Federal **Media & Marketing** Study 2019

Healthcare 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: approximately 285)

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

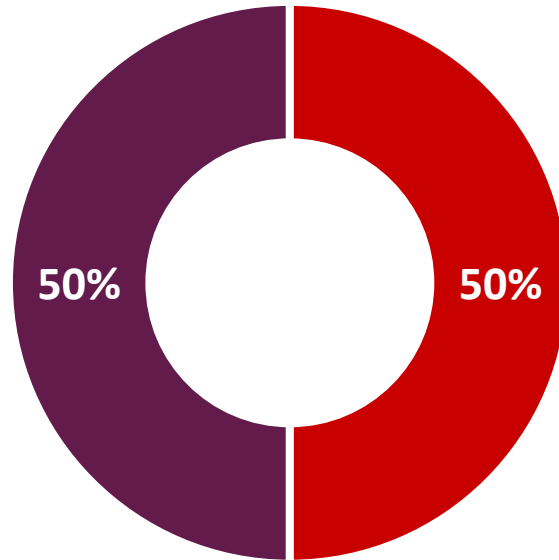- **Day in the Life:** Media exposure throughout a typical day

Demographics

DEMOGRAPHICS
Agency Type & Location

Agency Type

50% 50%

Location

89%

11%

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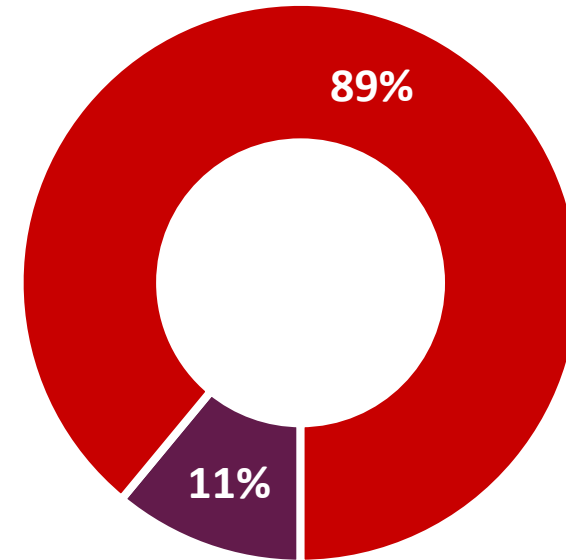
■ Inside the Beltway   ■ Outside the Beltway

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

TREND 2017-2019

Age

■ 21 to 34   ■ 35 to 44   ■ 45 to 54   ■ 55+

2017: 3%, 12%, 29%, 56%
2018: 12%, 16%, 24%, 47%
2019: 7%, 15%, 36%, 42%

What is your age?
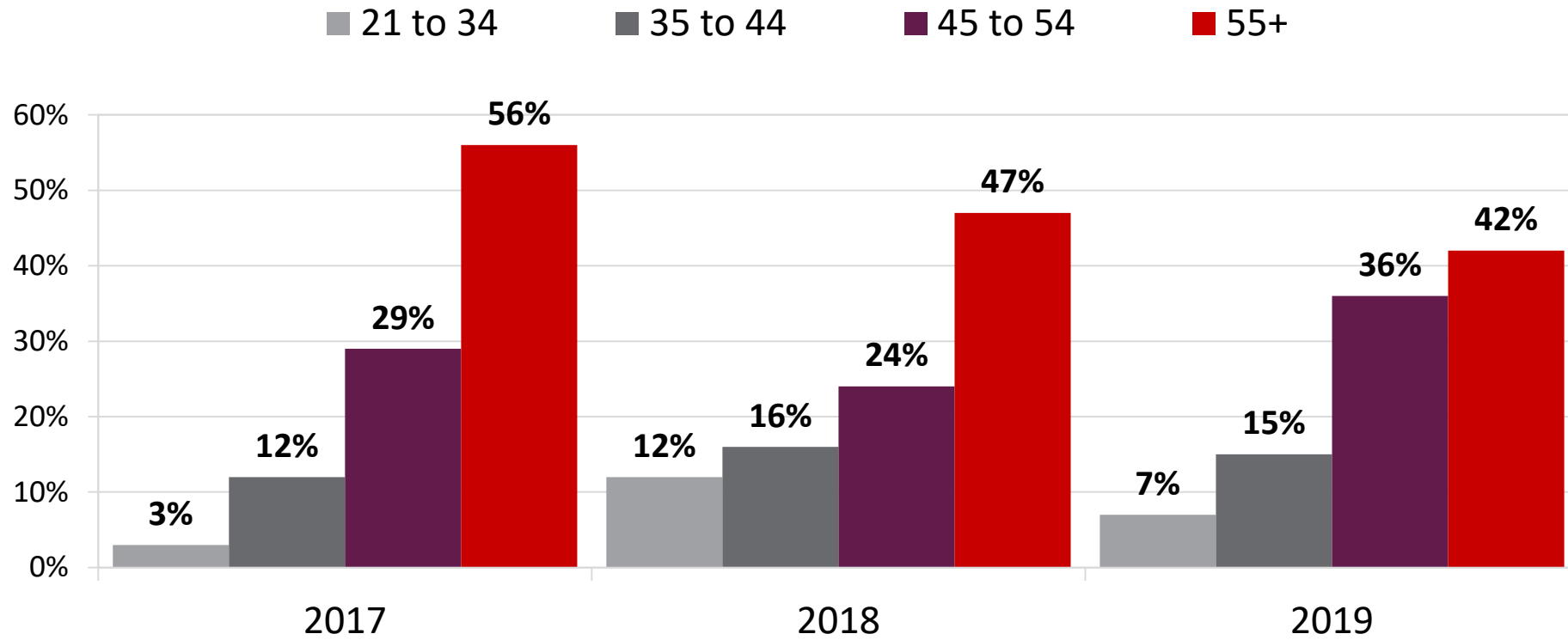
DEMOGRAPHICS
Political Affiliation

Independent/No preference **51%**

Republican **29%**

Democrat **21%**

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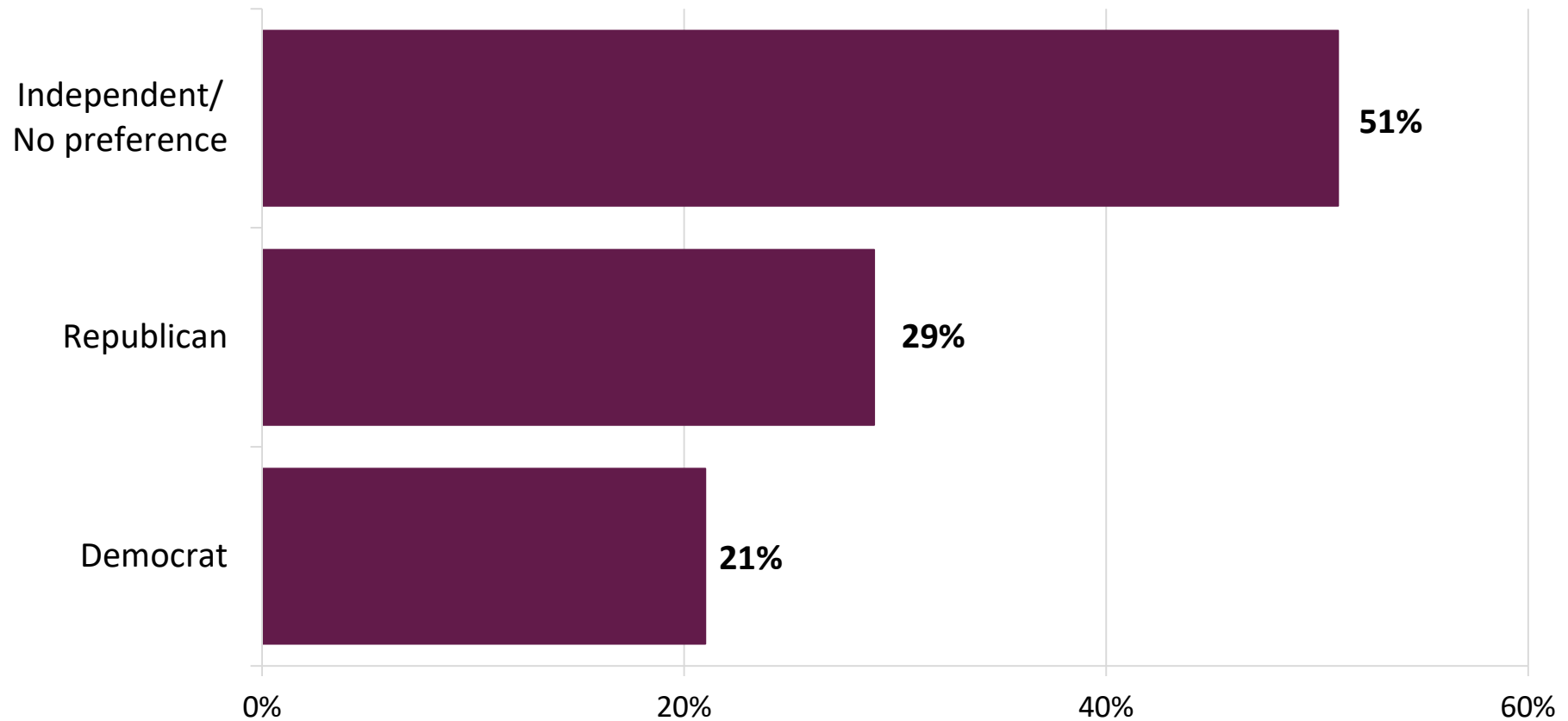
In politics today, do you consider yourself a Republican, a Democrat, or an Independent?

Top 10 Job Functions & Purchase Categories

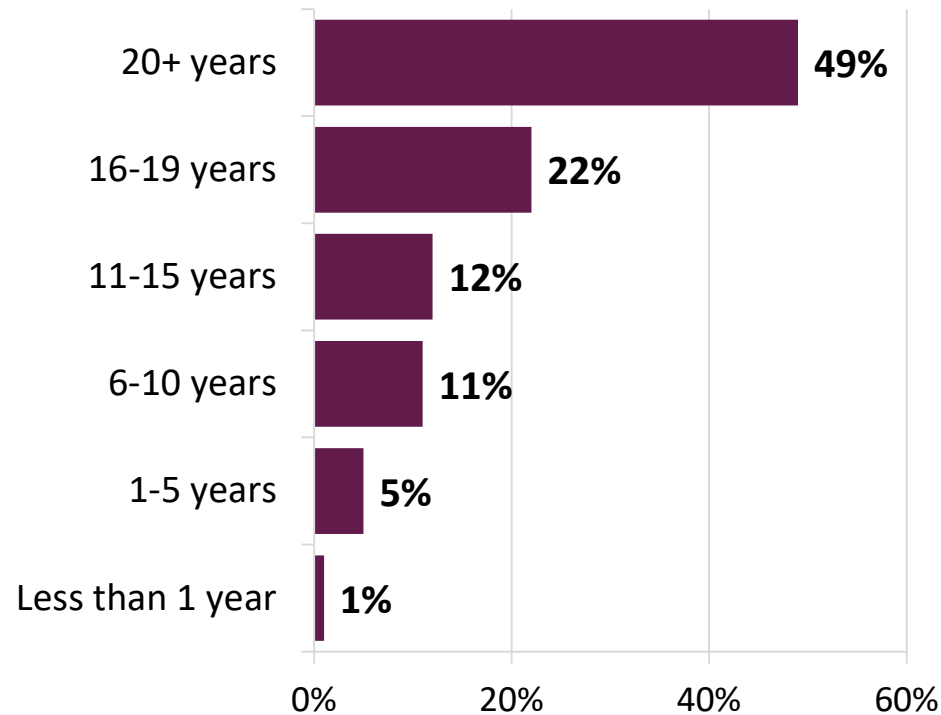| Job Function	Product/Service Purchase Categories
Medical, health	Office equipment and supplies
Health IT	Computer systems/hardware
Administration and office services	Furniture/furnishings
Project/program management	Building/facilities/real estate/office space
Human resources, personnel, benefits	Education/training classes and services
Informational technology, computers, systems	Health IT
Training, education	Laboratory, scientific and medical products
Executive and command	IT services
Communications/telecommunications	Cloud computing services
Purchasing, contracting, procurement	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	49%
16-19 years	22%
11-15 years	12%
6-10 years	11%
1-5 years	5%
Less than 1 year	1%

Years Until Leaving Federal Employment

10+ years	28%
6-9 years	17%
3-5 years	22%
1-2 years	20%
Less than 1 year	4%
Don't know/Undecided	10%
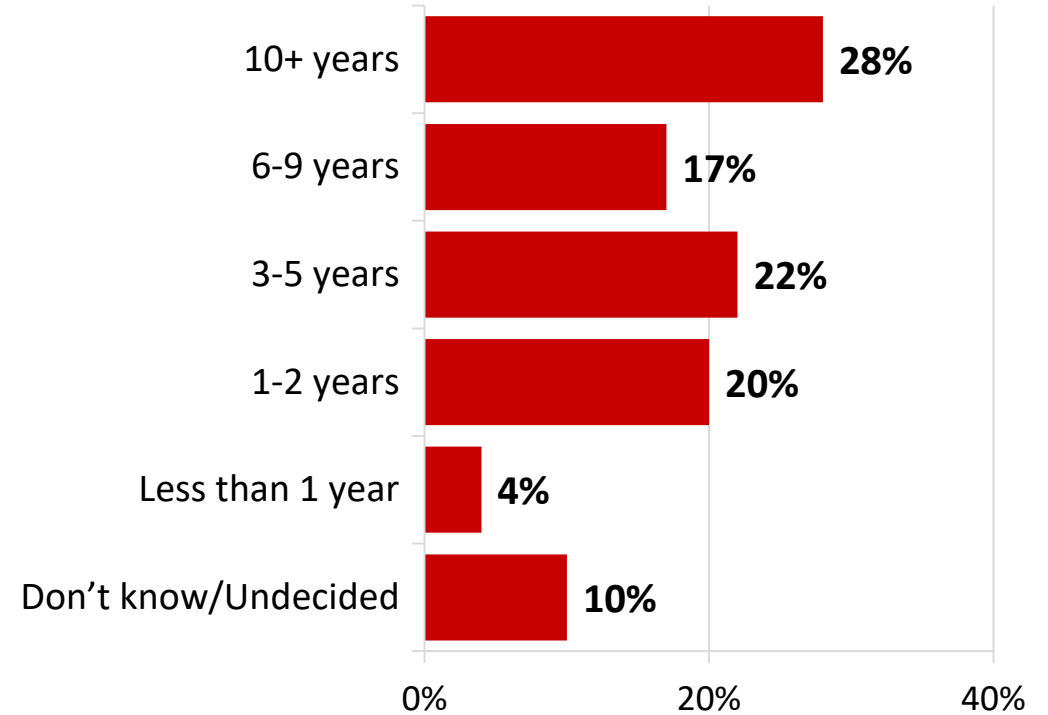
How many years in total have you served as a federal government employee? (Include military service, if applicable.)
In how many years do you plan to leave federal employment?

Future Plans

Plans After Leaving Federal Employment
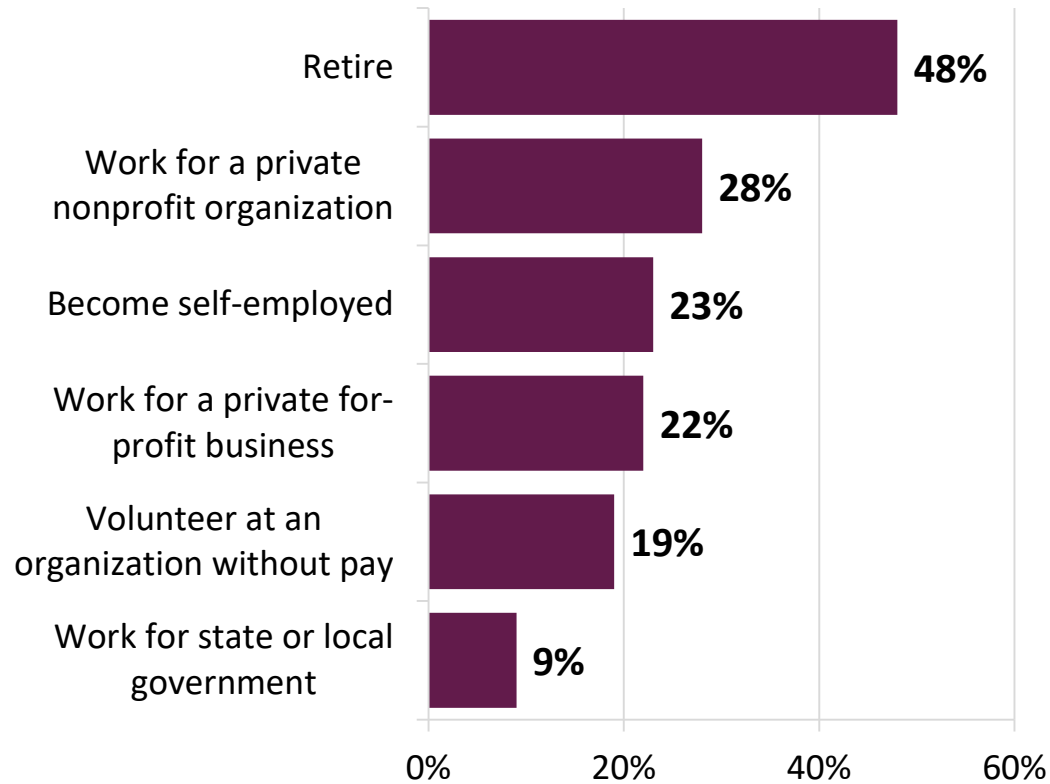
Career Plans for the Next 5 Years
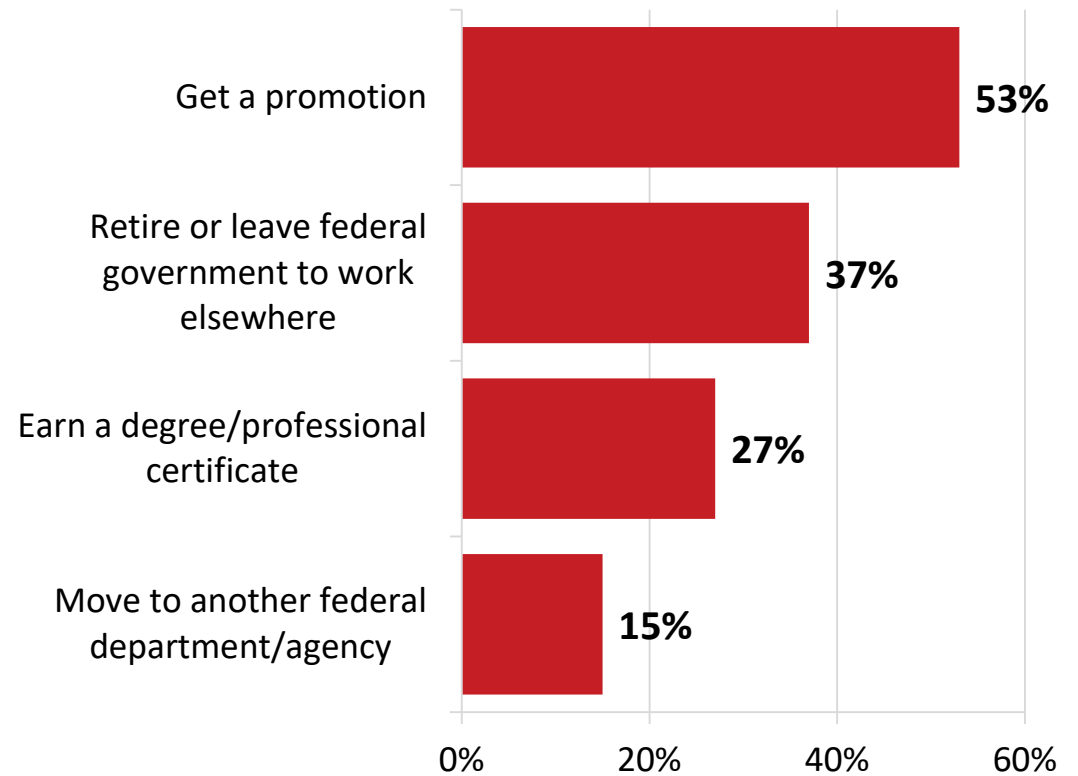
What do you plan to do after you leave federal employment? (select all that apply)
What are your career plans for the next 5 years? (select all that apply)

Top Work-Related Challenges Over Next Year

Challenge	Percentage
Employee morale	53%
Funding/budget	41%
Changes in government policies	39%
Retirement of current employees	35%
Staff recruitment	32%
Leadership turnover	29%
Potential threat of a shutdown	25%
Uncertainty in potential change of administration	24%
Planning for the next fiscal year	23%
Use of new technologies	18%
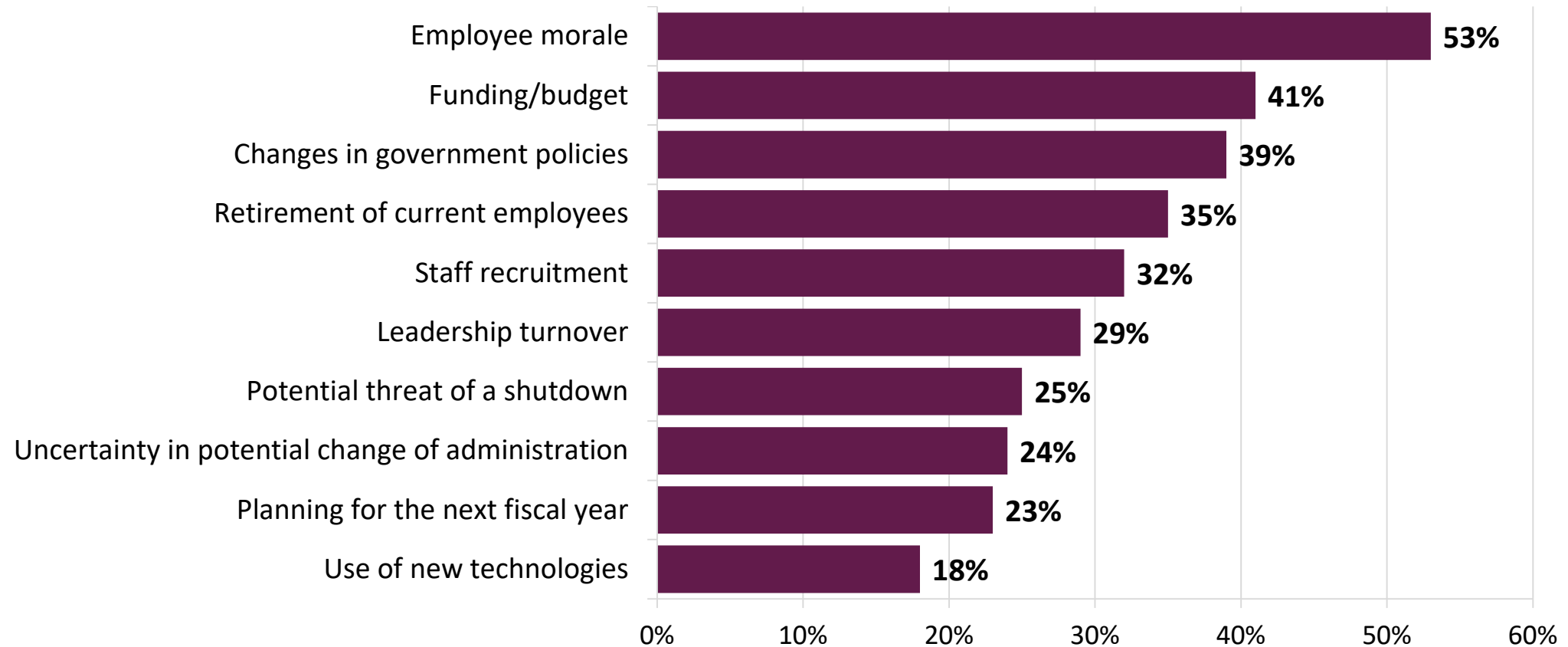
What do you see as the biggest work-related challenges coming over the next year in your agency? (select all that apply)

Mobile Devices in the Workplace

Works in a Secure Space Where Personal Mobile Devices Are Prohibited

73%

24%

■ Yes   ■ No
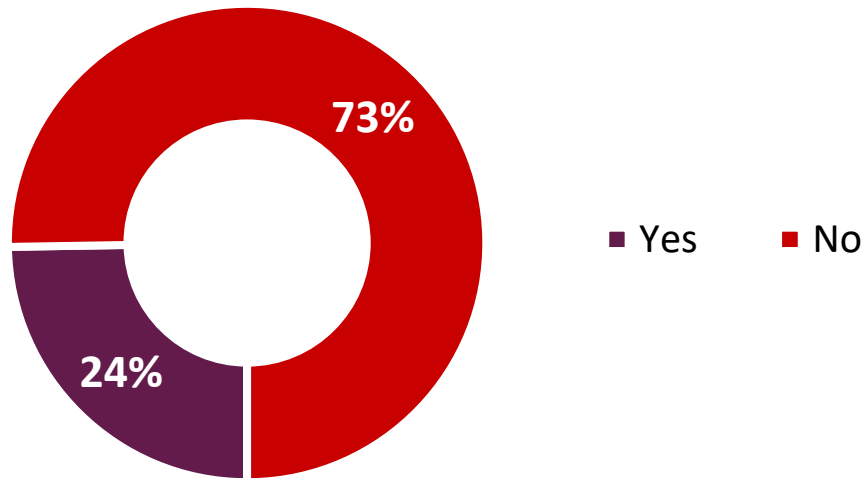
Mobile Device Use in the Workplace

A personal mobile device — 36%

Both a work and personal mobile device — 27%

A work mobile device — 17%

Do not use a mobile device in my workplace — 18%

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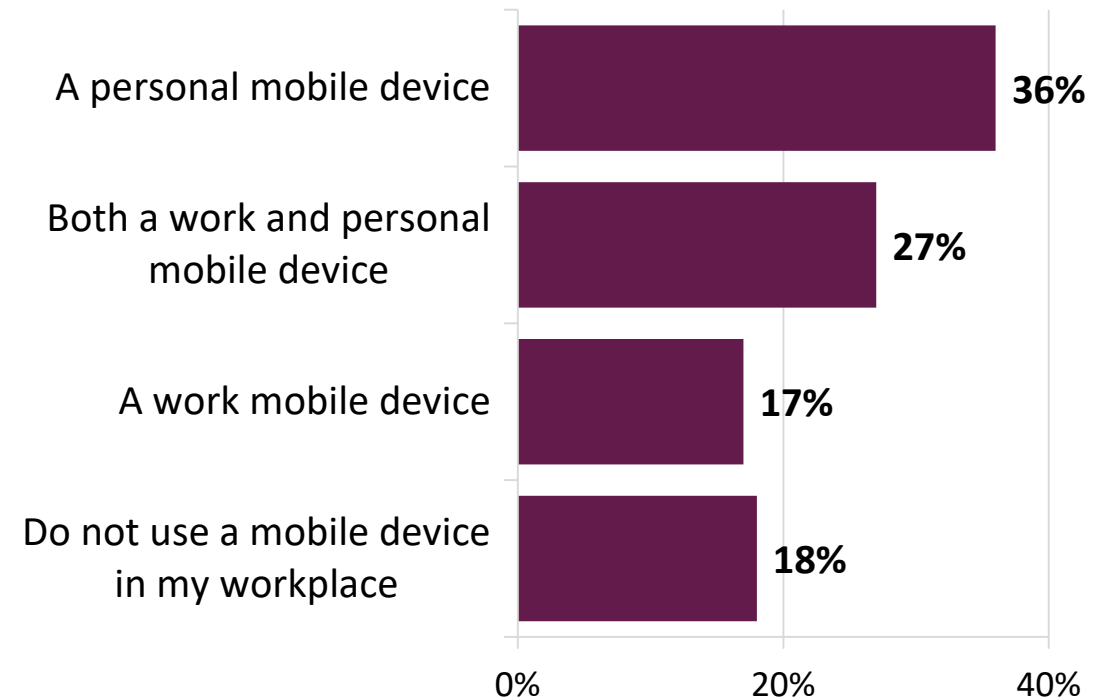
Do you spend the majority of your time at work in a secure space where personal mobile devices are prohibited?
Which of the following do you use while you're at your workplace?

Work Locations

% Always/Often

Work Location	%
Traditional office space	84%
Shared office space	24%
Telework from home	8%

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

Commute Time

Morning Commute

	Percentage
60 minutes +	16%
30-59 minutes	34%
< 30 minutes	50%

**AVERAGE
36 MINS**

DC Metro	Outside DC
60 MINS	33 MINS

Afternoon/Evening Commute

	Percentage
60 minutes +	19%
30-59 minutes	38%
< 30 minutes	43%

**AVERAGE
39 MINS**

DC Metro	Outside DC
65 MINS	36 MINS

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
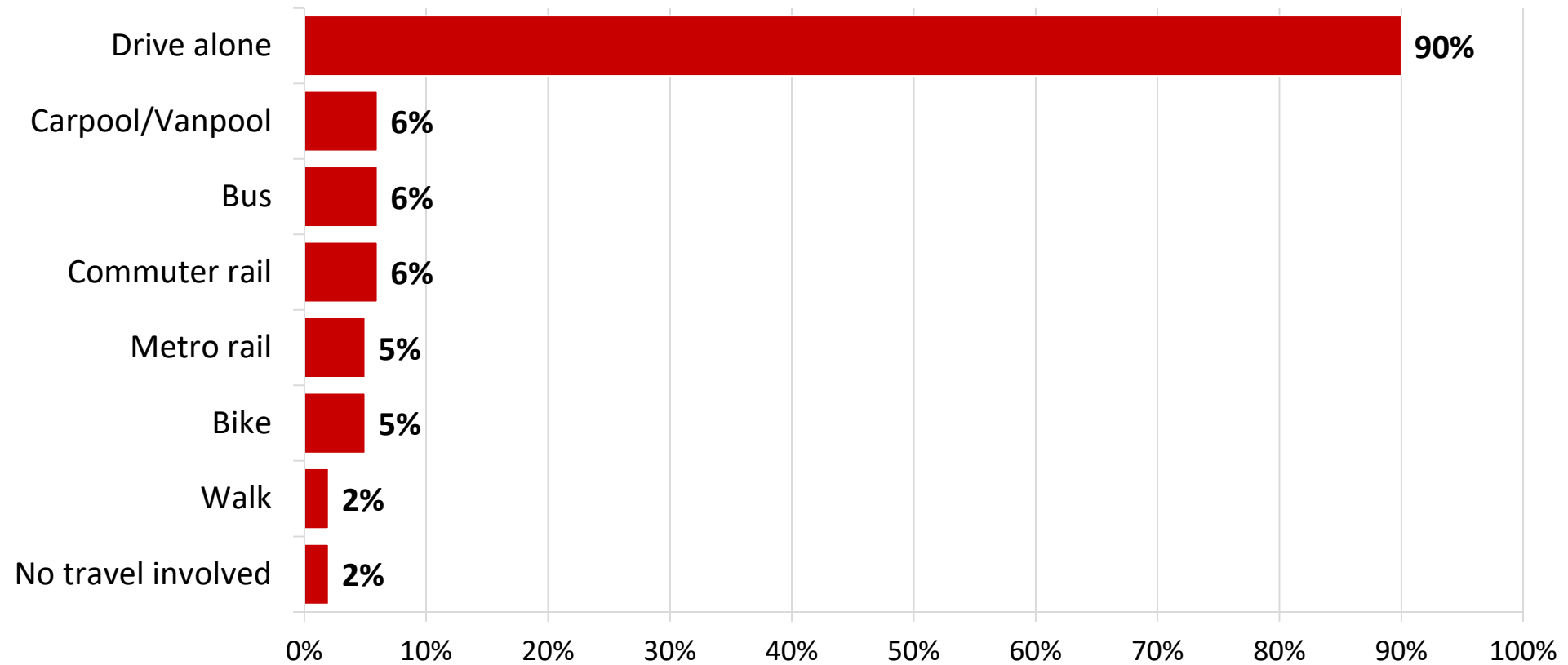
Mode	Percentage
Drive alone	90%
Carpool/Vanpool	6%
Bus	6%
Commuter rail	6%
Metro rail	5%
Bike	5%
Walk	2%
No travel involved	2%

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	87%
Metro rail	13%
Commuter rail	13%
Carpool/Vanpool	12%
Bus	6%
Walk	6%
Bike	6%
No travel involved	0%
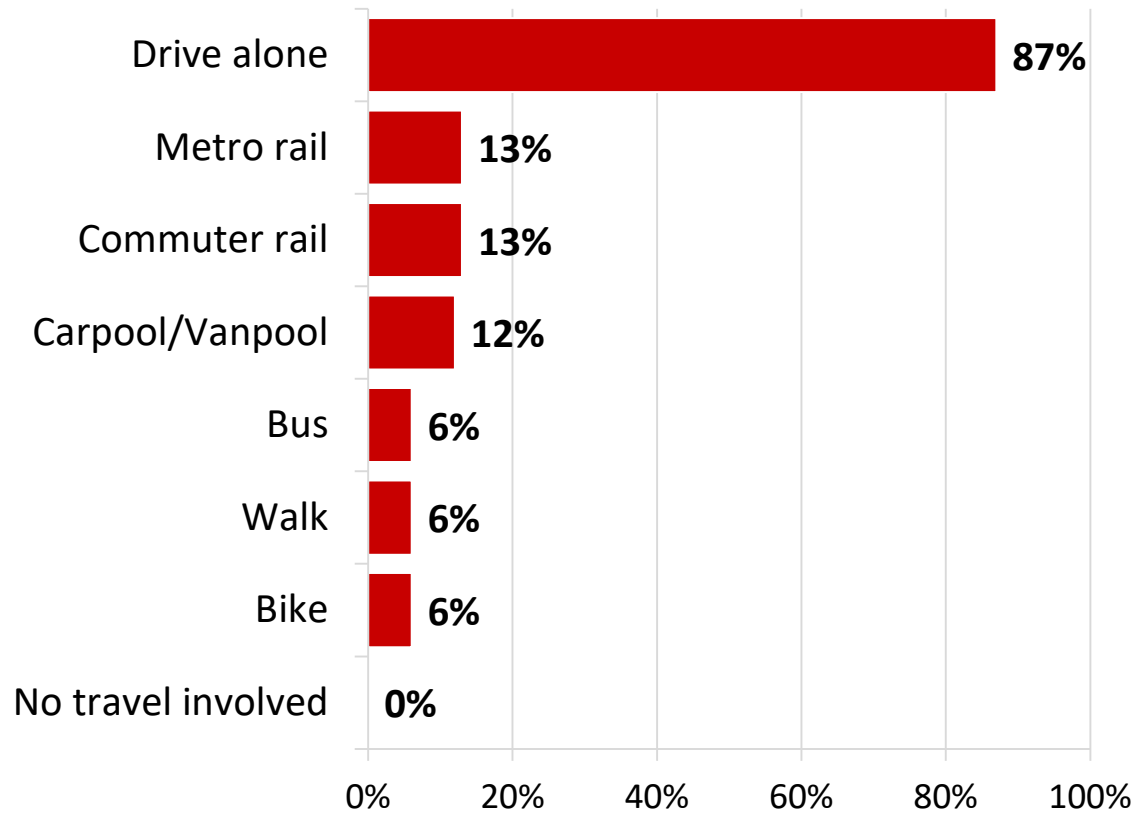
Outside Washington DC Metro Area
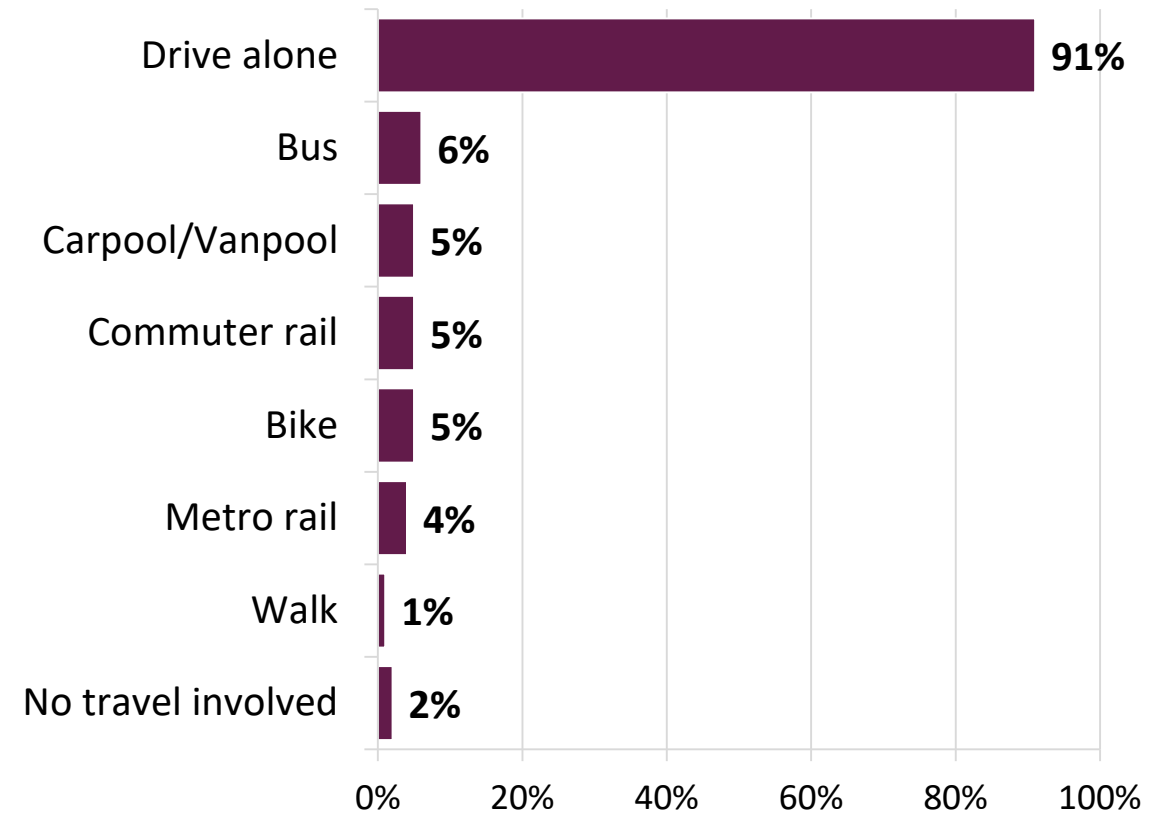
Mode	%
Drive alone	91%
Bus	6%
Carpool/Vanpool	5%
Commuter rail	5%
Bike	5%
Metro rail	4%
Walk	1%
No travel involved	2%

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
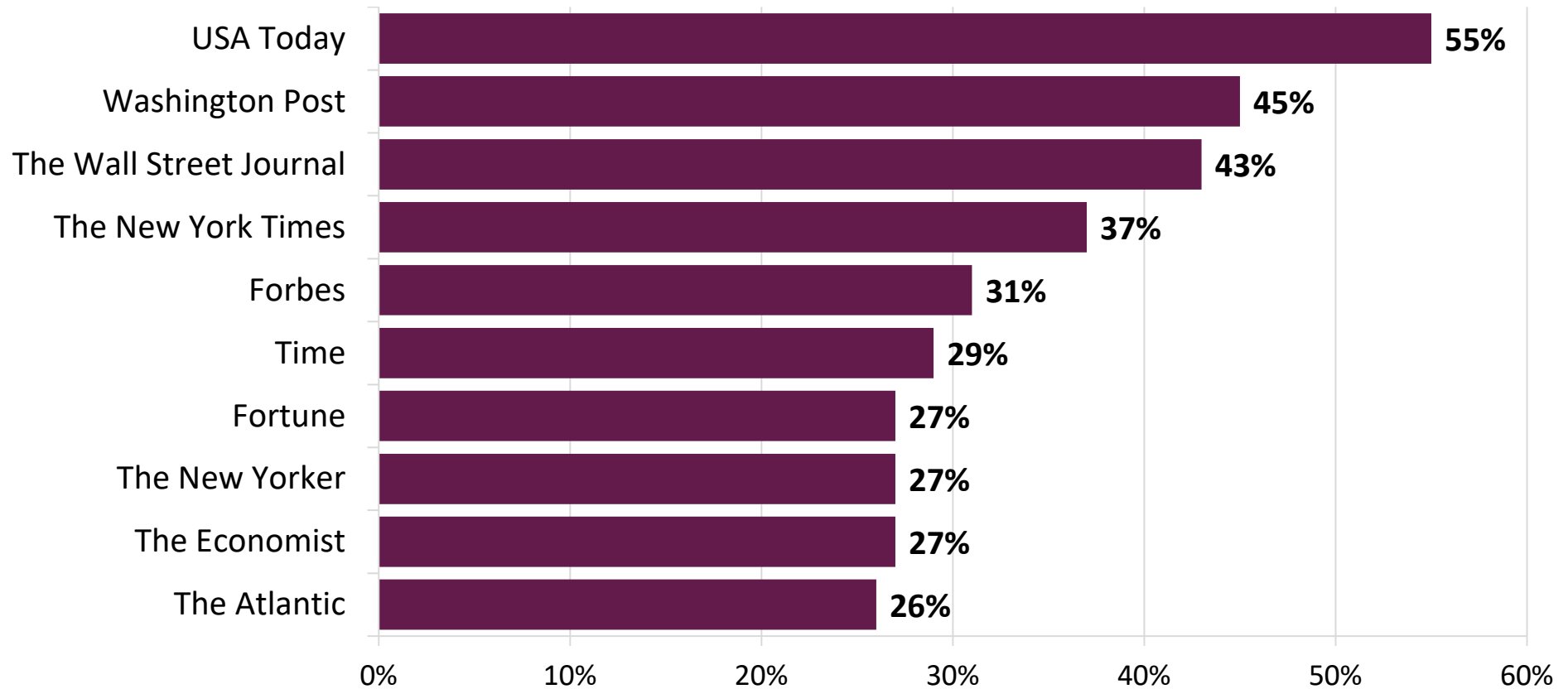
Publication	Percentage
USA Today	55%
Washington Post	45%
The Wall Street Journal	43%
The New York Times	37%
Forbes	31%
Time	29%
Fortune	27%
The New Yorker	27%
The Economist	27%
The Atlantic	26%

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
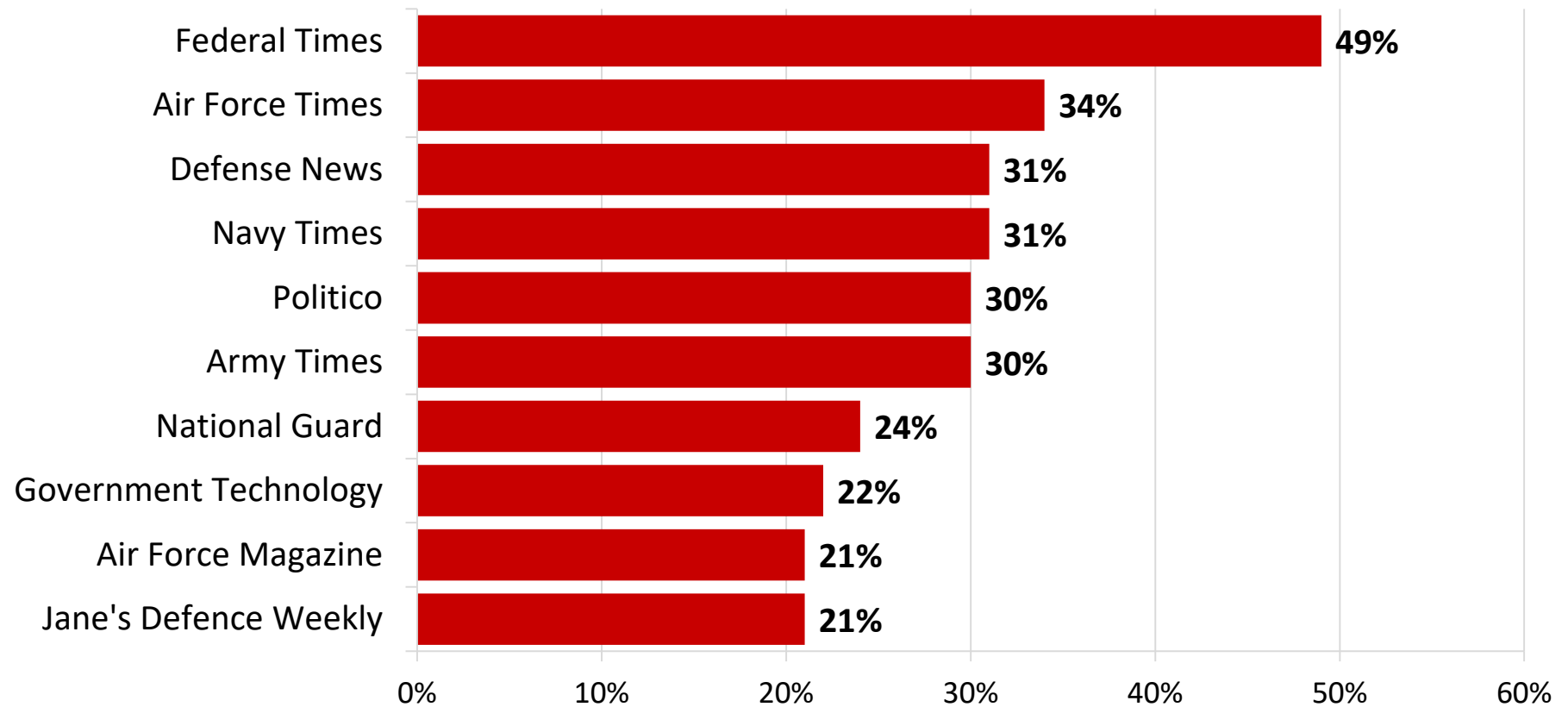
Publication	Percentage
Federal Times	49%
Air Force Times	34%
Defense News	31%
Navy Times	31%
Politico	30%
Army Times	30%
National Guard	24%
Government Technology	22%
Air Force Magazine	21%
Jane's Defence Weekly	21%

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
FederalTimes.com	27%
AirForceTimes.com	27%
MilitaryTimes.com	26%
GovExec.com	26%
NavyTimes.com	26%
ArmyTimes.com	25%
Military.com	23%
Nextgov.com	21%
Politico.com	21%
DefenseNews.com	20%

Top General Digital Sites

68% - Weather.com

55% - FoxNews.com

47% - AccuWeather.com

46% - CNN.com

41% - WashingtonPost.com
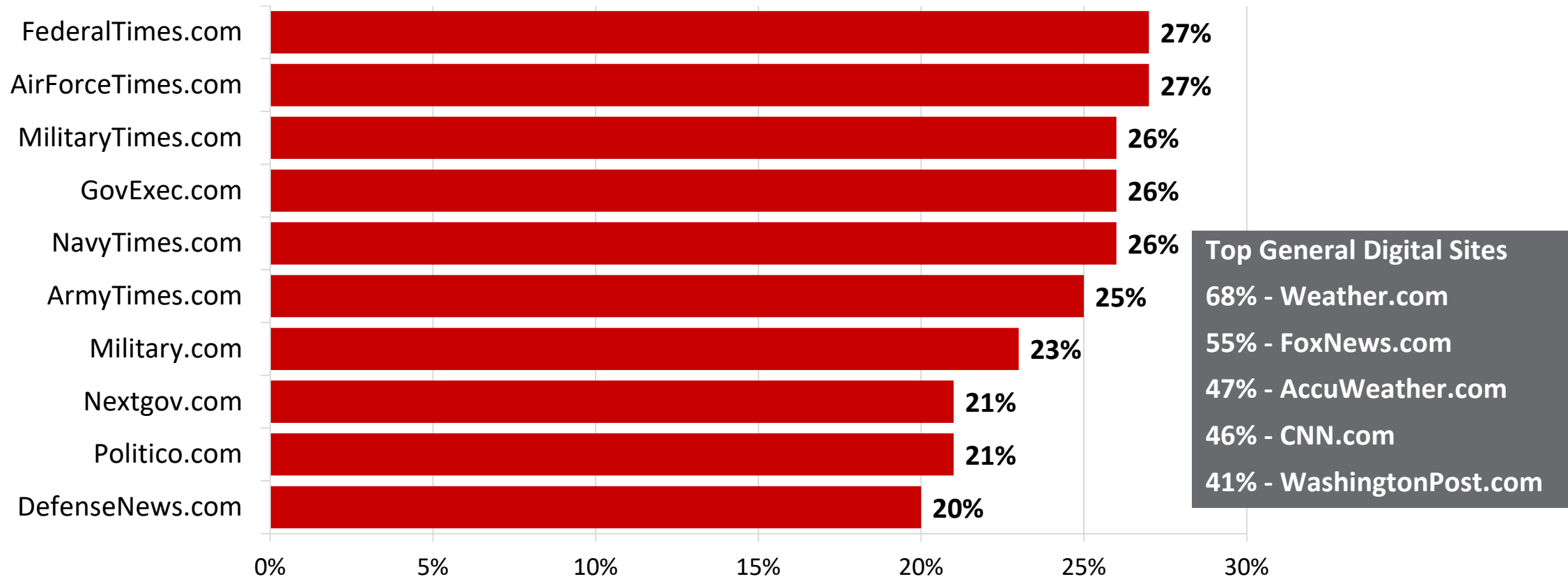
From the list below, please indicate which of the following you access digitally (i.e. websites, mobile sites, apps) for news or information.

Top Apps Downloaded on Mobile Device

The Weather Channel — **27%**
AccuWeather — **24%**
CNN — **17%**
Fox News — **15%**
Washington Post — **13%**
ESPN — **10%**
NBC News — **9%**
USA Today — **9%**
Military.com — **9%**
Huffington Post — **7%**
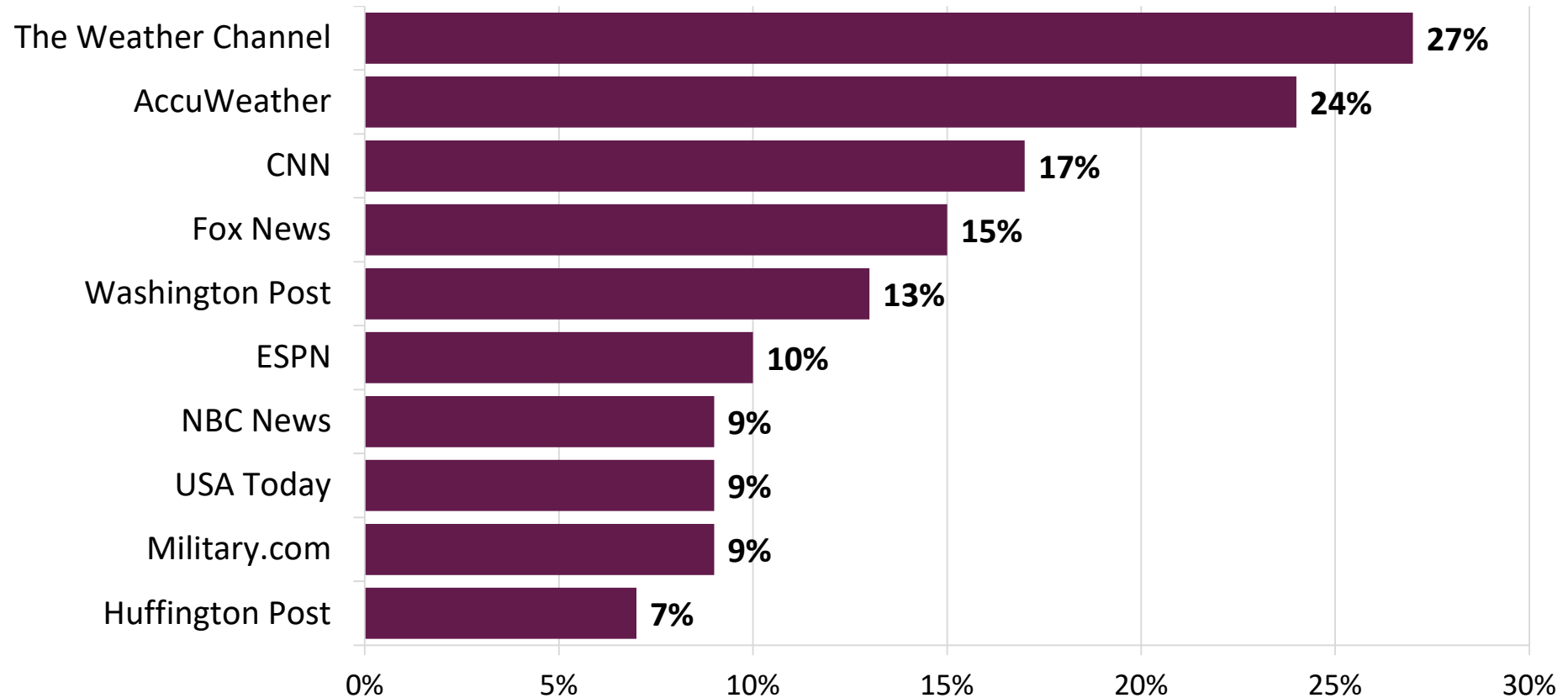
Which of the following apps do you have downloaded on your mobile device? (select all that apply)

Go-To Print and Digital Media Property for News

Go-To Government-Focused Media Property

■ Digital   ■ Print
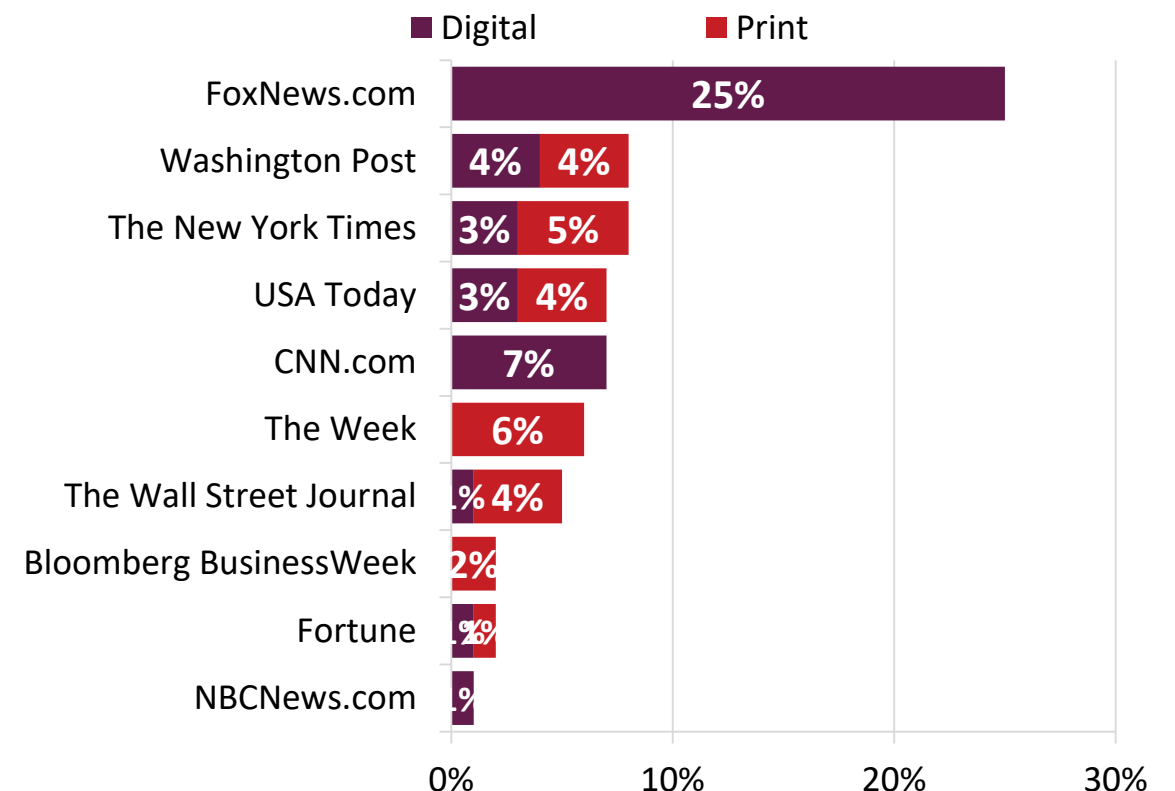
Property	Digital	Print
Air Force Times	6%	7%
GovExec.com	10%	
Navy Times	3%	7%
Army Times		8%
Federal Times		6%
Defense News		6%
FederalTimes.com	4%	
MilitaryTimes.com	3%	
Army Magazine		3%
FederalNewsRadio.com	2%	

Go-To General Media Property

■ Digital   ■ Print

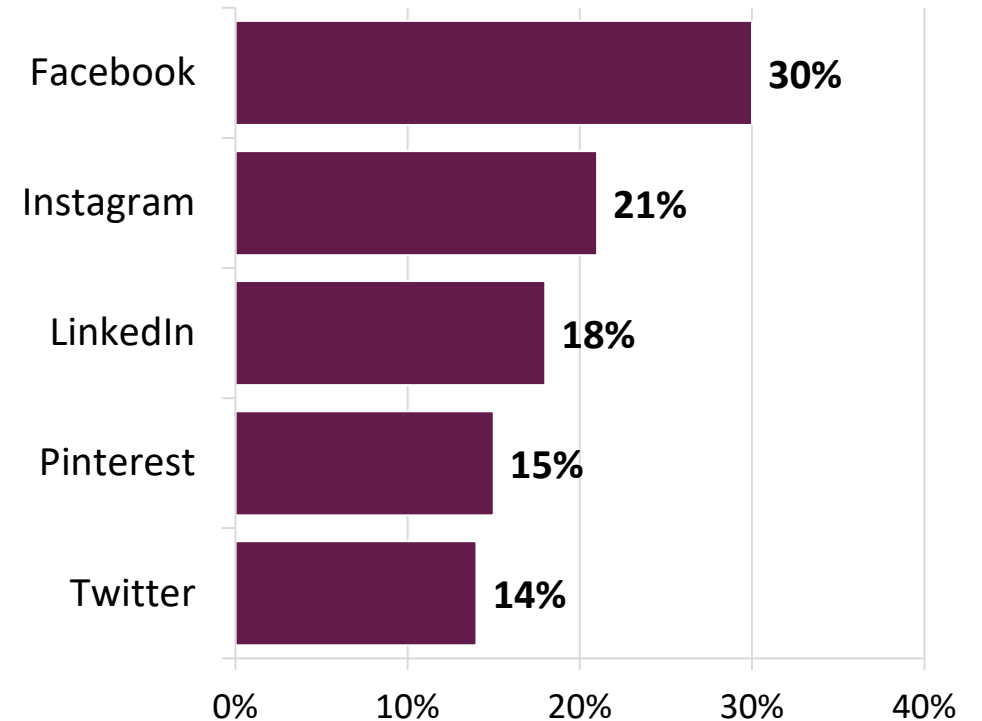| Property	Digital	Print
FoxNews.com	25%	
Washington Post	4%	4%
The New York Times	3%	5%
USA Today	3%	4%
CNN.com	7%	
The Week		6%
The Wall Street Journal	%	4%
Bloomberg BusinessWeek		2%
Fortune	%	%
NBCNews.com	%	
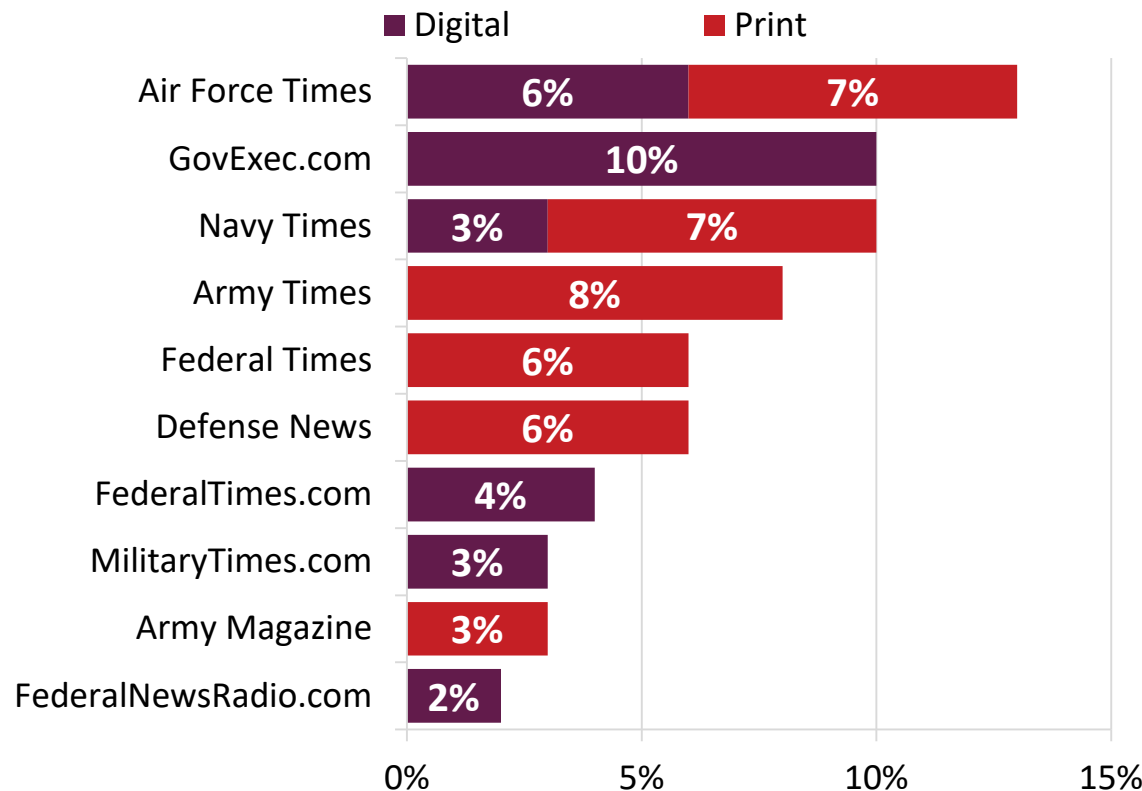
If you could only choose one government-focused media property as your "go-to" source for work-related news, which would you choose?
If you could only choose one general media property as your "go-to" source for news, which would you choose?

Online Social Sites

Top Online Social Sites Used

Site	Percentage
Facebook	84%
LinkedIn	57%
Twitter	51%
Instagram	48%
Pinterest	48%
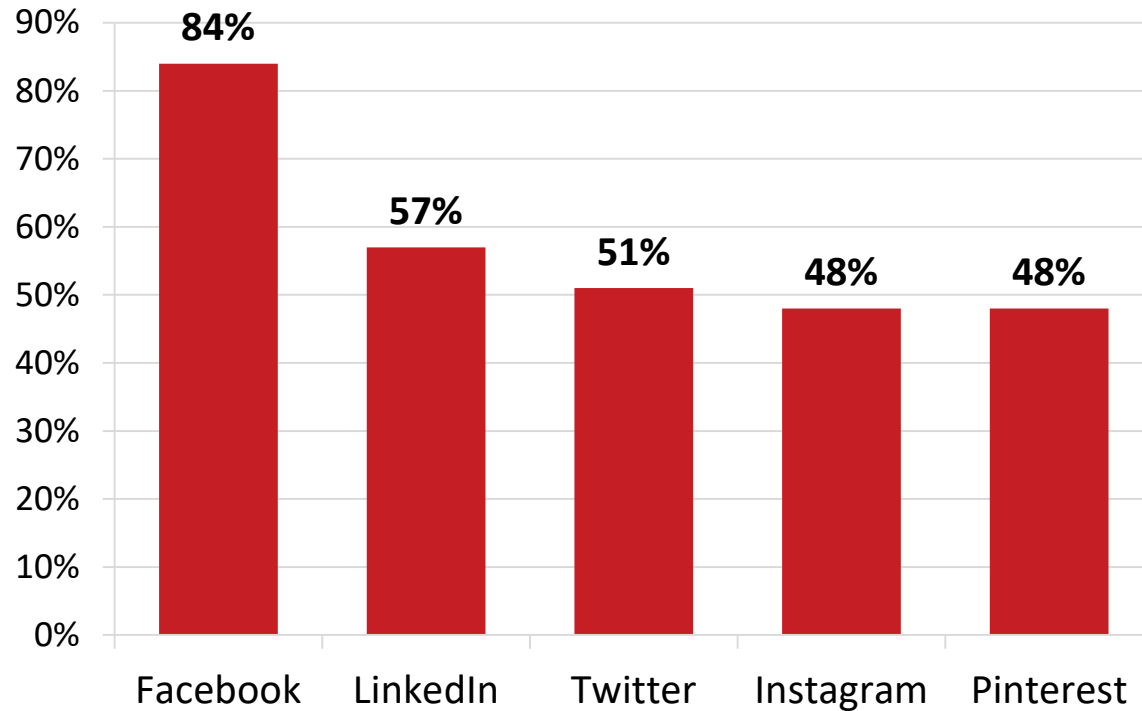
Daily Online Social Site Use

Site	Percentage
Facebook	30%
Instagram	21%
LinkedIn	18%
Pinterest	15%
Twitter	14%

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

Lifestyle Media Streaming Services

Service	Percentage
Amazon Prime Video	50%
Netflix	49%
Hulu	41%
YouTube TV	37%
OnDemand Cable or Satellite TV	37%
Spotify	27%
iHeartradio	27%
Pandora	25%
Facebook Watch	16%
SoundCloud	14%
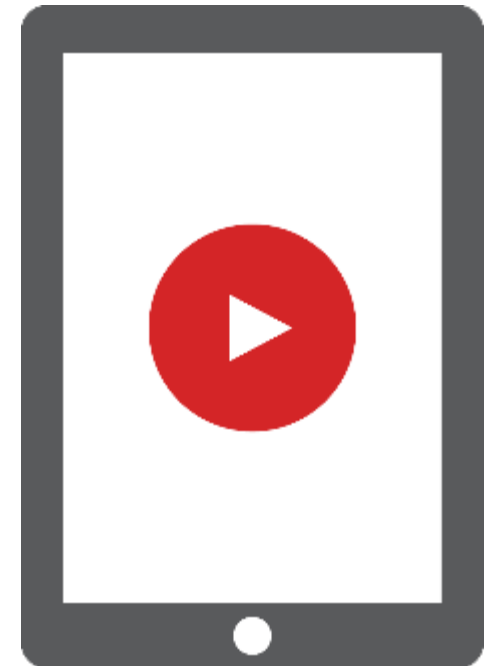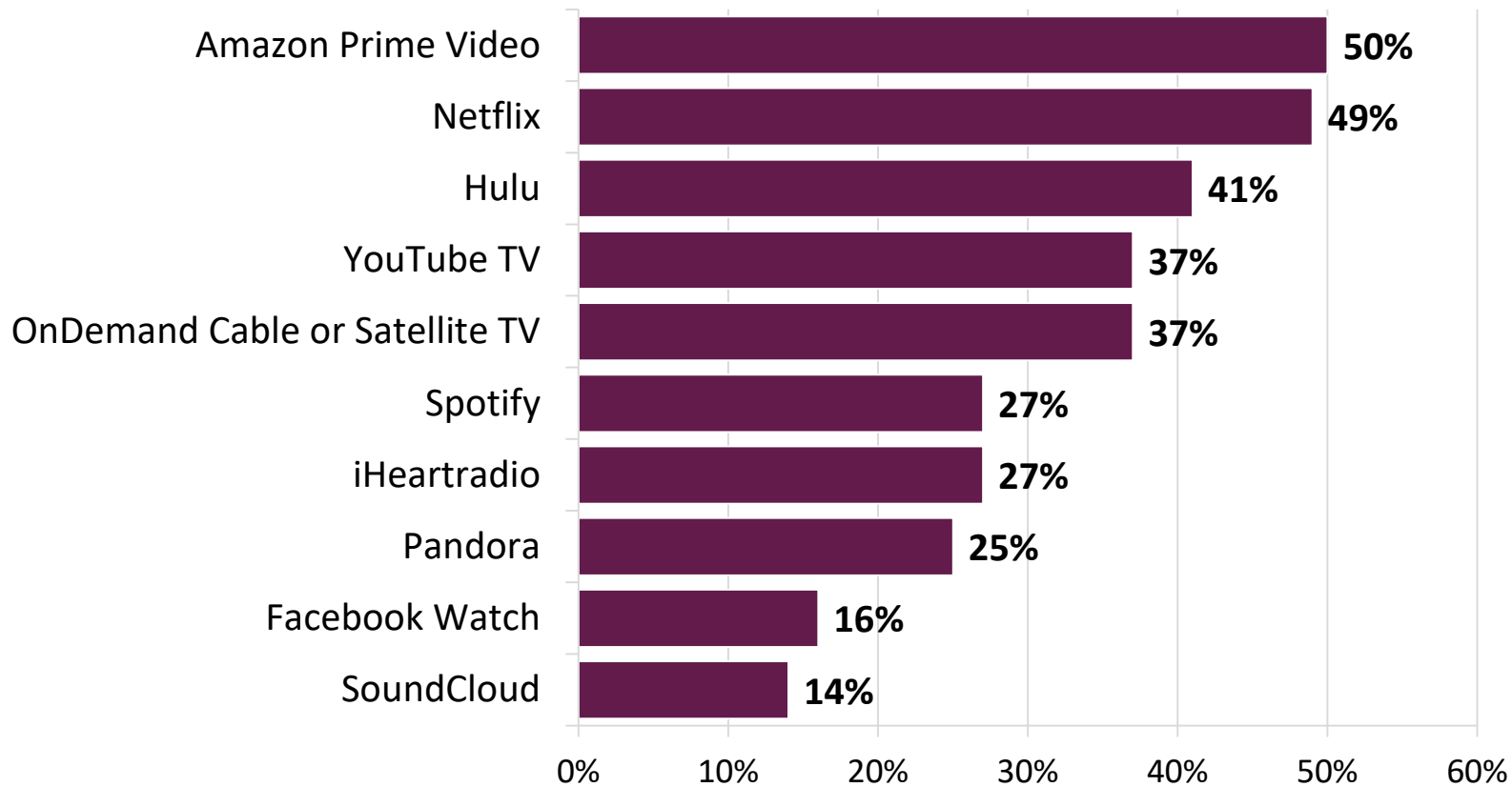
From the list below, please indicate which of the following you access.

DC METRO AREA
TV News Top Five

TV News Channels

Channel	Percentage
Fox News	46%
4 NBC WRC	42%
9 CBS WUSA	31%
5 FOX WTTG	31%
CNN	24%

0%   10%   20%   30%   40%   50%

News Programs

Program	Percentage
Meet the Press (NBC)	31%
Face the Nation (CBS)	31%
Fox News Sunday (Fox News)	25%
State of the Union (CNN)	18%
This Week with George Stephanopoulos (ABC)	18%

0%   10%   20%   30%   40%

N=31
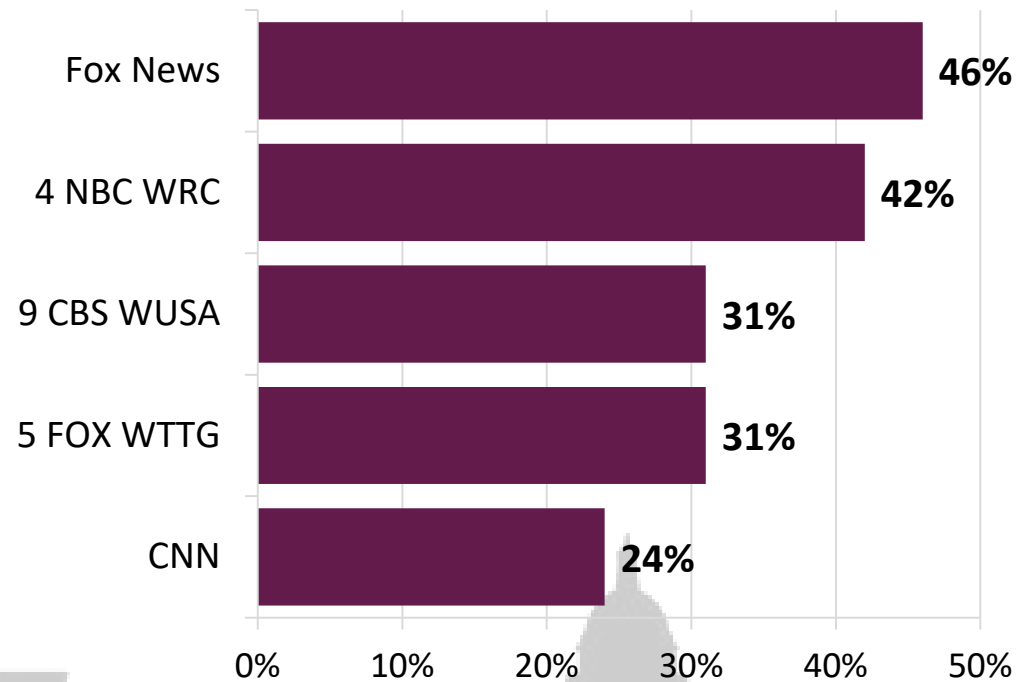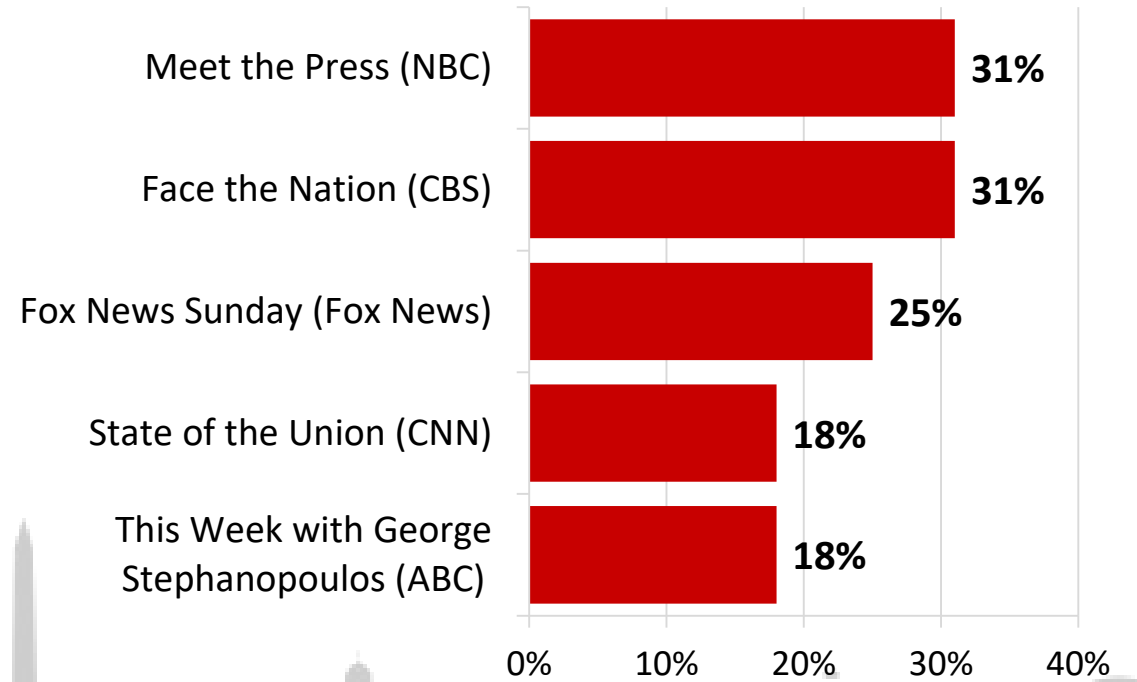
Which of the following television channels do you turn to most often for news? (select all that apply)
Please indicate which of the following news programs you watch. (select all that apply)

DC METRO AREA
Radio Top Five

Radio Stations

Station	Percentage
WTOP 103.5 FM	73%
WASH 97.1 FM	37%
WMAL 105.9 FM	33%
WMZQ 98.7 FM	31%
WIAD 94.7 FM	31%

Radio Websites

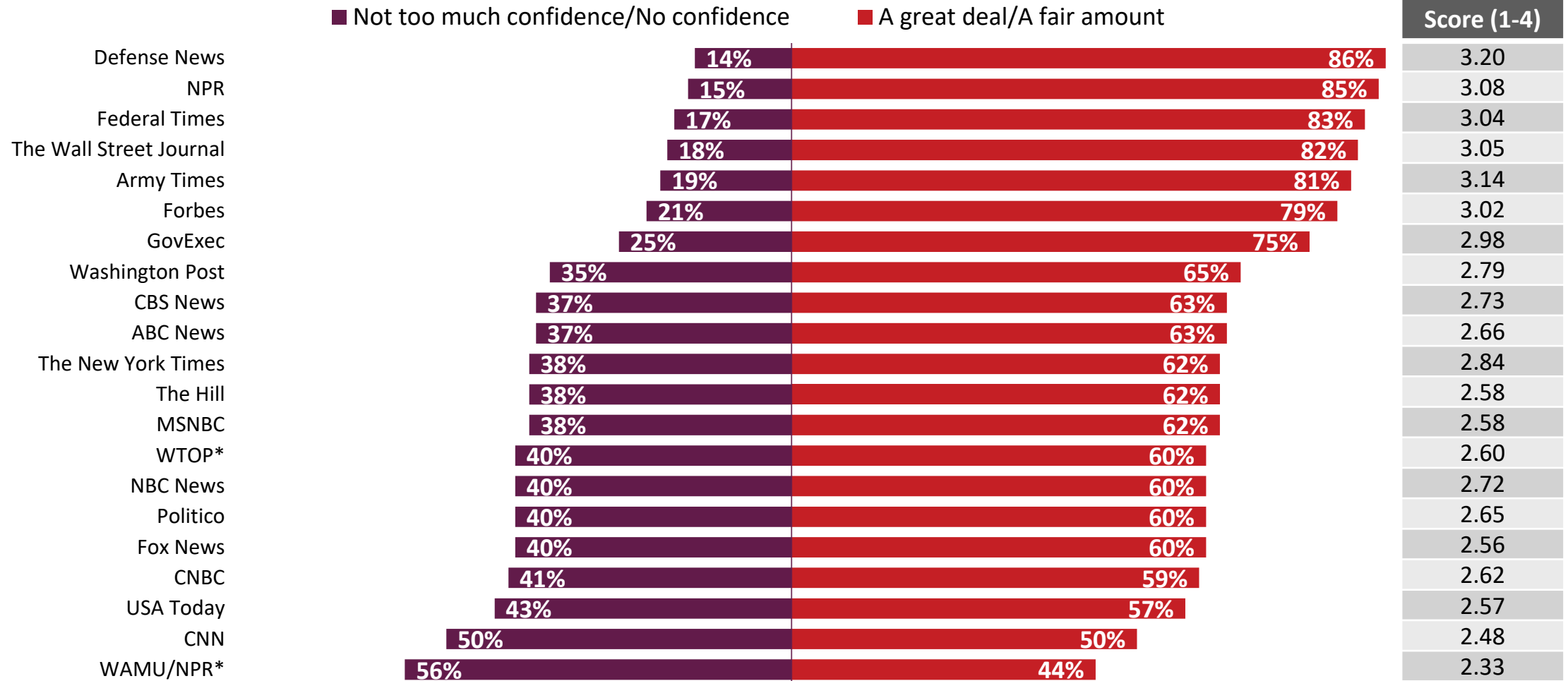| Website	Percentage
WTOP.com	76%
WMAL.com	27%
FederalNewsRadio.com	24%
WAMU.org	12%
WETA.org	12%
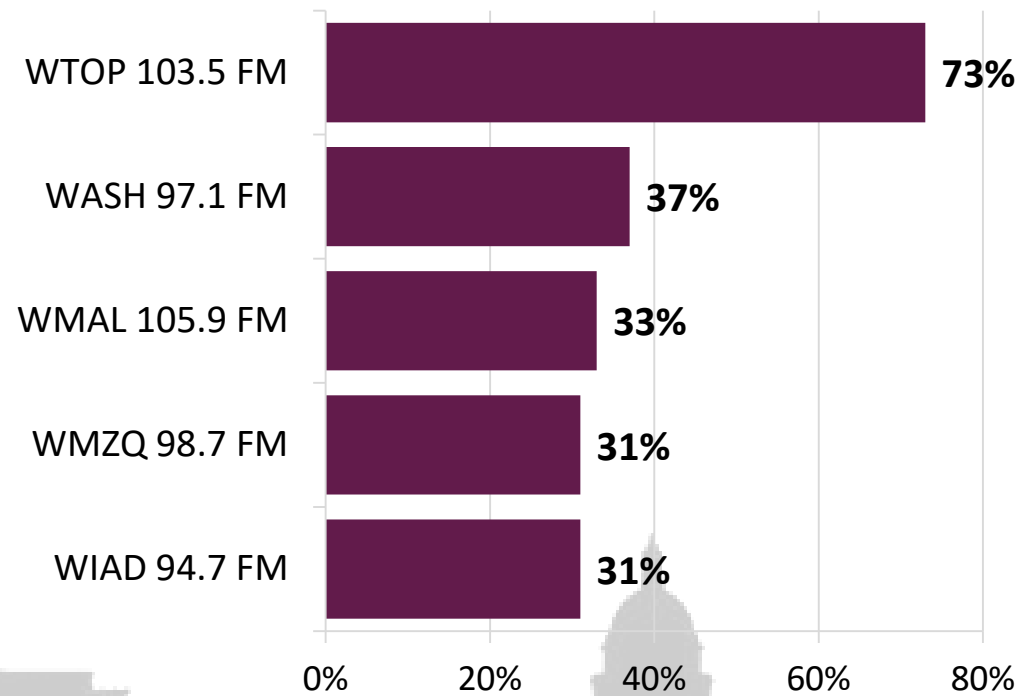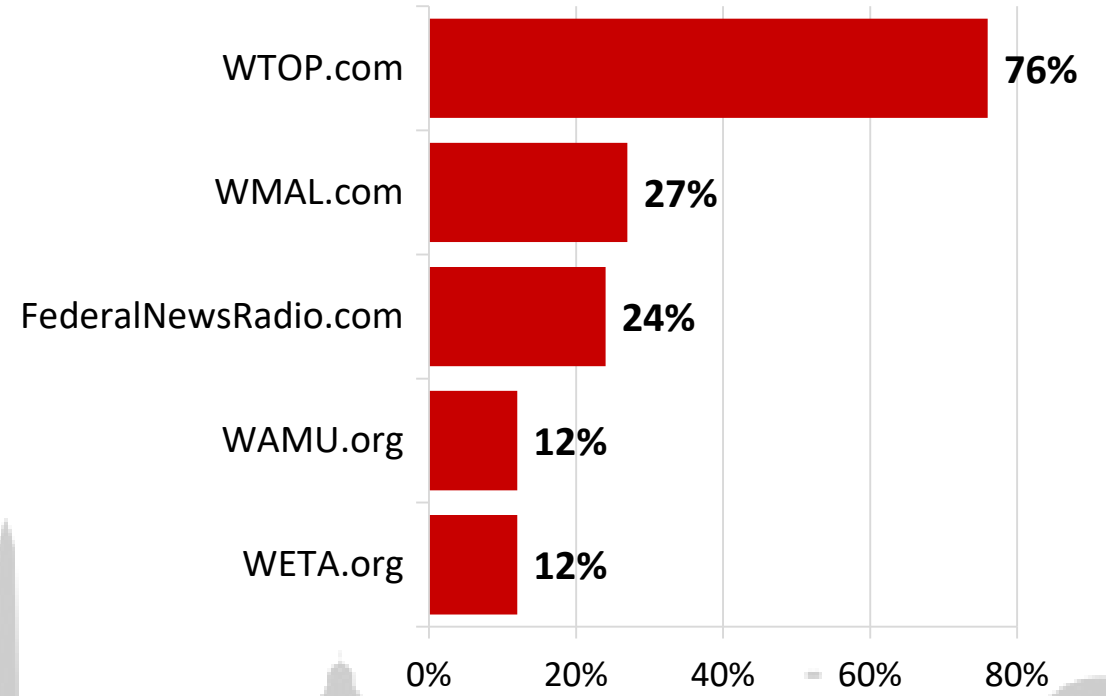
N=31

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

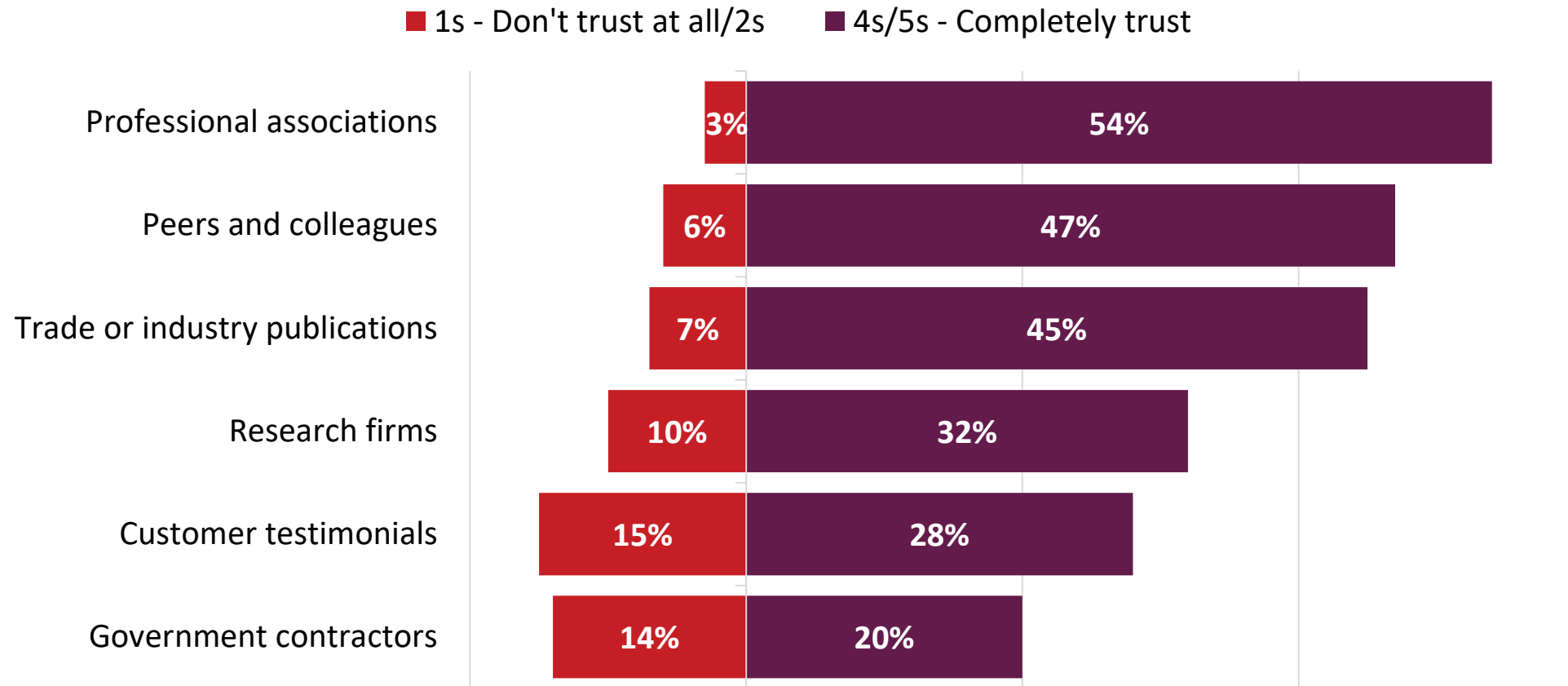|	Not too much confidence/No confidence	A great deal/A fair amount	Confidence Score (1-4)
Defense News	14%	86%	3.20
NPR	15%	85%	3.08
Federal Times	17%	83%	3.04
The Wall Street Journal	18%	82%	3.05
Army Times	19%	81%	3.14
Forbes	21%	79%	3.02
GovExec	25%	75%	2.98
Washington Post	35%	65%	2.79
CBS News	37%	63%	2.73
ABC News	37%	63%	2.66
The New York Times	38%	62%	2.84
The Hill	38%	62%	2.58
MSNBC	38%	62%	2.58
WTOP*	40%	60%	2.60
NBC News	40%	60%	2.72
Politico	40%	60%	2.65
Fox News	40%	60%	2.56
CNBC	41%	59%	2.62
USA Today	43%	57%	2.57
CNN	50%	50%	2.48
WAMU/NPR*	56%	44%	2.33

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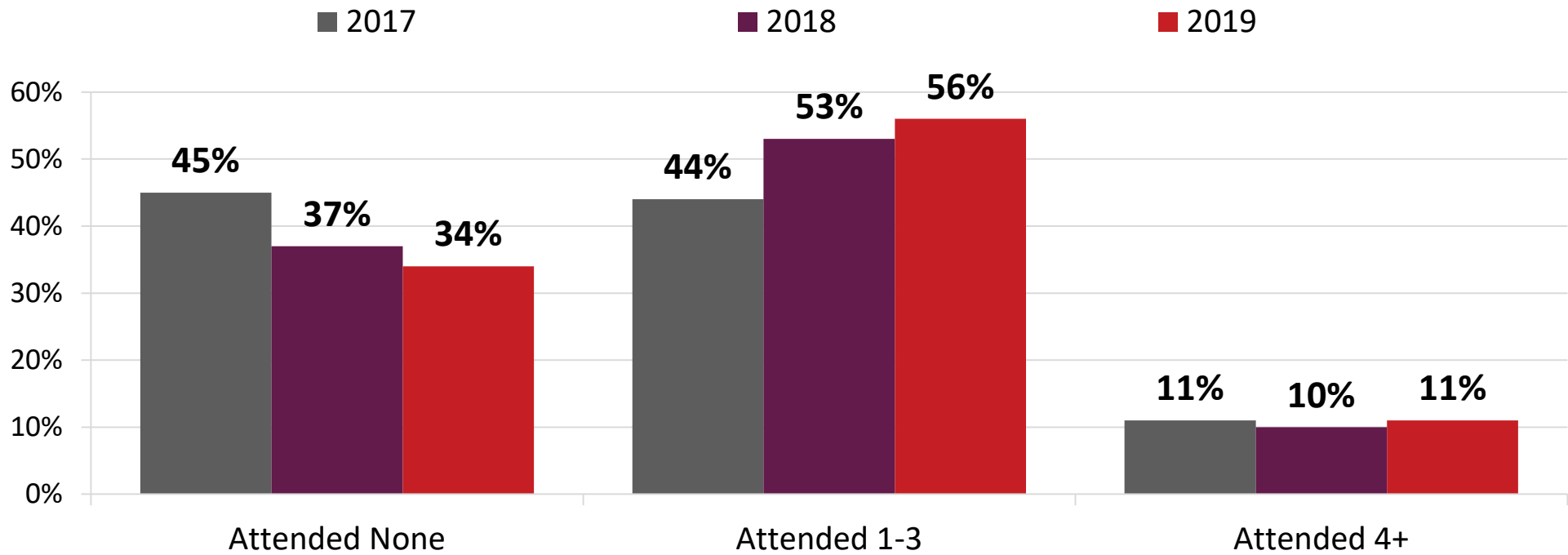
*Asked only in DC metro area

Marketing Tactics

Trusted Sources of Information

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

Source	1s - Don't trust at all/2s	4s/5s - Completely trust
Professional associations	3%	54%
Peers and colleagues	6%	47%
Trade or industry publications	7%	45%
Research firms	10%	32%
Customer testimonials	15%	28%
Government contractors	14%	20%

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

45% (Attended None, 2017)
37% (Attended None, 2018)
34% (Attended None, 2019)

44% (Attended 1-3, 2017)
53% (Attended 1-3, 2018)
56% (Attended 1-3, 2019)

11% (Attended 4+, 2017)
10% (Attended 4+, 2018)
11% (Attended 4+, 2019)
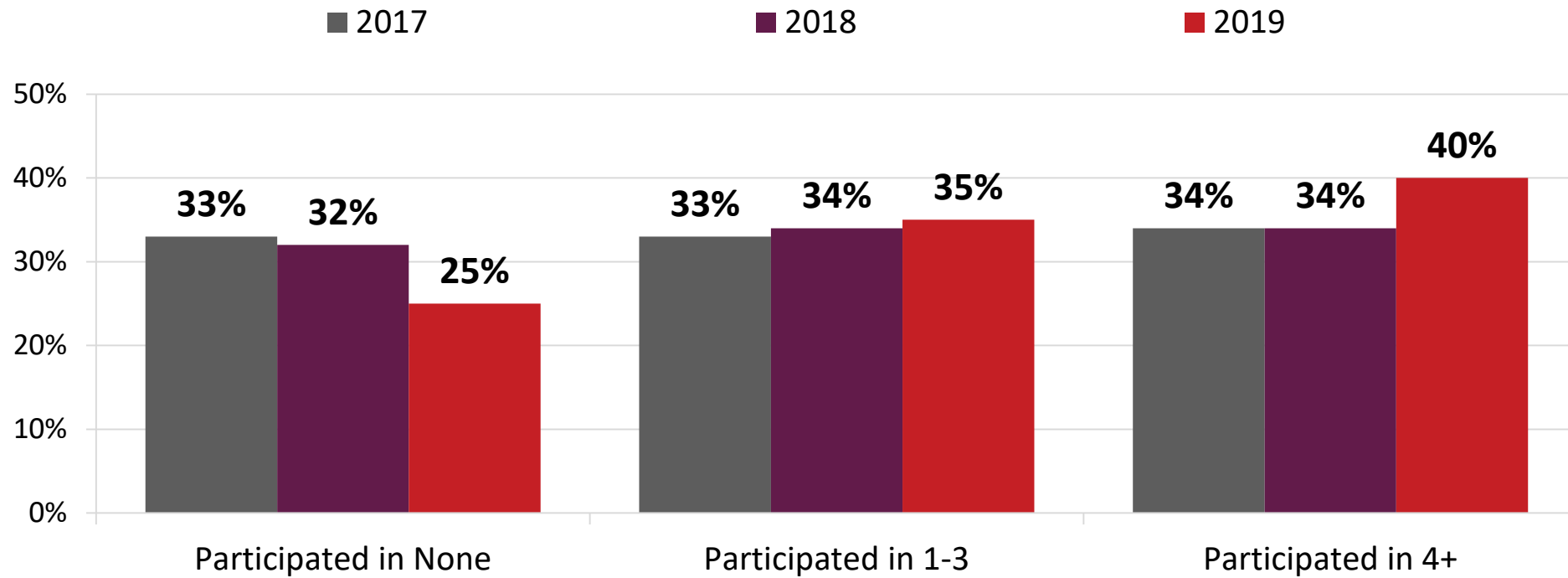
Attended None　　Attended 1-3　　Attended 4+

Approximately how many trade shows, conferences, or industry events have you attended in the past year?
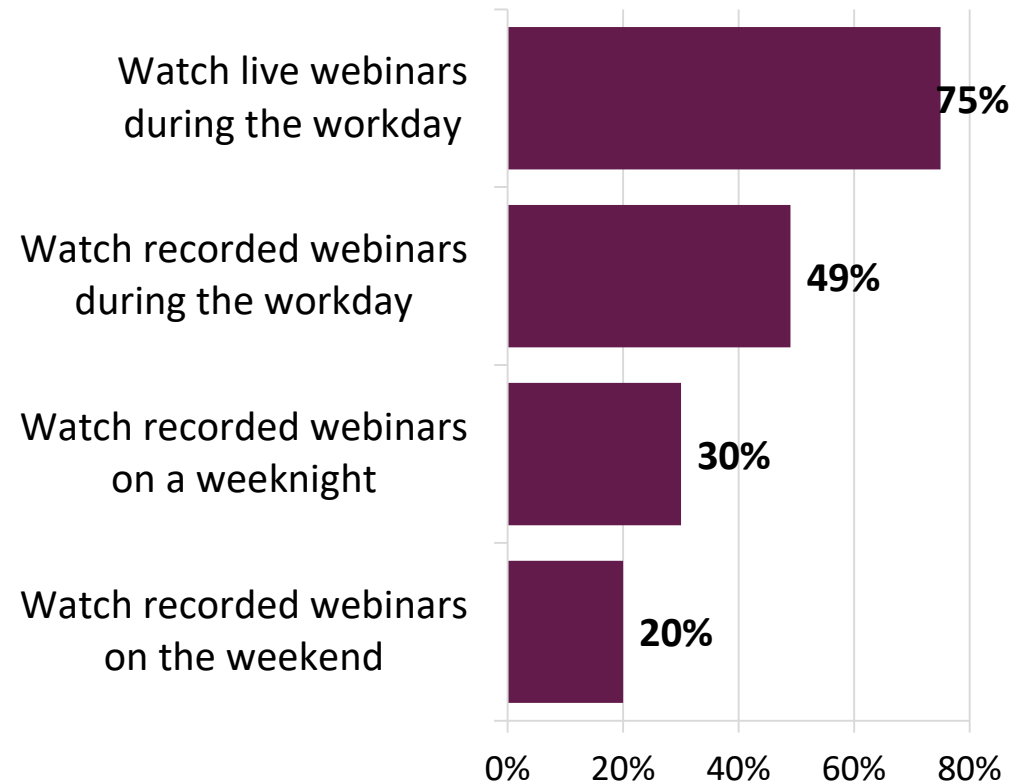
Likelihood to Attend Work Events on the Weekend

Very likely — 17%
Somewhat likely — 40%
Somewhat unlikely — 19%
Very unlikely — 24%

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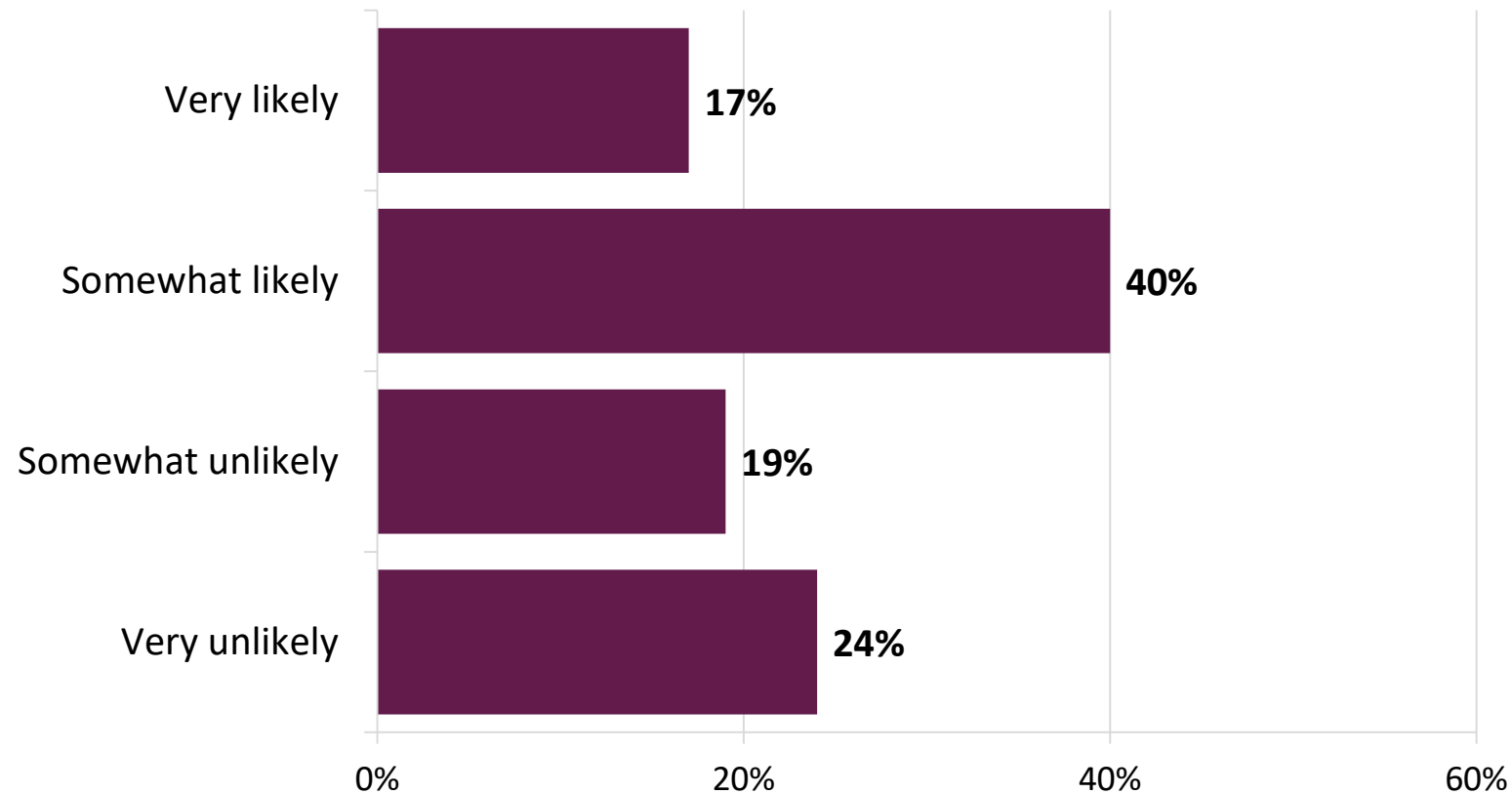
TREND 2017-2019
Webinar Participation in Past 12 Months

■ 2017   ■ 2018   ■ 2019

Participated in None
- 33%
- 32%
- 25%

Participated in 1-3
- 33%
- 34%
- 35%

Participated in 4+
- 34%
- 34%
- 40%

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

Participating in Webinars

Ways of Participating in Webinars

Way	Percentage
Watch live webinars during the workday	75%
Watch recorded webinars during the workday	49%
Watch recorded webinars on a weeknight	30%
Watch recorded webinars on the weekend	20%

Preferred Time to Participate

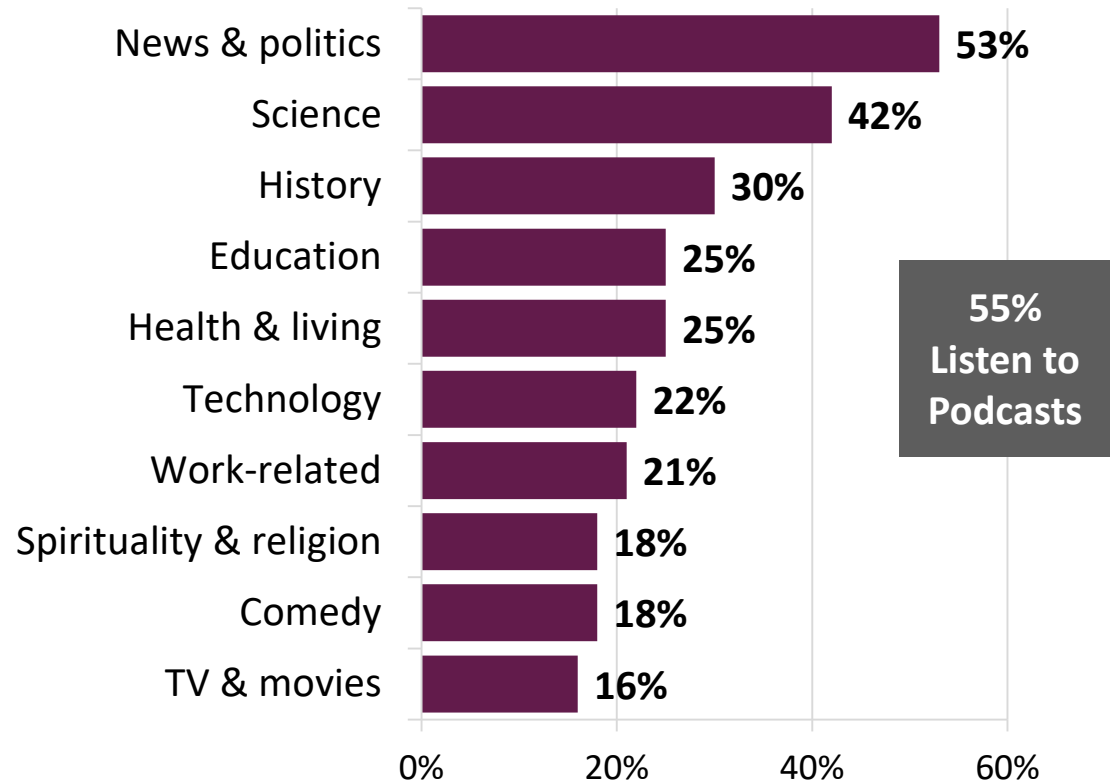| Time	Percentage
Before 11am	30%
11am-2pm	50%
After 2pm	35%
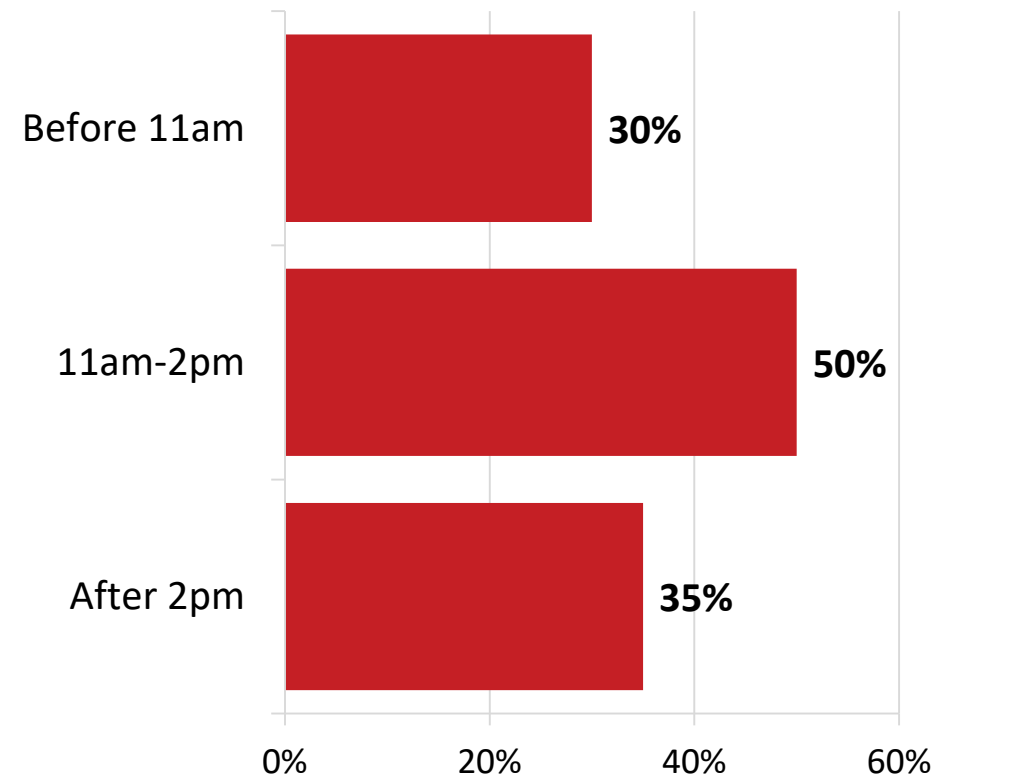
In which of the following ways do you participate in webinars? (select all that apply)
During what time in your typical workday do you prefer to participate in live webinars? (select all that apply)
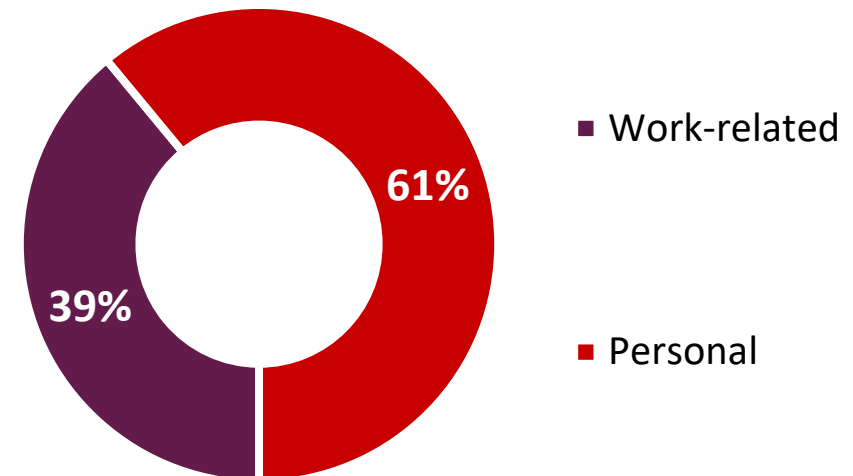
Listening to Audio Podcasts
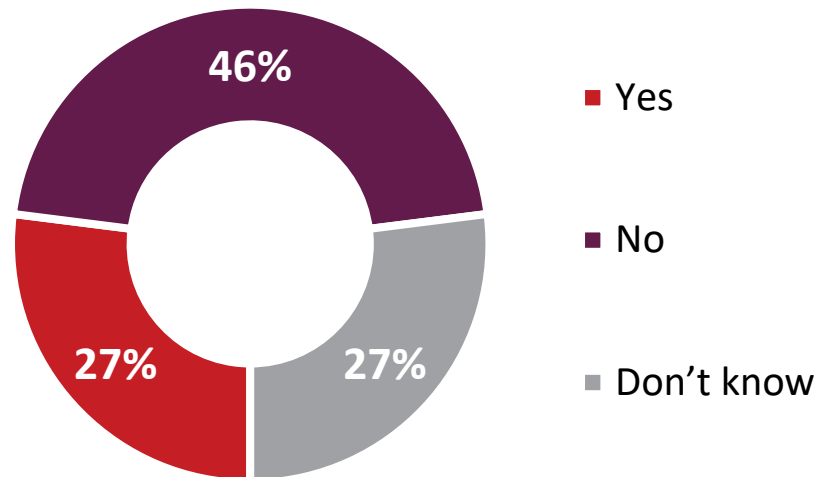
Top Types of Audio Podcasts Listened To

Type	Percentage
News & politics	53%
Science	42%
History	30%
Education	25%
Health & living	25%
Technology	22%
Work-related	21%
Spirituality & religion	18%
Comedy	18%
TV & movies	16%

55% Listen to Podcasts

Average Percentage of Time Spent Listening to Podcasts
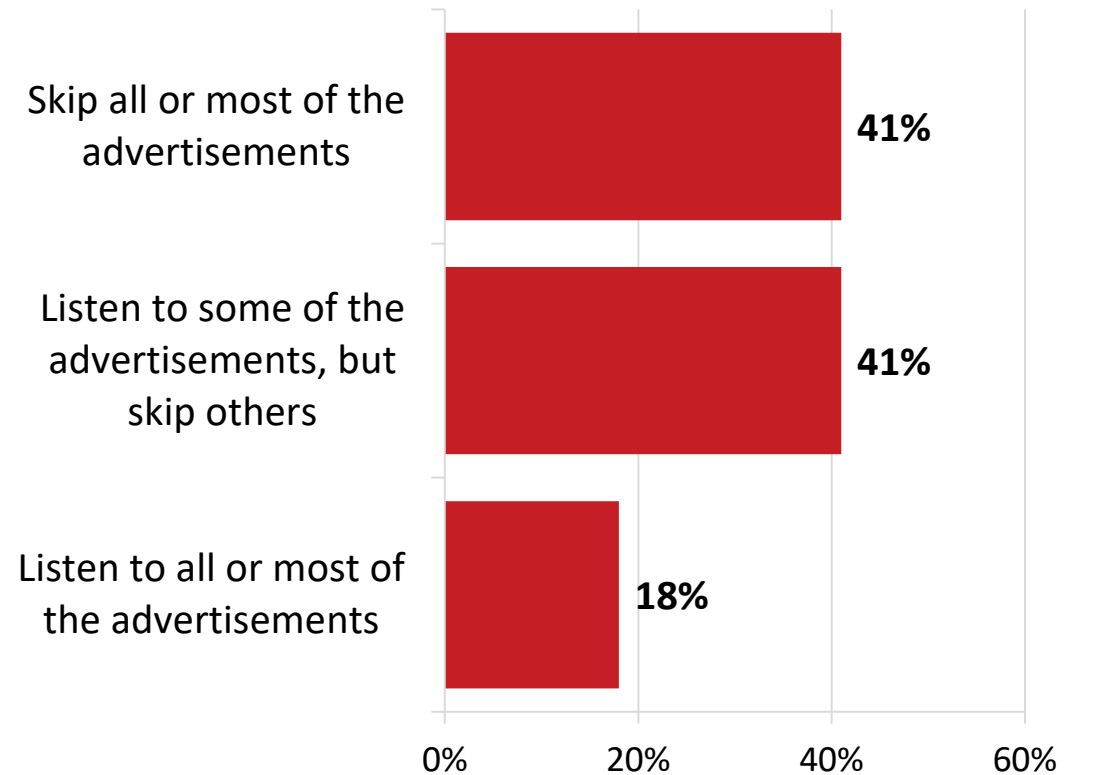
- Work-related: 39%
- Personal: 61%

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

- 46%
- 27%
- 27%

■ Yes

■ No

■ Don't know

Listening to or Skipping Ads in Podcasts

Skip all or most of the advertisements — 41%

Listen to some of the advertisements, but skip others — 41%

Listen to all or most of the advertisements — 18%
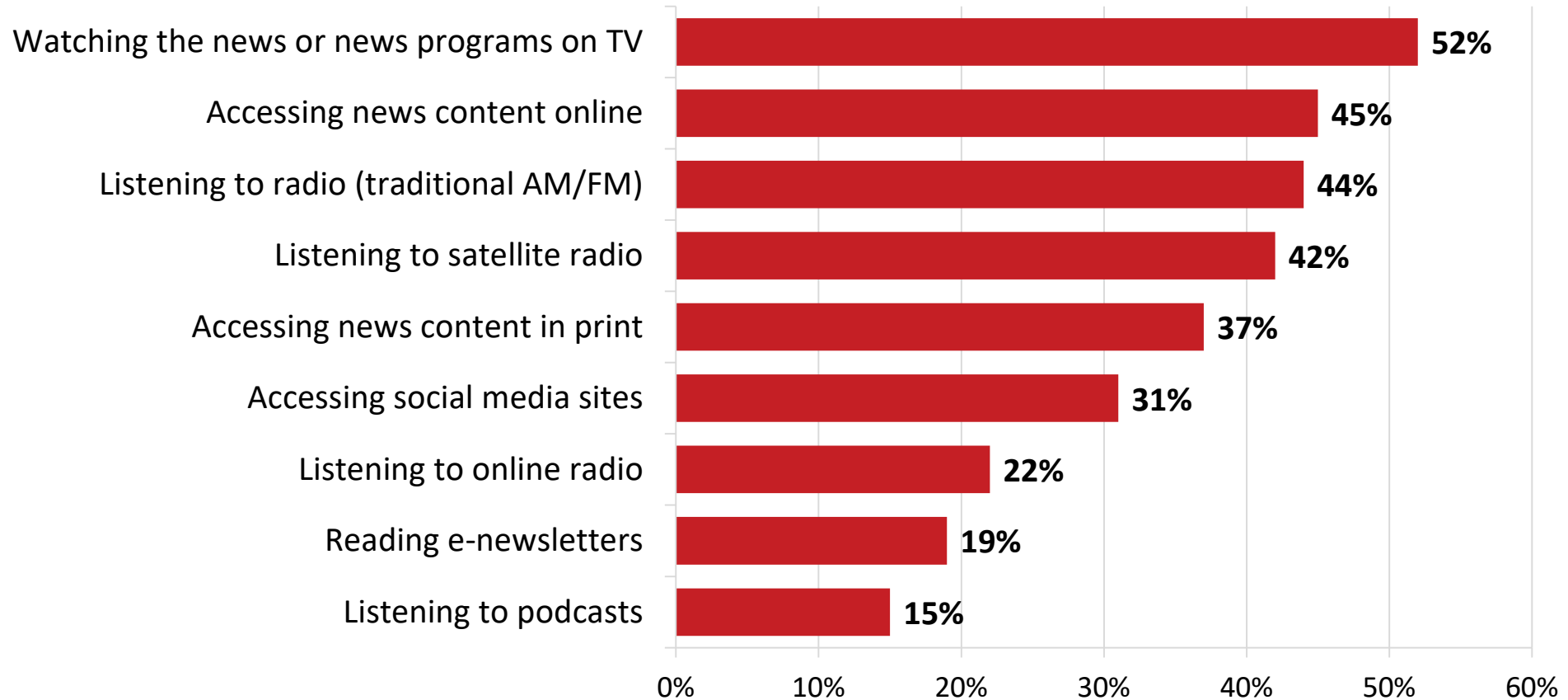
0%   20%   40%   60%

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

Top App Types with Push Notifications Allowed

App Type	Percentage
Weather	54%
Personal Email/Communications	33%
News	27%
Social Networking	24%
Navigation & Mapping	21%
Health & Fitness	21%
Games	21%
Sports	20%
Work Email/Communications	19%
Music & Audio	12%
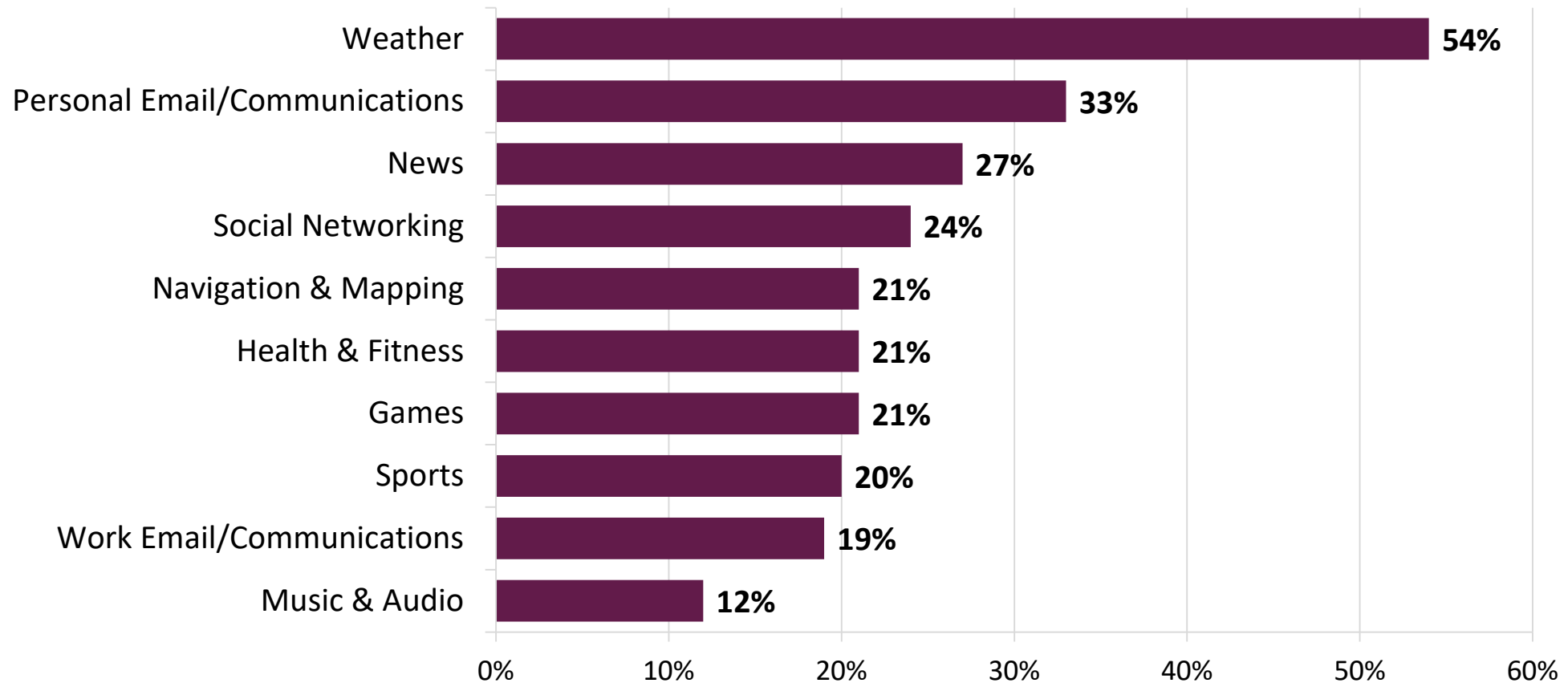
Which of the following app types, if any, do you allow push notifications from on your mobile device? (select all that apply)

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

Category	Percentage
Watching the news or news programs on TV	52%
Accessing news content online	45%
Listening to radio (traditional AM/FM)	44%
Listening to satellite radio	42%
Accessing news content in print	37%
Accessing social media sites	31%
Listening to online radio	22%
Reading e-newsletters	19%
Listening to podcasts	15%

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	21%	4%	3%	4%	5%	49%
	Online streaming video	2%	4%	2%	4%	4%	37%
Listening	AM/FM radio	11%	55%	7%	9%	43%	11%
	Satellite radio	13%	35%	9%	2%	34%	7%
	Podcasts	6%	9%	18%	9%	6%	15%
Reading	National print newspaper or magazine	13%	6%	9%	8%	2%	21%
	Local print newspaper or magazine	15%	7%	7%	12%	1%	15%
	Digital newspaper or magazine	7%	6%	20%	19%	6%	24%
	Social media sites	19%	14%	12%	30%	11%	39%

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
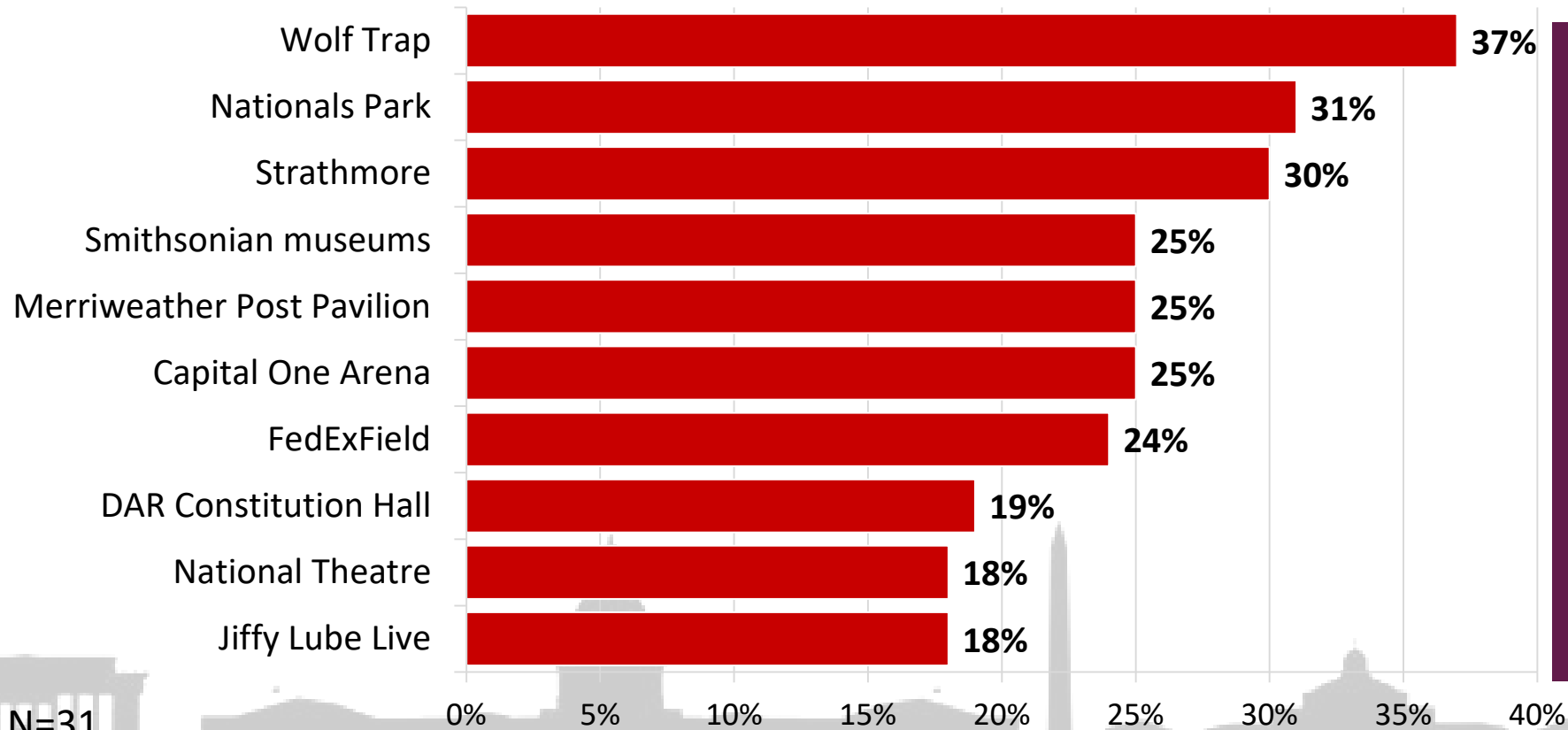
DC METRO AREA
Airport Trips
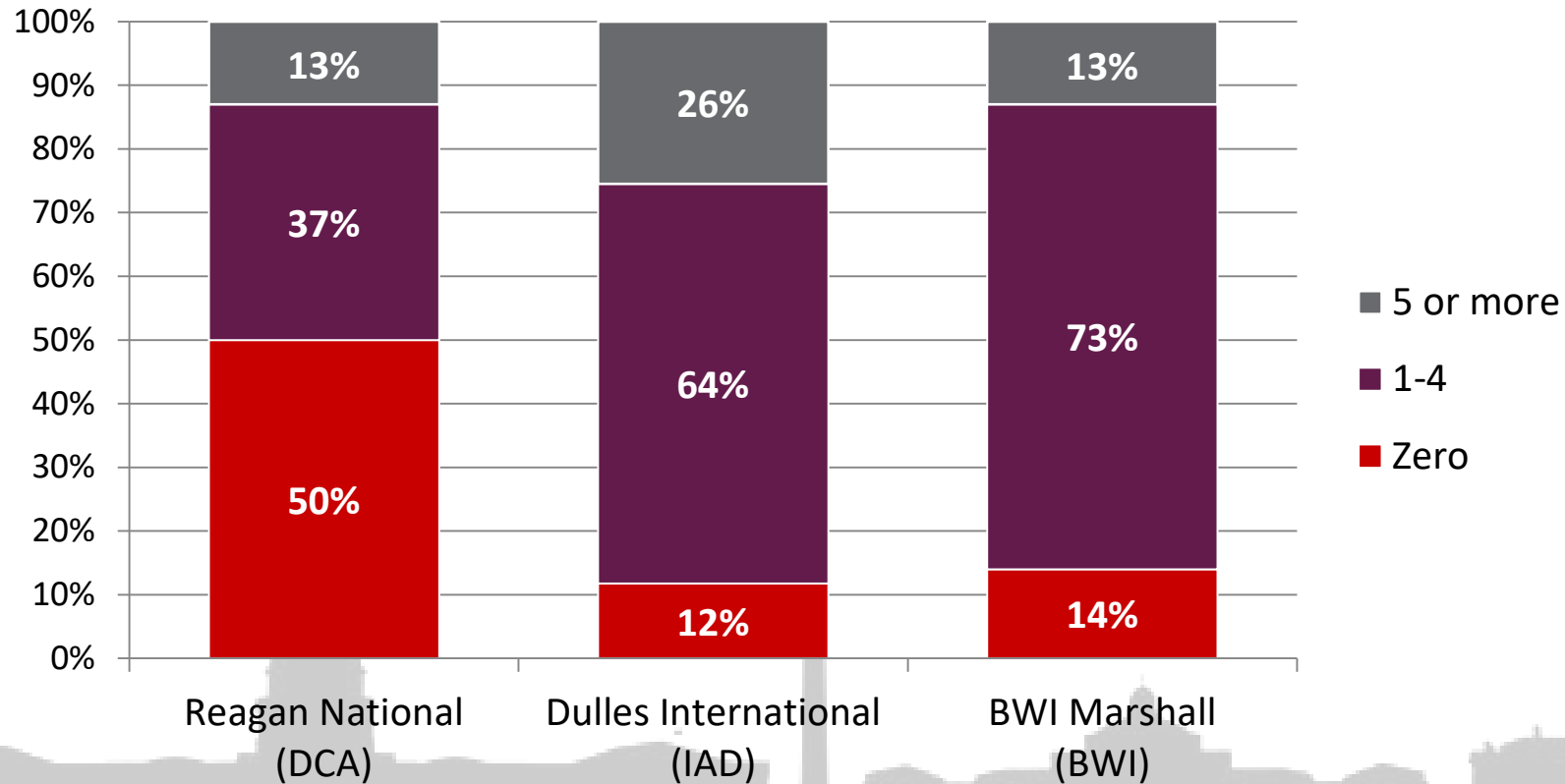
N=31

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
Wolf Trap	37%
Nationals Park	31%
Strathmore	30%
Smithsonian museums	25%
Merriweather Post Pavilion	25%
Capital One Arena	25%
FedExField	24%
DAR Constitution Hall	19%
National Theatre	18%
Jiffy Lube Live	18%

Other venues in survey:
- Arena Stage
- Audi Field
- EagleBank Arena
- Folger Theatre
- RFK Stadium
- The Anthem
- The Fillmore Silver Spring
- The Kennedy Center
- The Theater at MGM National Harbor
- Walter E Washington Convention Center
- Warner Theatre

N=31

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:
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#FMMS2019
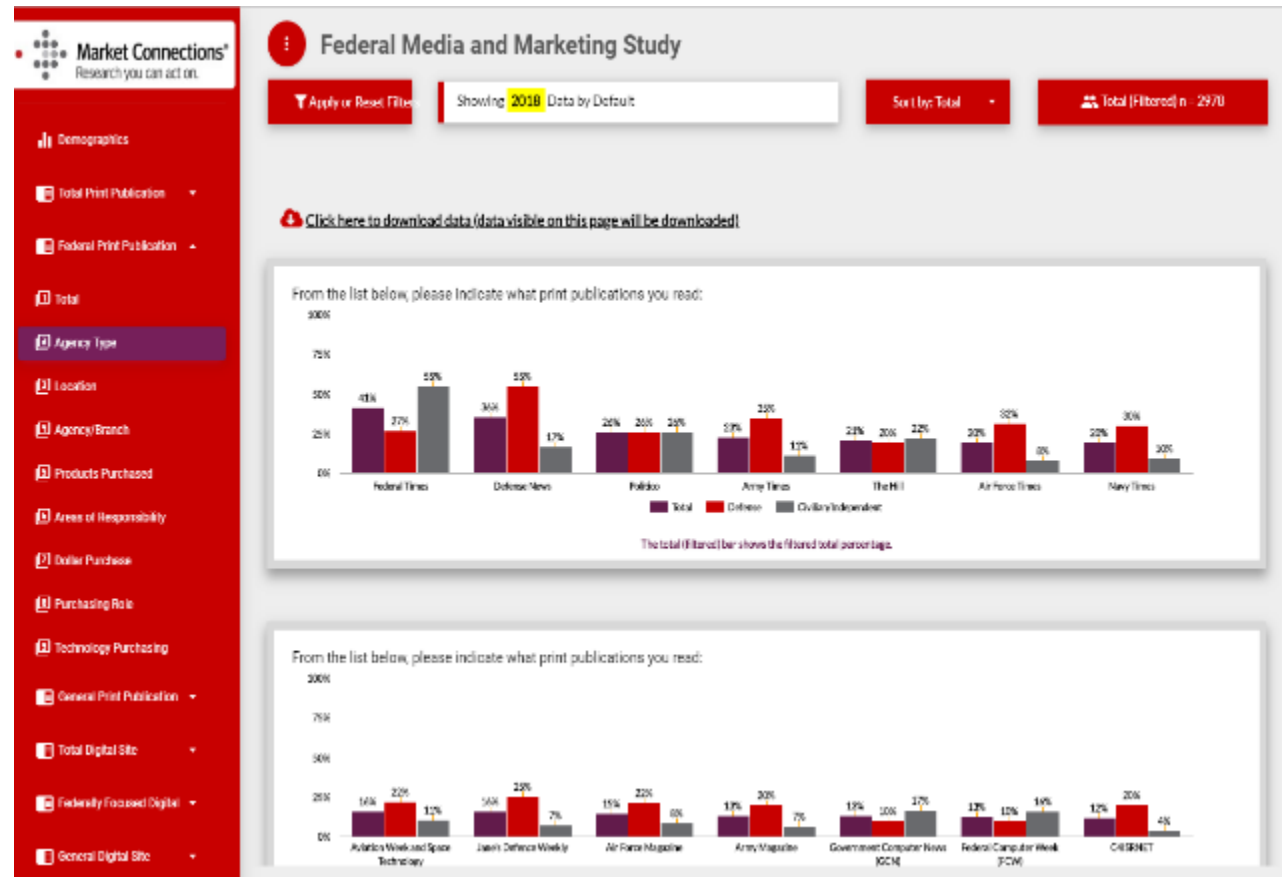
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