


DC Overall TV Viewership Throughout the Day

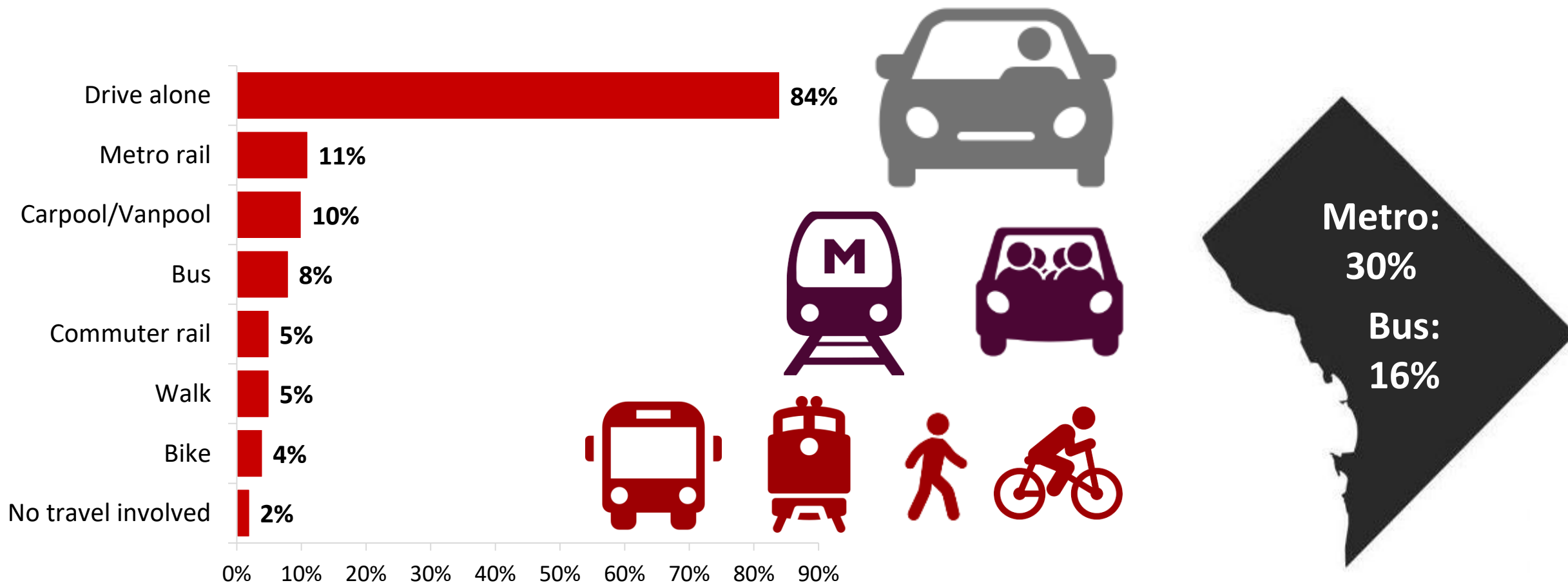
TV News Channels



News Programs



Getting to the Office: Primary Mode of Transportation



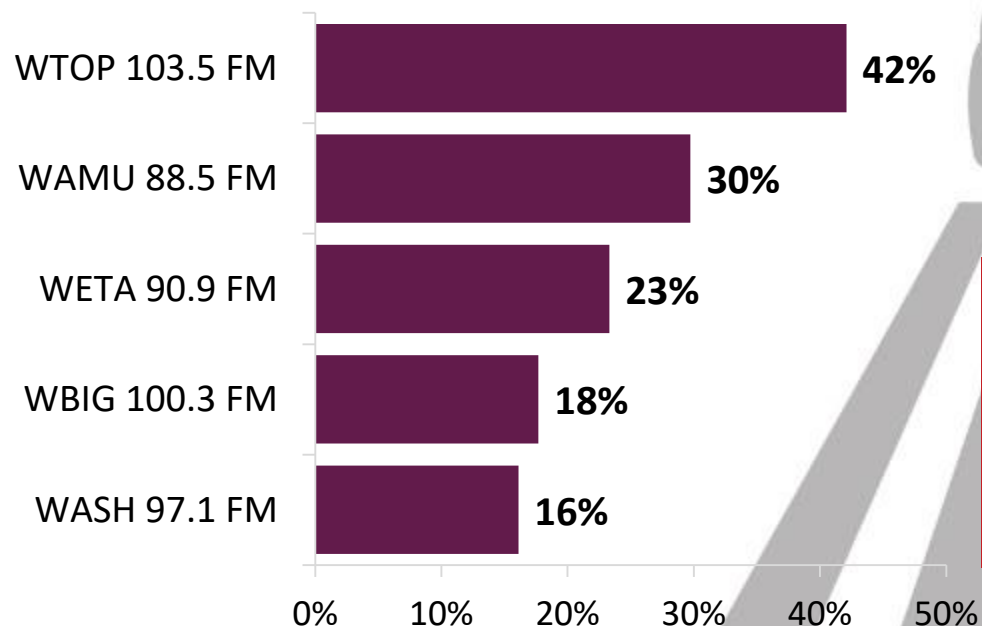
Getting to the Office: Feds Tune In

Half of respondents listen to AM/FM radio, followed by one-quarter listening to satellite radio.

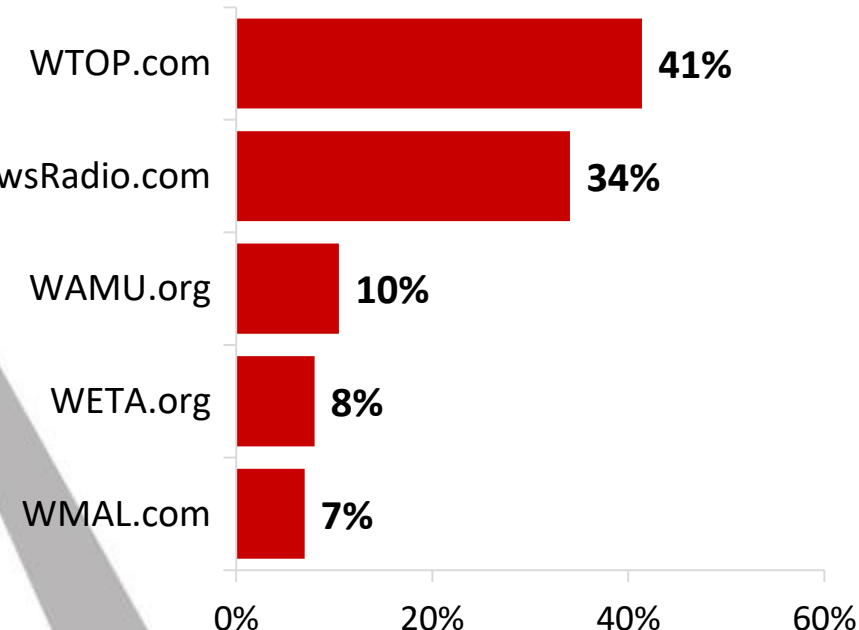


DC Listenership Throughout the Day

Radio Stations



Radio Websites



**Average morning
commute time:**
35 minutes
DC:
44 minutes

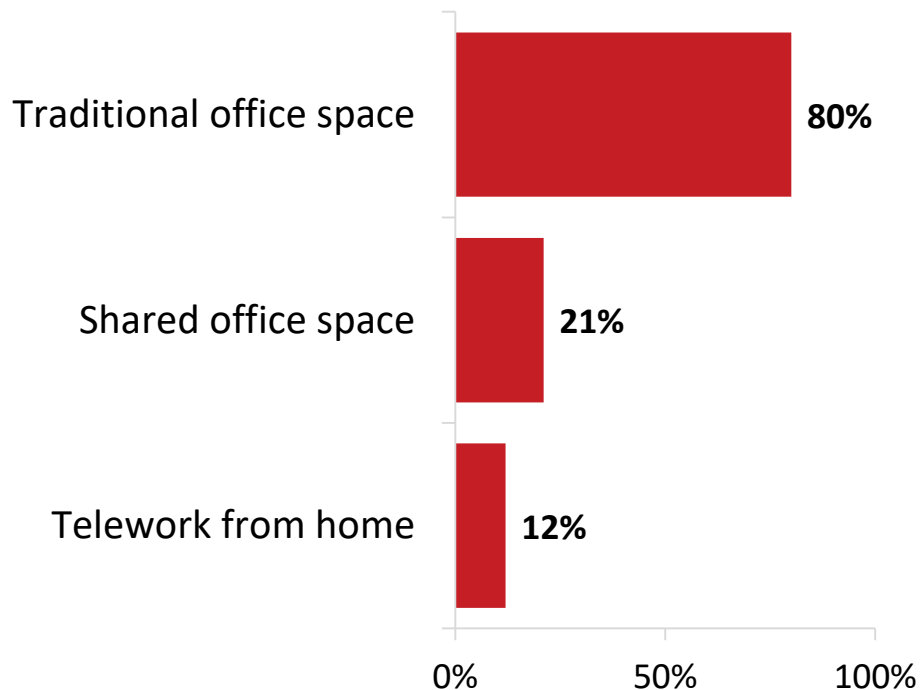


Entering the Workplace

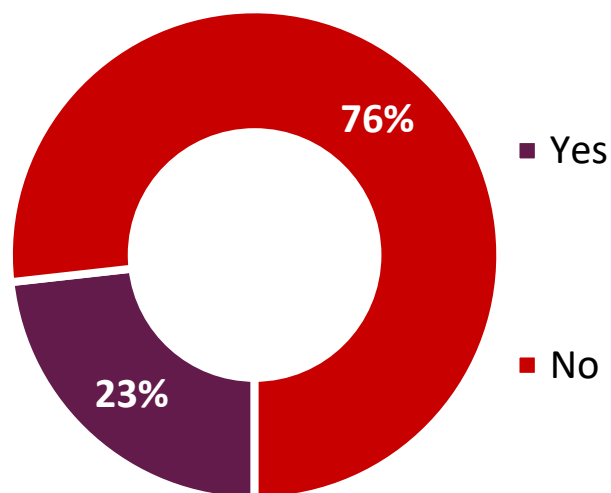
Three-quarters of federal employees have ungated access through their mobile devices in their workplace.



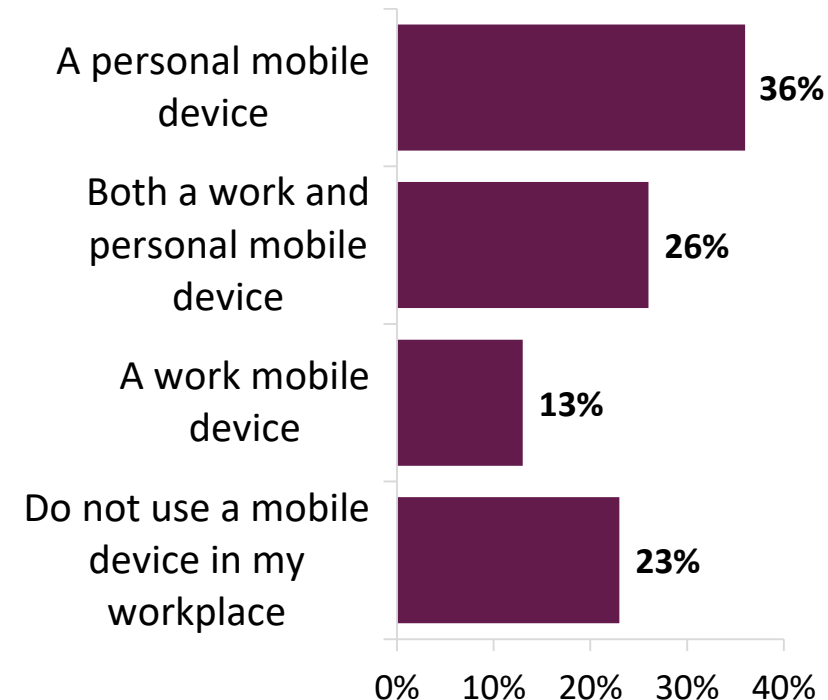
% Always/Often



Works in a Secure Space Where Personal Mobile Devices Are Prohibited



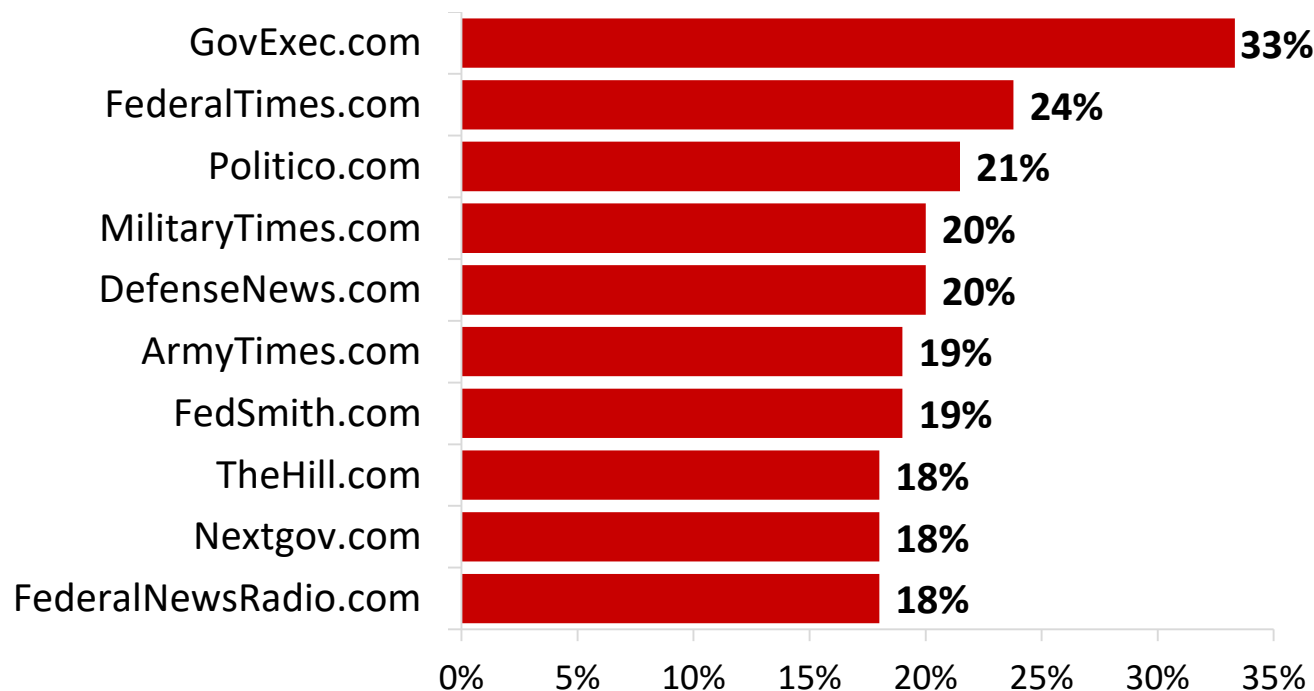
Mobile Device Use in the Workplace



Feds Catch Up on News from Digital Sites in the Workplace

One-quarter of federal employees reveal they are going to digital news sites during the workday.

Top Federally Focused Digital Sites Visited



Top General Digital Sites

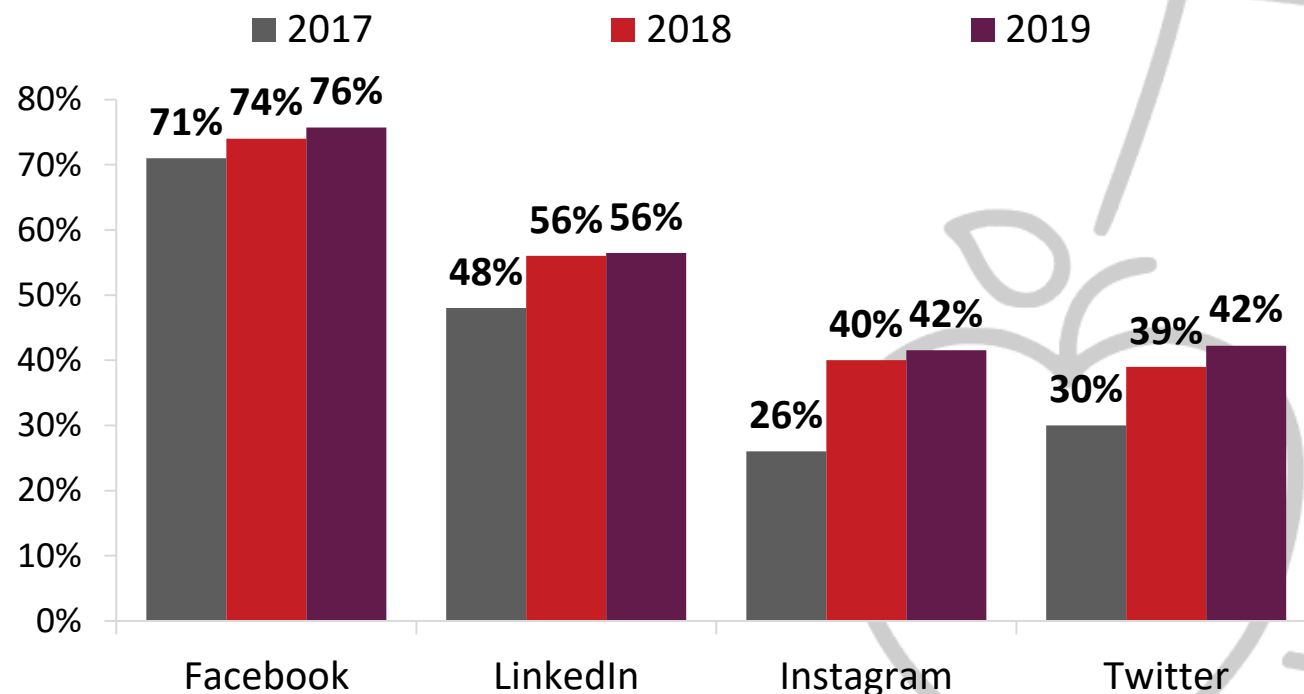
57% - Weather.com
47% - FoxNews.com
44% - CNN.com
38% - AccuWeather.com
36% - WashingtonPost.com



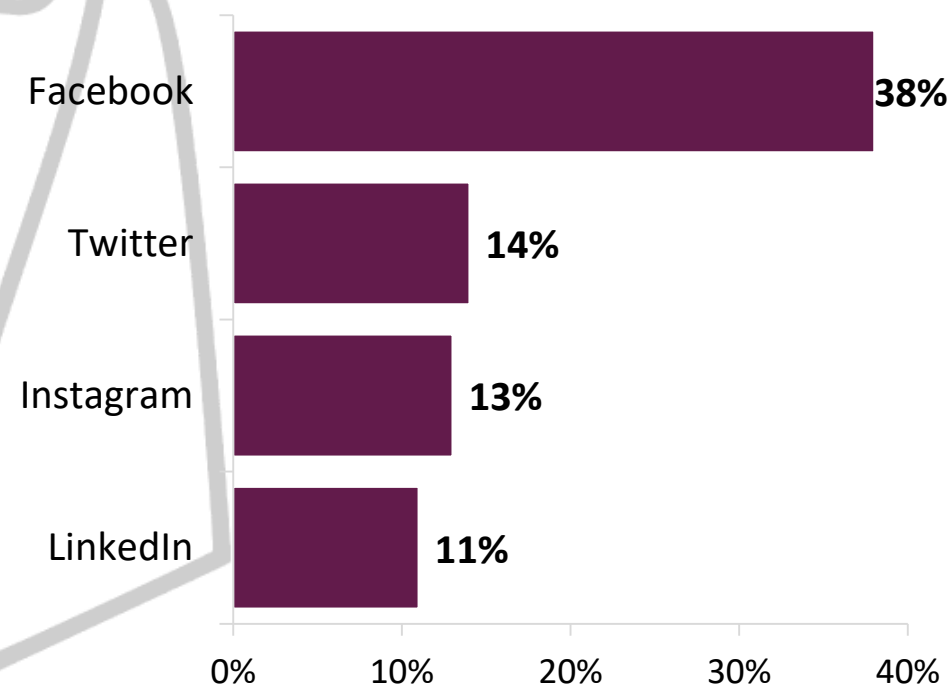
Lunch Is for Socializing

More than any other activity, more than 1 in 5 feds are scrolling their social media during their lunch break.

Top Social Sites: 2017-2019



Daily Online Social Site Use

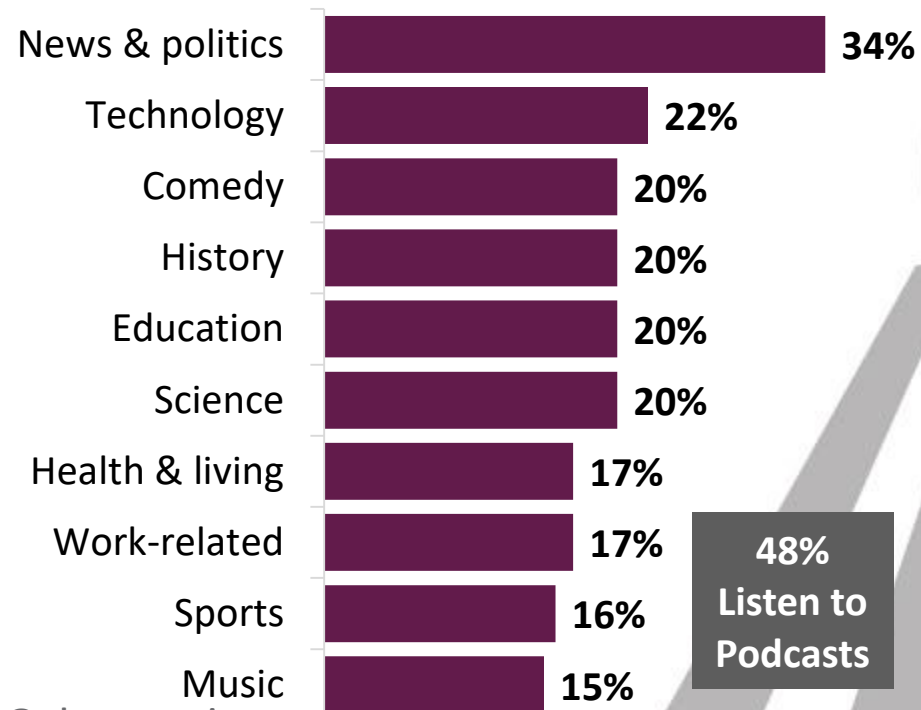


Driving Home: Radio Still Rules, Followed by Podcasts

While AM/FM radio is still the top activity, 1 in 5 note listening to satellite radio and 1 in 10 are listening to podcasts.



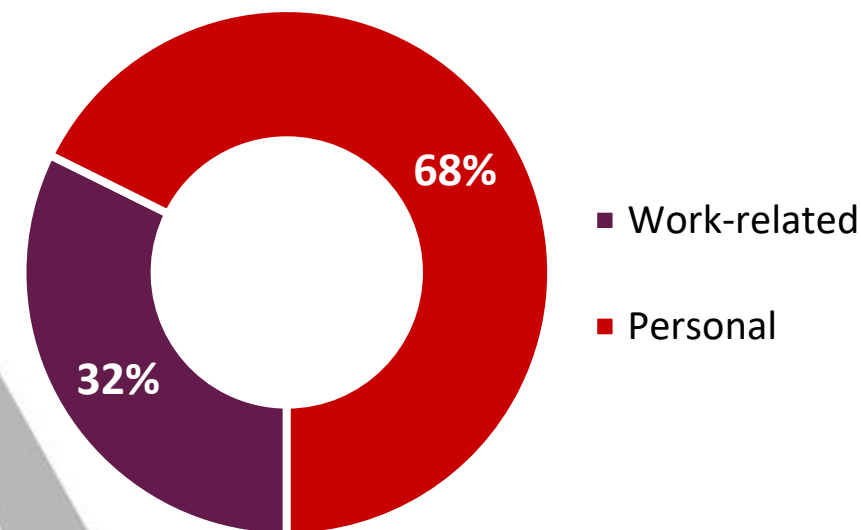
Types of Audio Podcasts Listened To



48%
Listen to
Podcasts

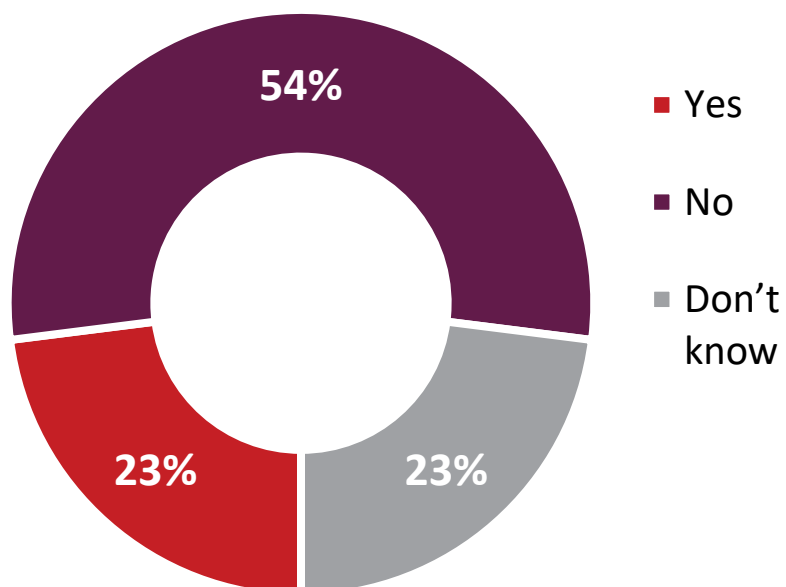
Average evening
commute time:
39 minutes
DC:
49 minutes

Average Percentage of Time Spent Listening to Podcasts

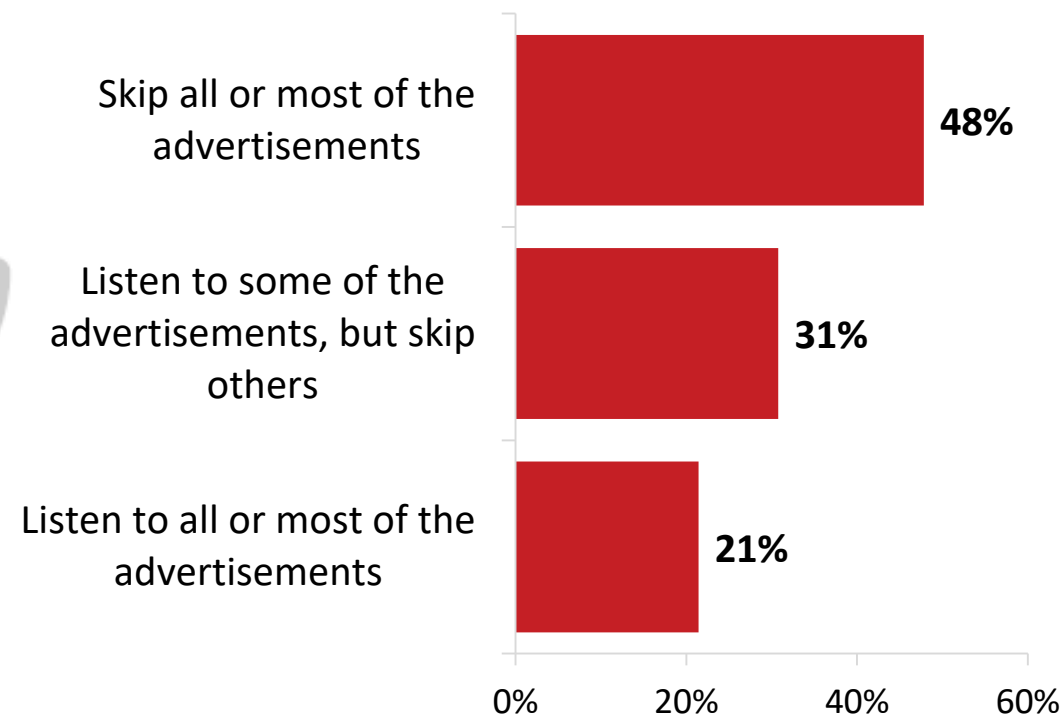


Ads in Podcasts – Are Feds Paying Attention?

Have Heard a Work-Related Ad During a Podcast



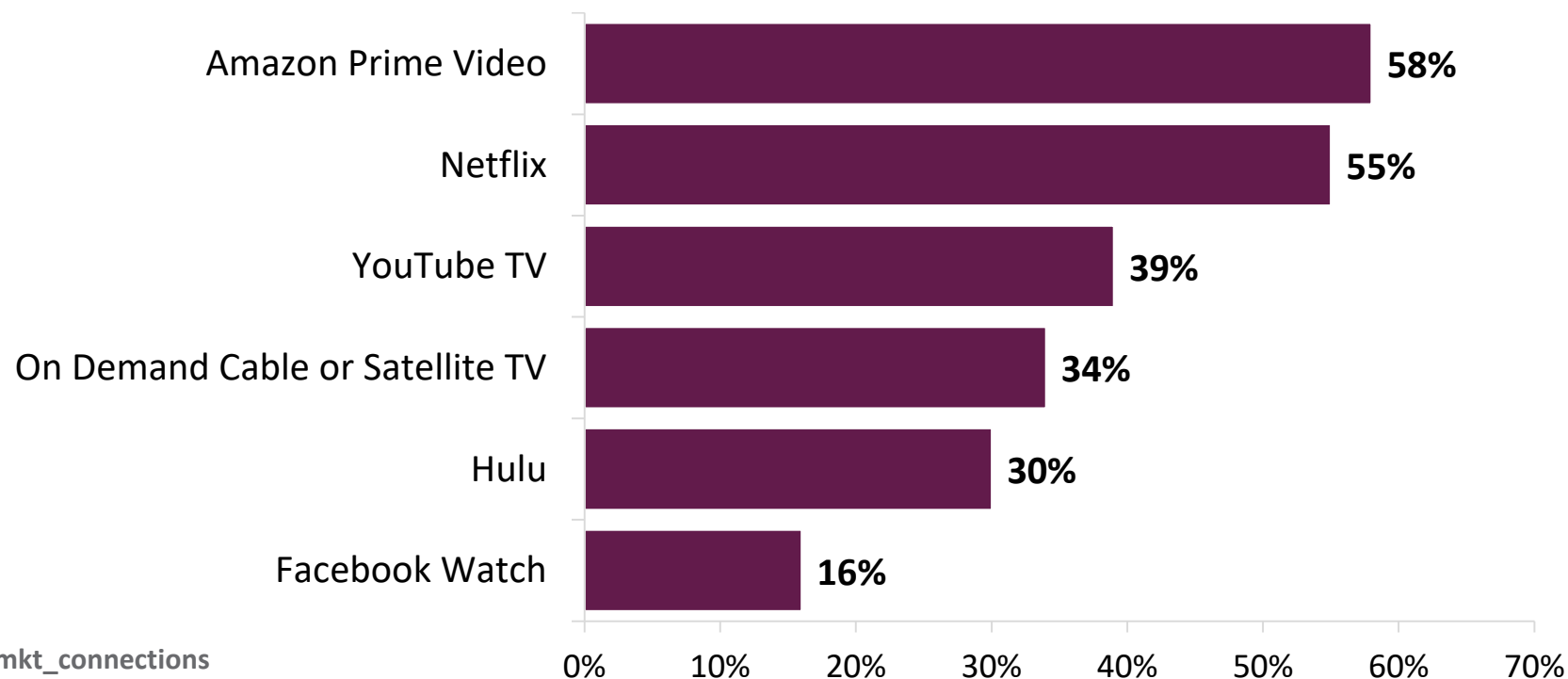
Listening to or Skipping Ads in Podcasts



Winding Down at Home – Evening Habits

Second only to broadcast TV, nearly half of respondents (45%) are watching online streaming video.

Top Online Video Streaming Sites

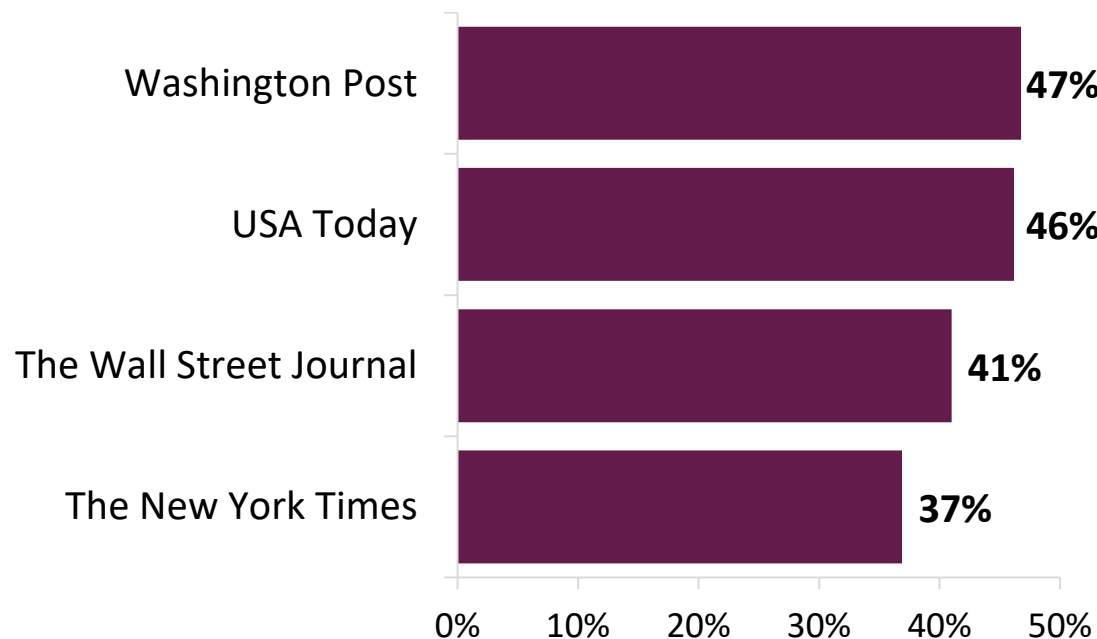


Winding Down at Home – Evening Habits (cont.)

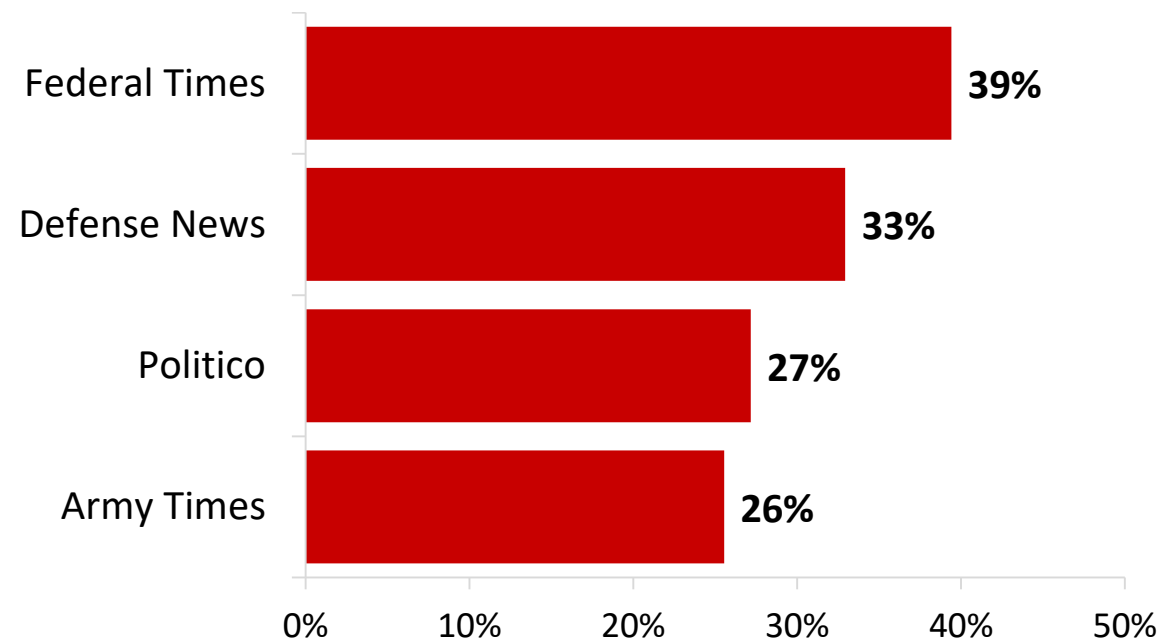
Reading print news peaks in the evening. Nearly one-quarter of respondents say they read national or local print publications in the evening.



Top Four General Print News Publications

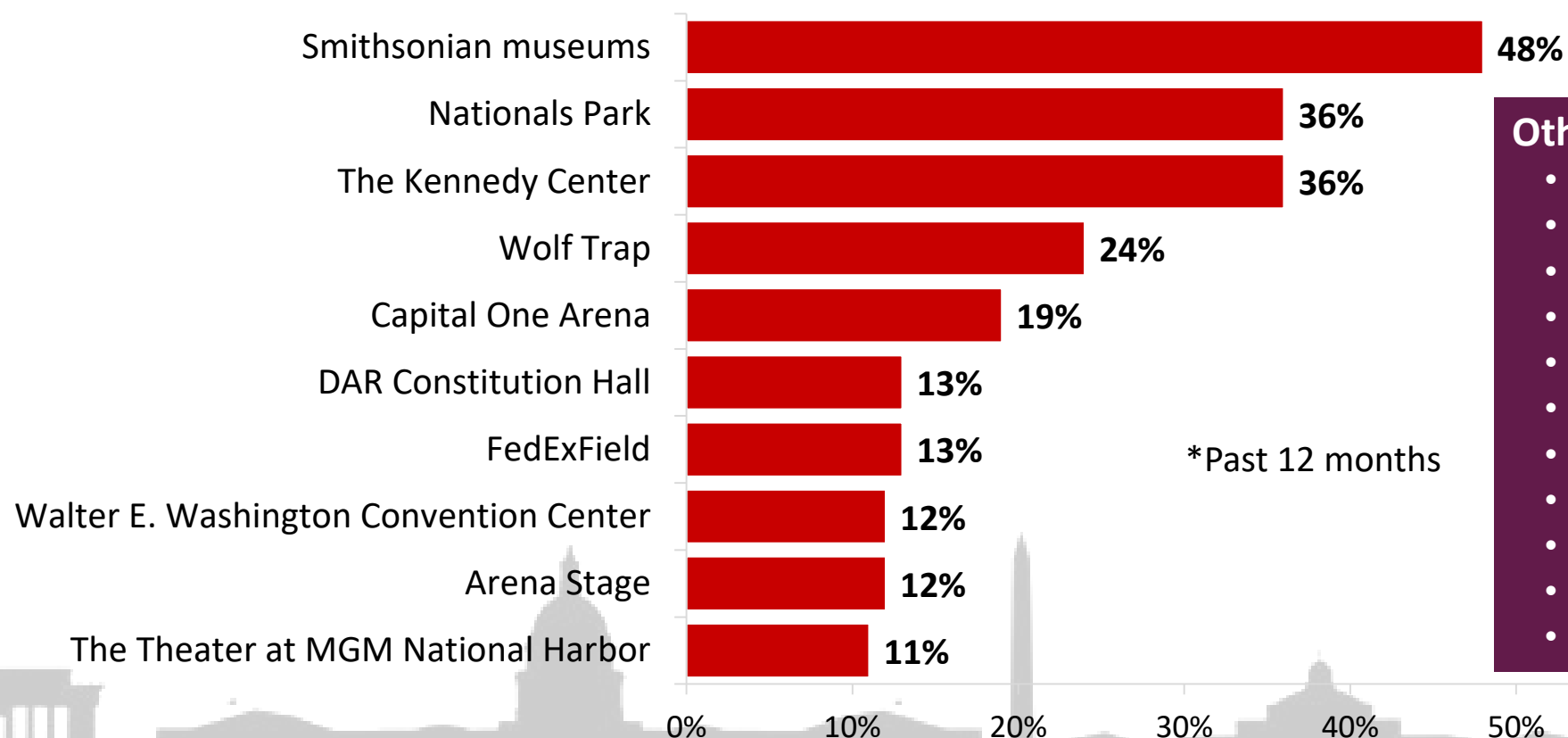


Top Four Federal/Congressional Print News Publications



Winding Back Up? – Evening Habits (cont.)

TOP DC AREA VENUES*



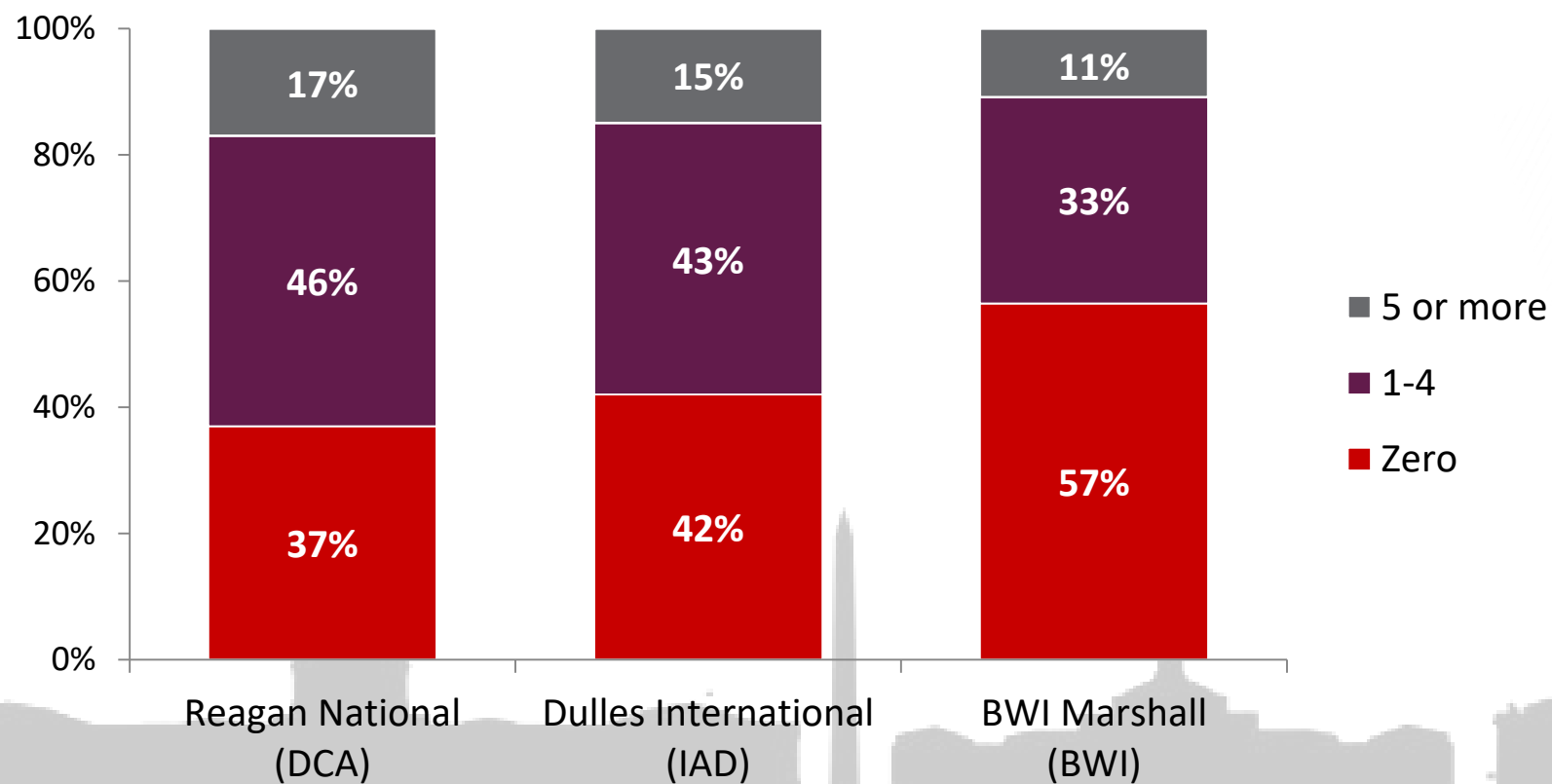
Other venues in survey:

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



Heading Out? – Evening Habits (cont.)

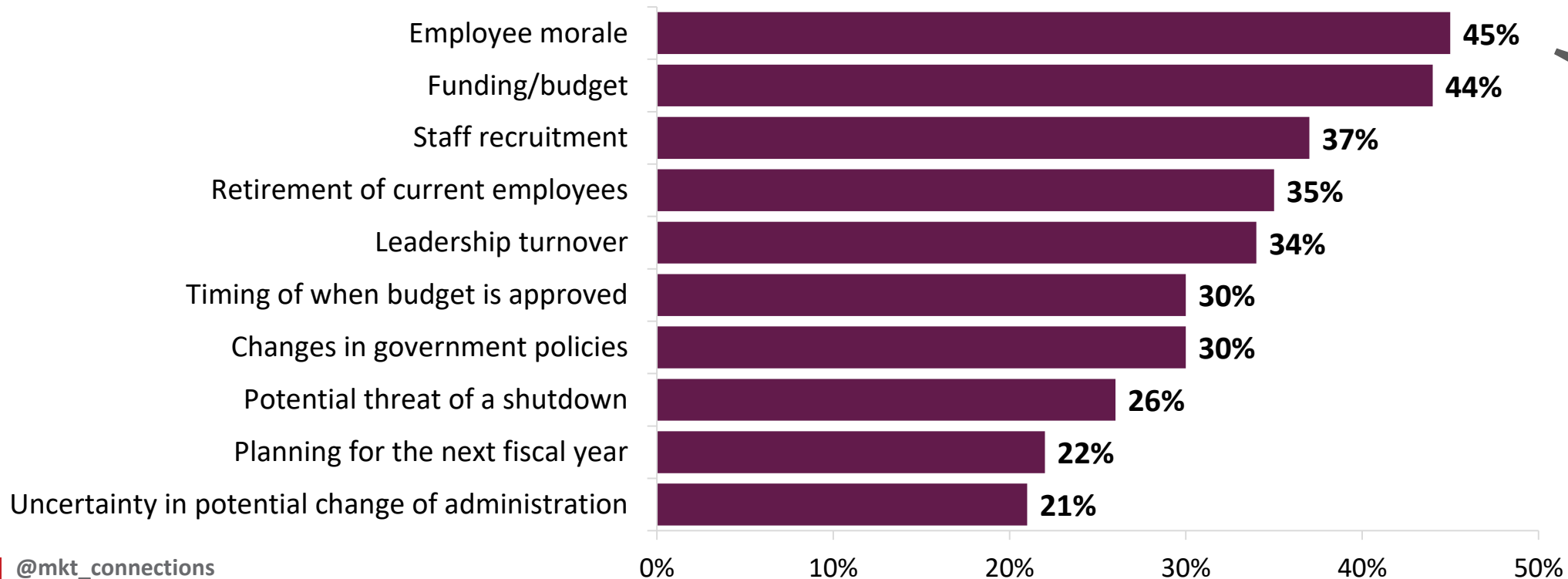
DC AREA AIRPORT TRIPS



What Keeps Feds Up at Night


TOP WORK-RELATED CHALLENGES

Employee issues like morale, staff recruitment, employees retiring, and leadership turnover are major concerns for our customers.



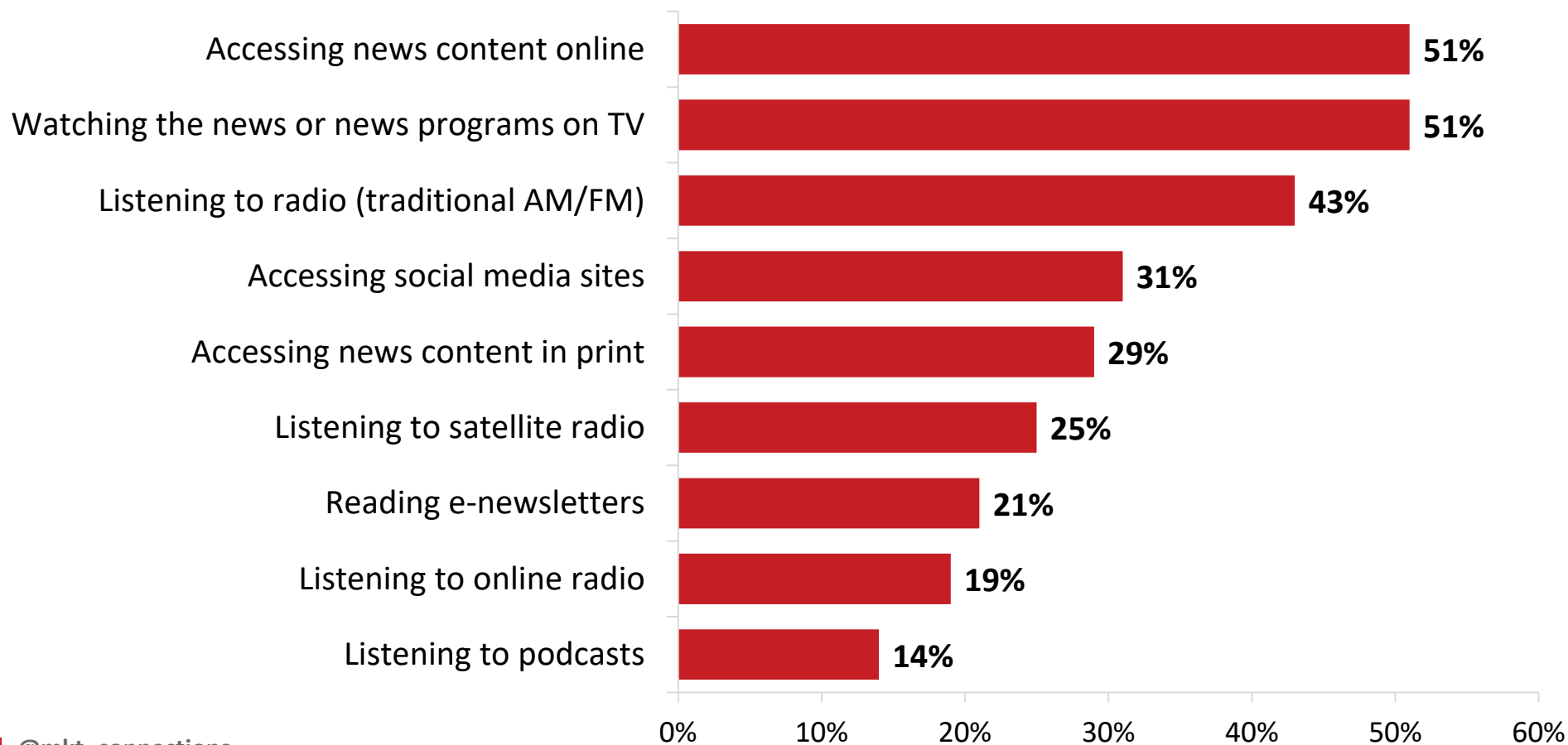
Defense	Fed Civ
37%	50%



The background of the slide features a grayscale image of classical architecture, specifically the upper portion of a temple facade. It shows two large, fluted columns supporting a heavy entablature with a decorative frieze. The lighting is dramatic, with strong highlights and deep shadows.

News, Trust and Confidence in Media

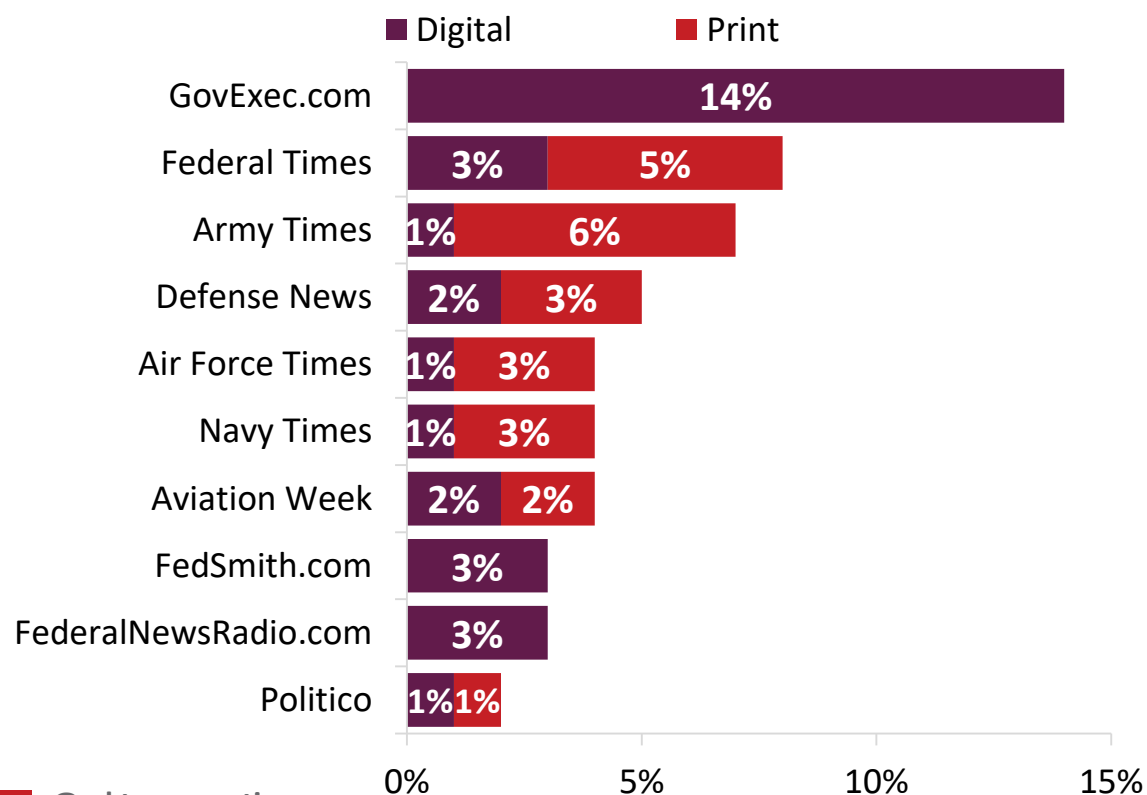
Time Spent on an Average Workday: 15+ Minutes Per Day



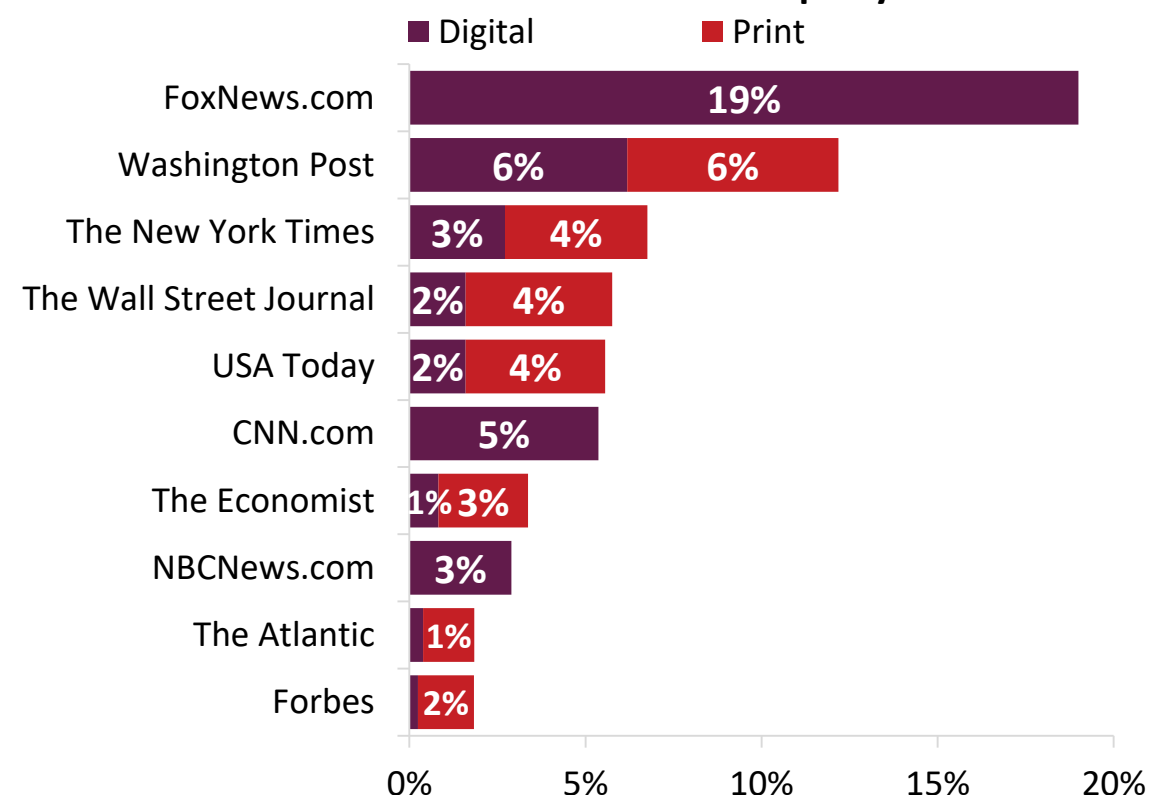
Digital or Print Go-To Source for News

Respondents could select one digital or print media property as their “go-to” for news.

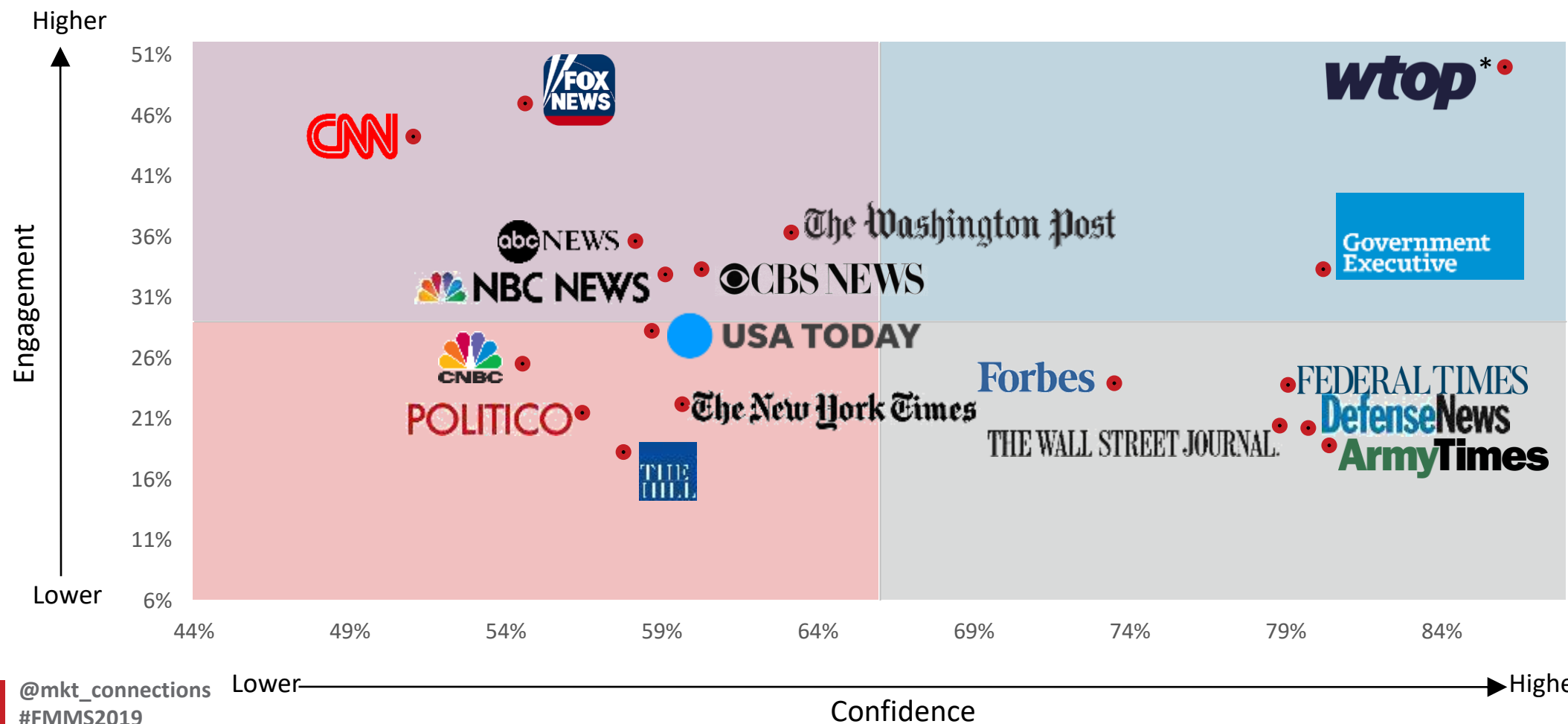
Go-To Government-Focused Media Property



Go-To General Media Property



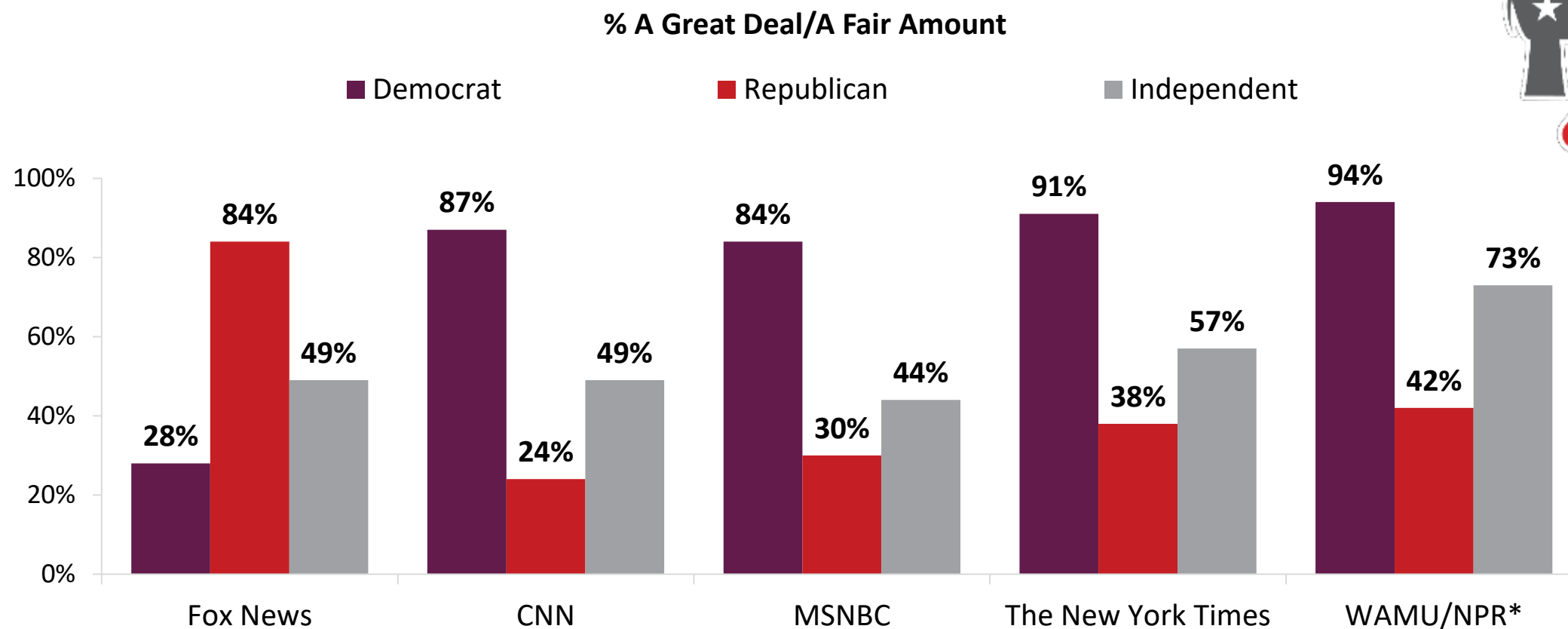
Marketing Impact



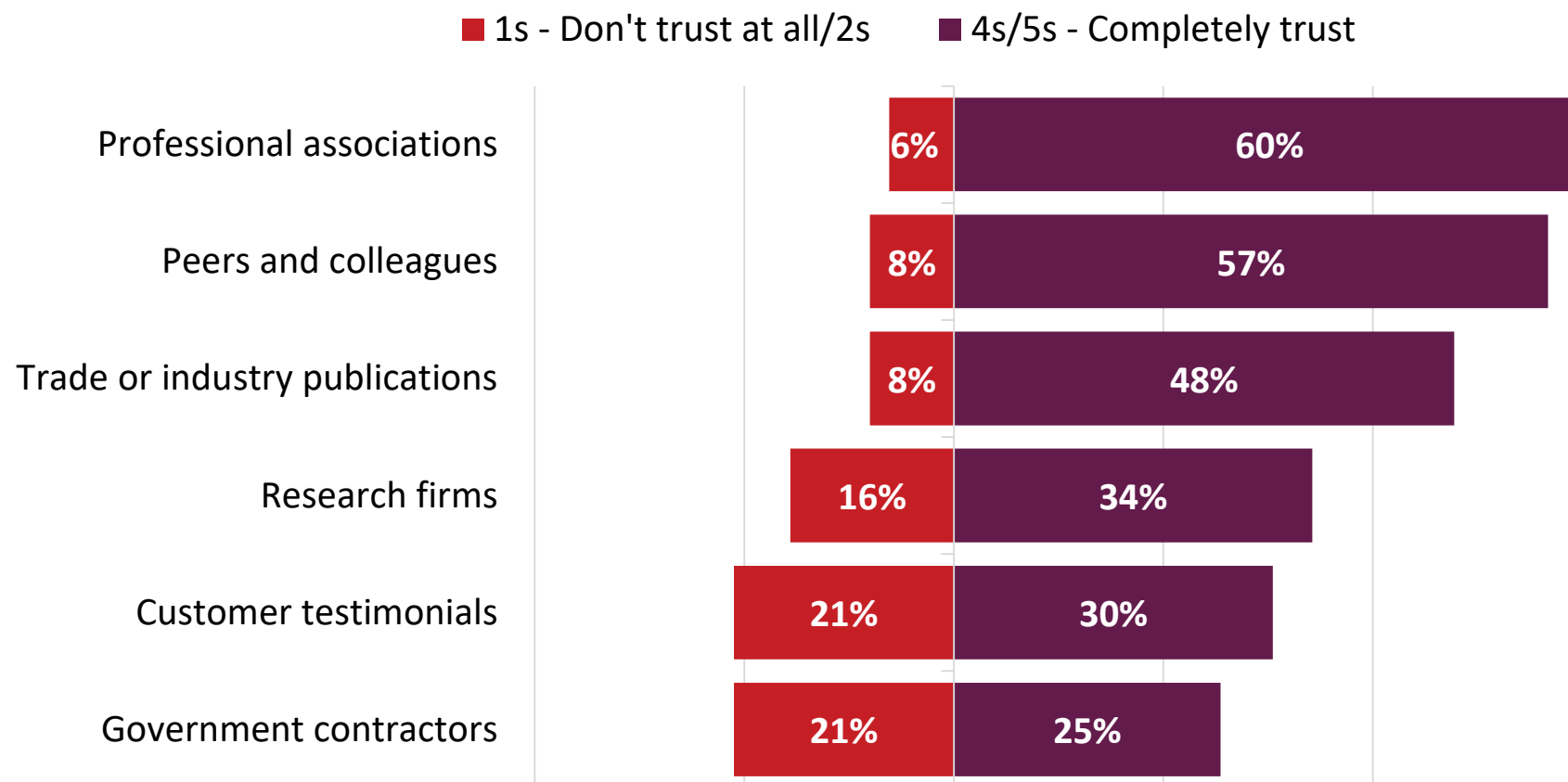
@mkt_connections
#FMMS2019

* Asked only in DC metro area

Confidence in News by Political Party: Top Five Gaps



Trusted Sources of Information

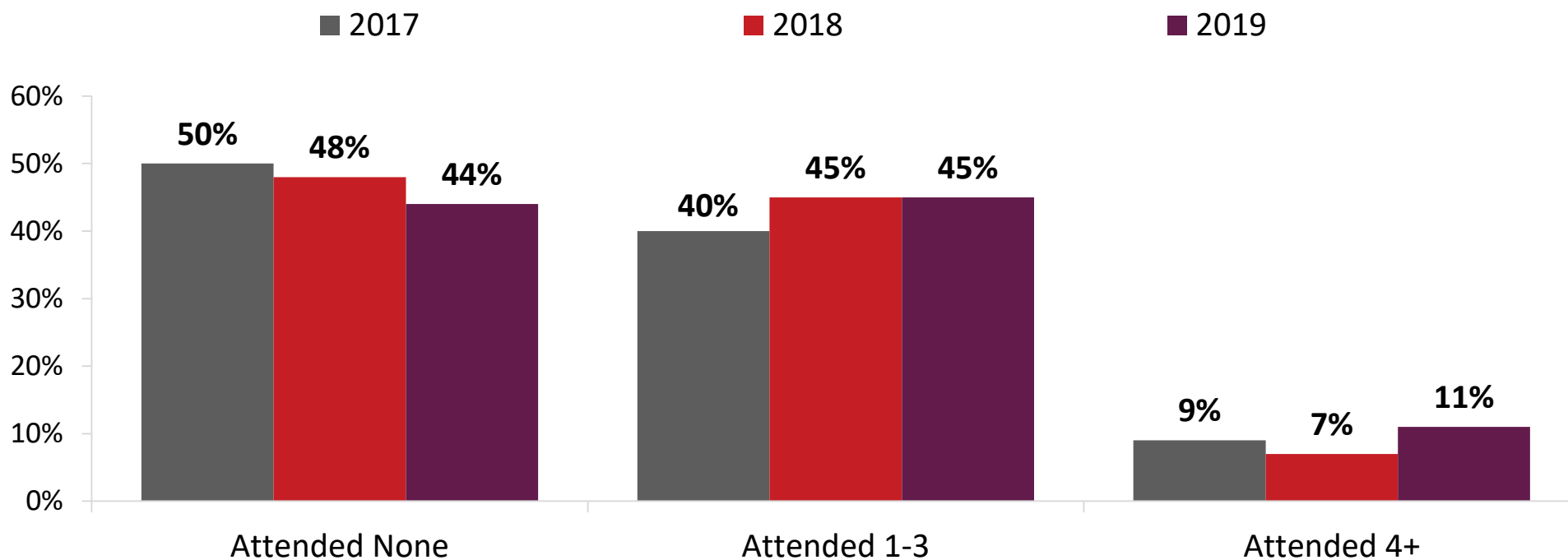




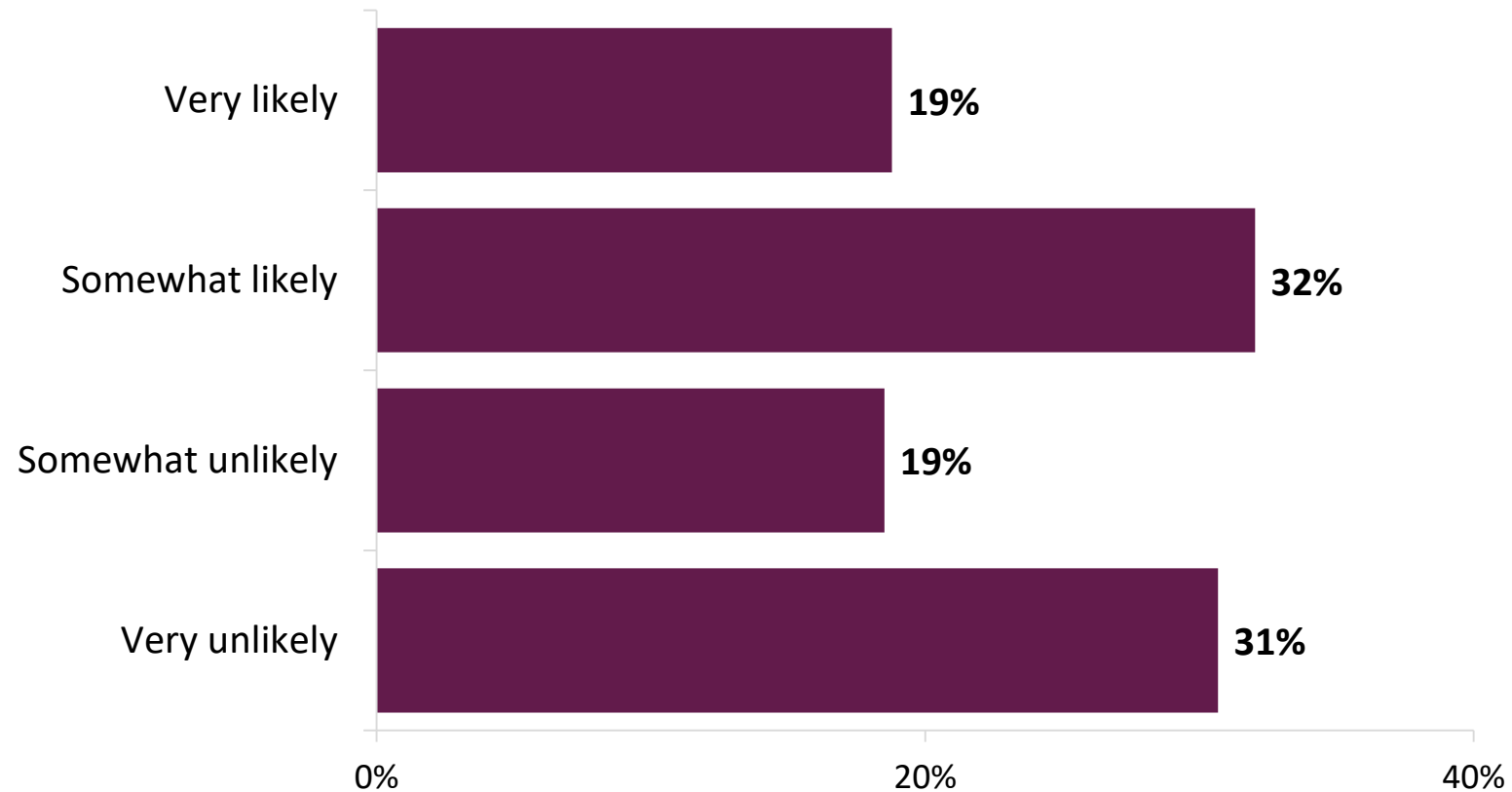
Marketing Beyond Media

TREND 2017-2019

Event Attendance in Past 12 Months

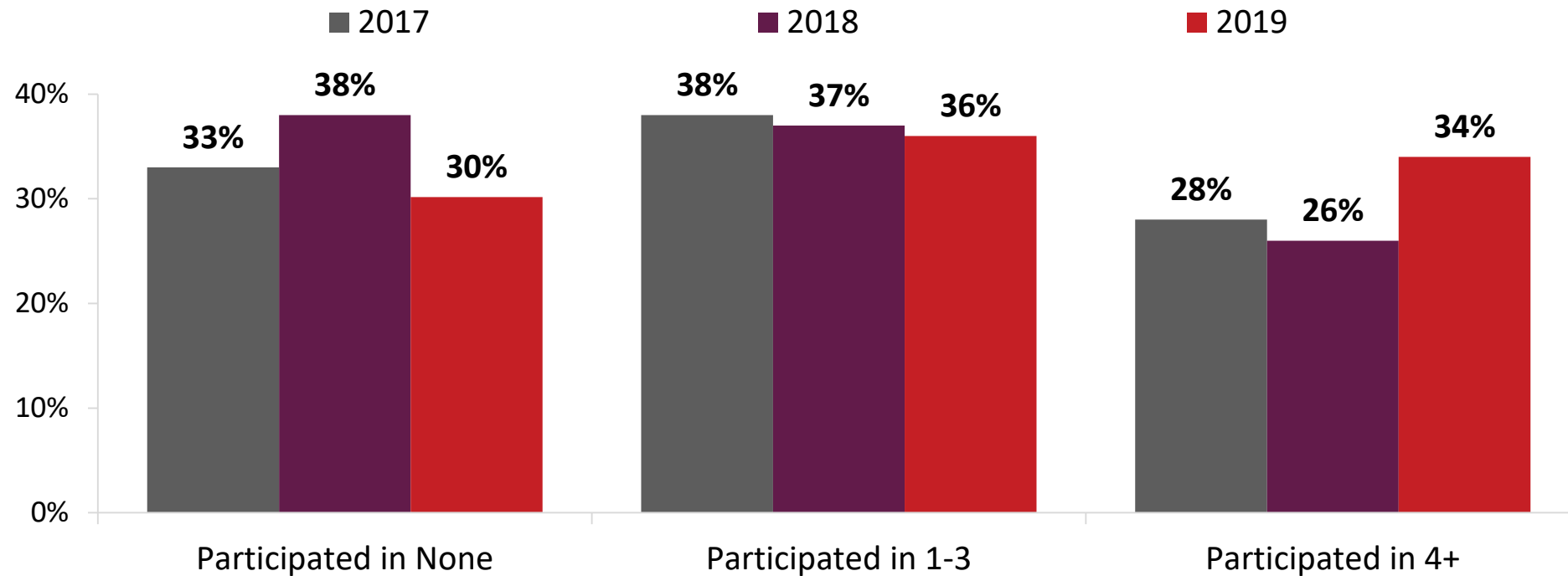


Likelihood to Attend Work Events on the Weekend



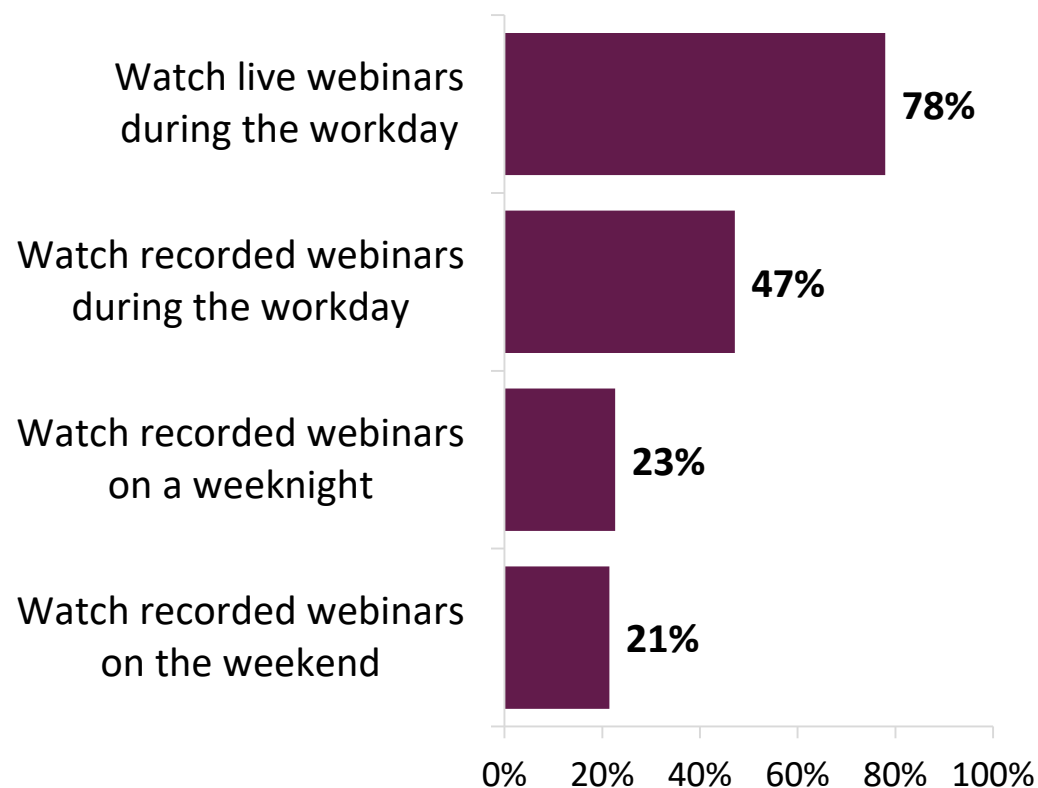
TREND 2017-2019

Webinar Participation in Past 12 Months

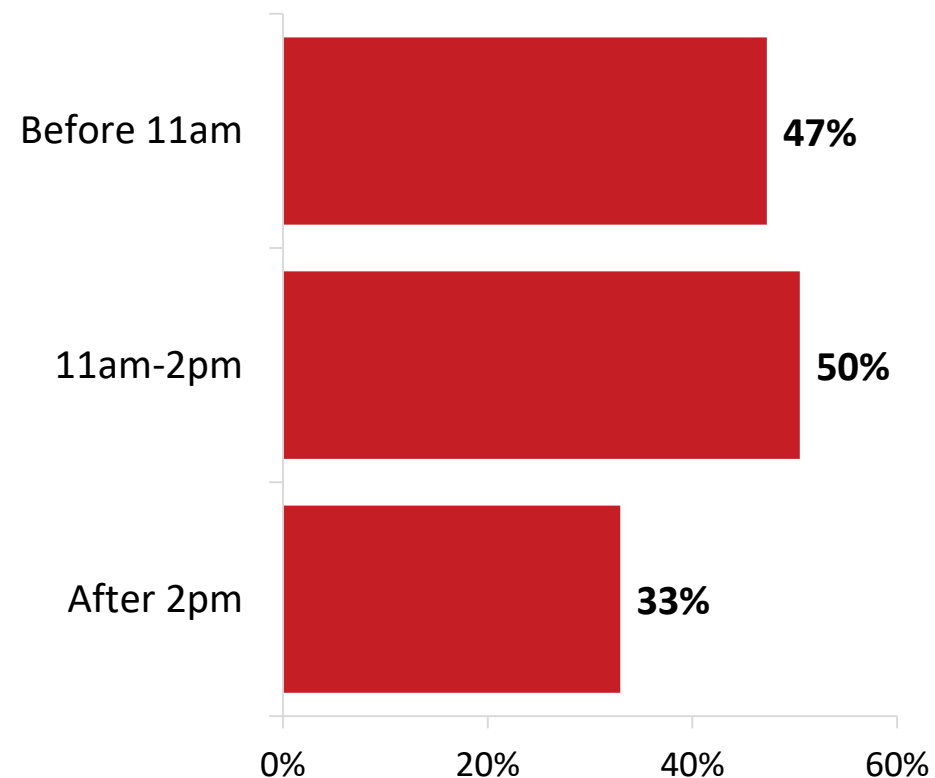


Participating in Webinars

Ways of Participating in Webinars



Preferred Time to Participate





| Key Takeaways

Key Takeaway #1



- ***Maximize the Journey: Consider how your media might reach your audience and when***
 - Radio still maintains a strong presence in the marketplace during the commute.
 - Daytime is the time to highlight digital media.
 - Social media can connect during the day.

Key Takeaway #2



- ***Take Measure of the Message: Build your message around needs and concerns***
 - Federal workers are faced with budget challenges, low morale and increased responsibility. How can you help?
 - How can you use the right channel to get to them when their needs are the greatest?

Key Takeaway #3



- ***Rebuild the Bridges: Connect with the market to build trust***
 - Educational materials (without a hard sales angle) can help rebuild relationships.
 - Meeting individuals in person and being a resource will help establish a long-term relationship.



Federal Media & Marketing Dashboard

Federal Media & Marketing Dashboard

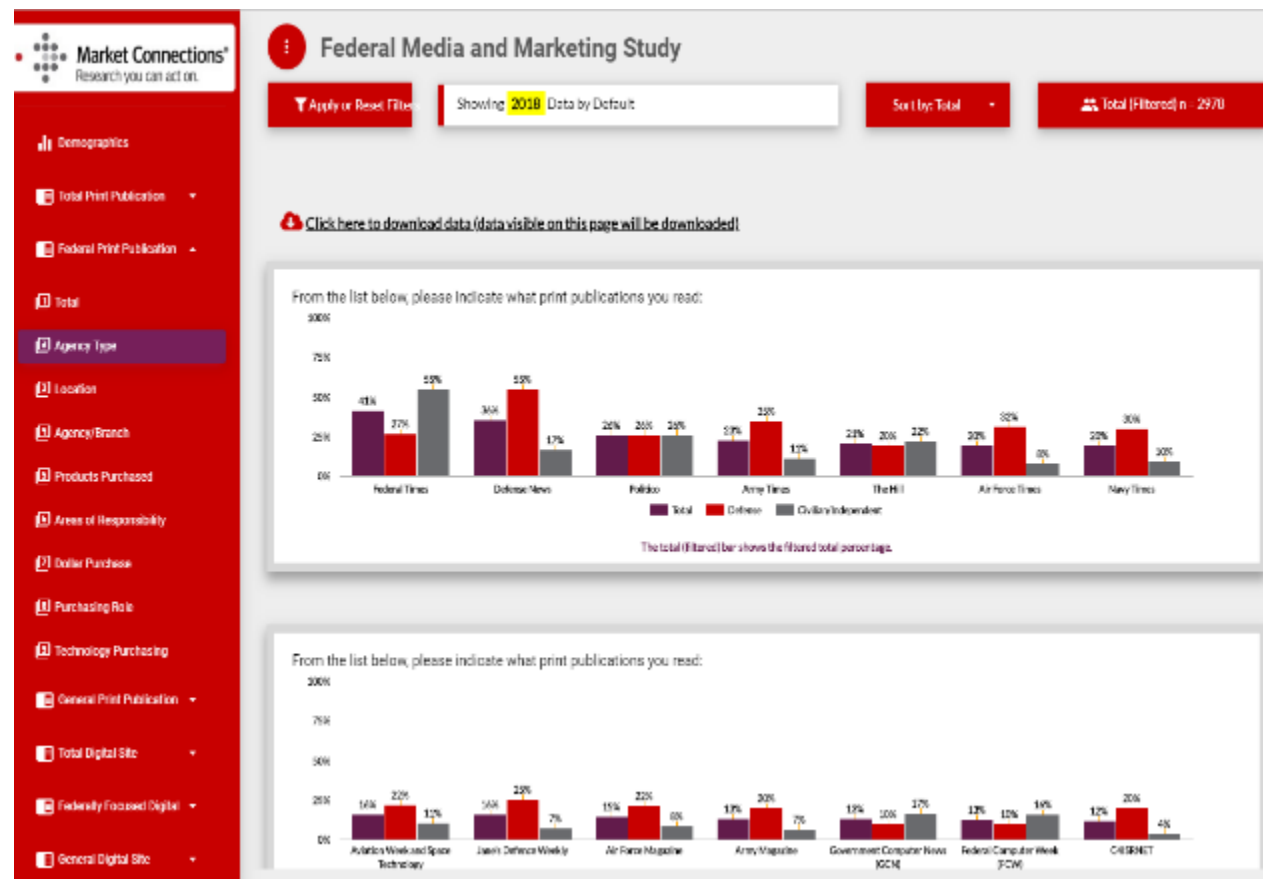
For more information and specific cuts in the data, an annual subscription helps plan your media strategy.

- 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



@mkt_connections
 #FMMS2019



New This Year

Beyond their business decisions, see insights on federal employees' major purchase plans for the next 12 months.

NEW!
2019

UNDERSTAND MAJOR FINANCIAL CONSIDERATIONS

- Financial products
 - Banking
 - Insurance
 - Retirement
 - More...
- Major purchases
 - Car/SUV/Truck/Van
 - Home
 - Renovations
 - Recreational vehicles
 - More...

The background of the image is a grayscale photograph of classical architecture. It features two large, fluted columns with prominent Corinthian capitals. The capitals are decorated with acanthus leaves and volutes. The columns are set against a wall of large, rectangular stone blocks. The lighting is soft, highlighting the textures of the stone and the fluting of the columns.

| Think “Strategy”

Media Strategy

Strategy will justify
your media allocation



WHERE IS YOUR AUDIENCE?

HOW ARE THEY SPENDING TIME WITH MEDIA?

- Location
- Time spent with the media
- Trusted sources
- Budgets

RESULT: MEDIA ROAD MAP

Media Road Map

Targeting criteria

How much is enough?



LOCATION

- 60% Inside the Beltway/40% National

AGENCY

- 50/50 Civilian and Defense Agencies

MEDIA ALLOCATION

- 40% digital (web and mobile)
- 15% print
- 30% radio/inside beltway
- 15% webinars and white papers
- Government and business media

Insights



INSIGHTS

- Strength of general business media
- Print and broadcast inside the beltway

Additional Resources



COMING SOON!

- White paper from Sara Leiman, VP Media Director at TMP Worldwide
- 2019 FMMS Overview Report (complimentary to attendees!)
- Single reports for target audiences including:
 - Department of Defense
 - Military branches
 - IT decision-makers
 - Others
- Social media among feds webinar