



Federal Media & Marketing Study 2019

Cloud Computing Purchasers
Edition



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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: 360)



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



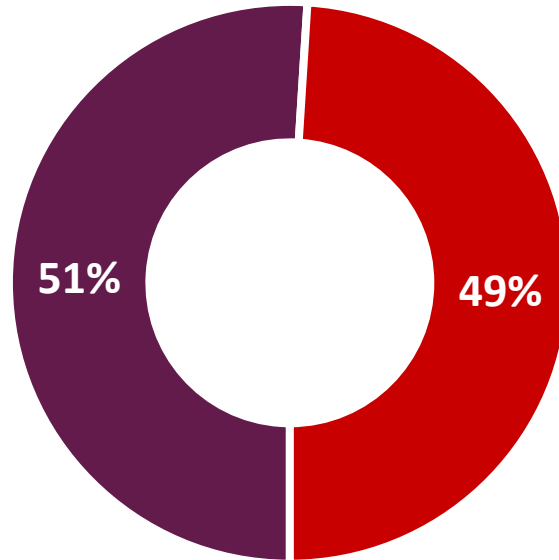


Demographics

DEMOGRAPHICS

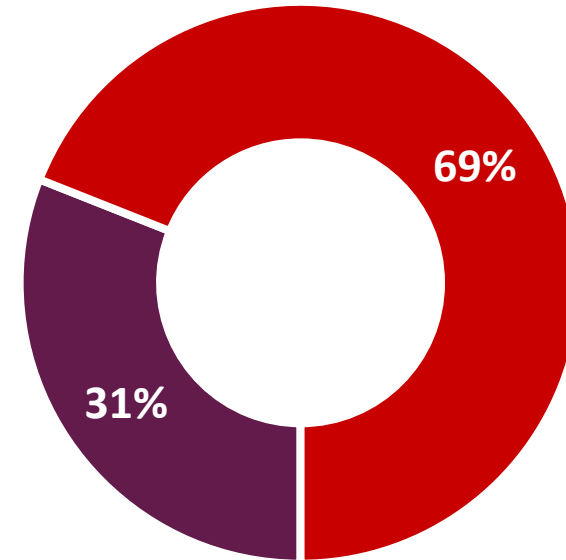
Agency Type & Location

Agency Type



■ Civilian or Independent ■ Defense or Military

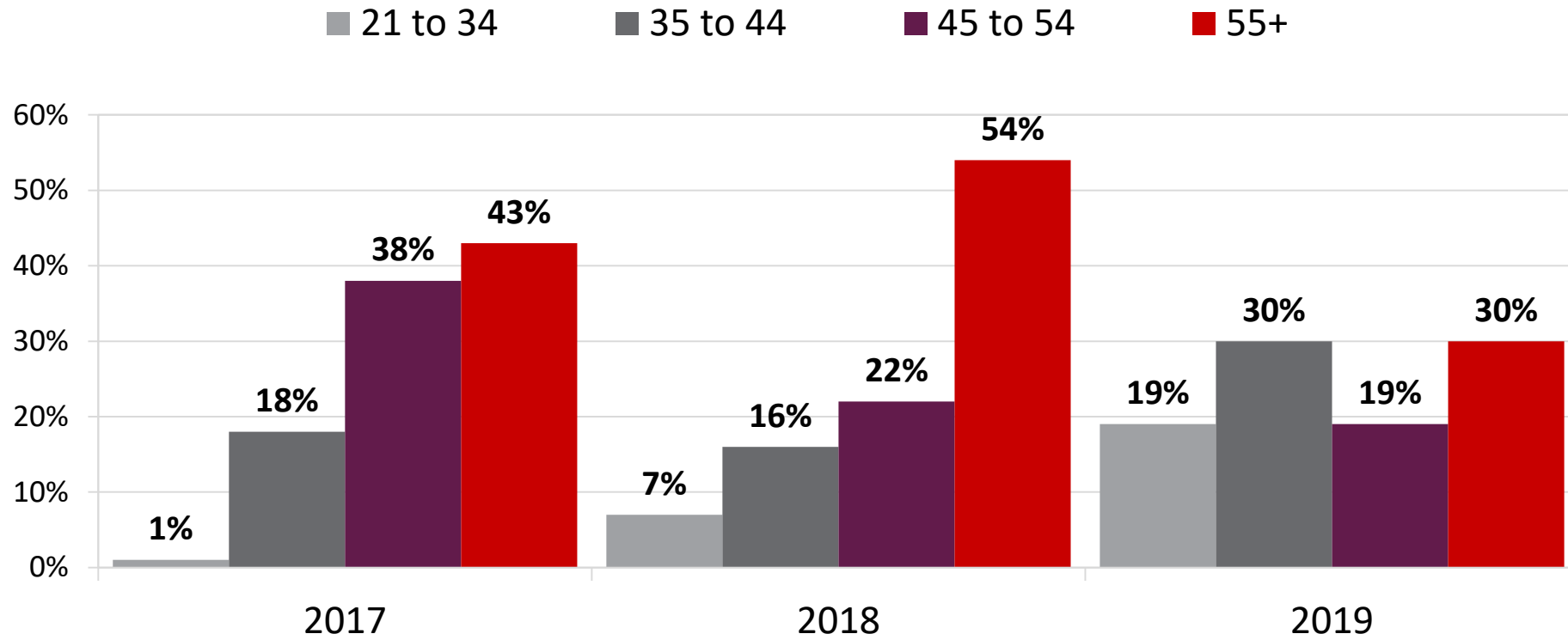
Location



■ Inside the Beltway ■ Outside the Beltway

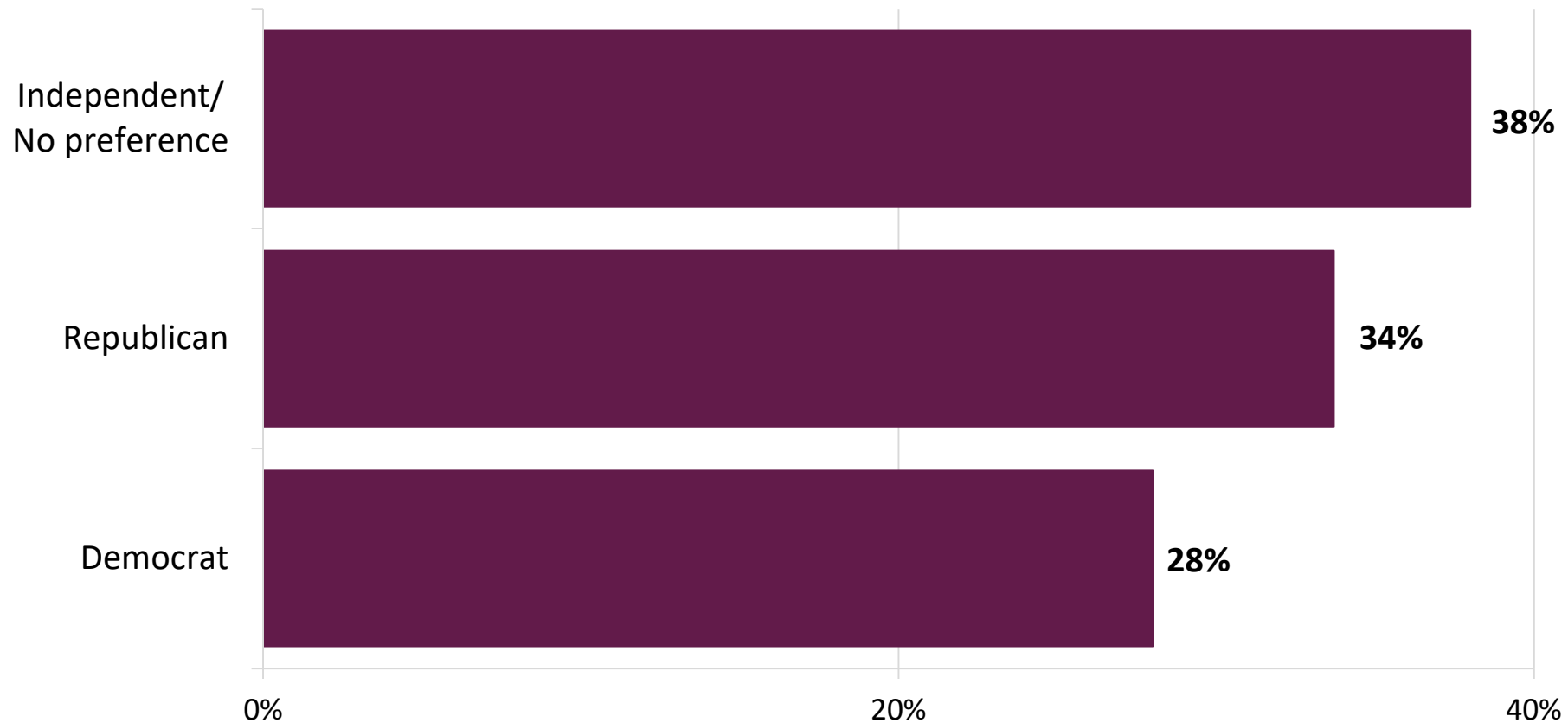
TREND 2017-2019


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
Informational technology, computers, systems	Cloud computing services
Cloud computing	Computer systems/hardware
Cybersecurity	Cybersecurity
Data science	Big data/analytics
Purchasing, contracting, procurement	IT services
Communications/telecommunications	Communications/telecommunications
Accounting, budget and finance	IT security
Project/program management	Software
Executive and command	Artificial intelligence
Intel/security	Consulting services



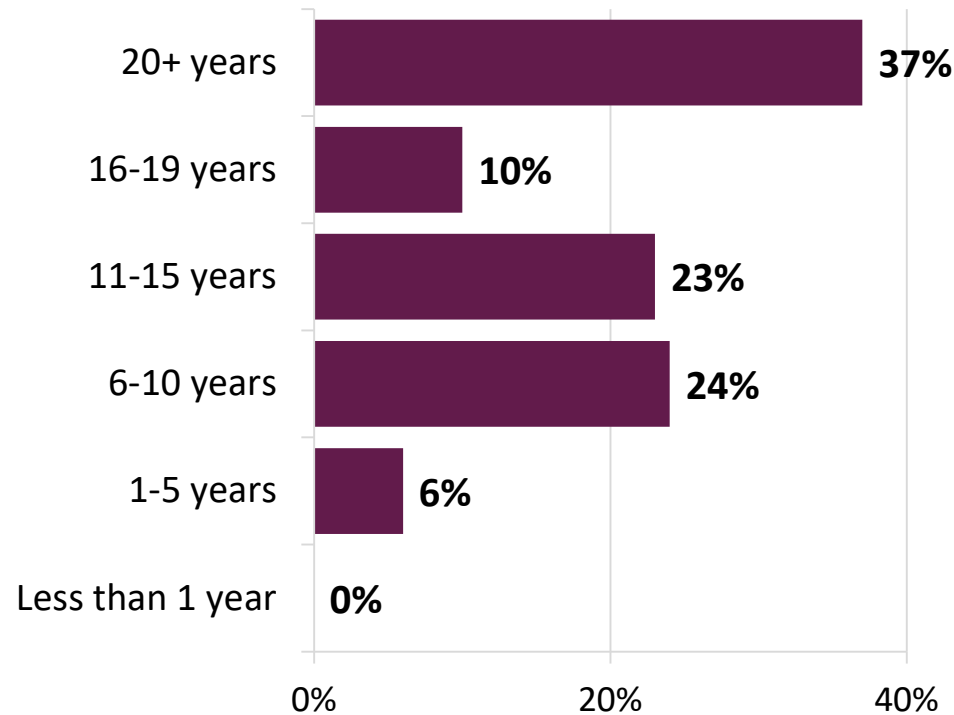
Which of these categories best represents your area of responsibility at work? (select all that apply)
 In the past year, for which of the following products or services have you been involved in the acquisition/procurement process (specify, evaluate, recommend, approve or buy)? (select all that apply)



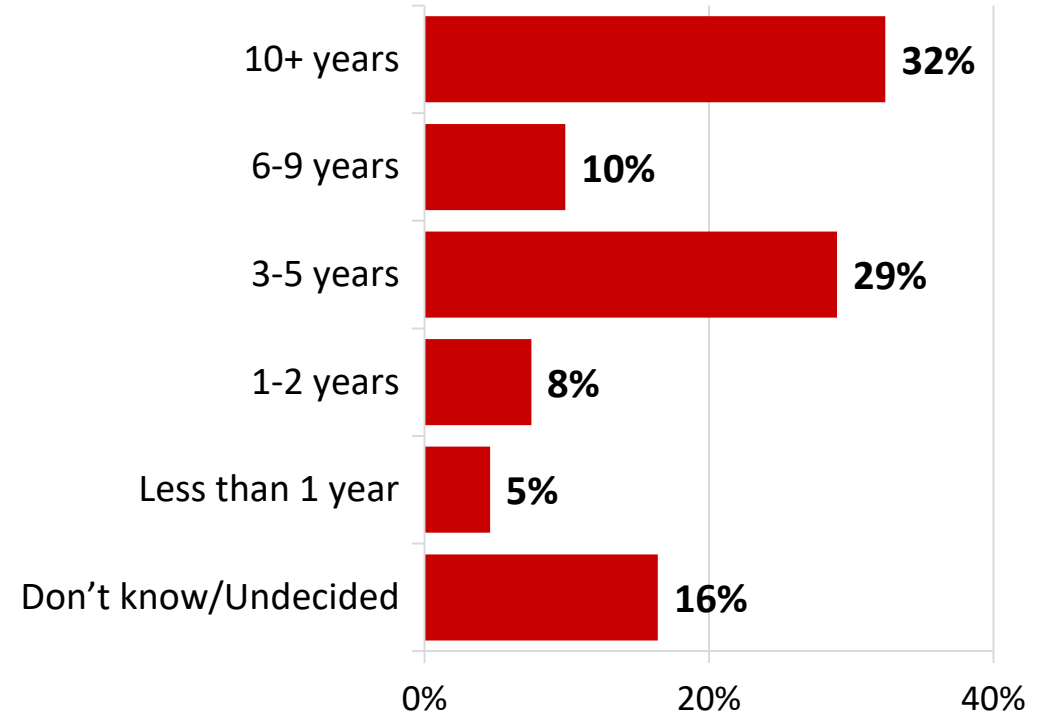
Federal Environment


Tenure & Time Remaining in Federal Employment

Total Years as a Federal Employee



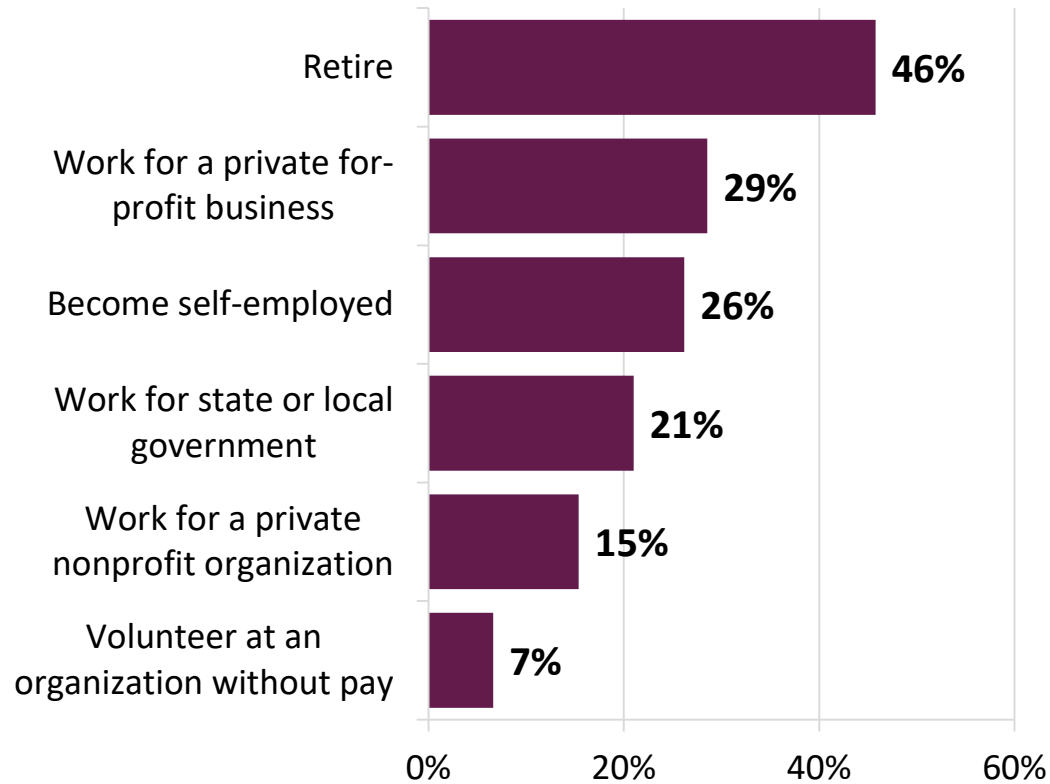
Years Until Leaving Federal Employment



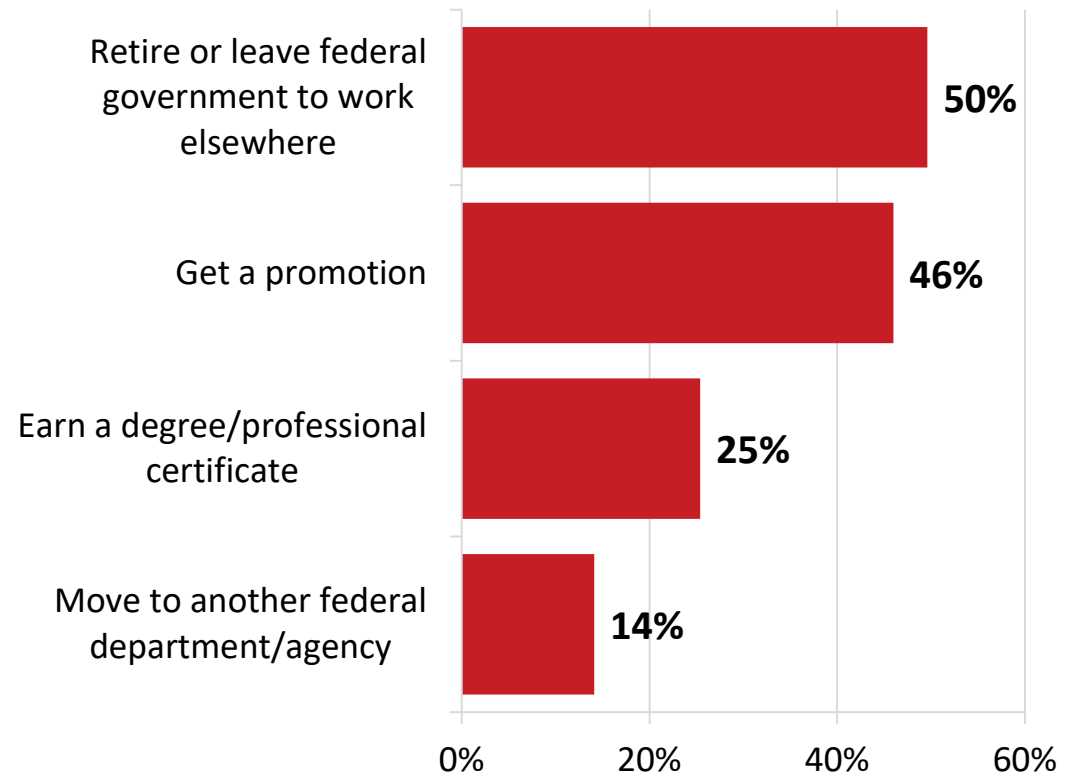
 How many years in total have you served as a federal government employee? (Include military service, if applicable.)
In how many years do you plan to leave federal employment?


Future Plans

Plans After Leaving Federal Employment

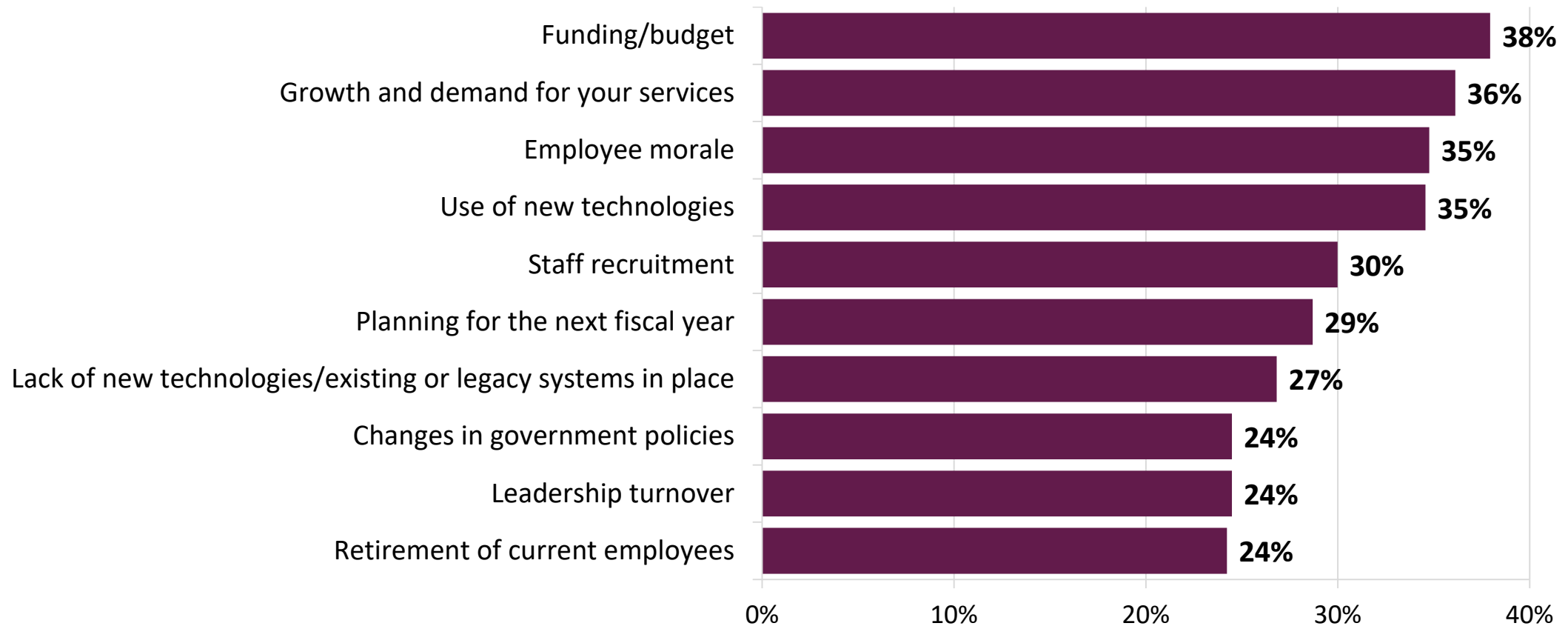


Career Plans for the Next 5 Years



 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)

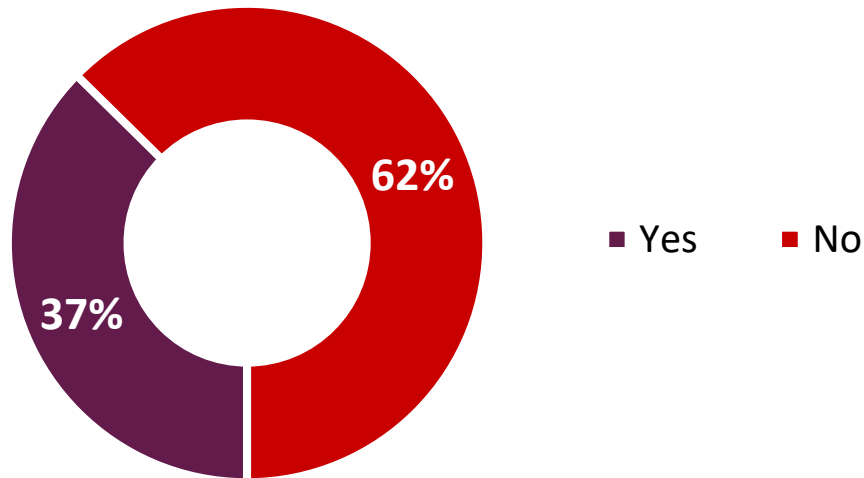
Top Work-Related Challenges Over Next Year



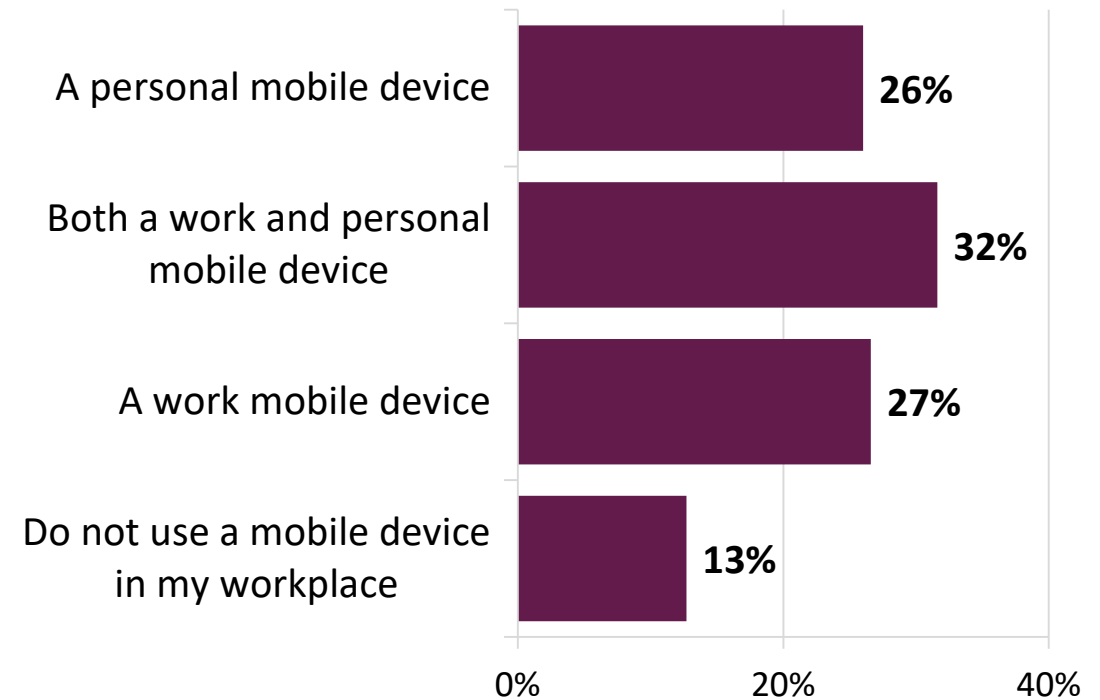
What do you see as the biggest work-related challenges coming over the next year in your agency? (select all that apply)

Mobile Devices in the Workplace

Works in a Secure Space Where Personal Mobile Devices Are Prohibited

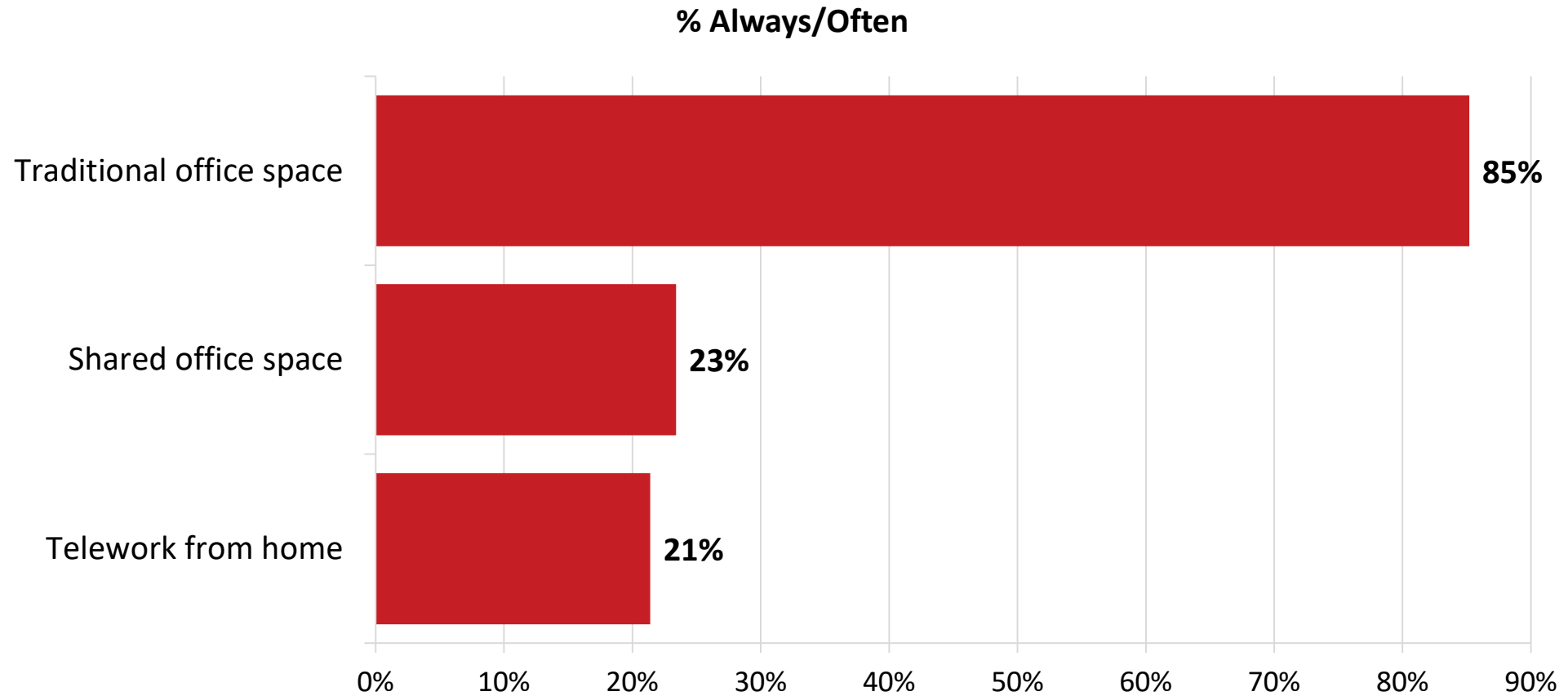


Mobile Device Use in the Workplace

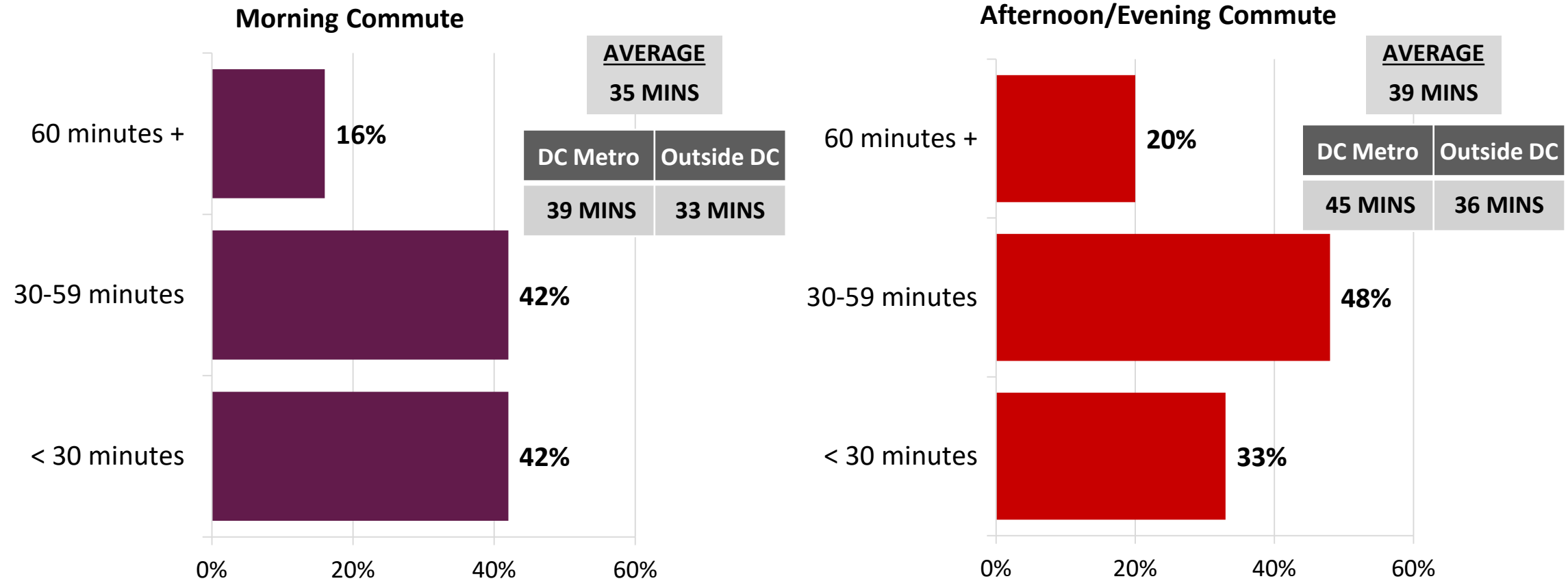


Q Do you spend the majority of your time at work in a secure space where personal mobile devices are prohibited?
Which of the following do you use while you're at your workplace?

Work Locations

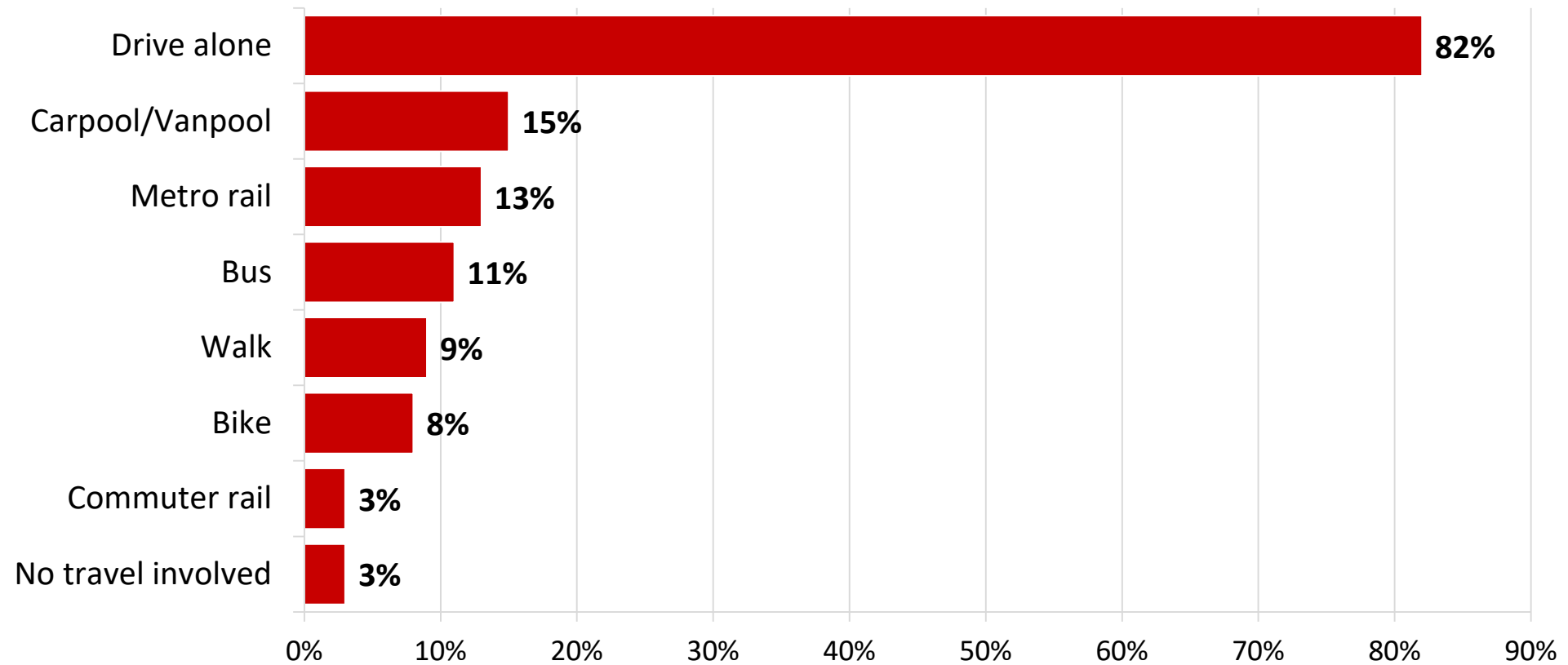


Commute Time



Q 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)

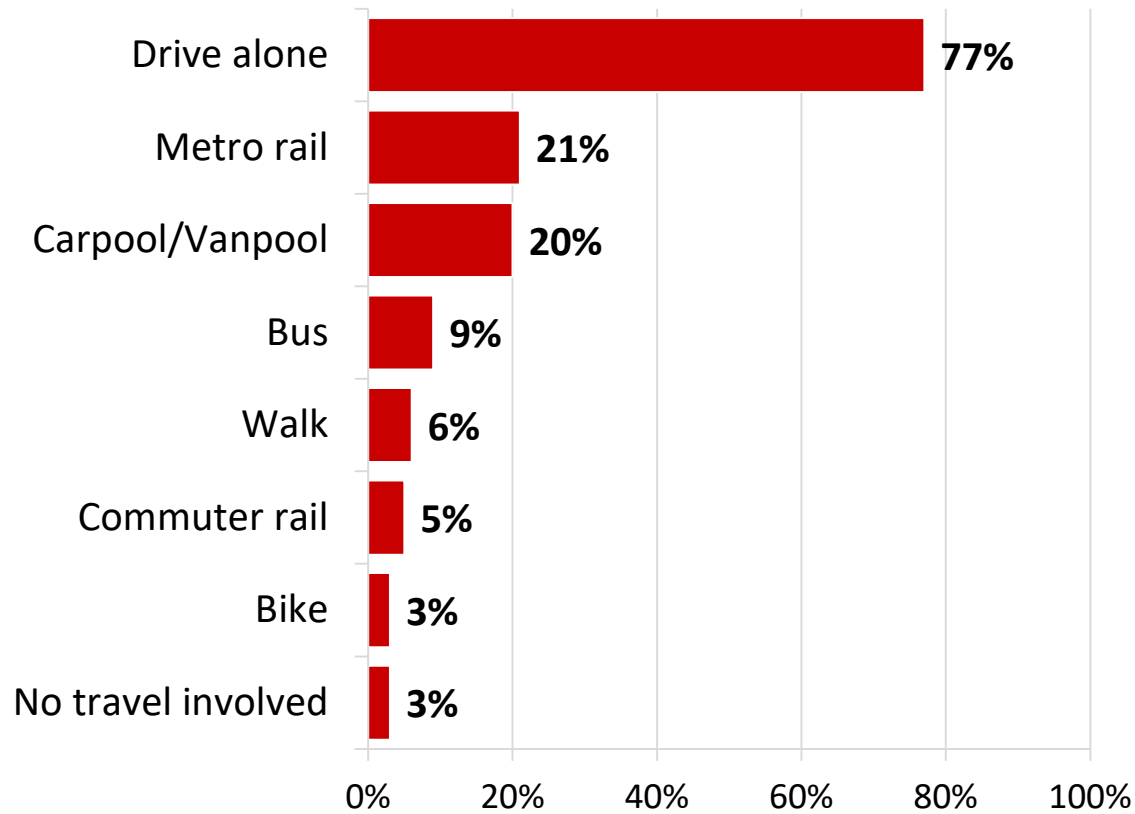
Primary Transportation



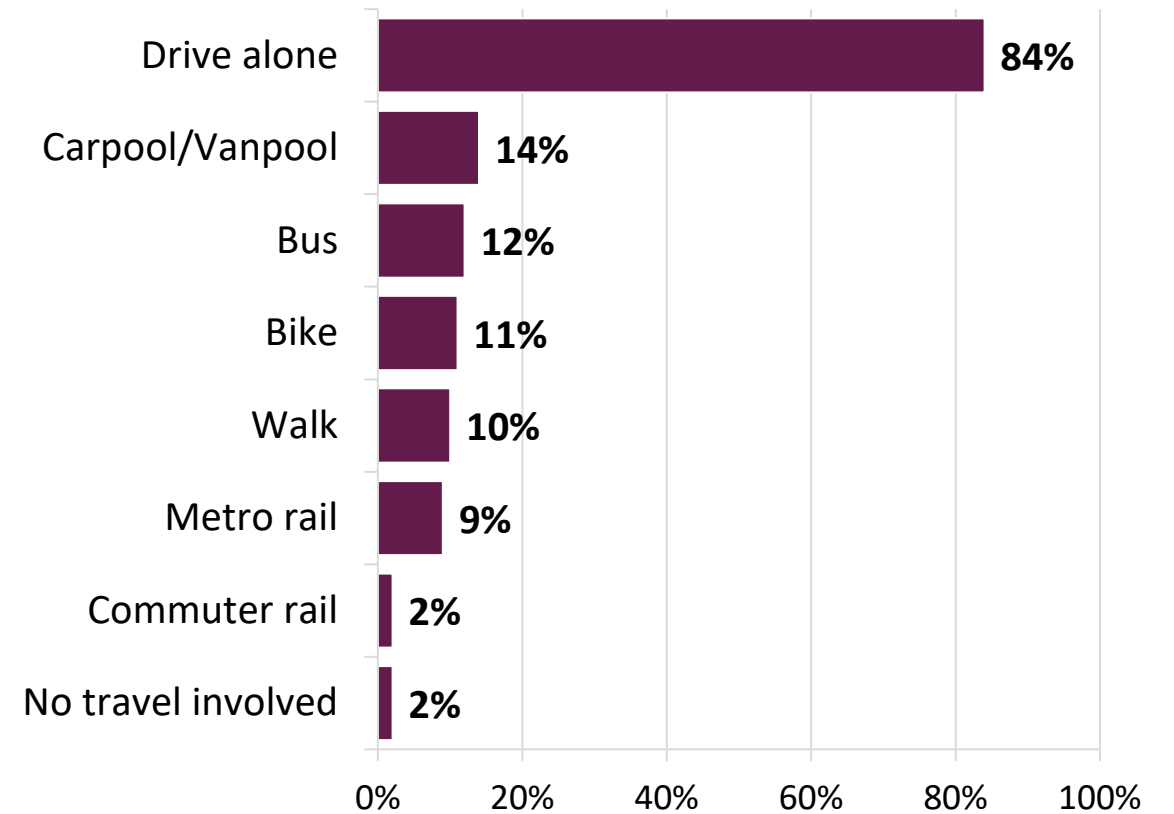
Which of the following are your primary modes of transportation to get to work? (select all that apply)

Primary Transportation

Washington DC Metro Area



Outside Washington DC Metro Area

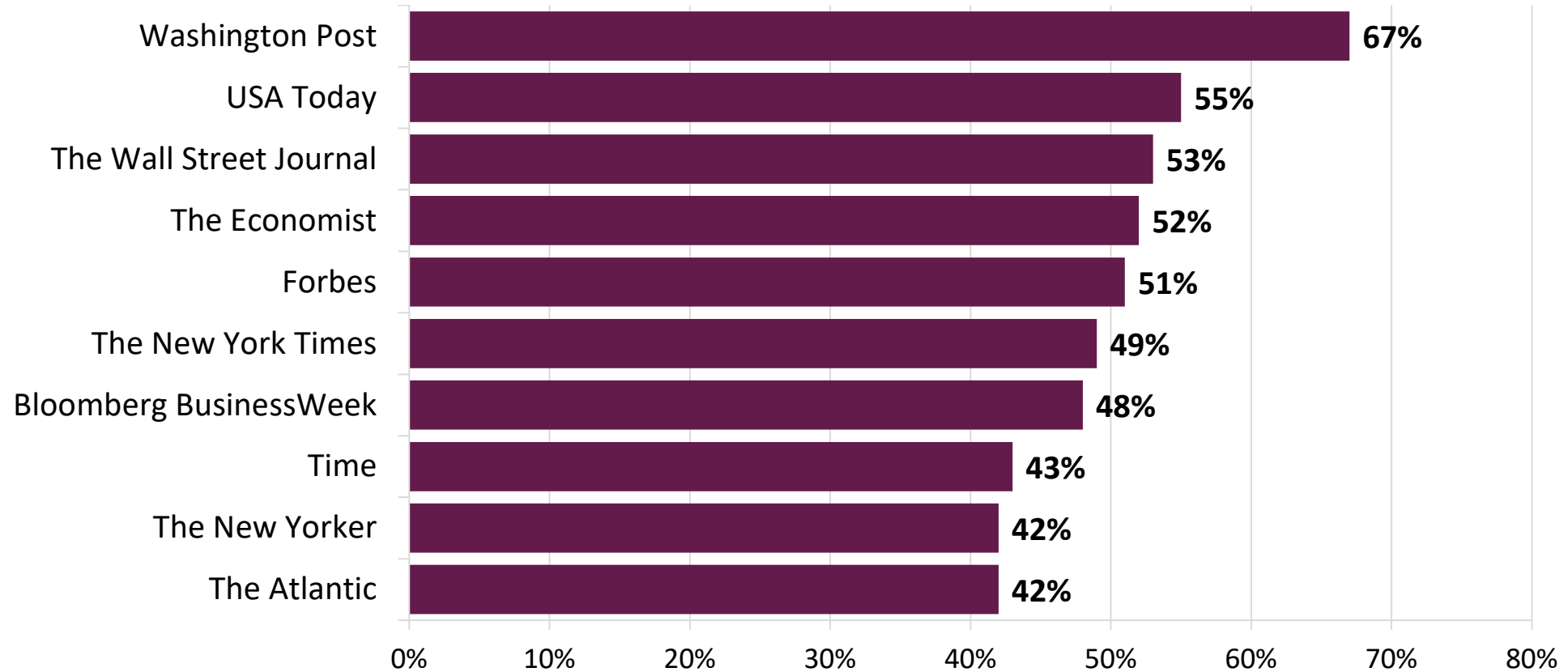


Which of the following are your primary modes of transportation to get to work? (select all that apply)



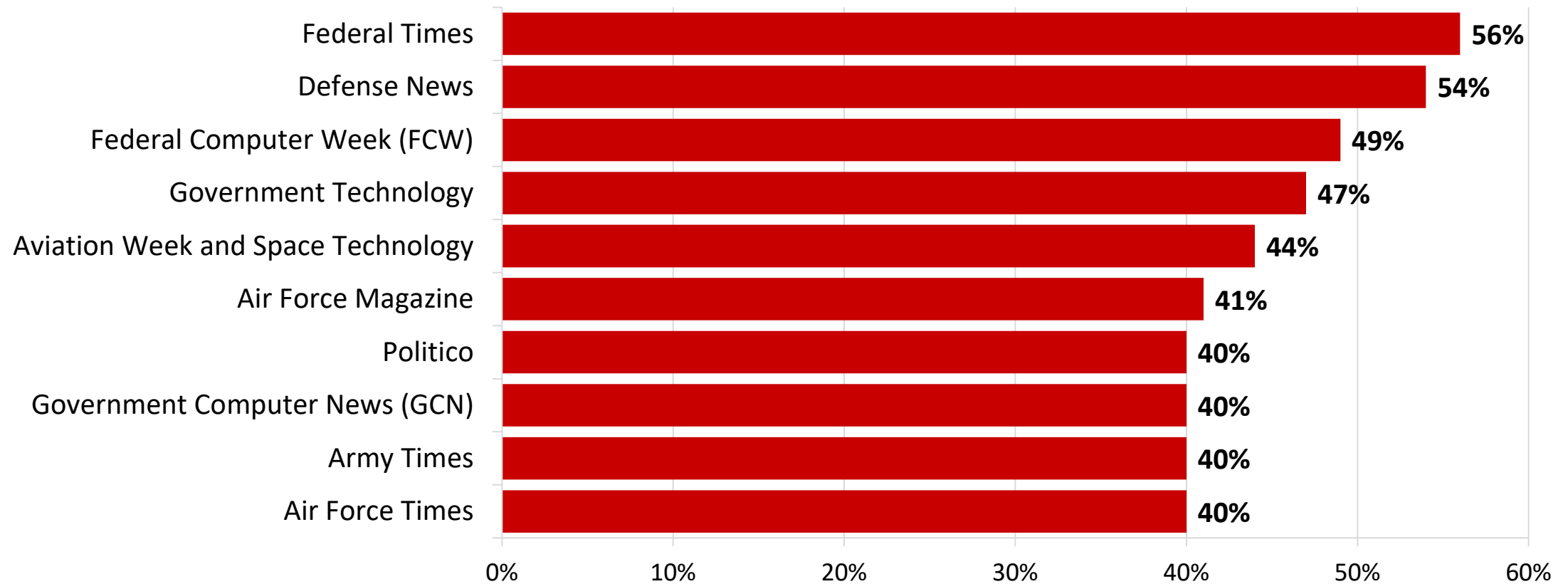
Media Results

Top Print Business & News Publications Read



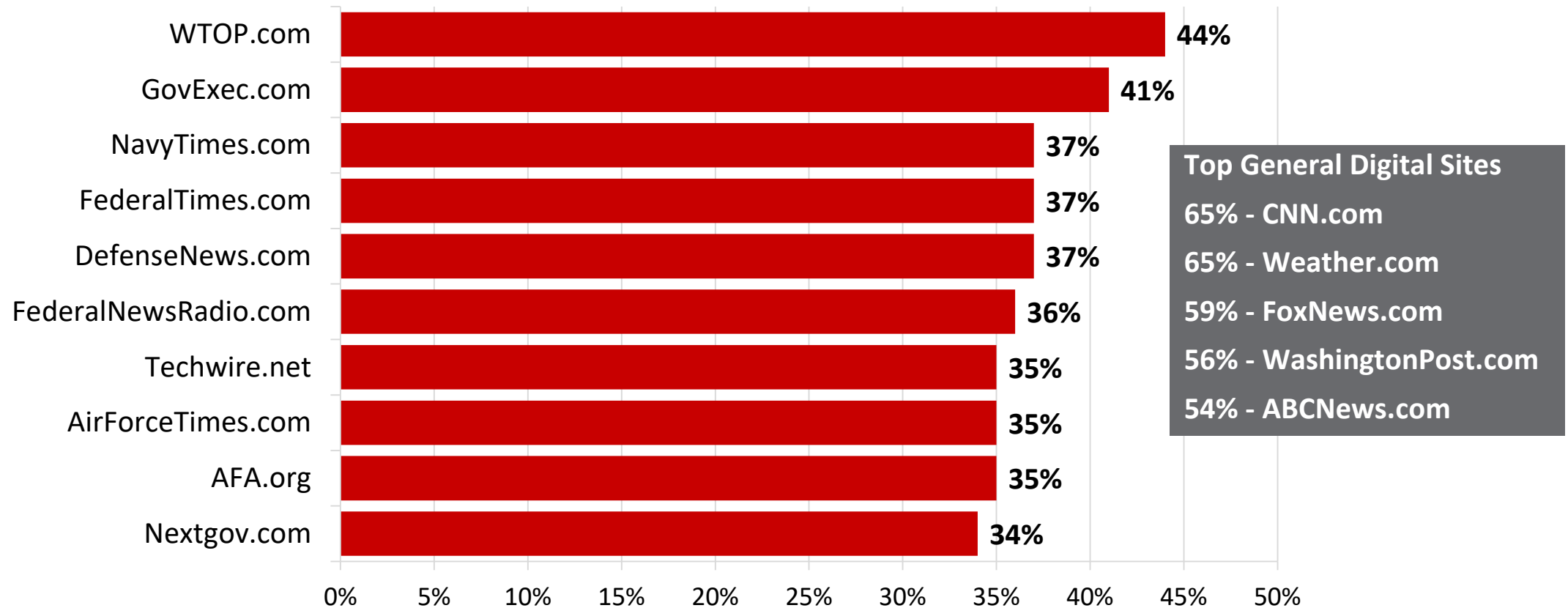
From the list below, please indicate what print publications you read on a regular basis (3 of 4 issues) and which you occasionally read.

Top Print Federal & Congressional Publications Read



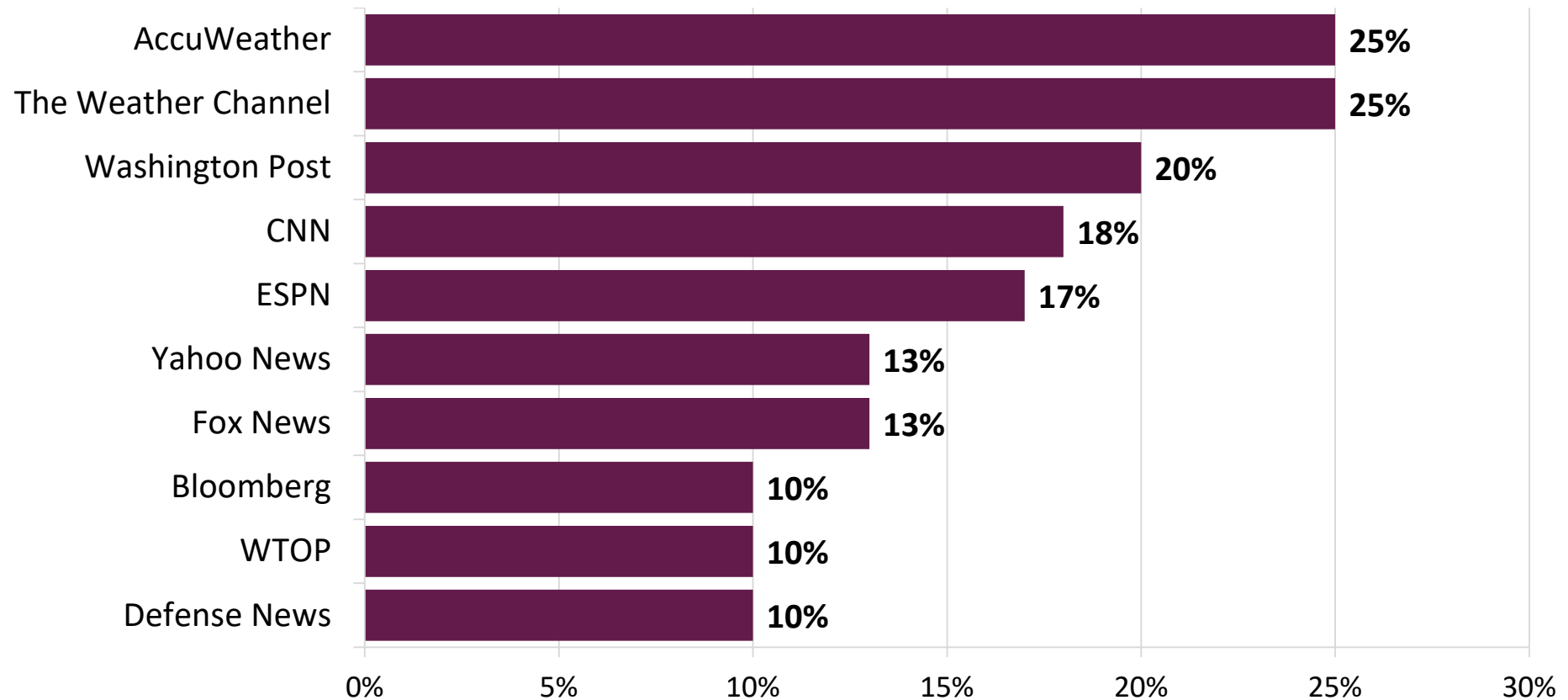
From the list below, please indicate what print publications you read on a regular basis (3 of 4 issues) and which you occasionally read.

Top Federally Focused Digital Sites Visited



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

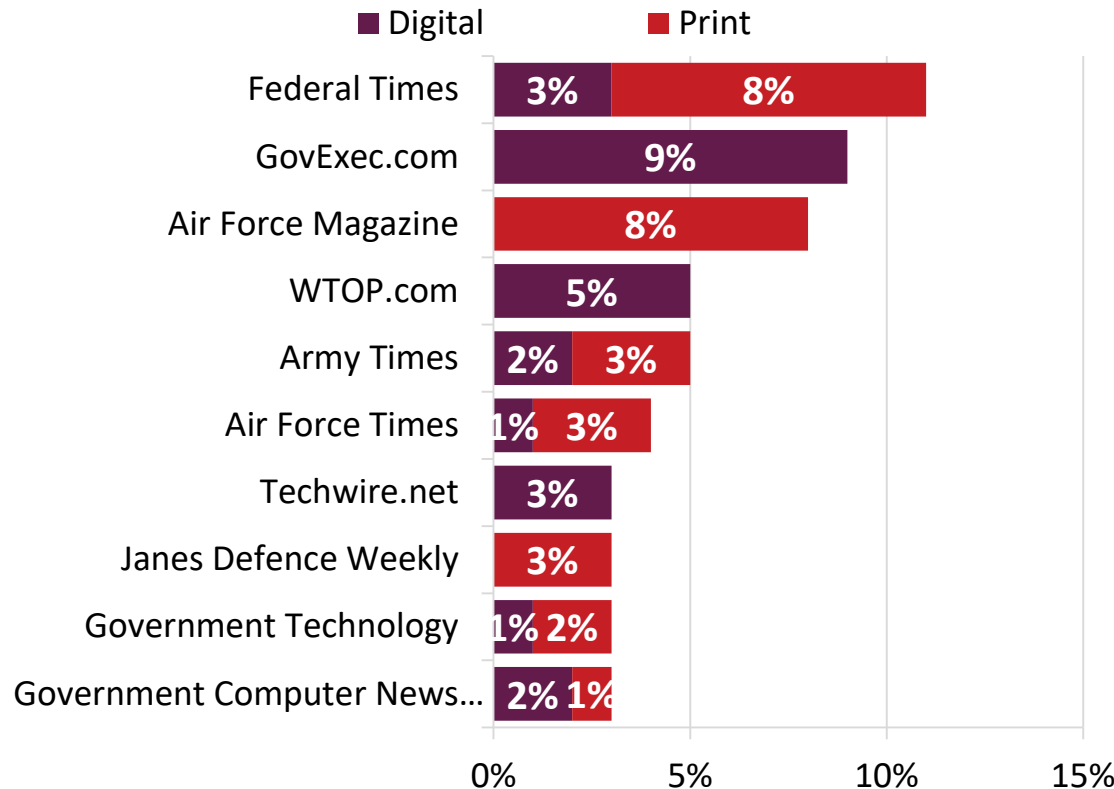
Top Apps Downloaded on Mobile Device



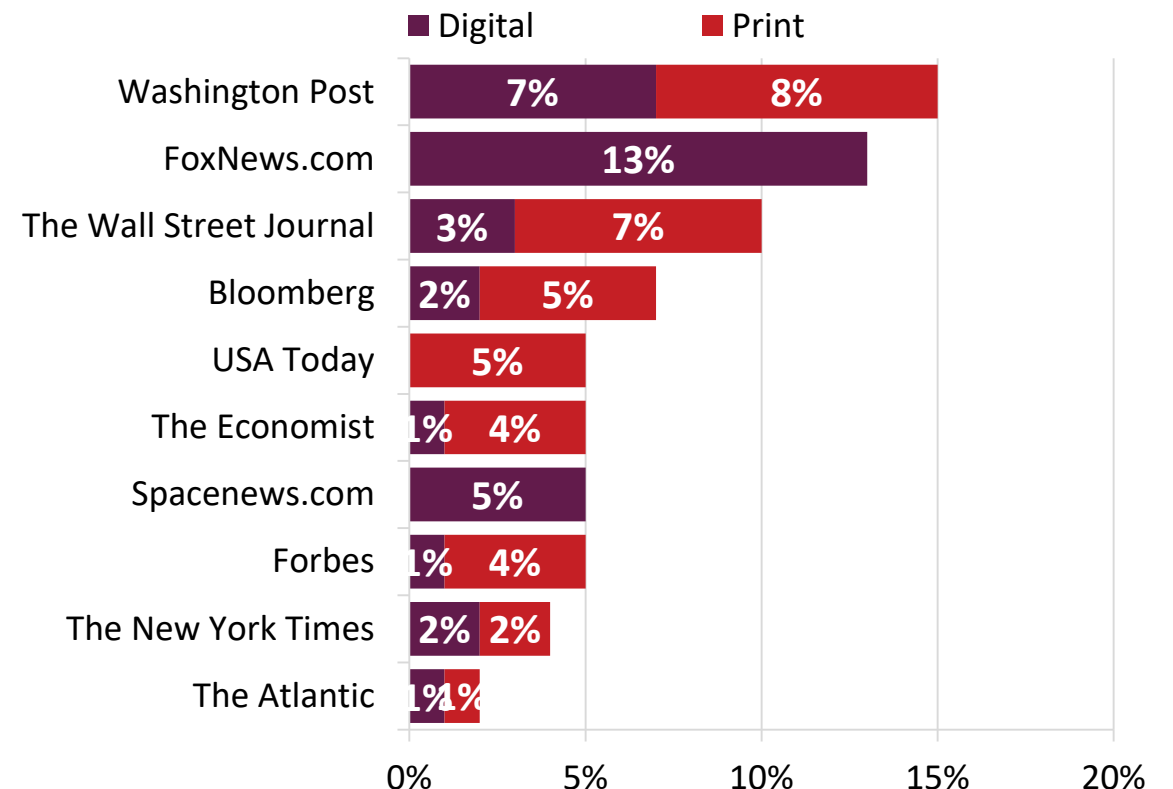
 Which of the following apps do you have downloaded on your mobile device? (select all that apply)

Go-To Print and Digital Media Property for News

Go-To Government-Focused Media Property



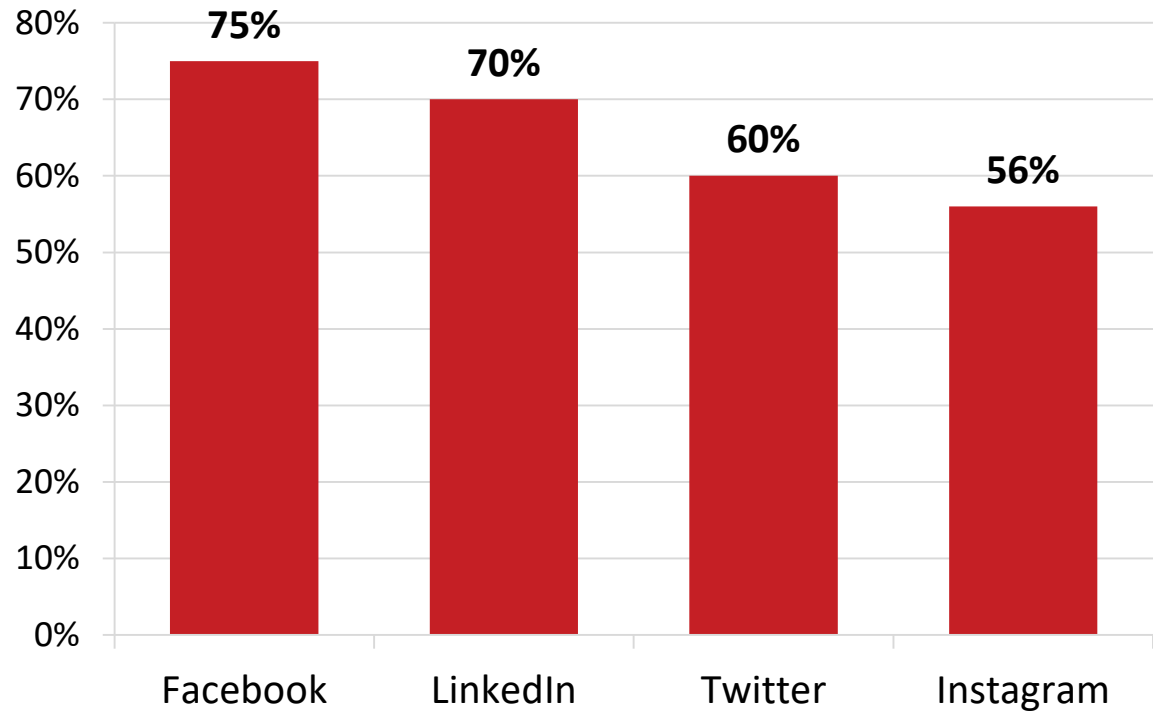
Go-To General Media Property



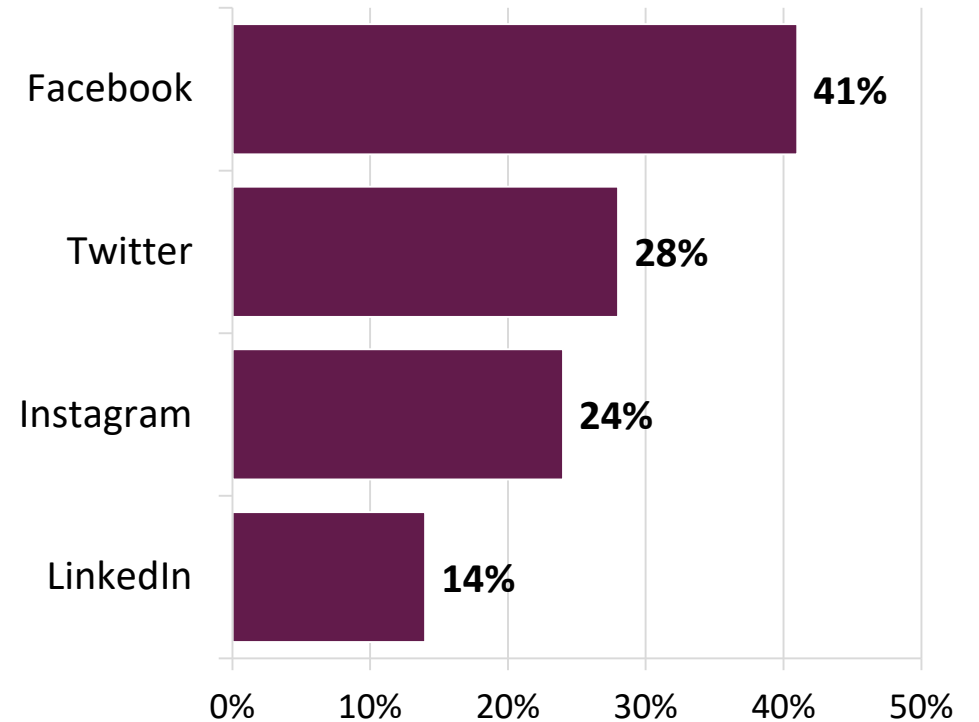
Q If you could only choose one government-focused media property as your “go-to” source for work-related news, which would you choose?
 If you could only choose one general media property as your “go-to” source for news, which would you choose?


Online Social Sites

Top Online Social Sites Used

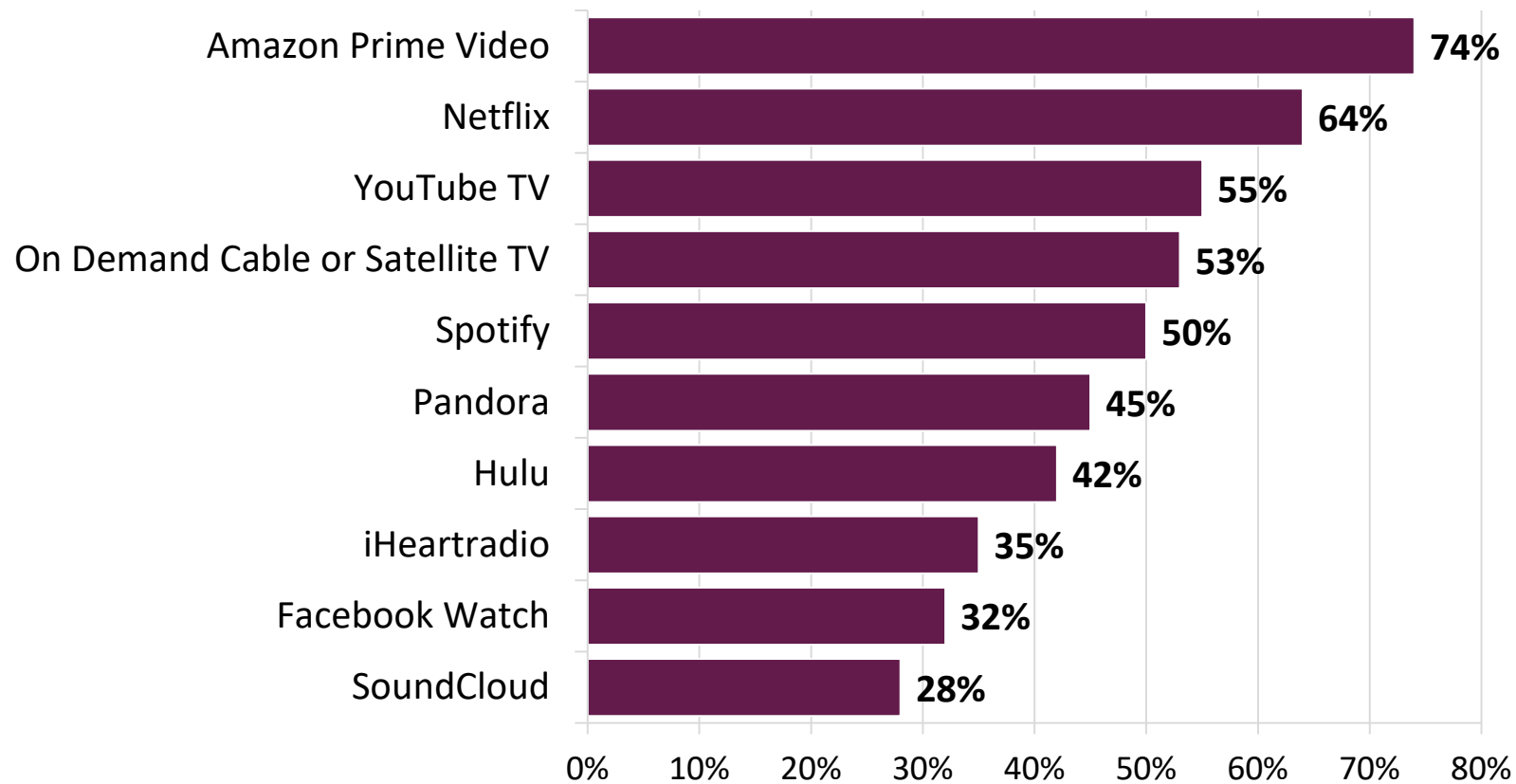


Daily Online Social Site Use



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

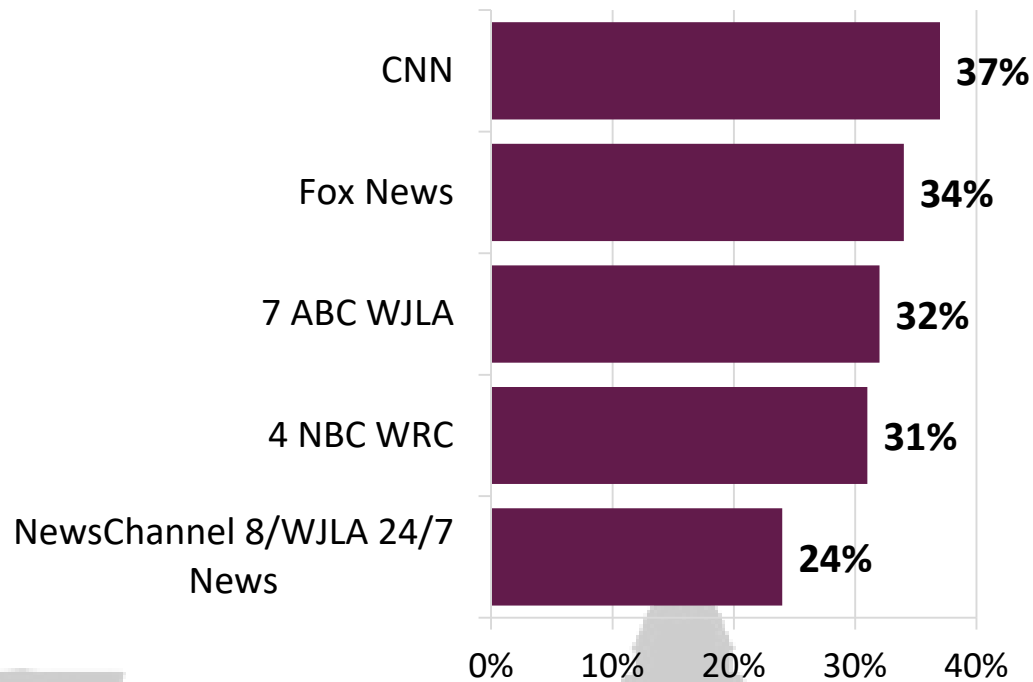
Lifestyle Media Streaming Services



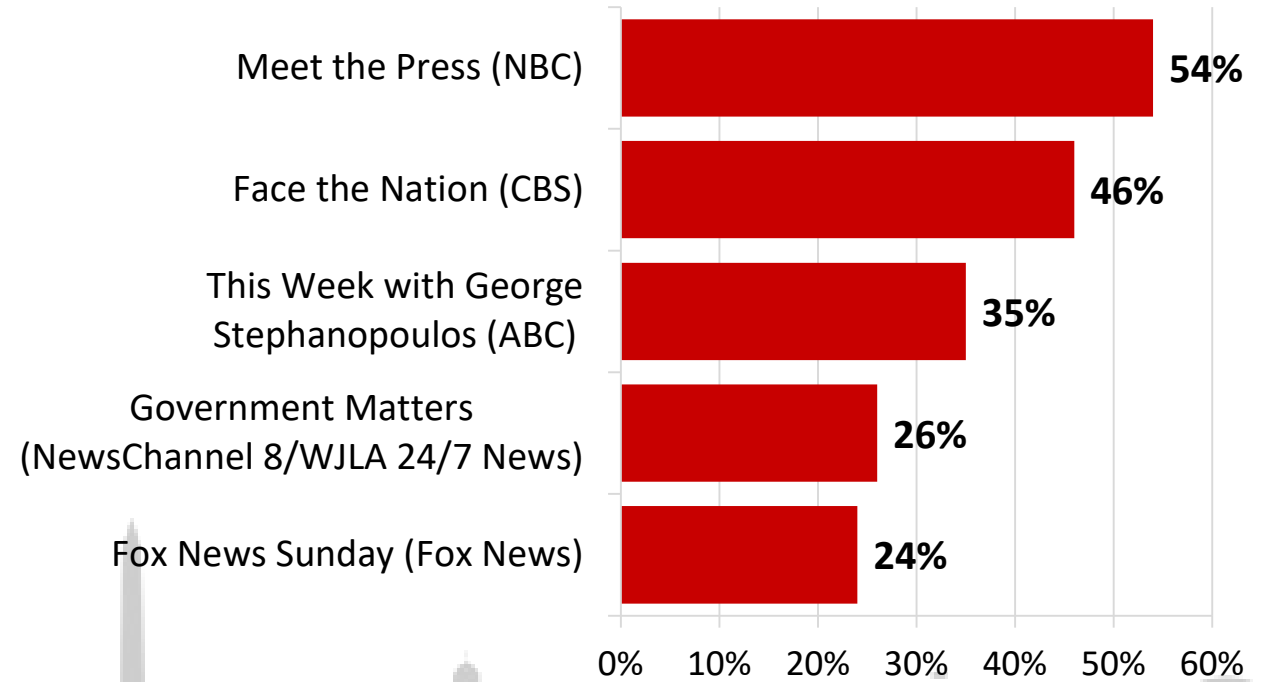
 From the list below, please indicate which of the following you access.

DC METRO AREA TV News Top Five

TV News Channels



News Programs

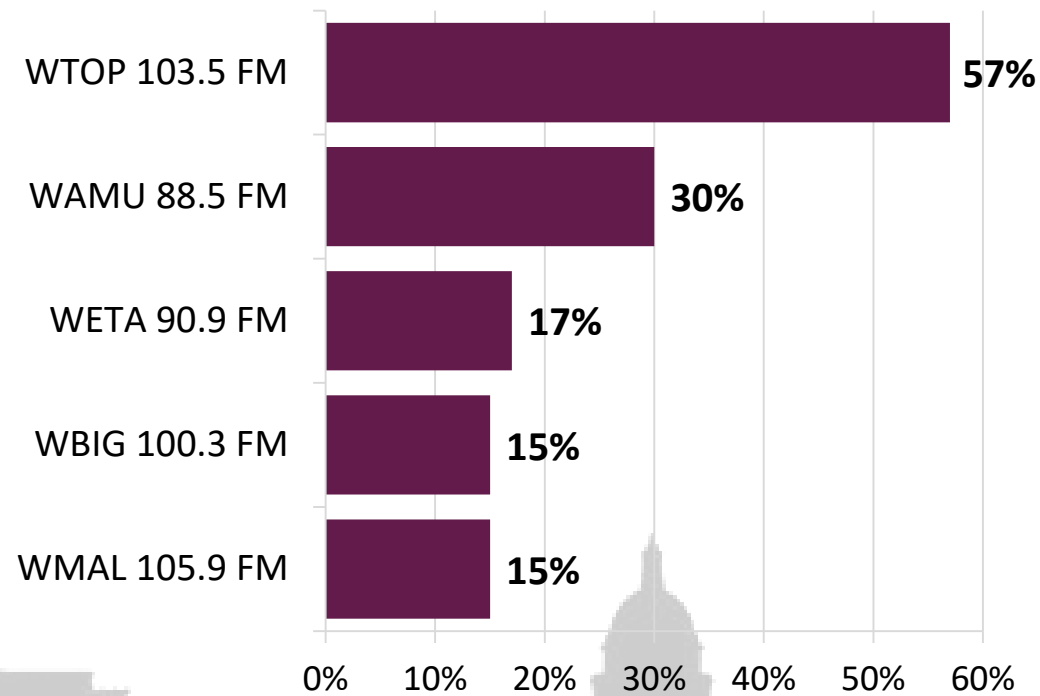


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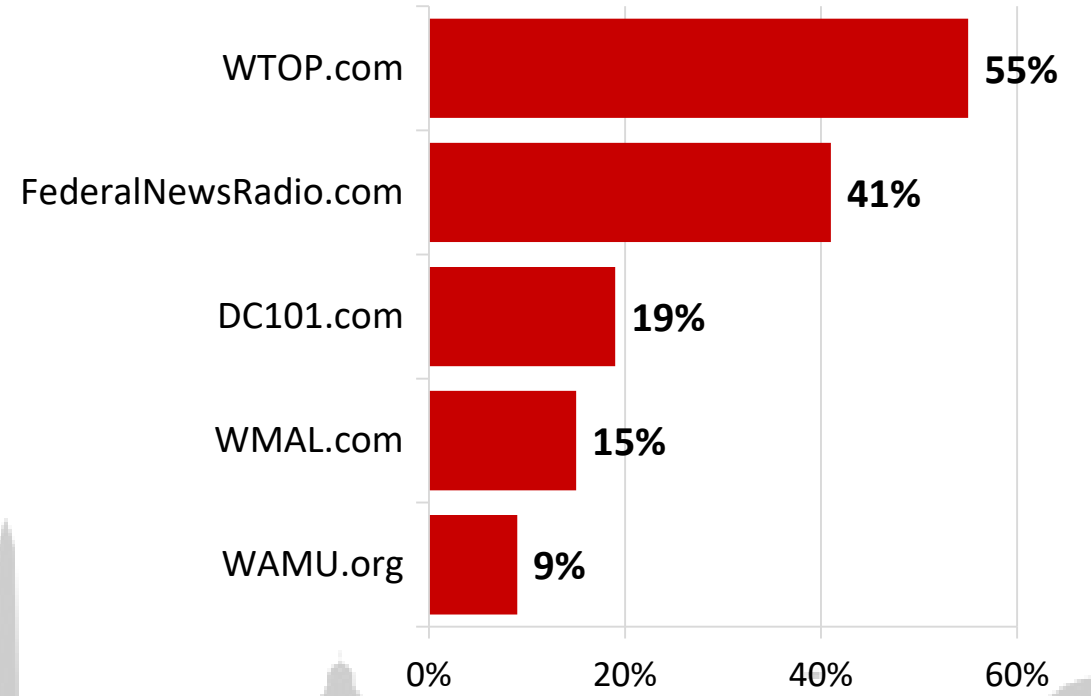
Which of the following television channels do you turn to most often for news? (select all that apply)
Please indicate which of the following news programs you watch. (select all that apply)

DC METRO AREA Radio Top Five

Radio Stations



Radio Websites



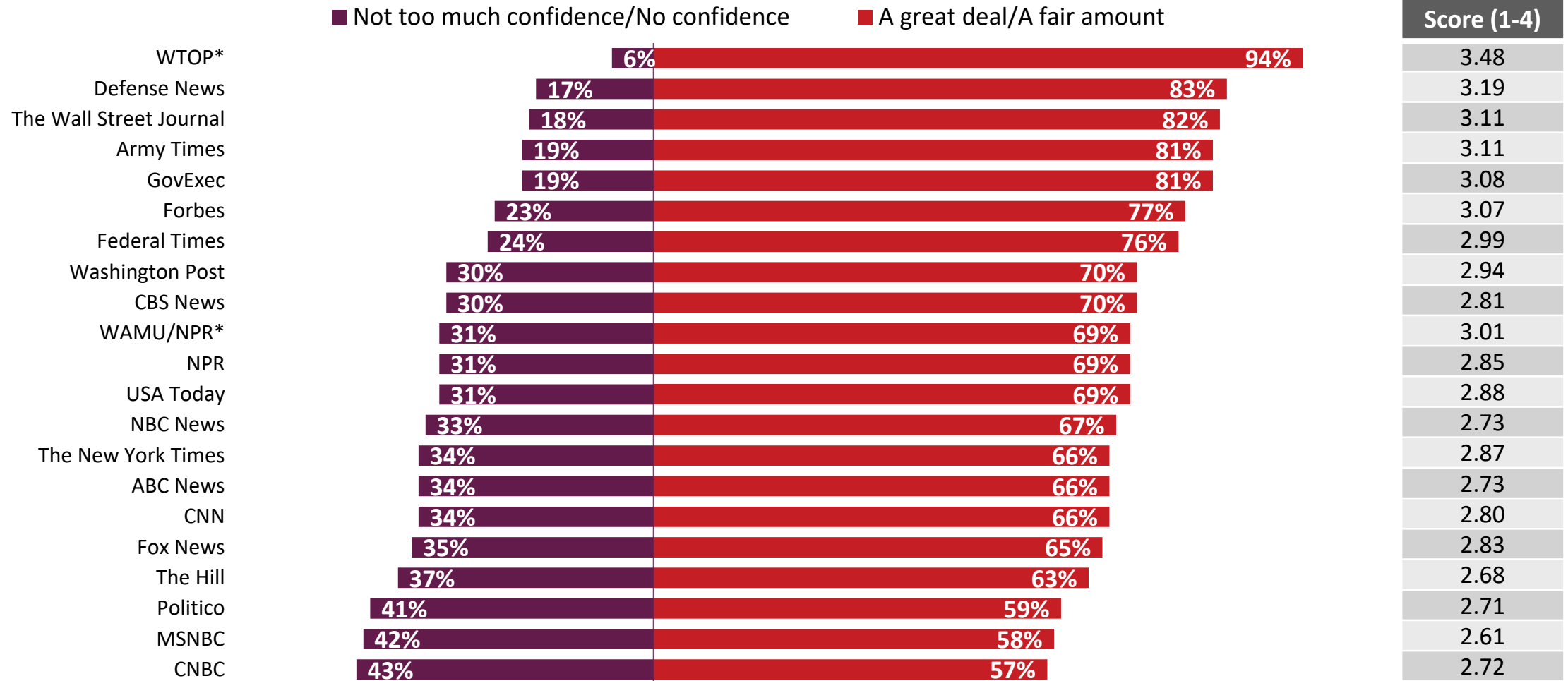
N=110

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 in News

Confidence in News



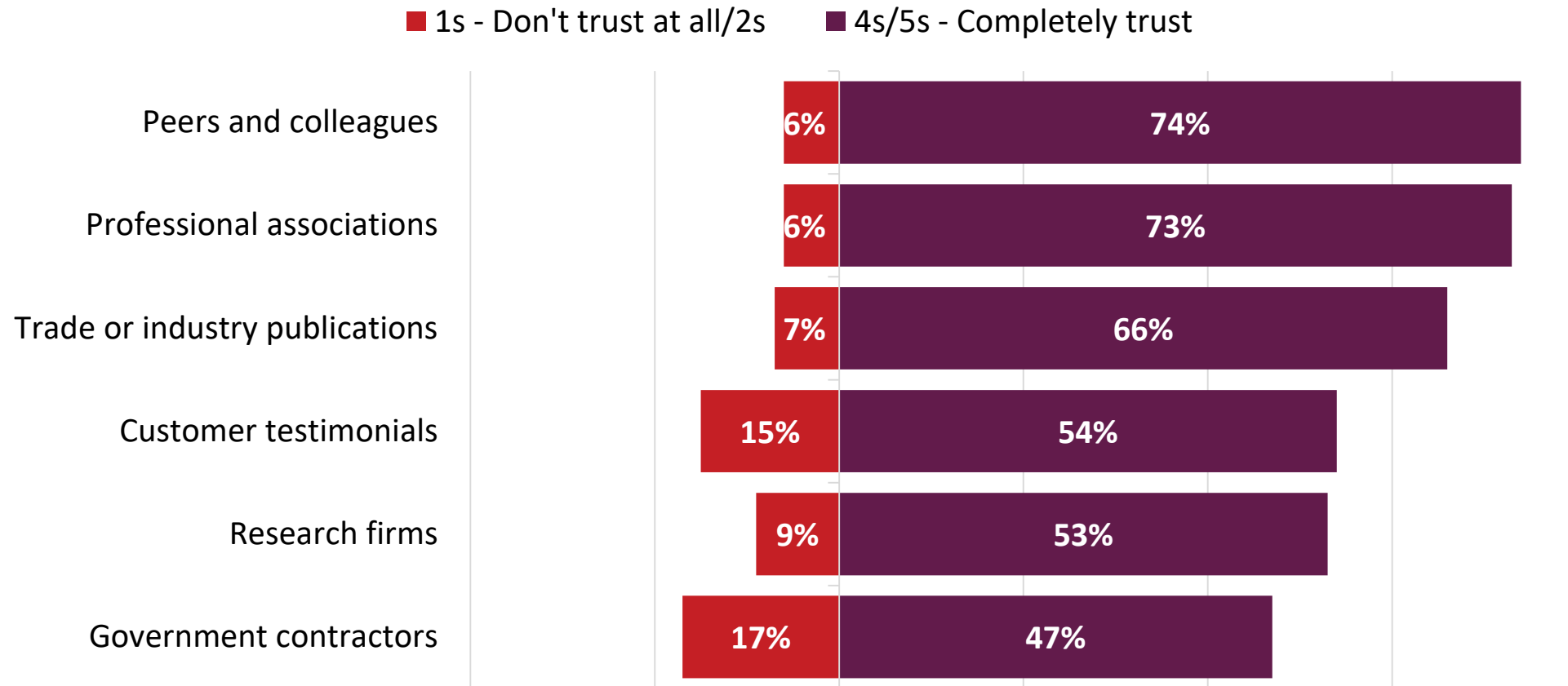
How much confidence do you have in the following sources in the news that they report?

*Asked only in DC metro area



Marketing Tactics

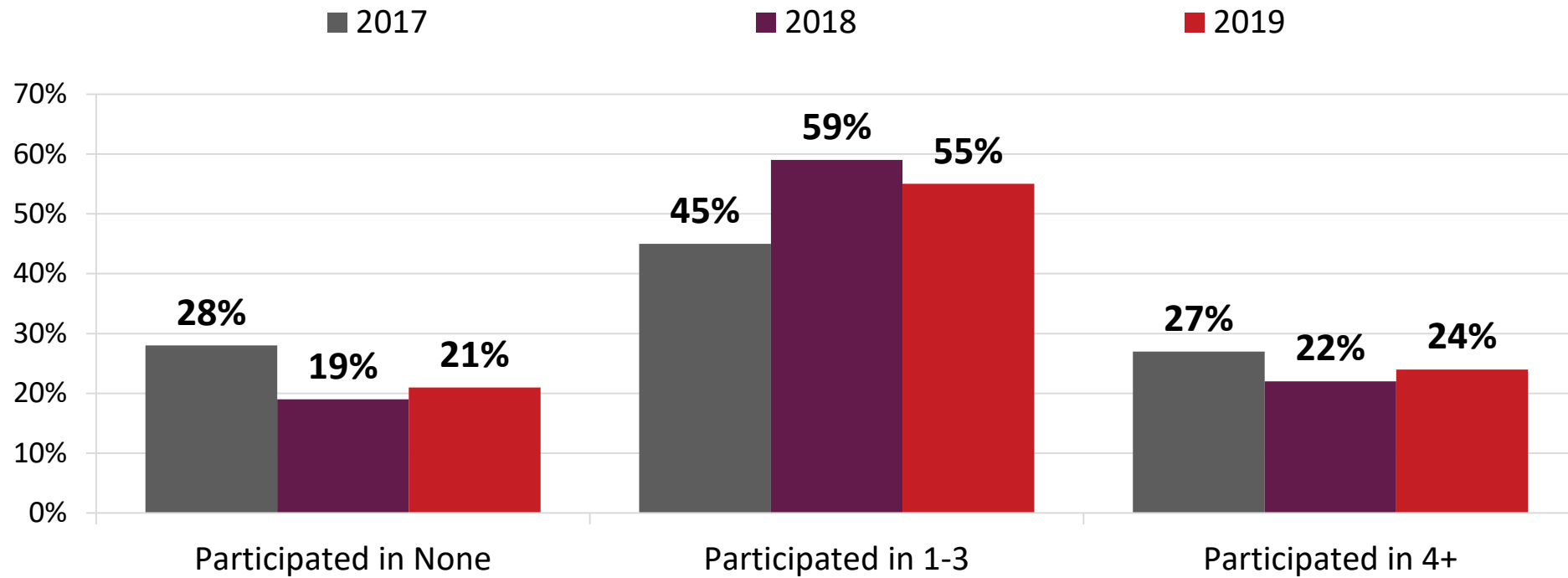
Trusted Sources of Information



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

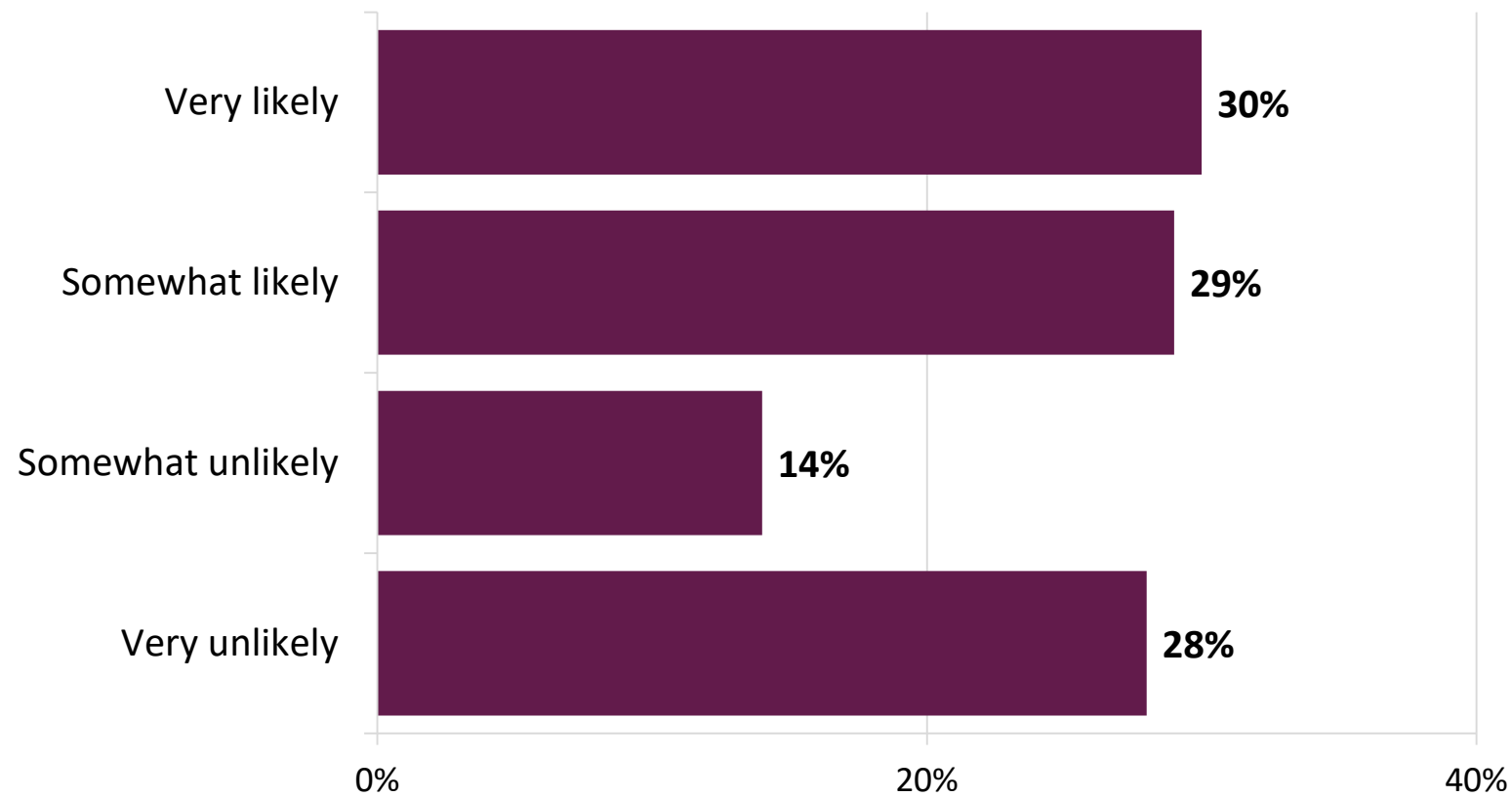
TREND 2017-2019

Event Attendance in Past 12 Months



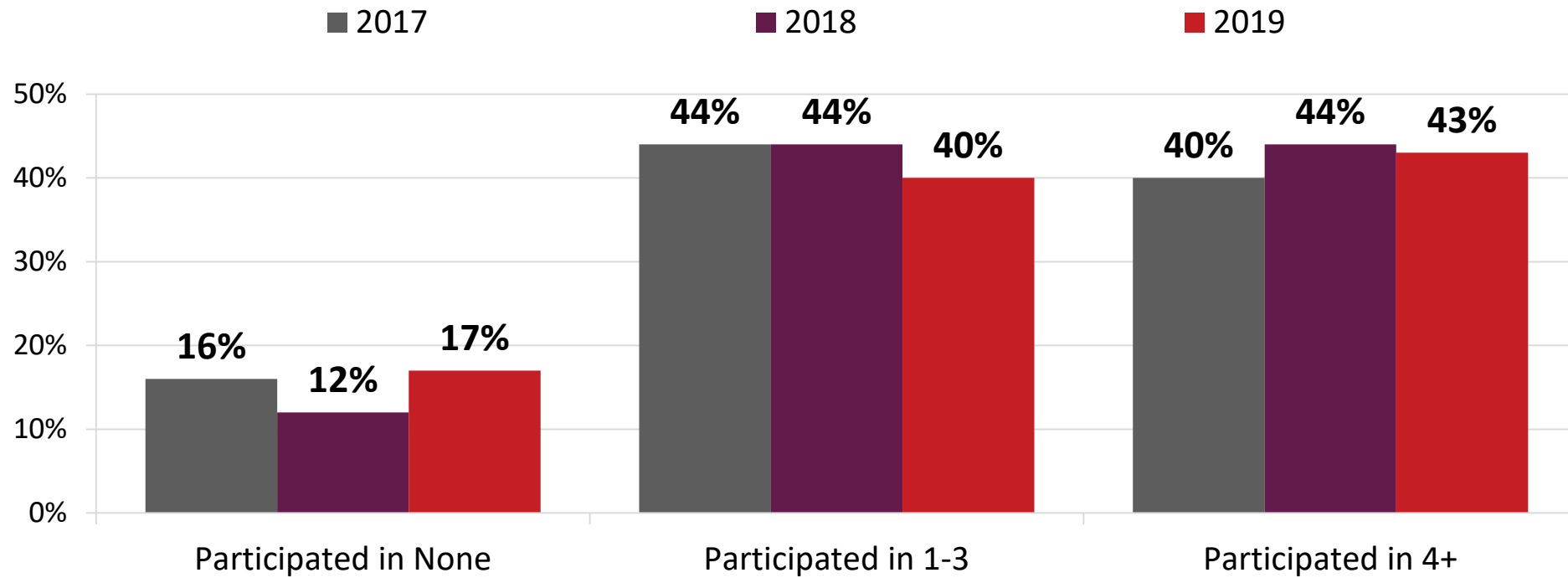
Approximately how many trade shows, conferences, or industry events have you attended in the past year?

Likelihood to Attend Work Events on the Weekend



TREND 2017-2019

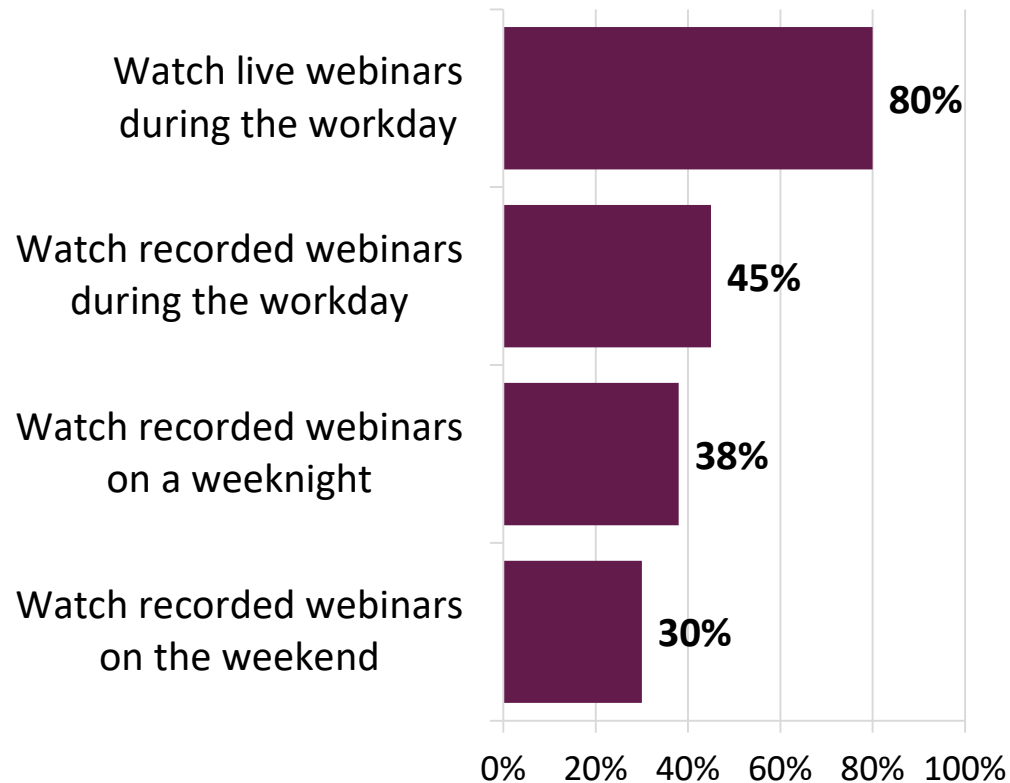
Webinar Participation in Past 12 Months



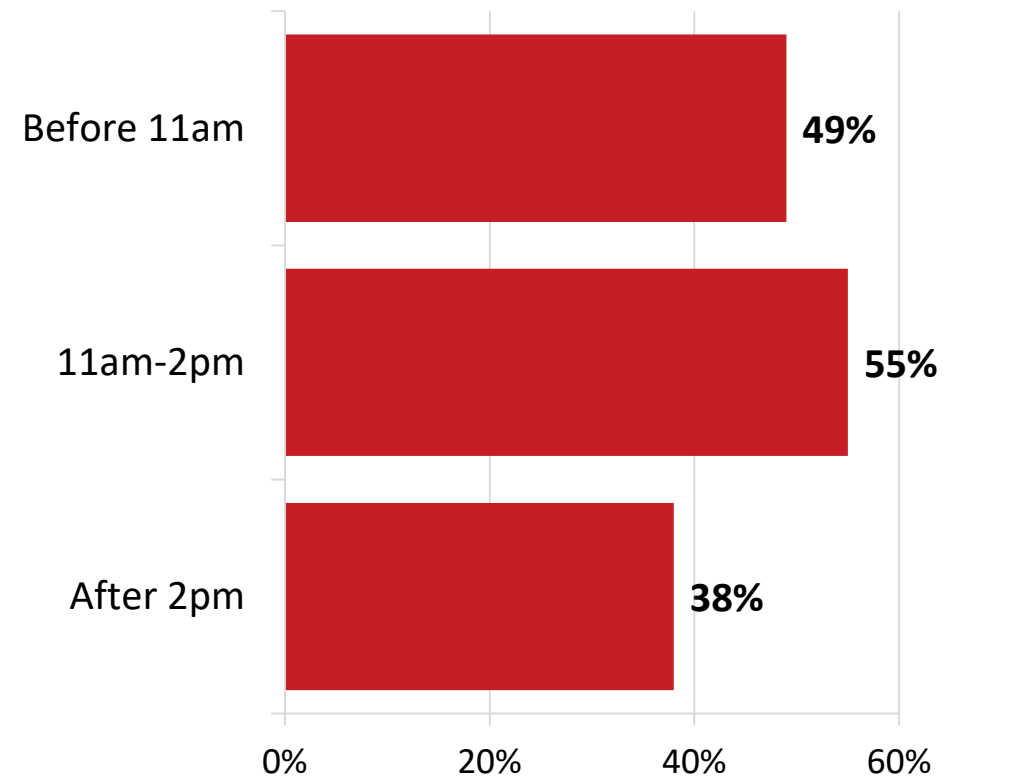
In how many webinars (seminars over the Internet) have you participated in the last year?


Participating in Webinars

Ways of Participating in Webinars



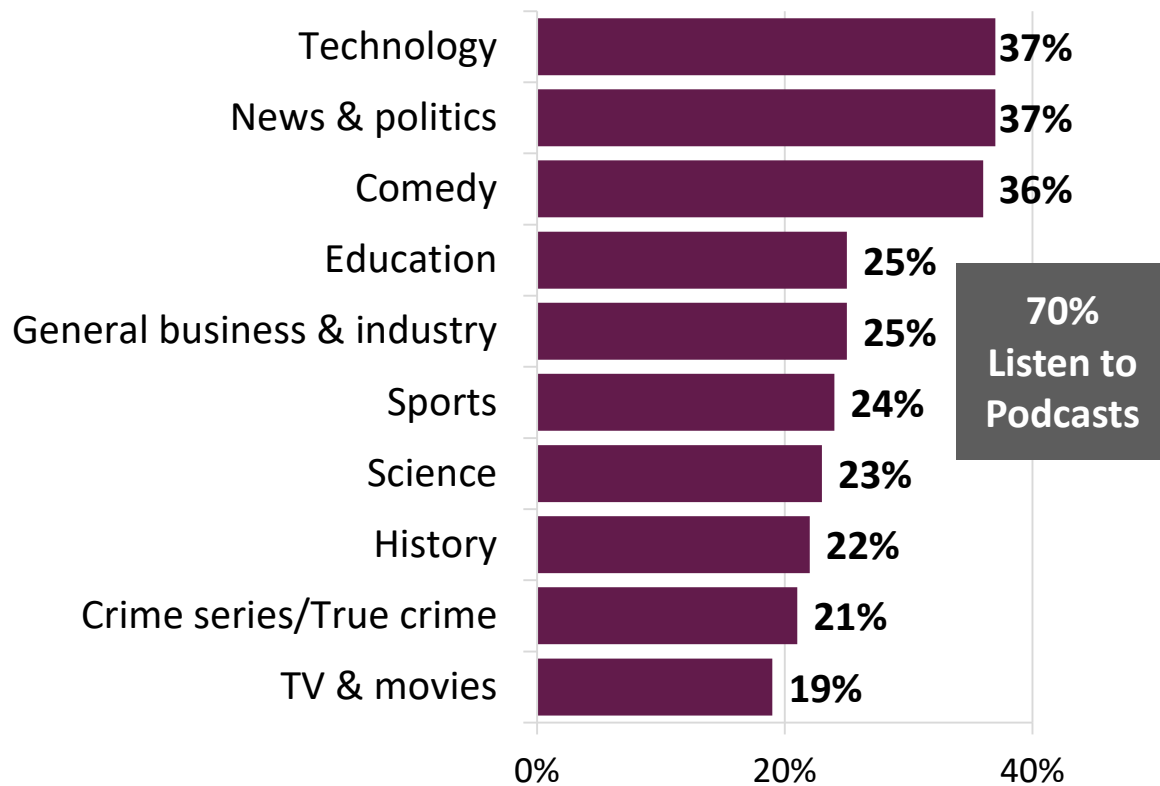
Preferred Time to Participate



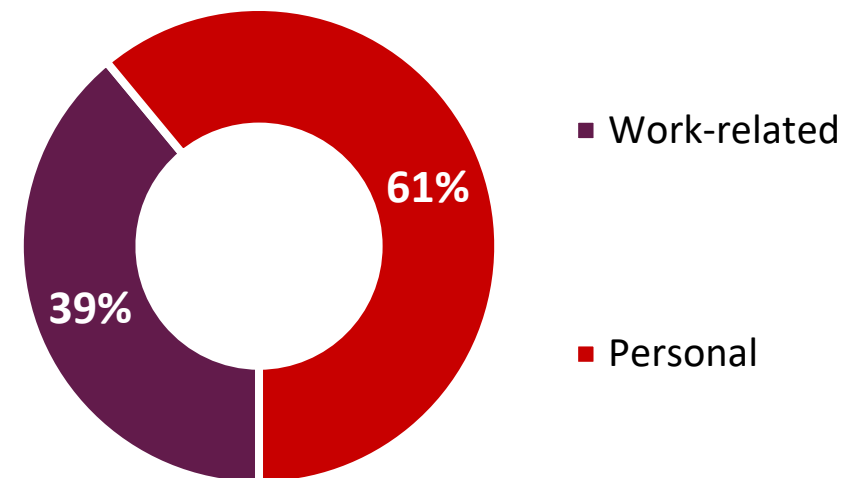
 In which of the following ways do you participate in webinars? (select all that apply)
 During what time in your typical workday do you prefer to participate in live webinars? (select all that apply)

Listening to Audio Podcasts

Top Types of Audio Podcasts Listened To



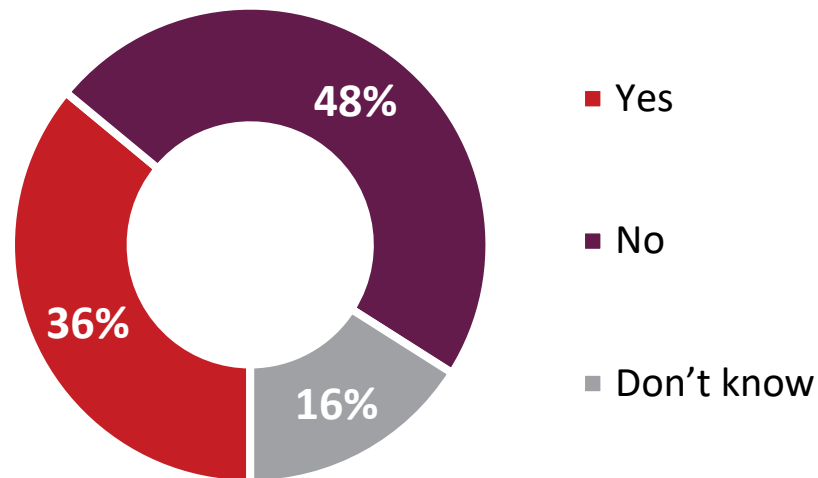
Average Percentage of Time Spent Listening to Podcasts



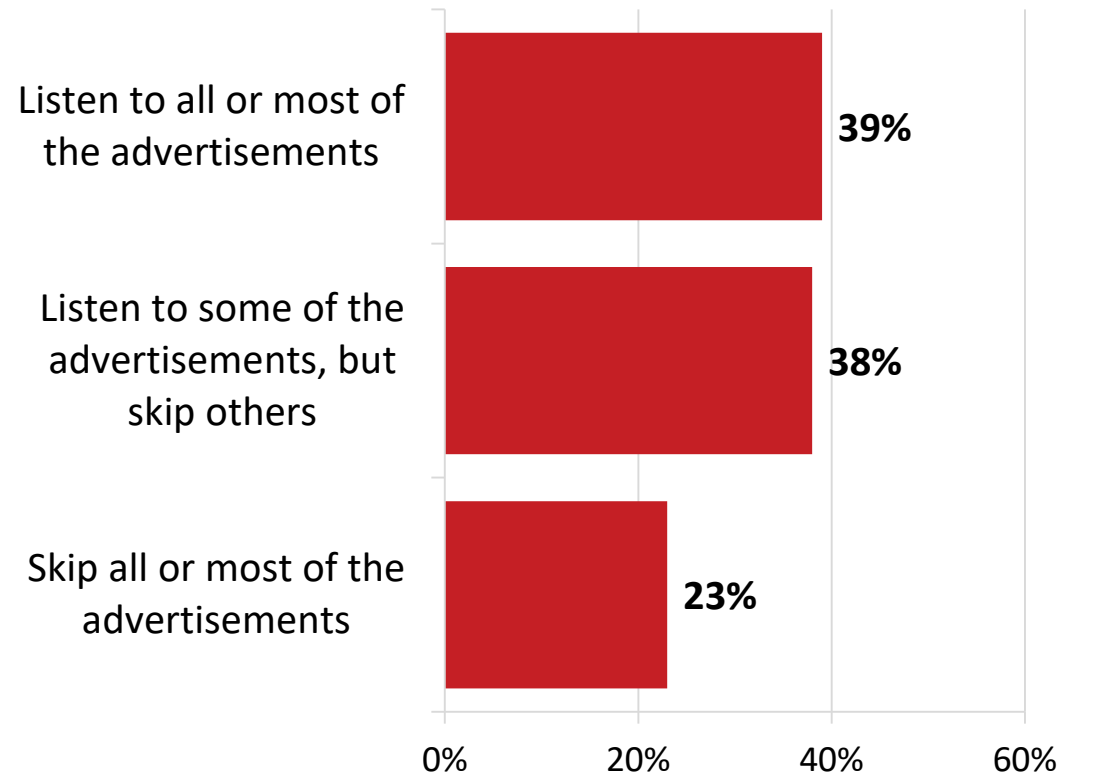
Which of the following, if any, types of audio podcasts do you listen/subscribe to? (select all that apply)
 What percentage of the time you spend listening to podcasts is work-related vs. personal?

Advertisements in Podcasts

Have Heard a Work-Related Ad During a Podcast

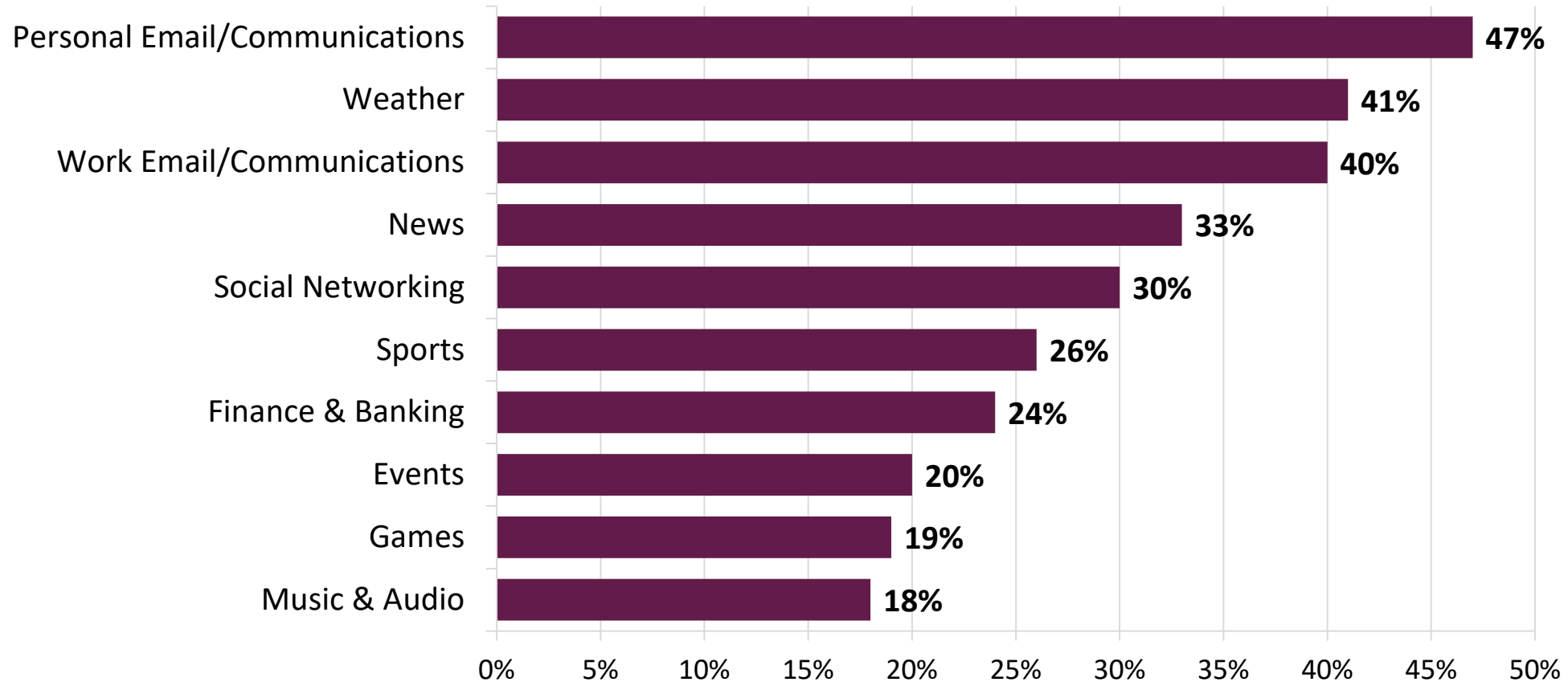


Listening to or Skipping Ads in Podcasts



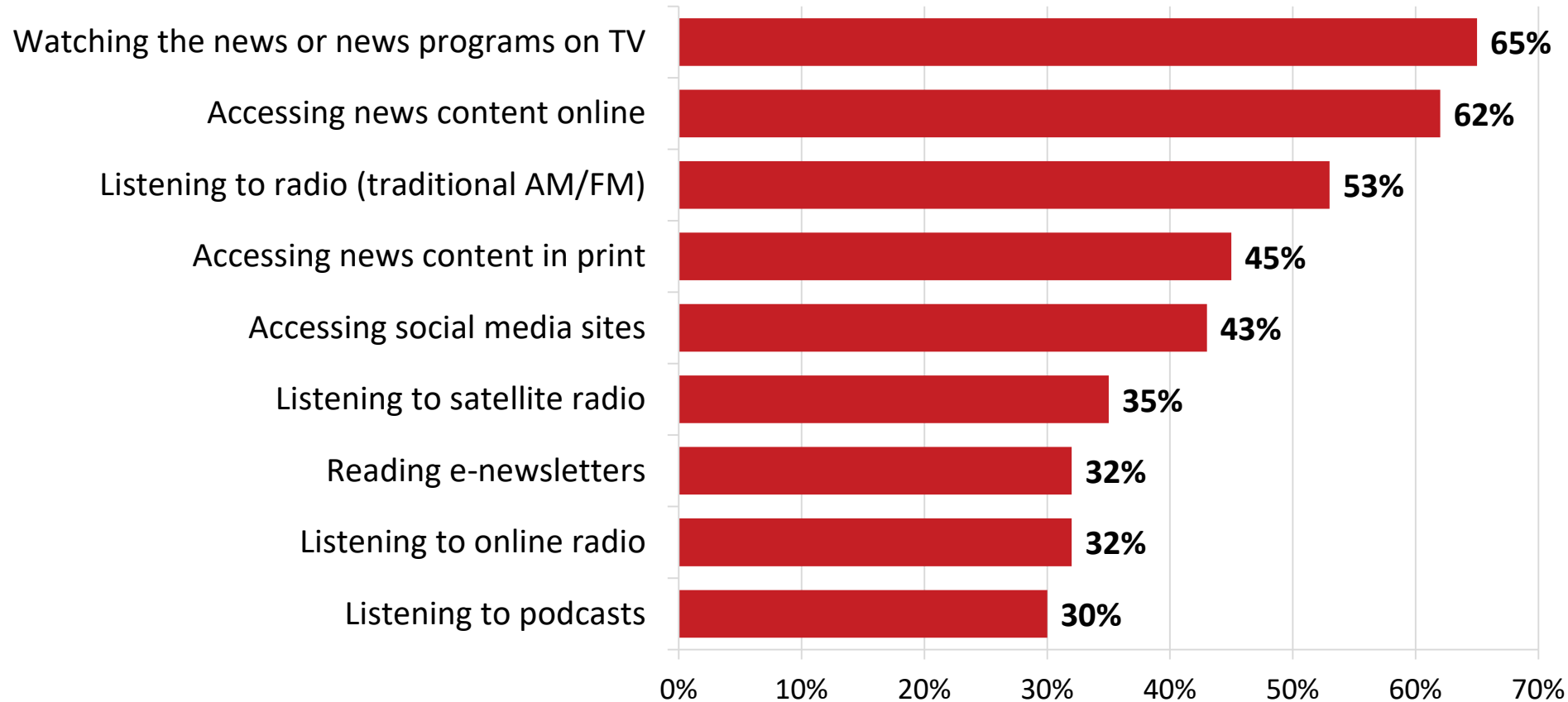
Q Have you heard a work-related advertisement during a podcast?
When you listen to podcasts, do you generally...?

Top App Types with Push Notifications Allowed



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



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	22%	11%	9%	13%	10%	51%
	Online streaming video	10%	11%	5%	9%	13%	49%
Listening	AM/FM radio	27%	52%	15%	9%	36%	17%
	Satellite radio	14%	28%	7%	9%	21%	11%
	Podcasts	12%	27%	17%	15%	19%	17%
Reading	National print newspaper or magazine	22%	16%	17%	20%	9%	27%
	Local print newspaper or magazine	25%	10%	16%	19%	9%	18%
	Digital newspaper or magazine	21%	14%	31%	33%	9%	25%
	Social media sites	26%	14%	13%	29%	13%	41%

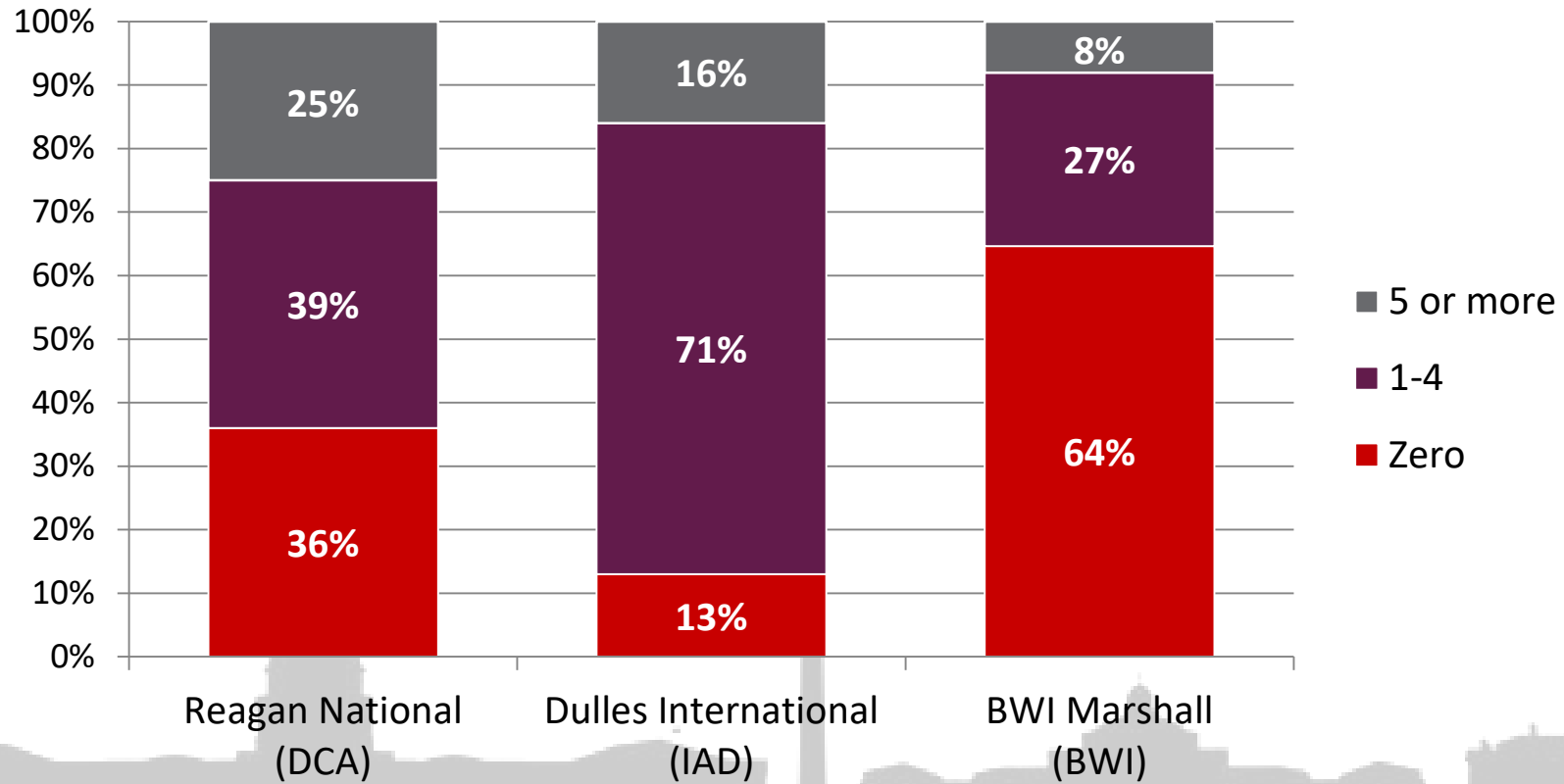


Which of the following types of media do you regularly consume during each of the following parts of a typical workday? (select all that apply)



Outdoor Advertising

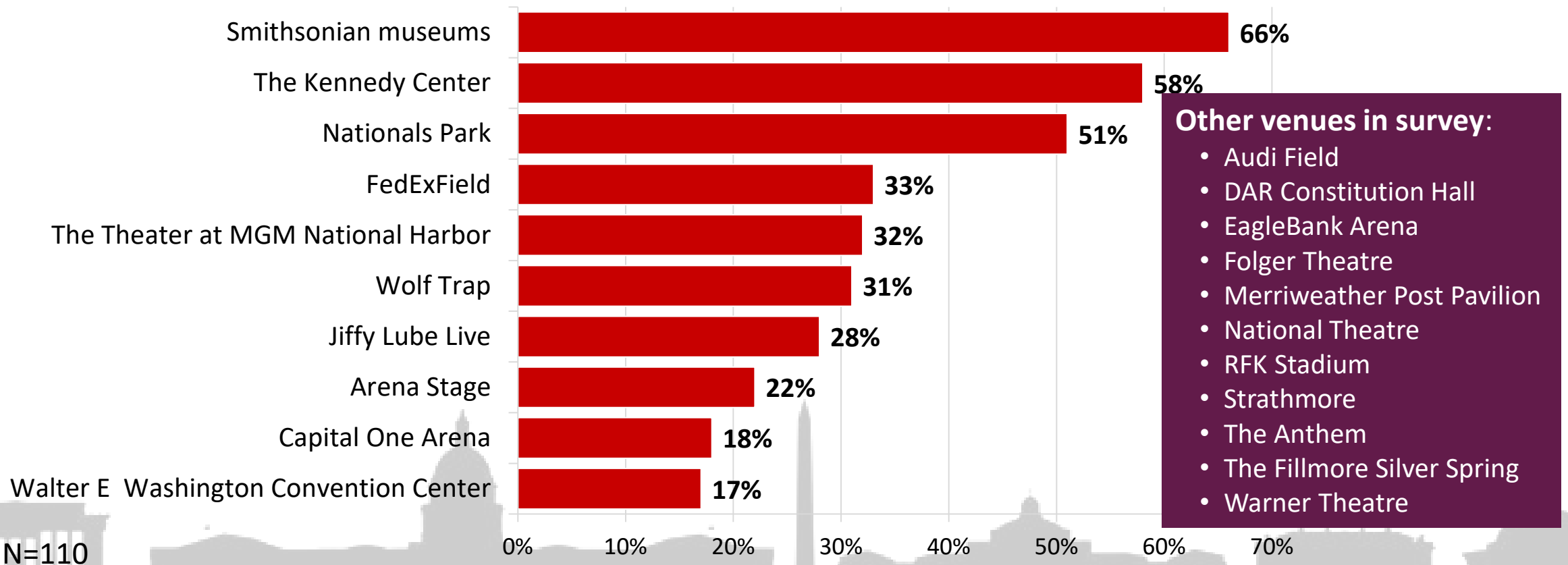
DC METRO AREA Airport Trips



N=110

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



N=110

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

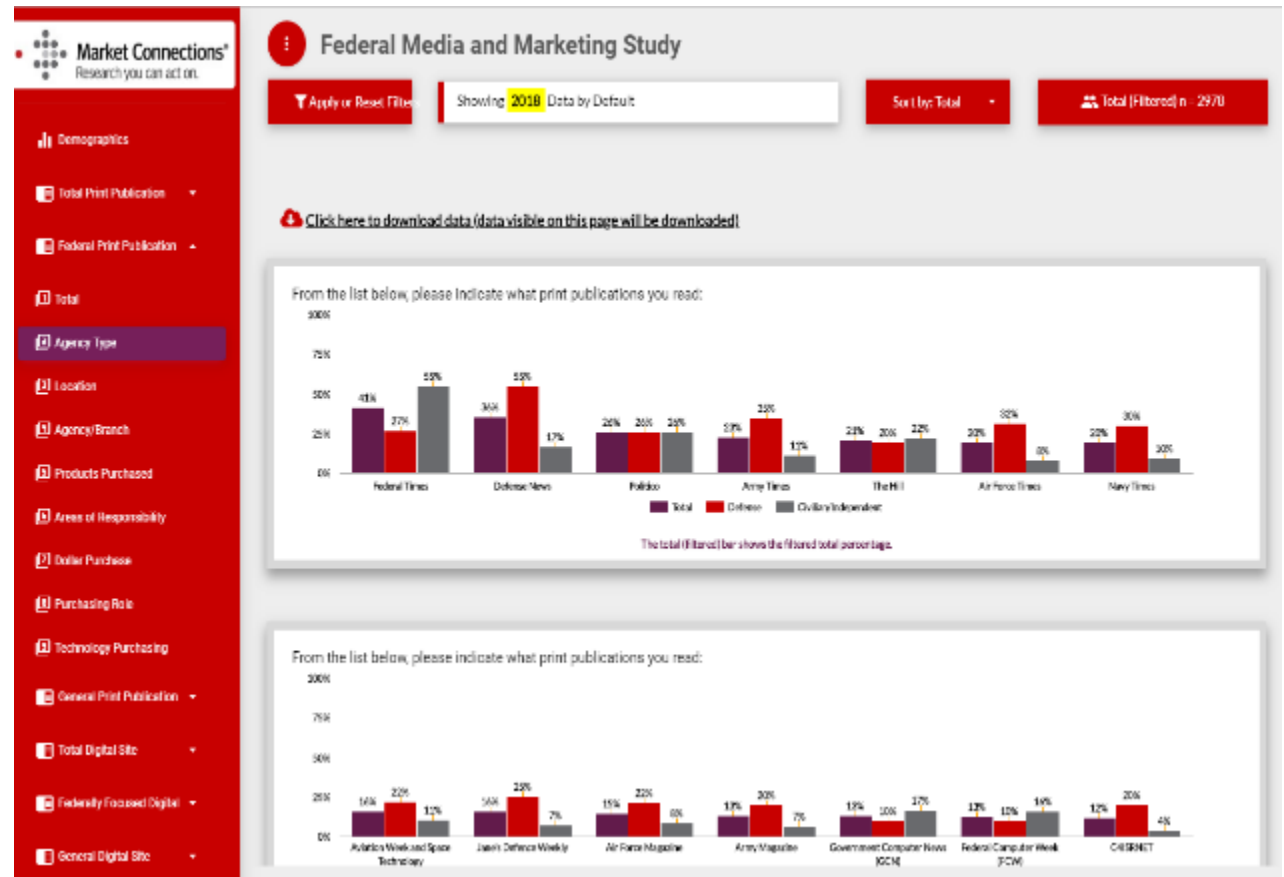
For more information and specific cuts in the data, an annual subscription helps plan your media strategy.

- 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/fmms2019study



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 #FMMS2019



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