



# Federal Media & Marketing Study 2019

Veterans Affairs Edition



# Table of Contents



Background & Methodology.....	3
Demographics.....	8
Federal Environment.....	13
Media Results.....	21
Confidence in News .....	29
Marketing Tactics.....	31
Federal Media & Marketing Dashboard.....	42



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 279)



# 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

...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



## 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





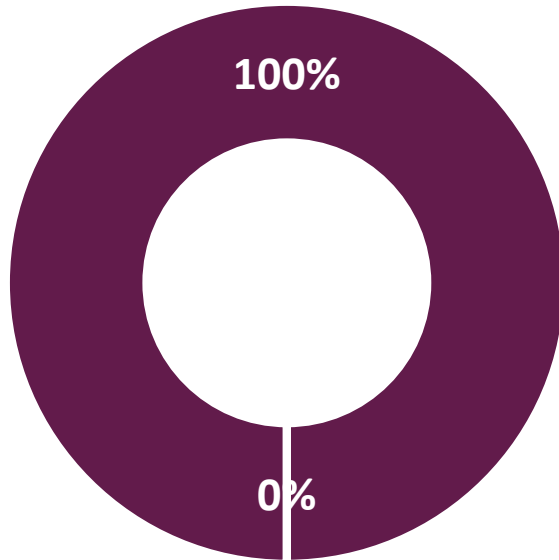
Demographics



# DEMOGRAPHICS

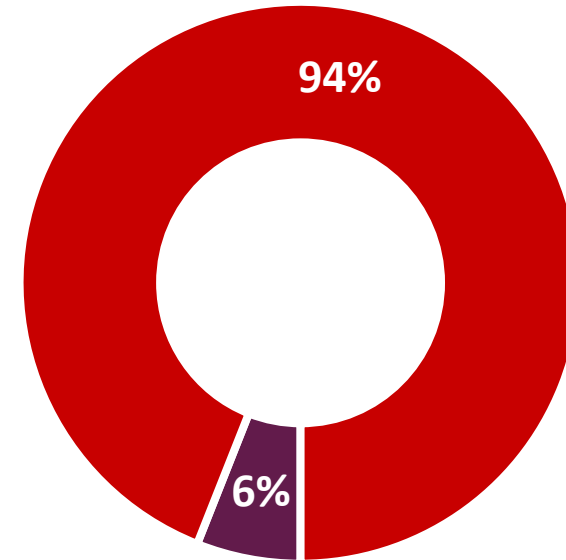
## Agency Type & Location

Agency Type



■ Civilian or Independent ■ Defense or Military

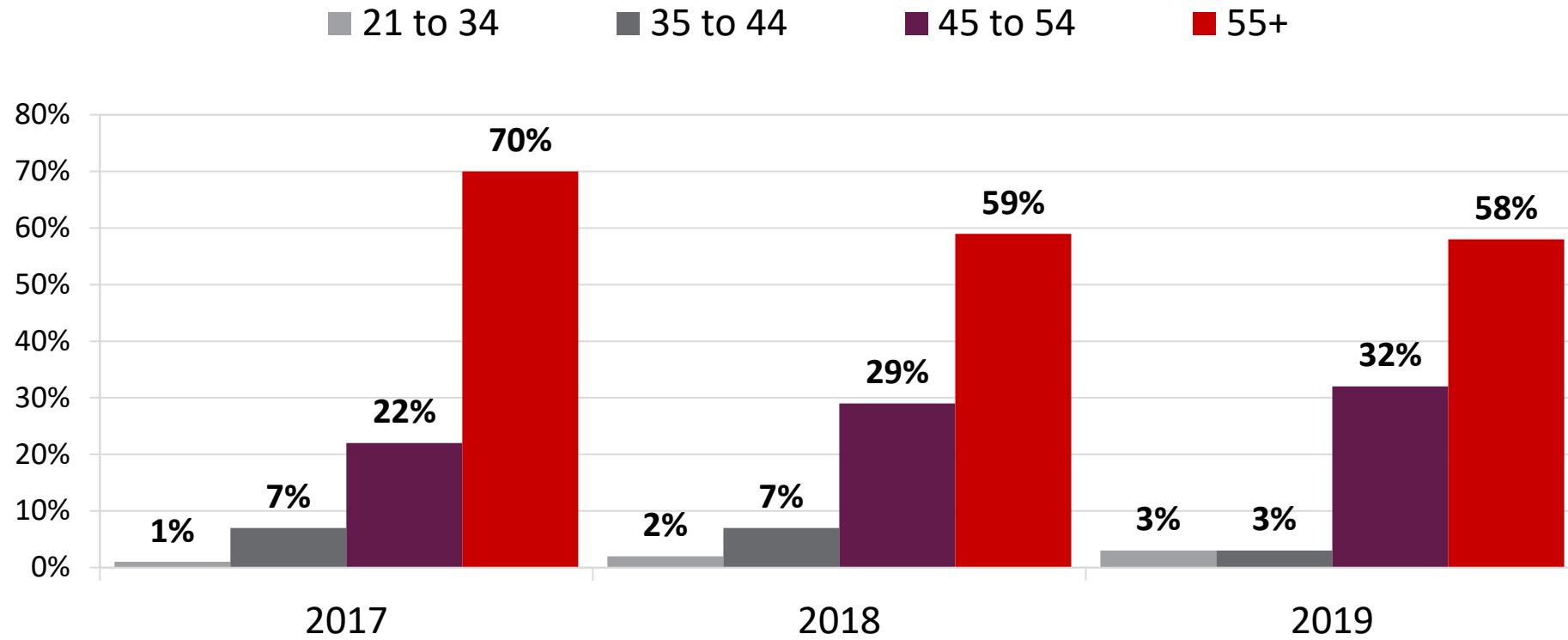
Location



■ Inside the Beltway ■ Outside the Beltway

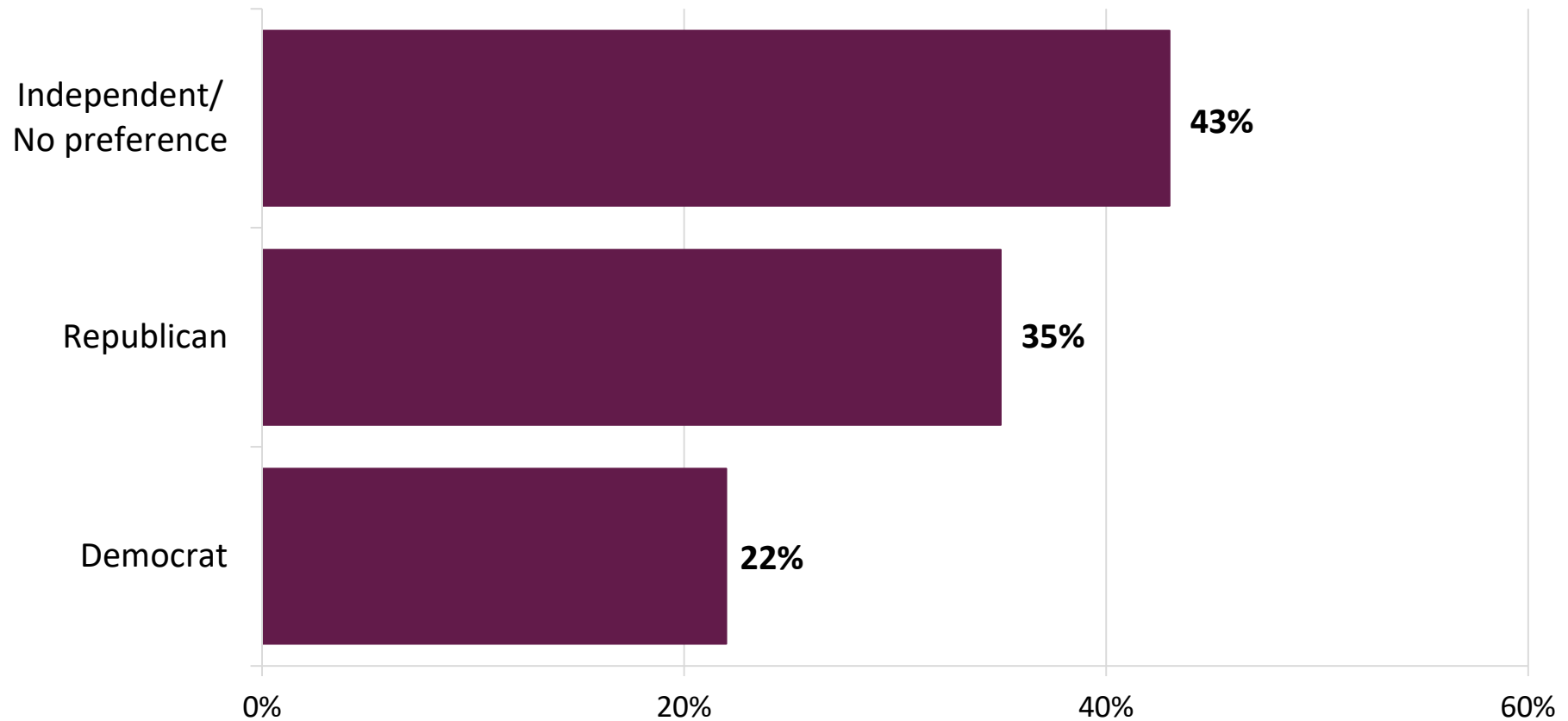
# TREND 2017-2019


## 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
Administration and office services	Office equipment and supplies
Medical, health	IT services
Accounting, budget and finance	Computer systems/hardware
Project/program management	Furniture/furnishings
Informational technology, computers, systems	Software
Human resources, personnel, benefits	Education/training classes and services
Records management	Health IT
Health IT	Human resource services
Public/government affairs	Building/facilities/real estate/office space
Purchasing, contracting, procurement	Records management solutions



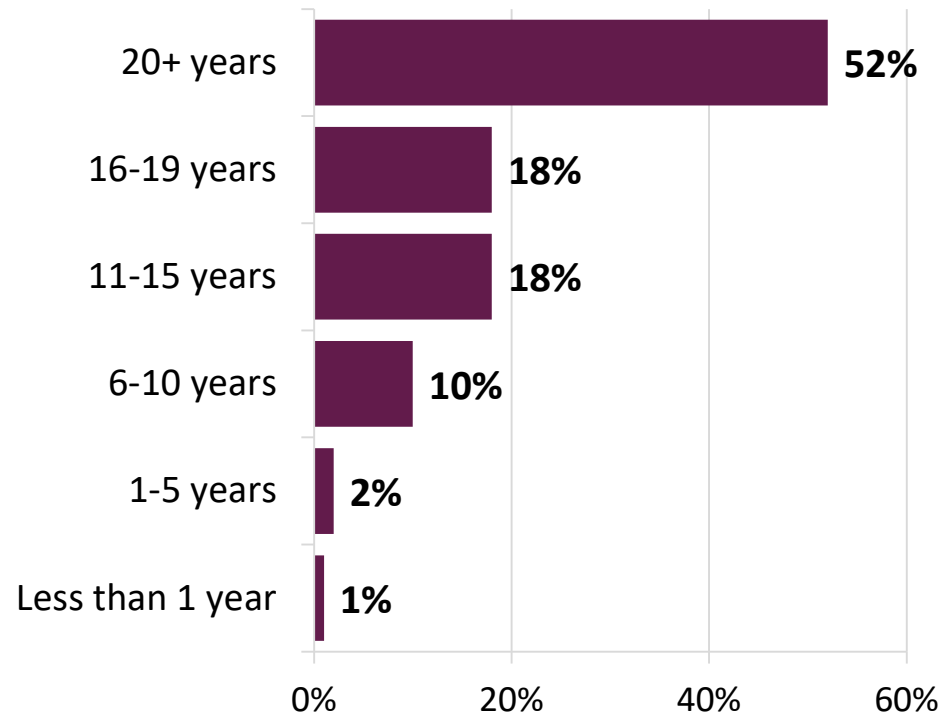
Which of these categories best represents your area of responsibility at work? (select all that apply)  
 In the past year, for which of the following products or services have you been involved in the acquisition/procurement process (specify, evaluate, recommend, approve or buy)? (select all that apply)



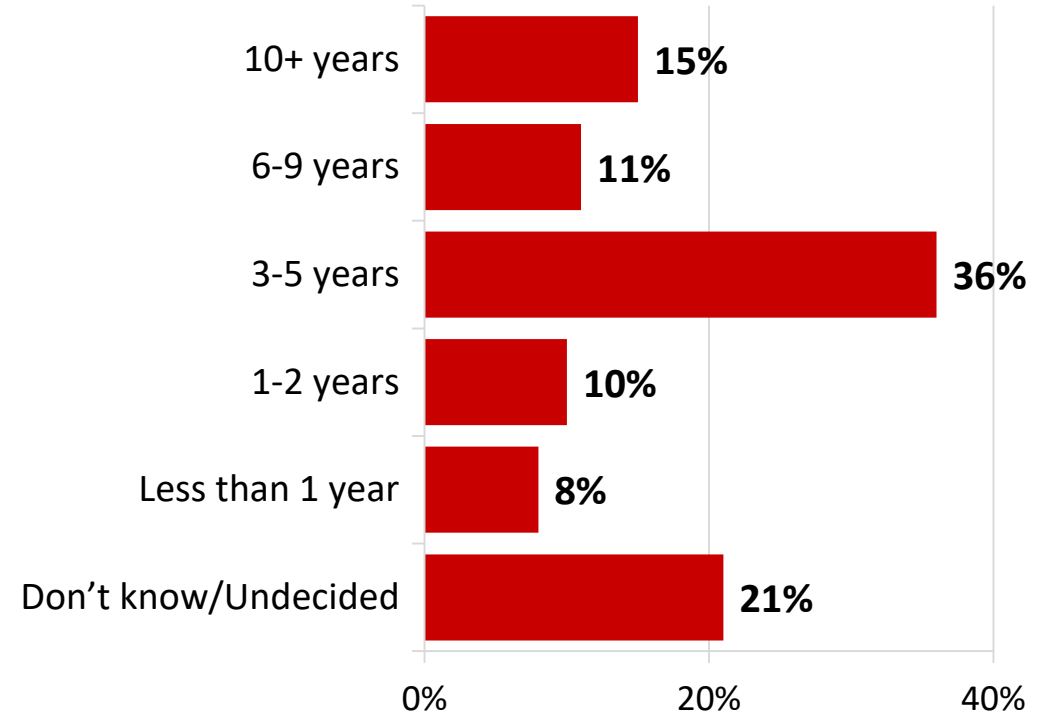
Federal Environment

# Tenure & Time Remaining in Federal Employment

**Total Years as a Federal Employee**



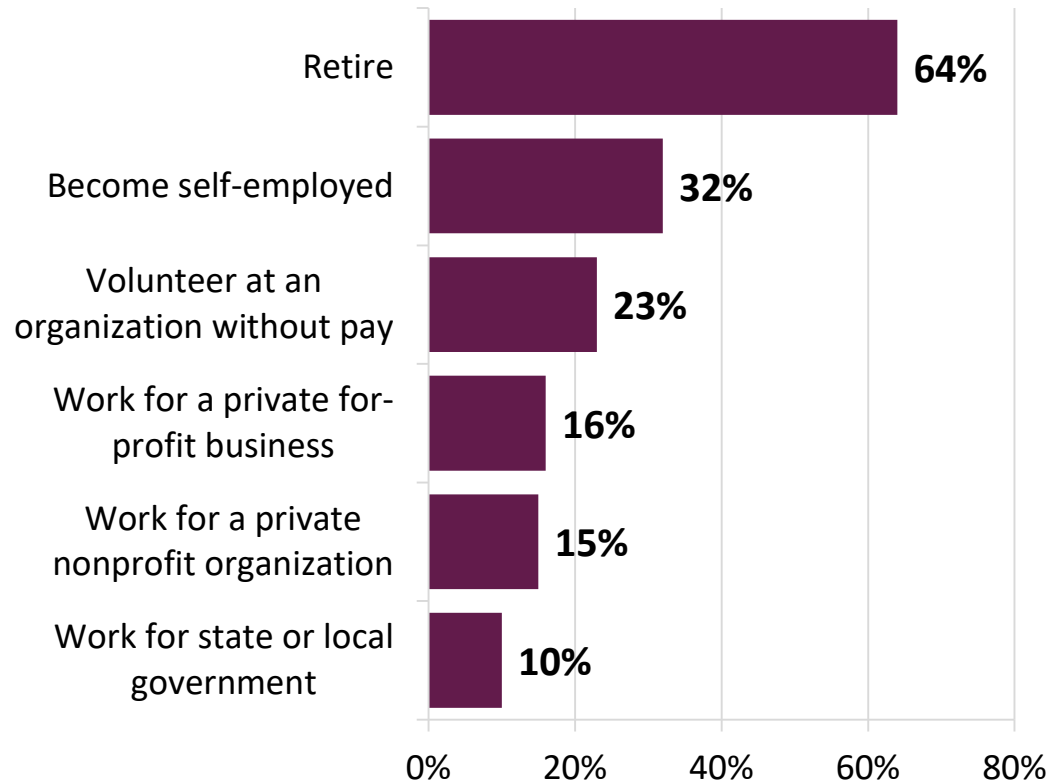
**Years Until Leaving Federal Employment**



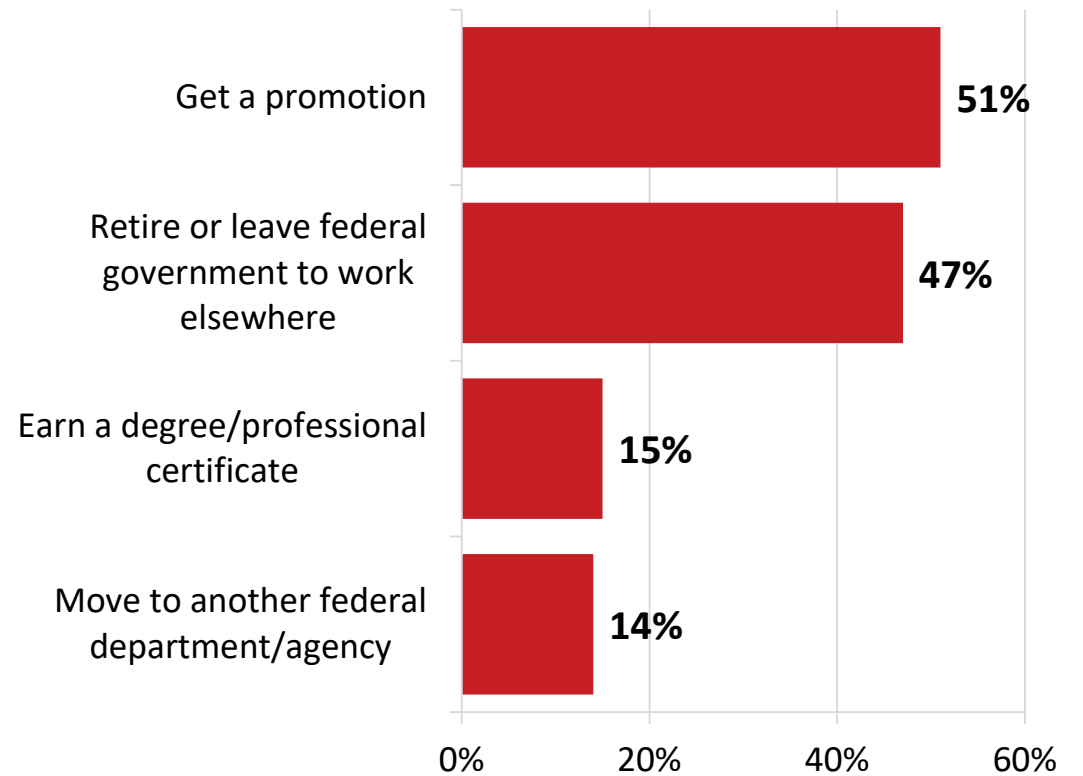
Q How many years in total have you served as a federal government employee? (Include military service, if applicable.)  
 In how many years do you plan to leave federal employment?


# Future Plans

**Plans After Leaving Federal Employment**

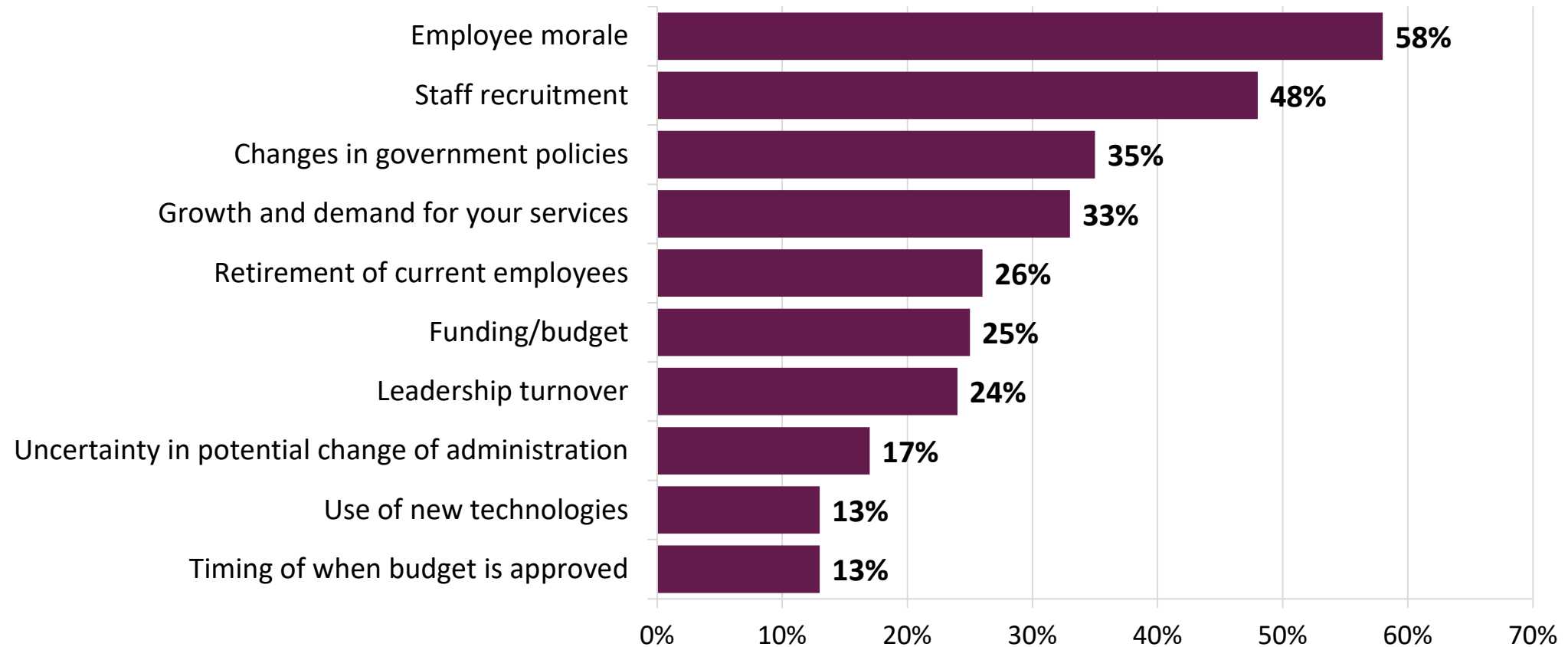


**Career Plans for the Next 5 Years**



 *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

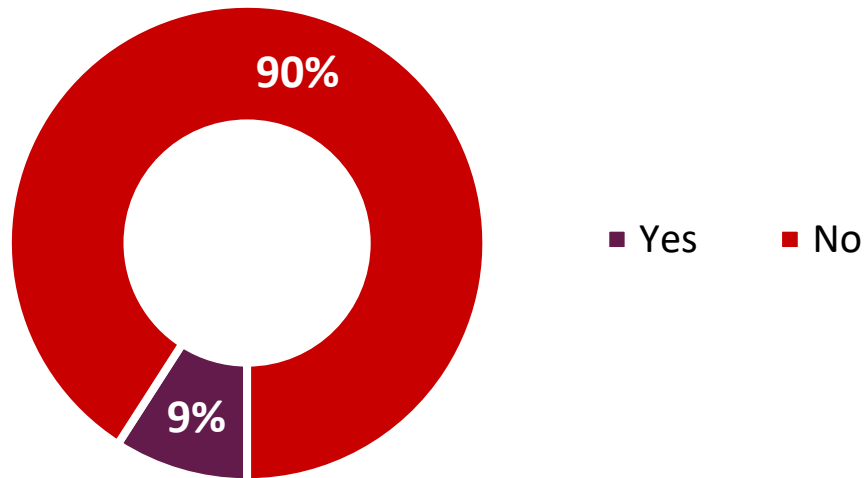


What do you see as the biggest work-related challenges coming over the next year in your agency? (select all that apply)

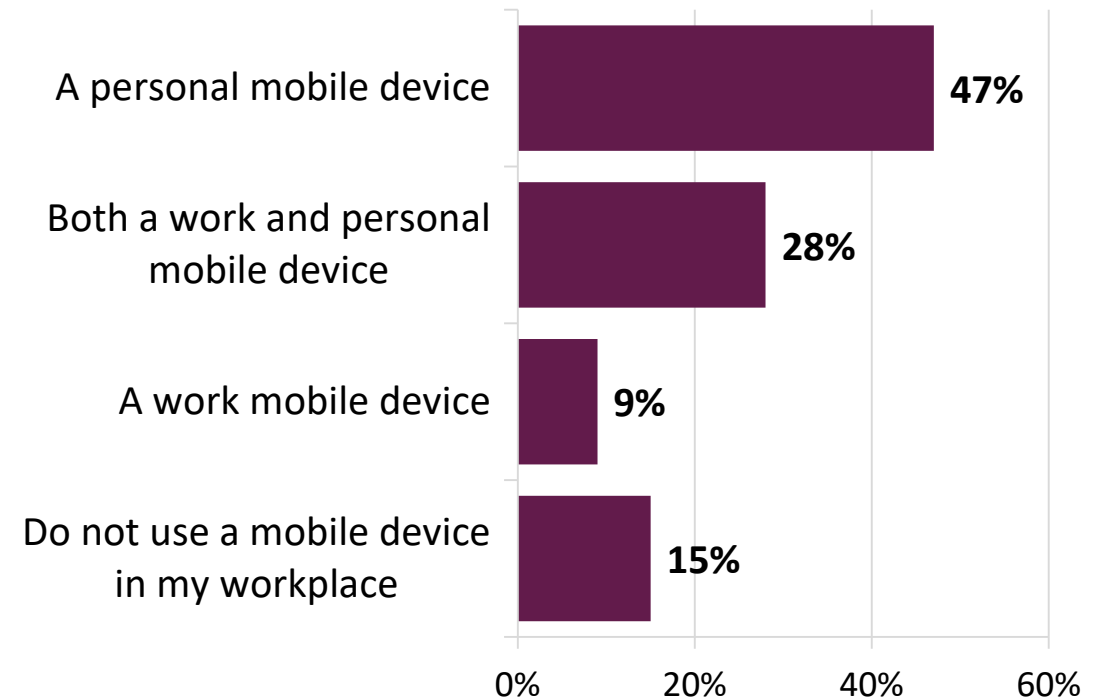


# Mobile Devices in the Workplace

**Works in a Secure Space Where Personal Mobile Devices Are Prohibited**

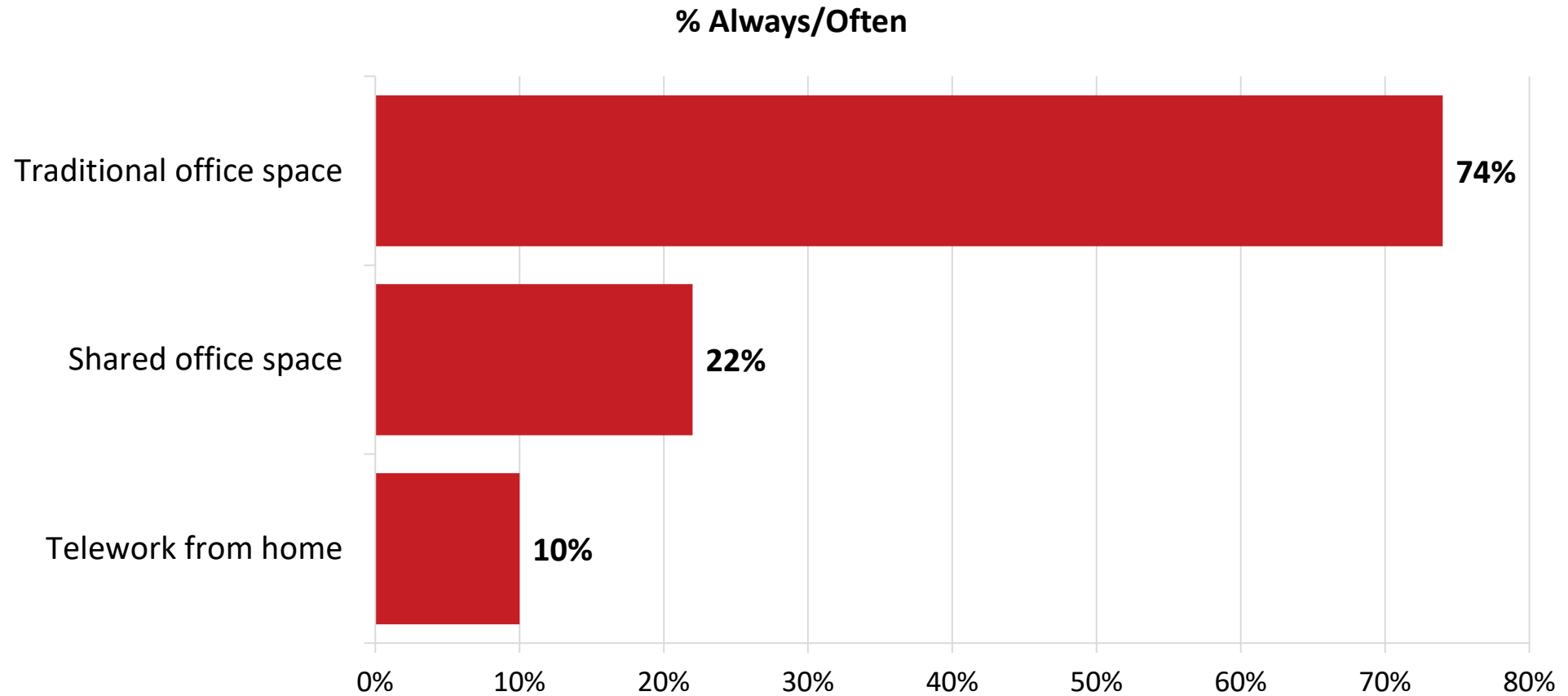


**Mobile Device Use in the Workplace**

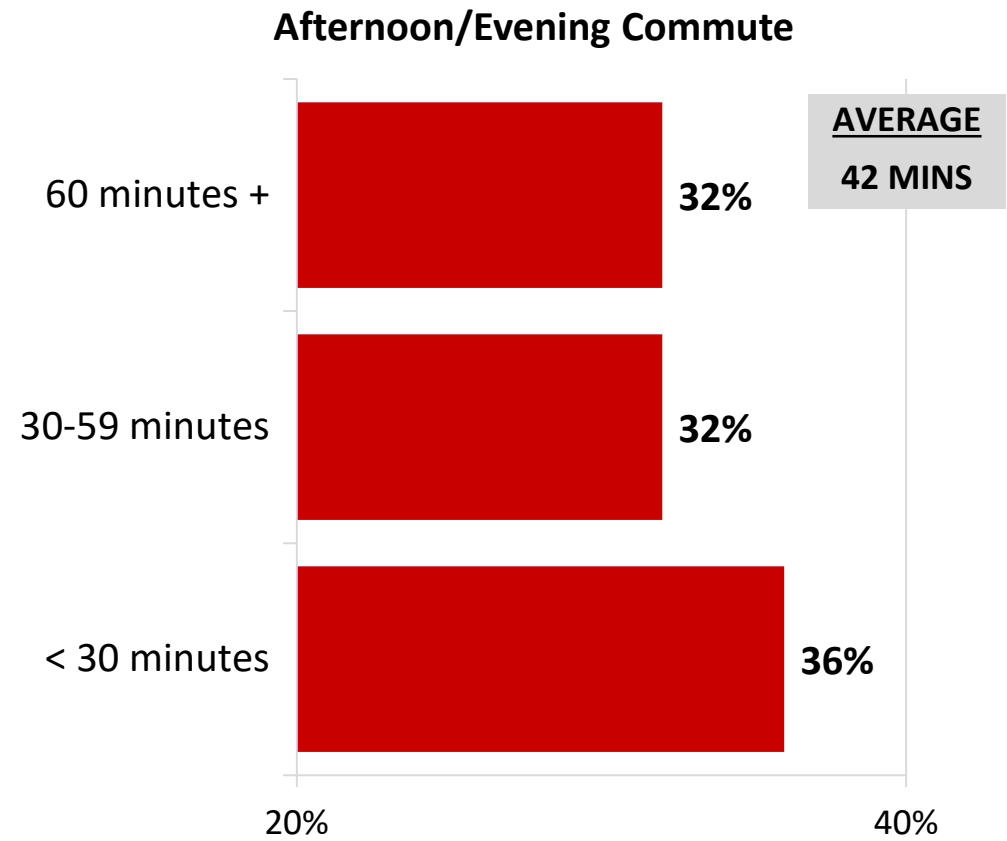
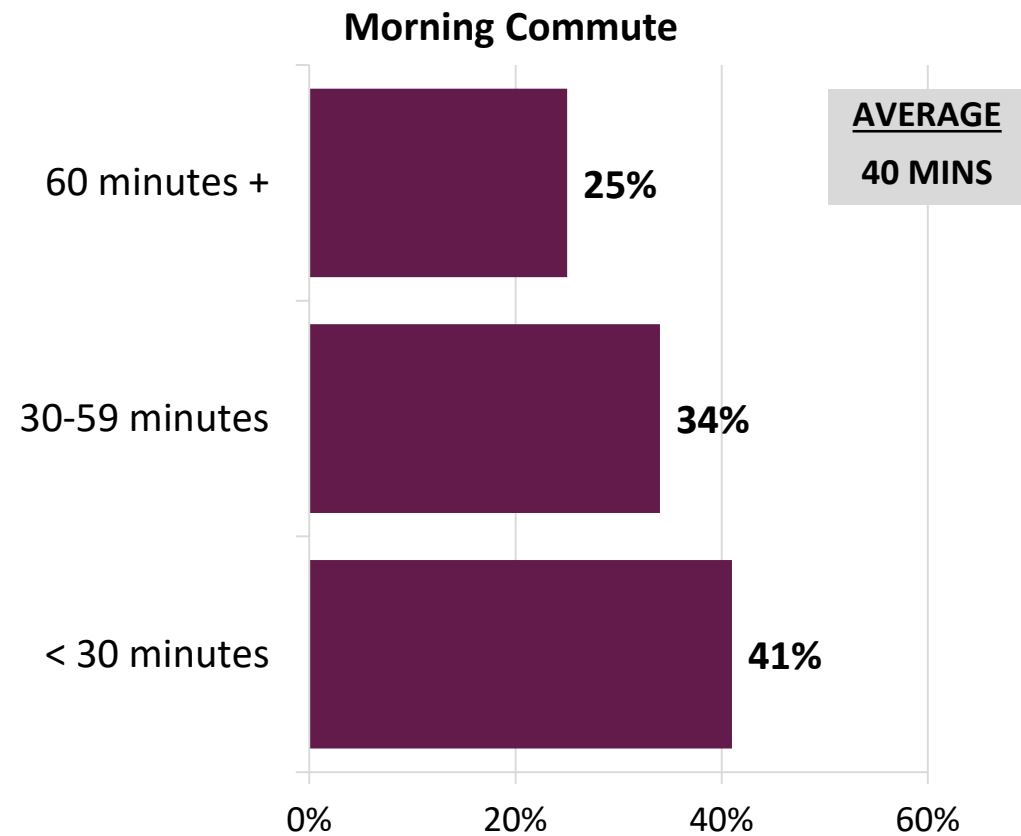


Q Do you spend the majority of your time at work in a secure space where personal mobile devices are prohibited?  
Which of the following do you use while you're at your workplace?

# Work Locations

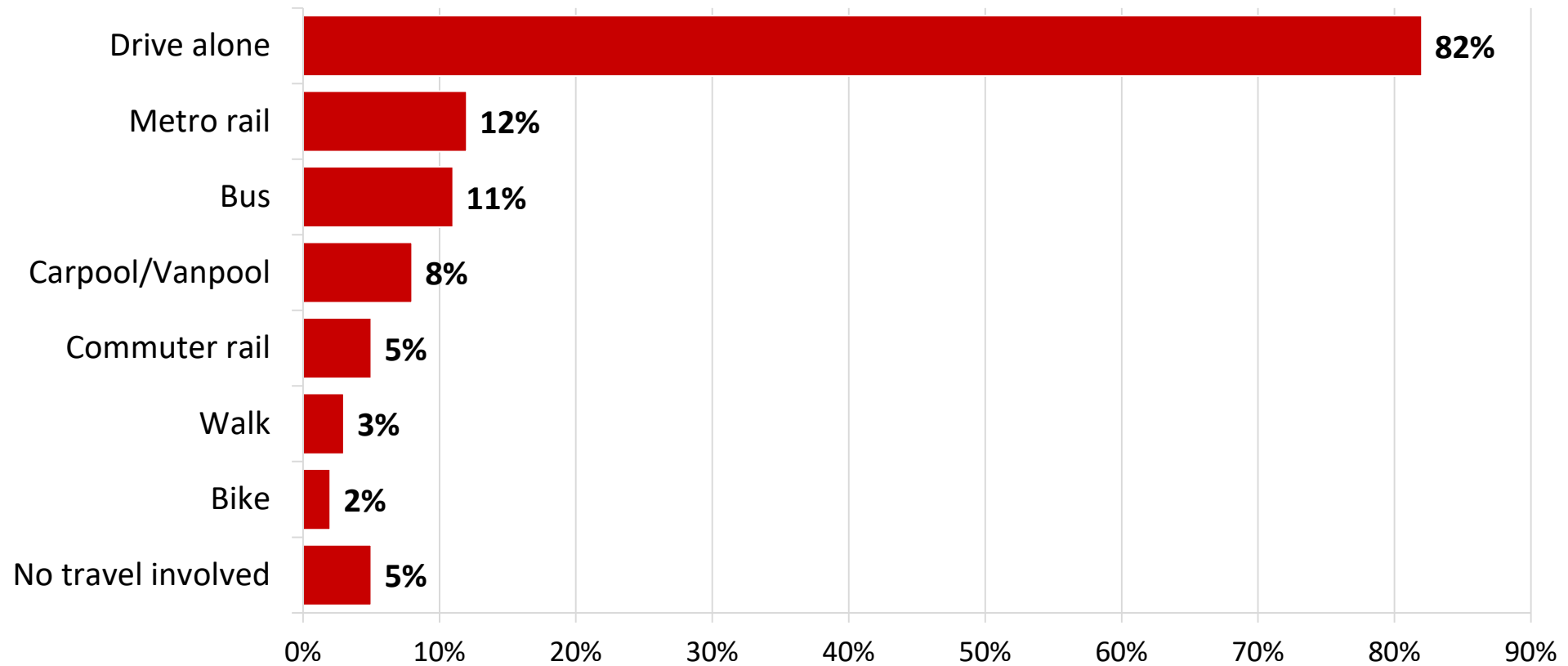


# Commute Time



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

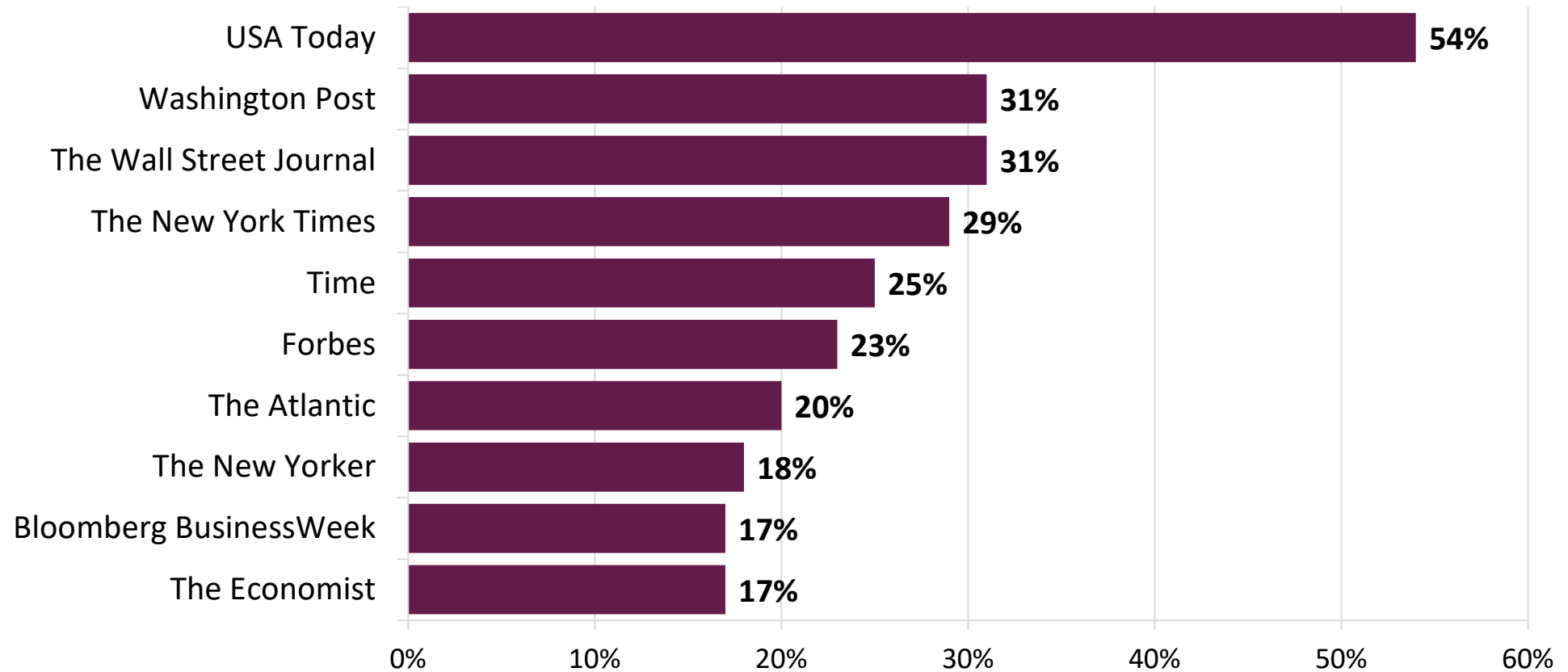


Which of the following are your primary modes of transportation to get to work? (select all that apply)



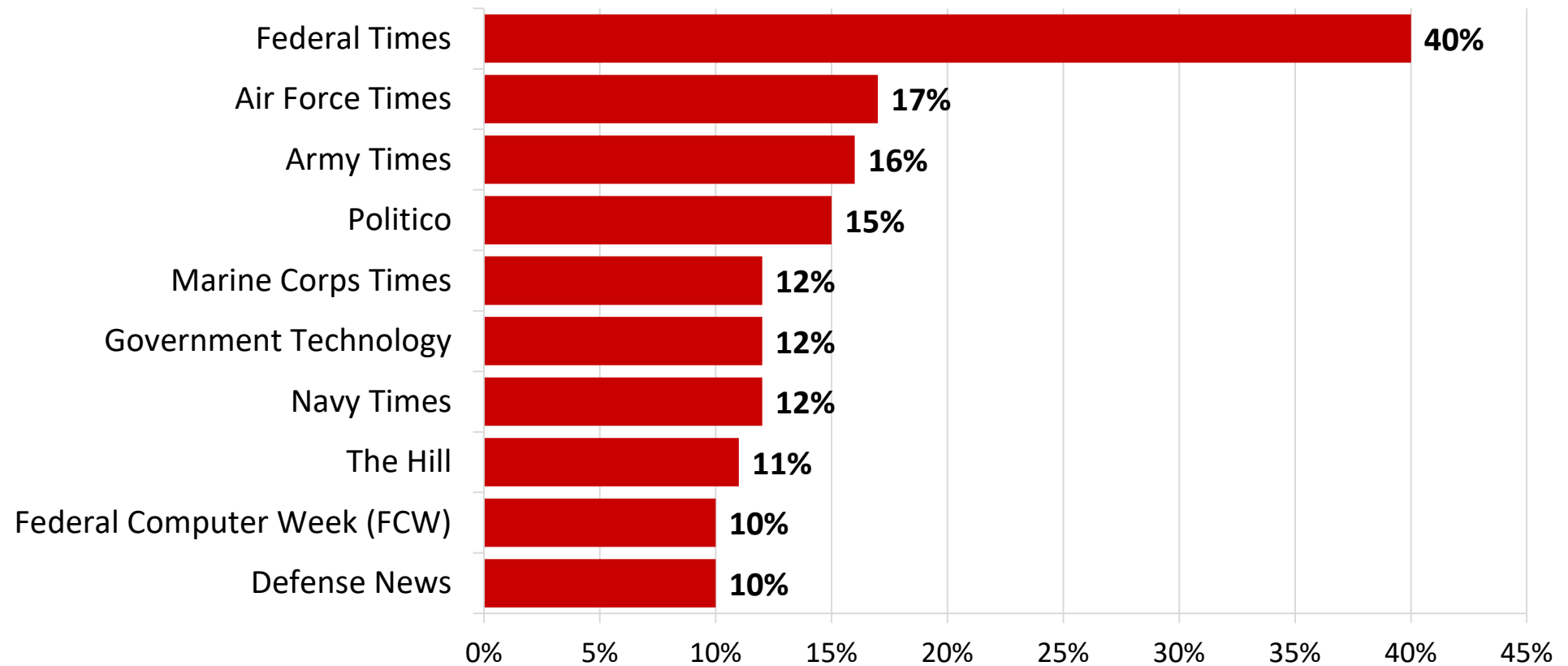
Media Results

# Top Print Business & News Publications Read



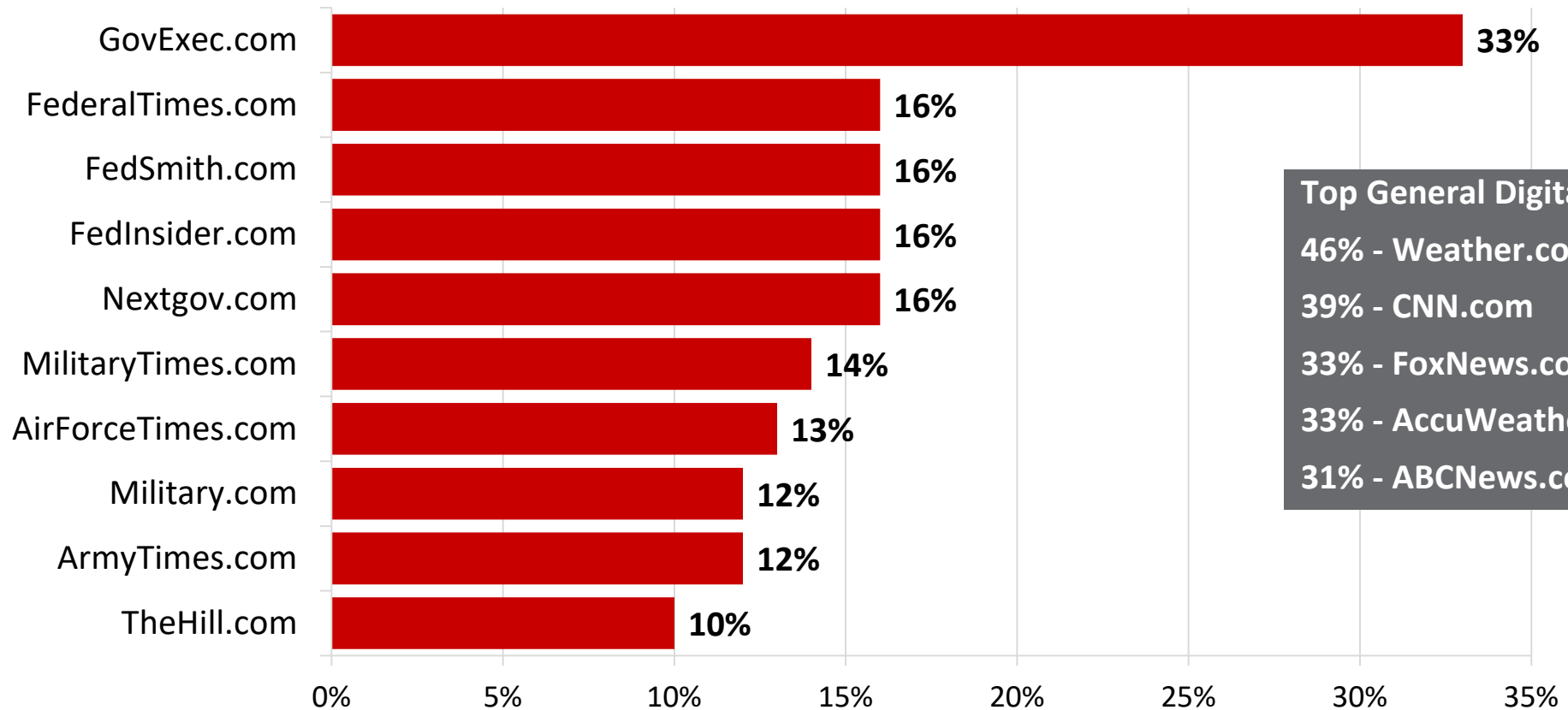
From the list below, please indicate what print publications you read on a regular basis (3 of 4 issues) and which you occasionally read.

# 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



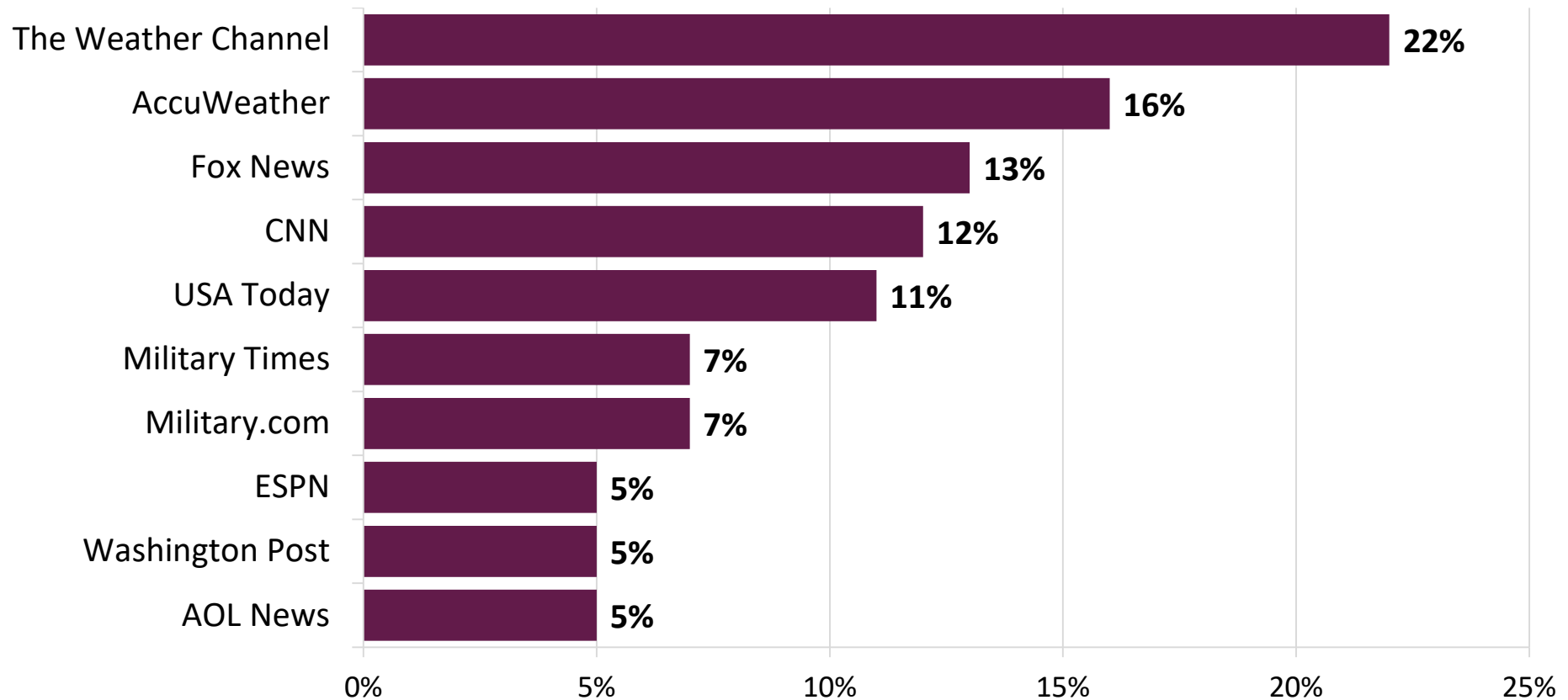
**Top General Digital Sites**  
 46% - Weather.com  
 39% - CNN.com  
 33% - FoxNews.com  
 33% - AccuWeather.com  
 31% - ABCNews.com



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



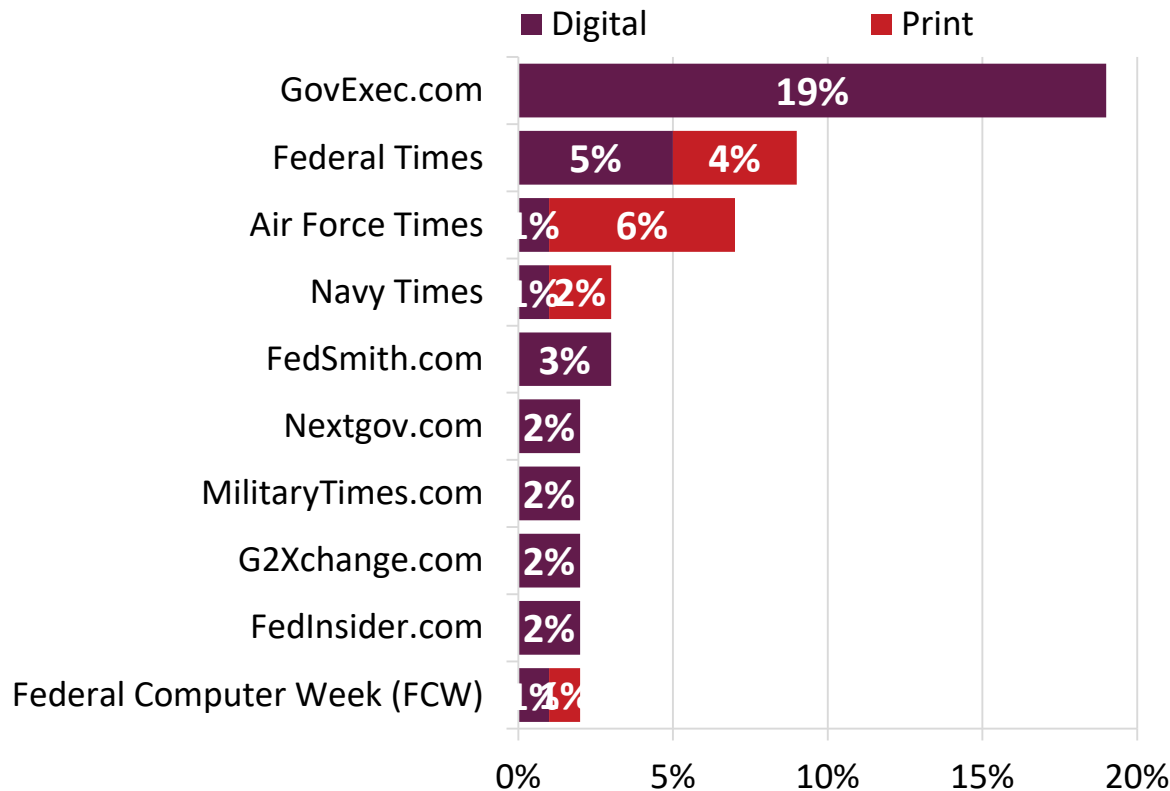
# Top Apps Downloaded on Mobile Device



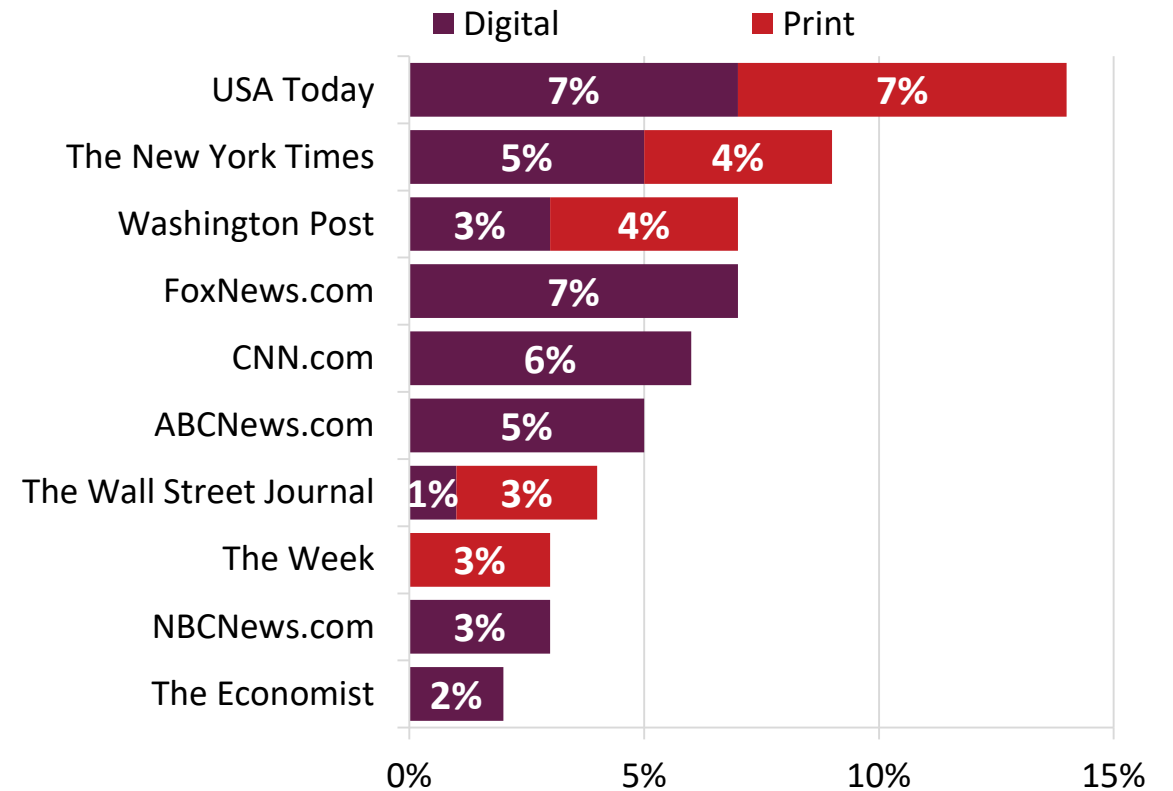
 Which of the following apps do you have downloaded on your mobile device? (select all that apply)

# Go-To Print and Digital Media Property for News

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



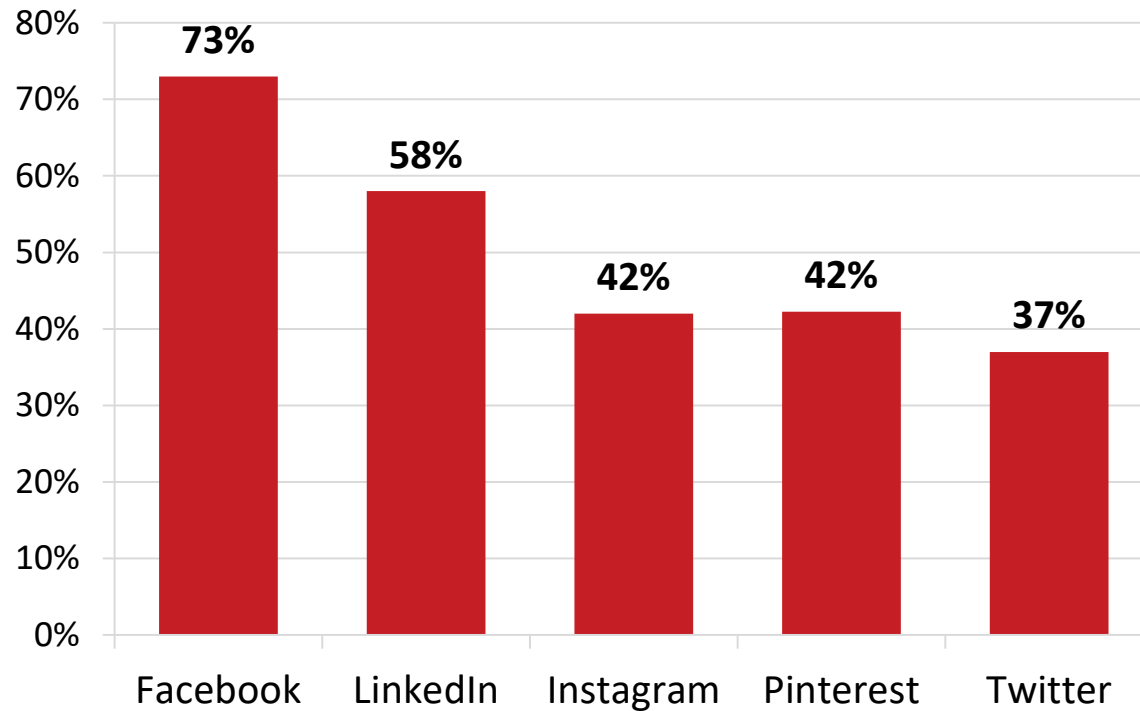
**Go-To General Media Property**



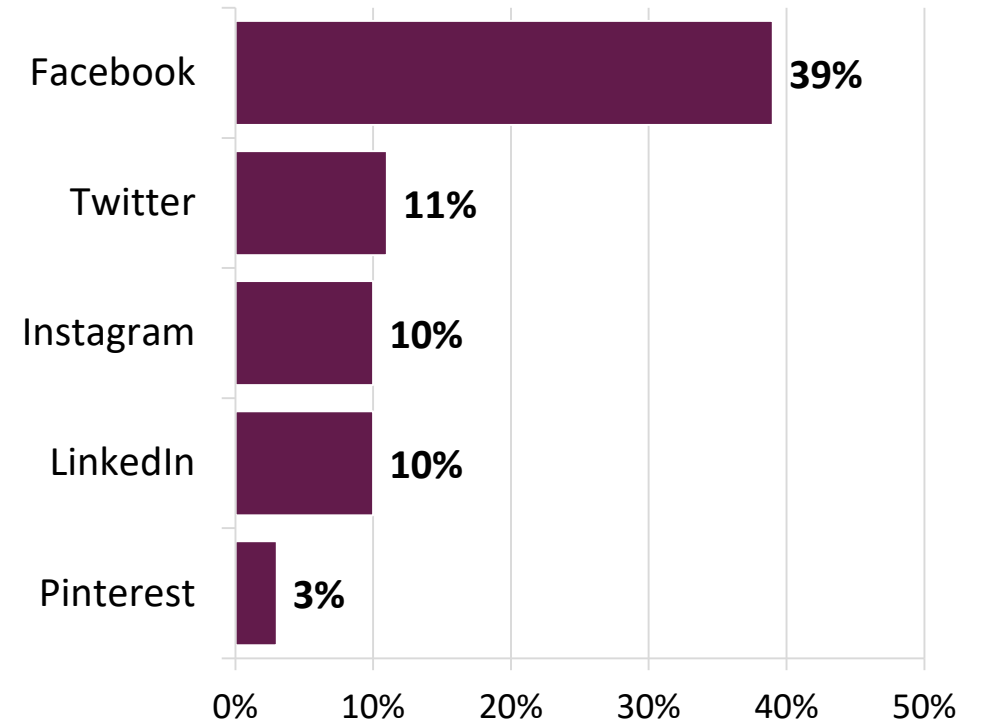
If you could only choose one government-focused media property as your “go-to” source for work-related news, which would you choose?  
 If you could only choose one general media property as your “go-to” source for news, which would you choose?


# Online Social Sites

**Top Online Social Sites Used**

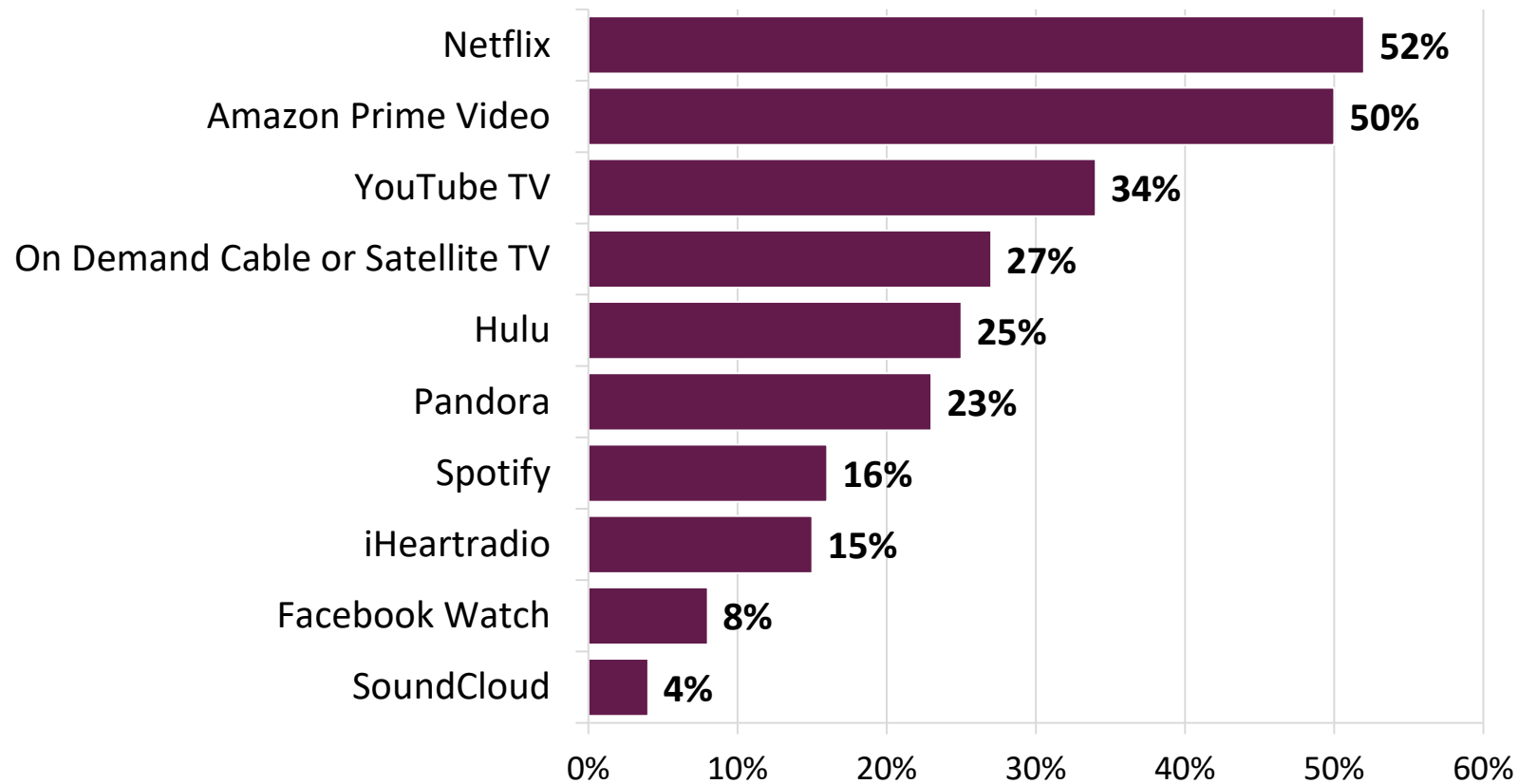



**Daily Online Social Site Use**




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

# Lifestyle Media Streaming Services

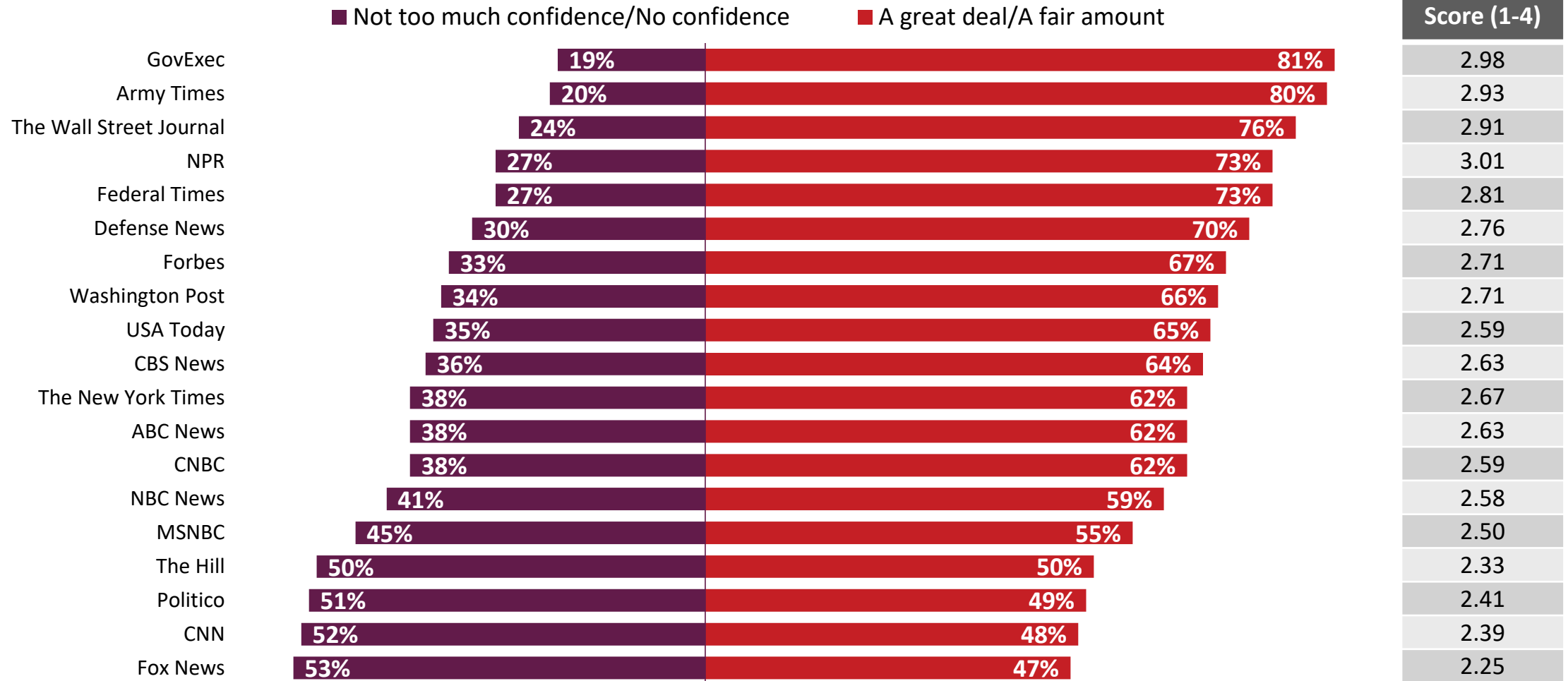


 From the list below, please indicate which of the following you access.



Confidence &  
Marketing Impact Index

# Confidence in News

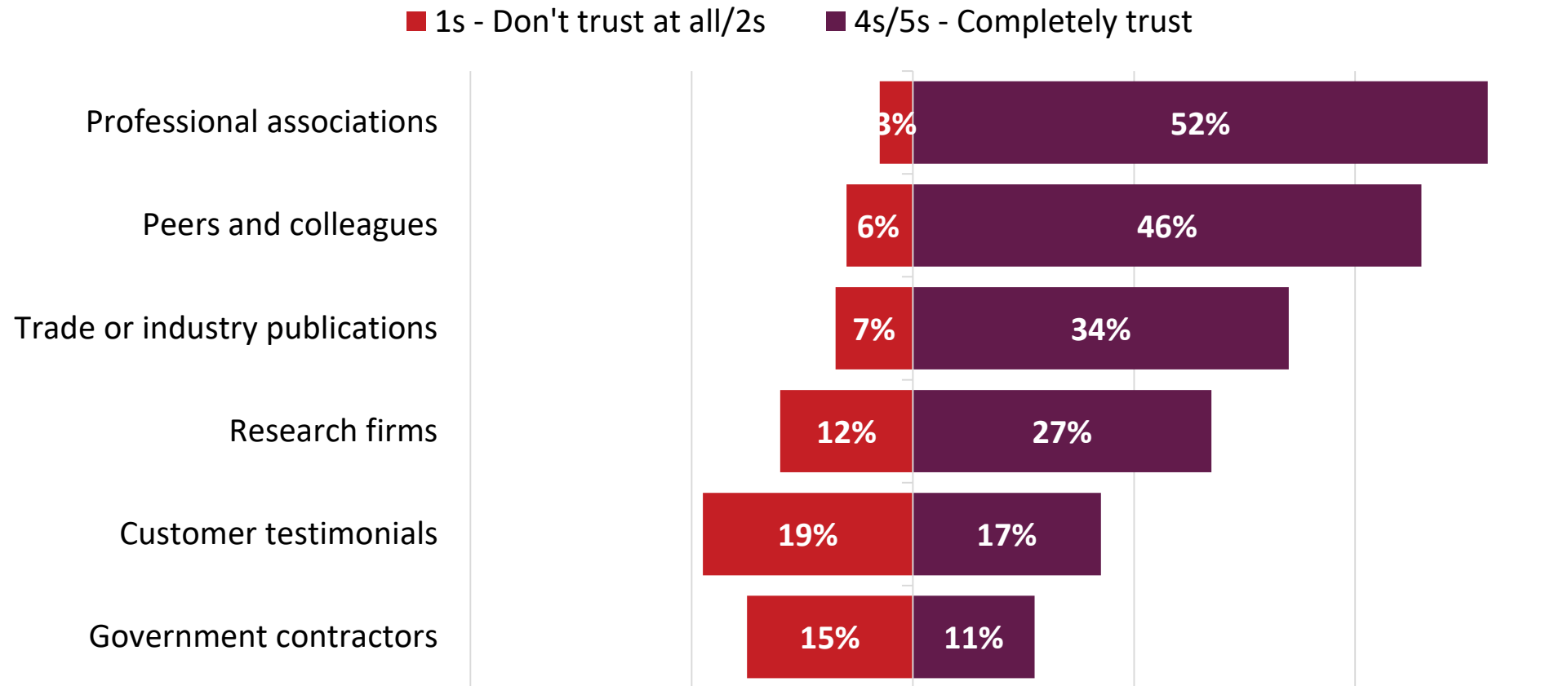


Q How much confidence do you have in the following sources in the news that they report?



Marketing Tactics

# Trusted Sources of Information

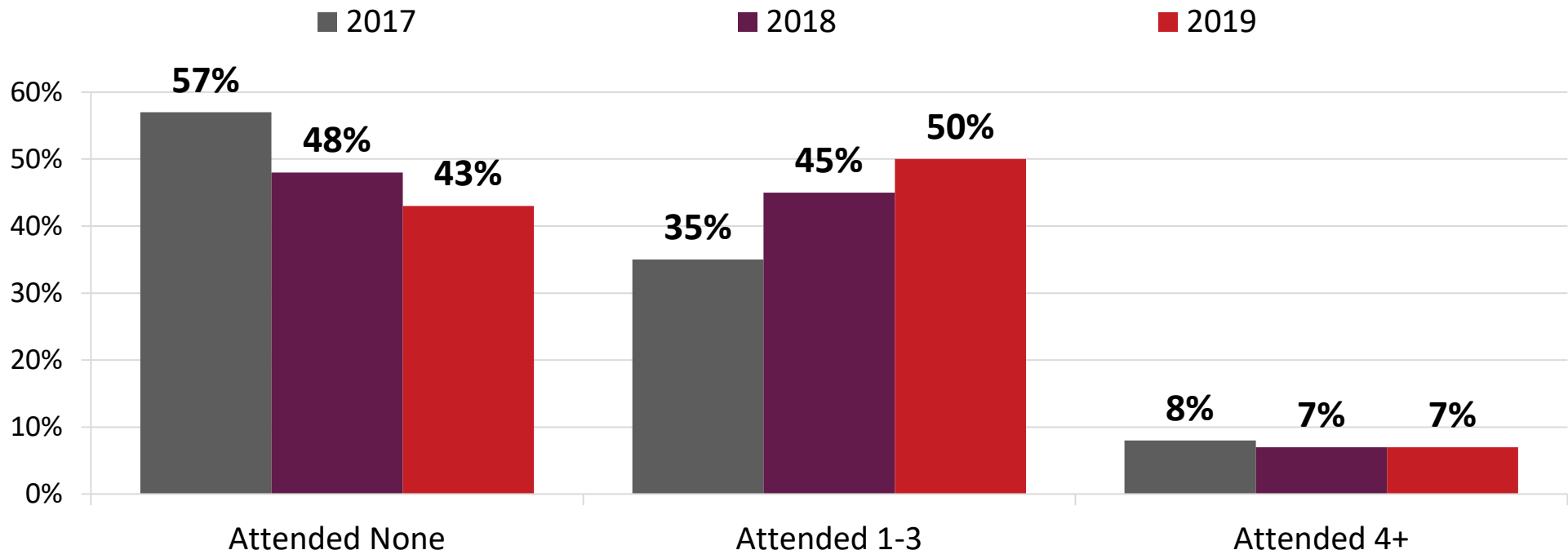


Generally, to what extent do you trust news and information you seek for your job from each of the following?

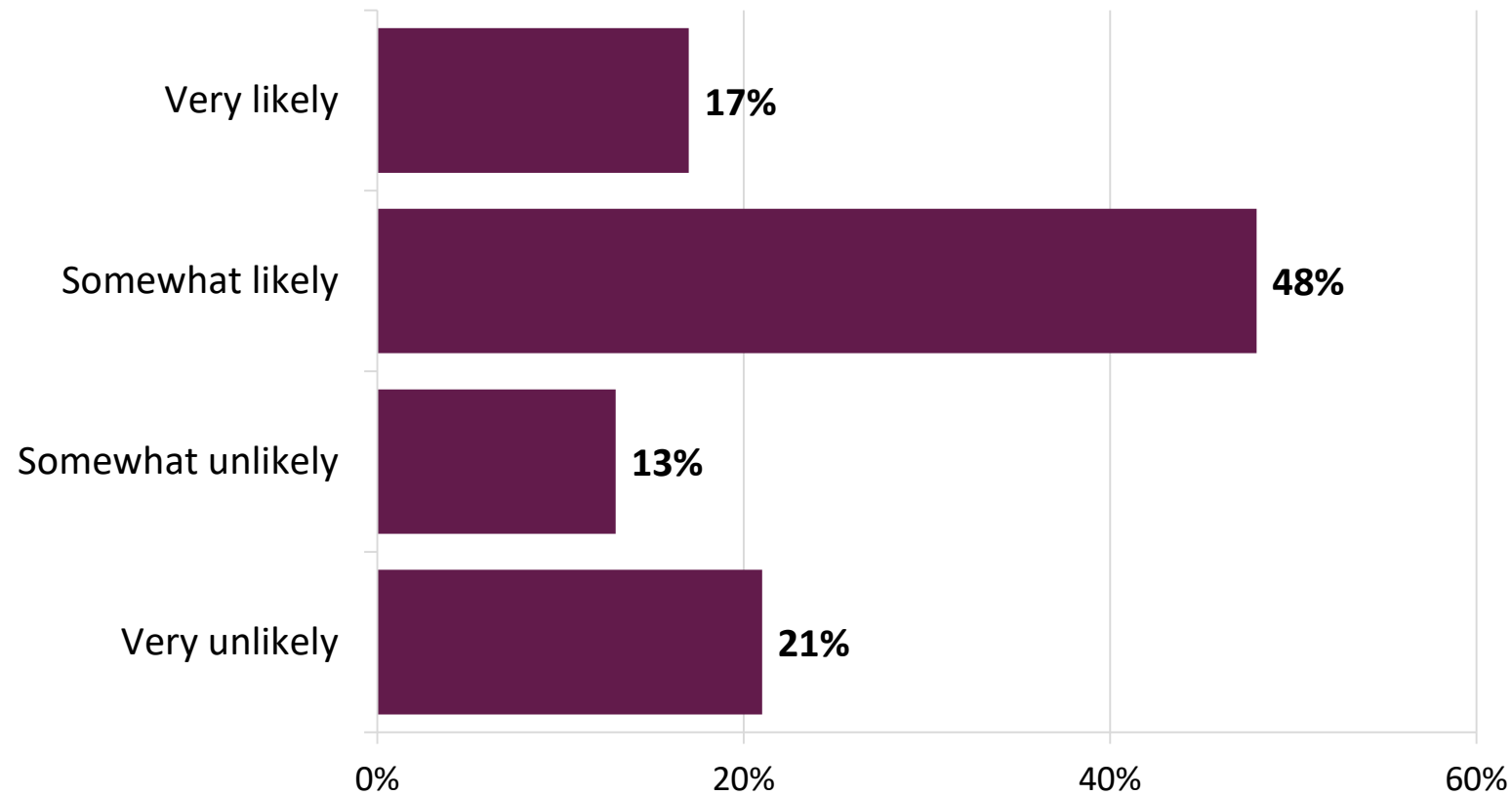


# TREND 2017-2019

## Event Attendance in Past 12 Months

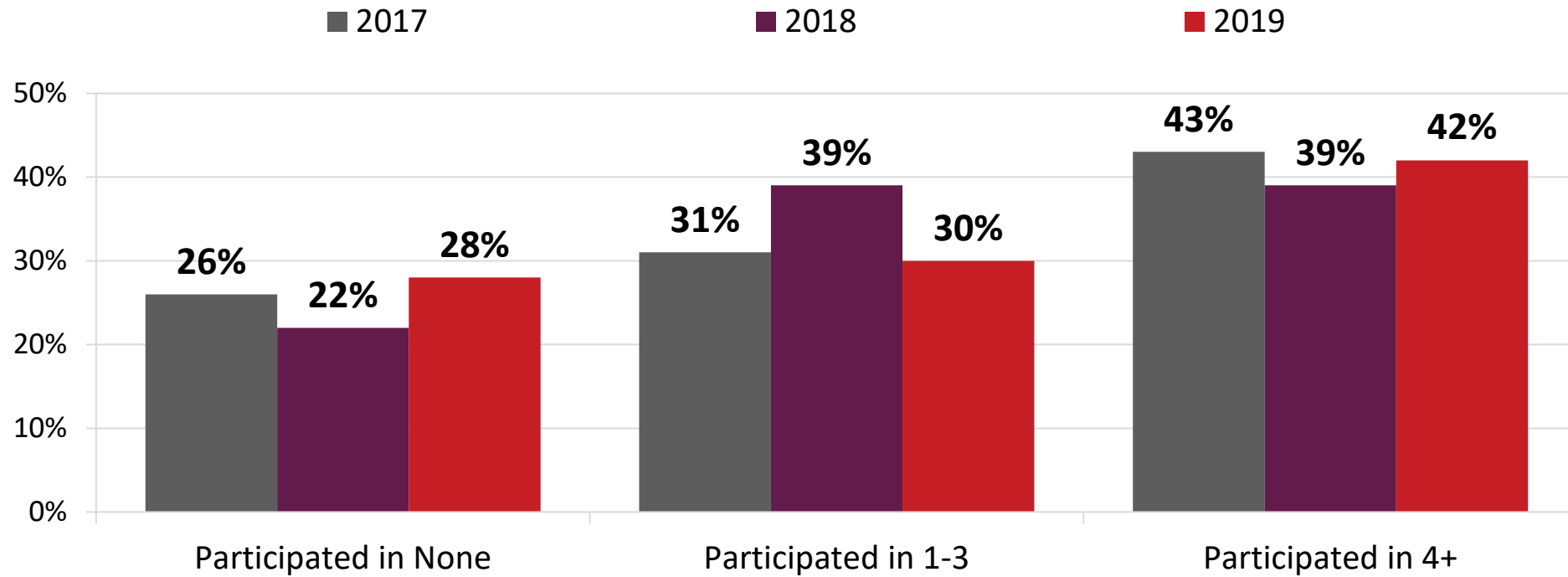


# Likelihood to Attend Work Events on the Weekend



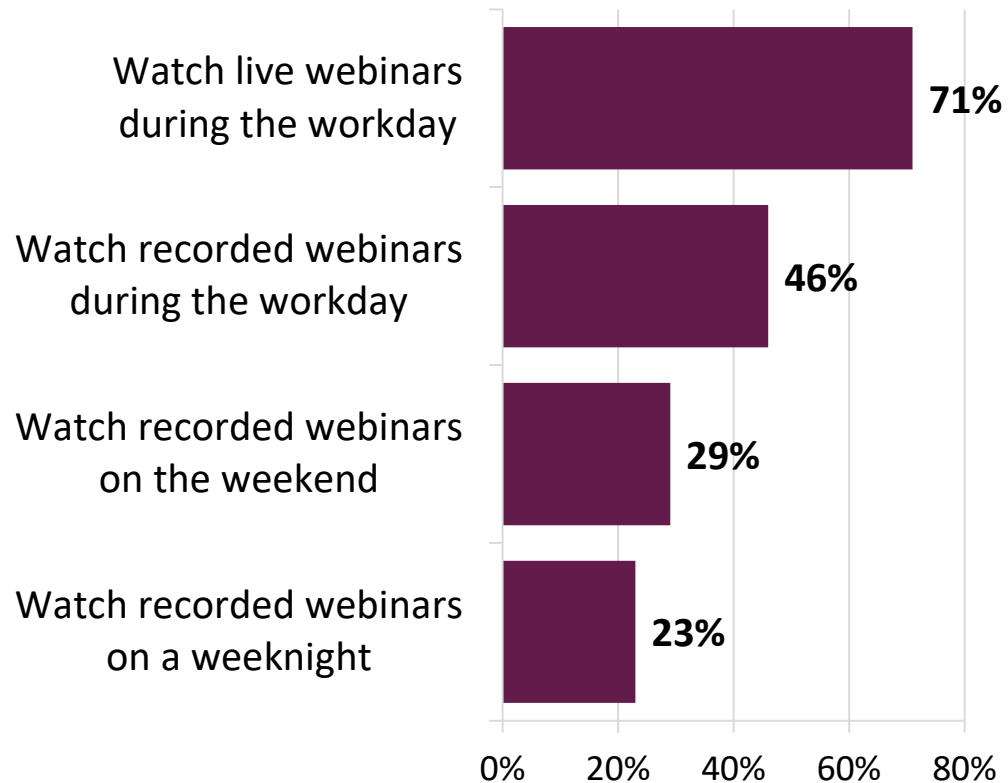
TREND 2017-2019

# Webinar Participation in Past 12 Months

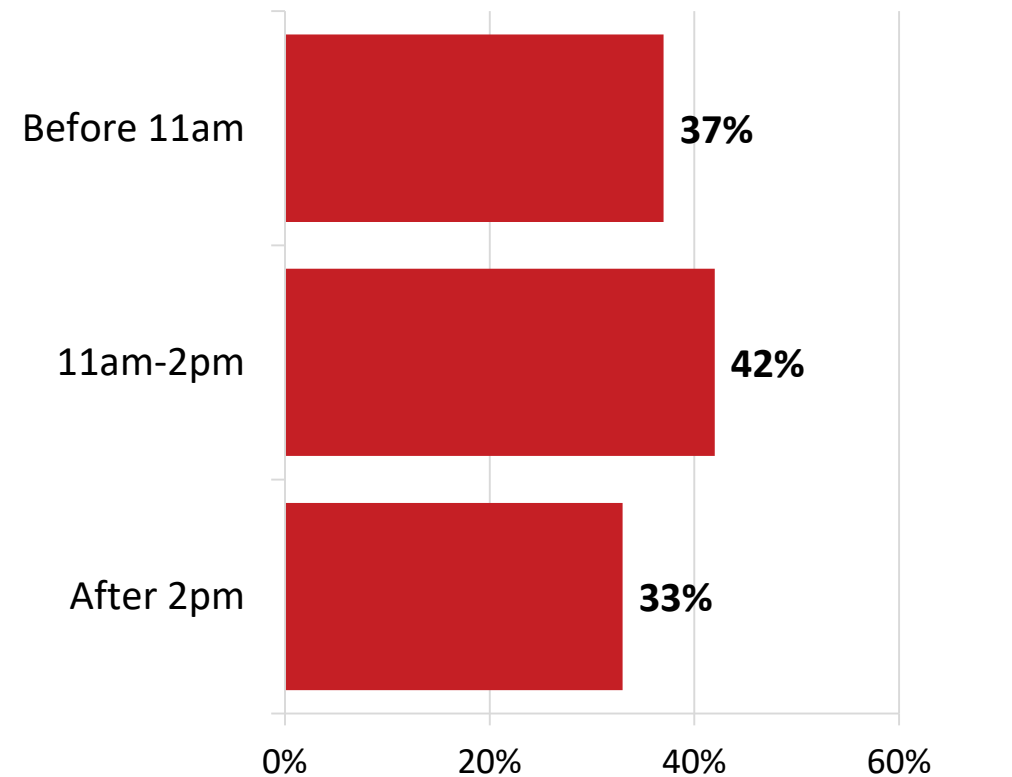



# Participating in Webinars

**Ways of Participating in Webinars**



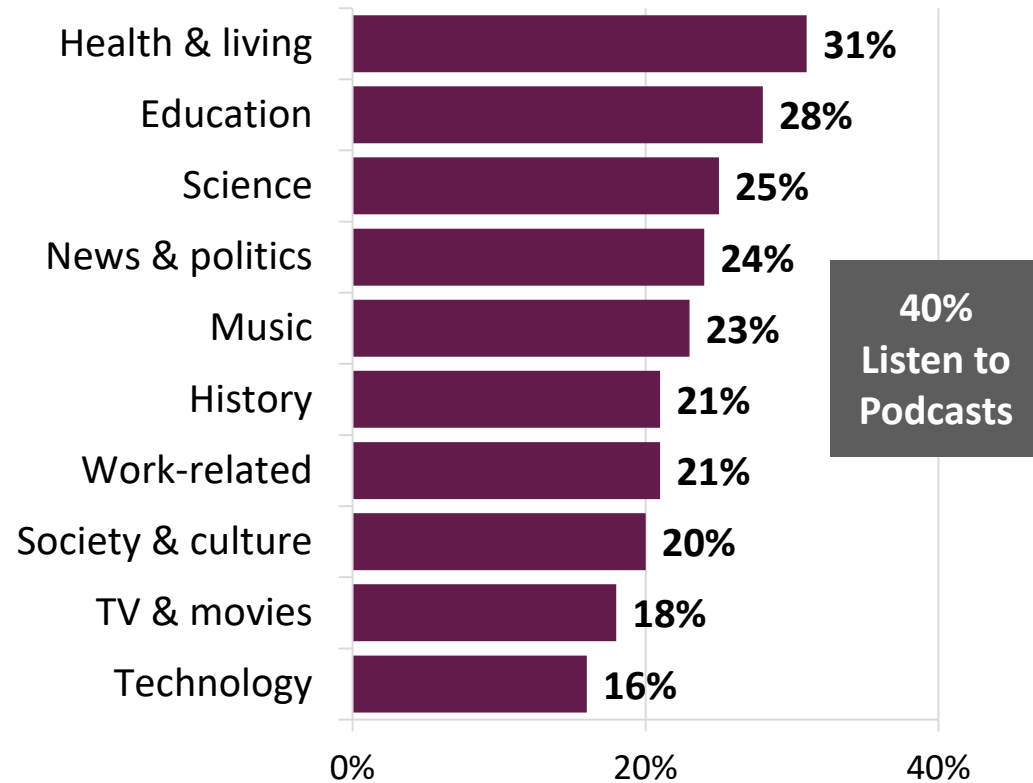
**Preferred Time to Participate**



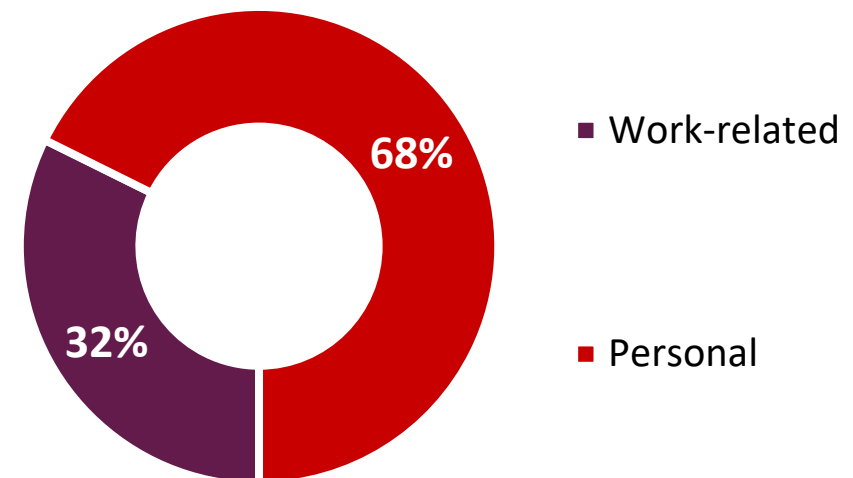
 *In which of the following ways do you participate in webinars? (select all that apply)*  
*During what time in your typical workday do you prefer to participate in live webinars? (select all that apply)*

# Listening to Audio Podcasts

**Top Types of Audio Podcasts Listened To**



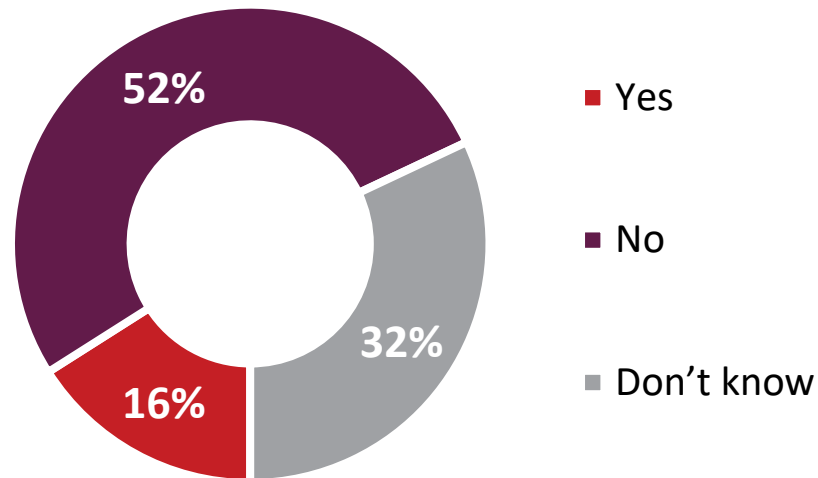
**Average Percentage of Time Spent Listening to Podcasts**



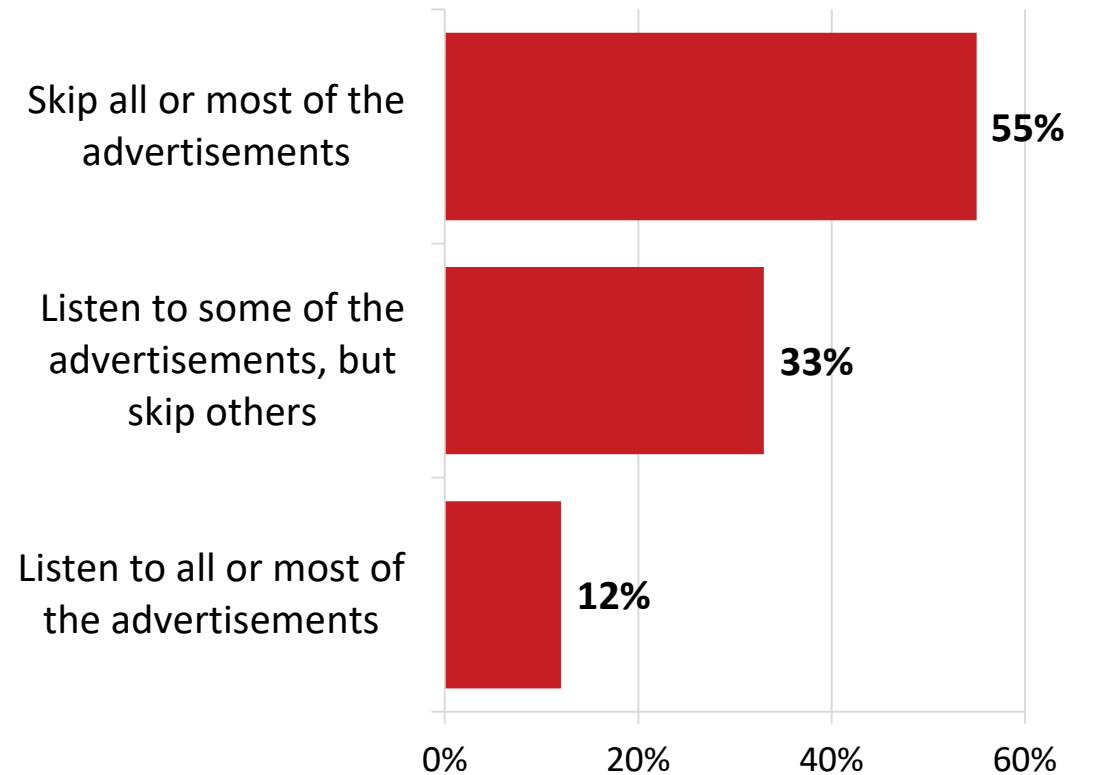
Which of the following, if any, types of audio podcasts do you listen/subscribe to? (select all that apply)  
 What percentage of the time you spend listening to podcasts is work-related vs. personal?

# Advertisements in Podcasts

Have Heard a Work-Related Ad During a Podcast

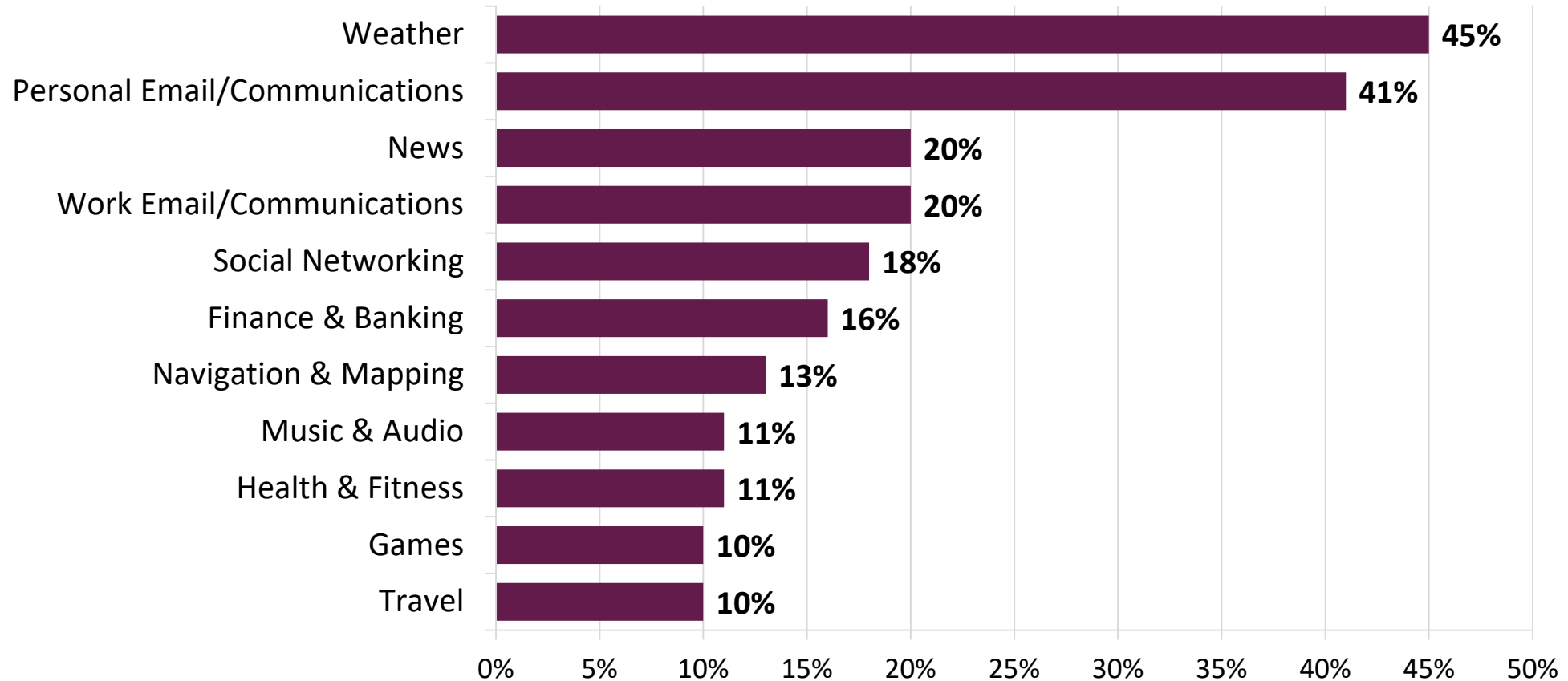


Listening to or Skipping Ads in Podcasts



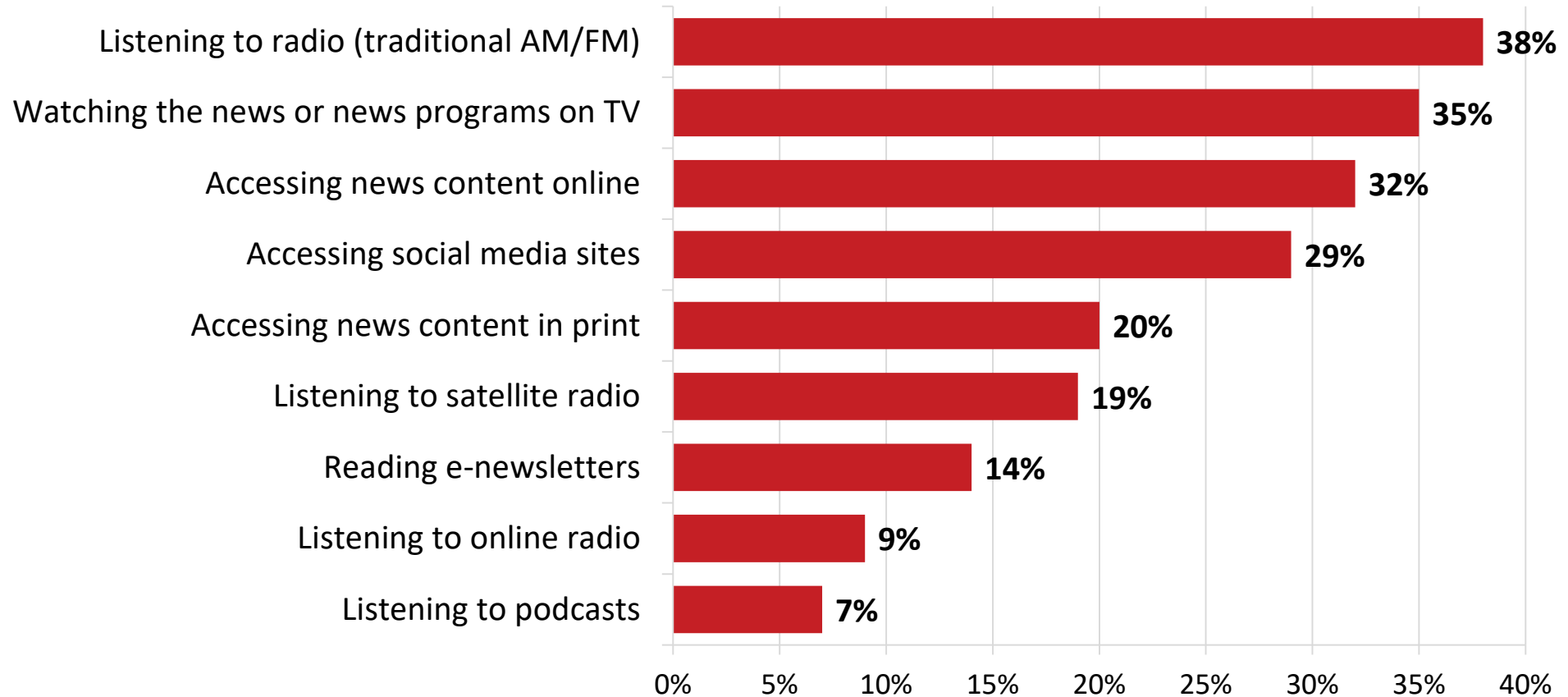
Q Have you heard a work-related advertisement during a podcast?  
When you listen to podcasts, do you generally...?

# 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	19%	1%	2%	1%	3%	55%
	Online streaming video	2%	1%	2%	4%	2%	44%
Listening	AM/FM radio	12%	46%	13%	6%	28%	13%
	Satellite radio	3%	18%	3%	0%	15%	9%
	Podcasts	2%	5%	6%	3%	6%	13%
Reading	National print newspaper or magazine	9%	3%	6%	7%	1%	29%
	Local print newspaper or magazine	13%	3%	3%	9%	2%	25%
	Digital newspaper or magazine	10%	4%	11%	8%	5%	27%
	Social media sites	13%	6%	8%	19%	6%	35%



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)



Federal Media &  
Marketing  
Dashboard

# Federal Media & Marketing Dashboard

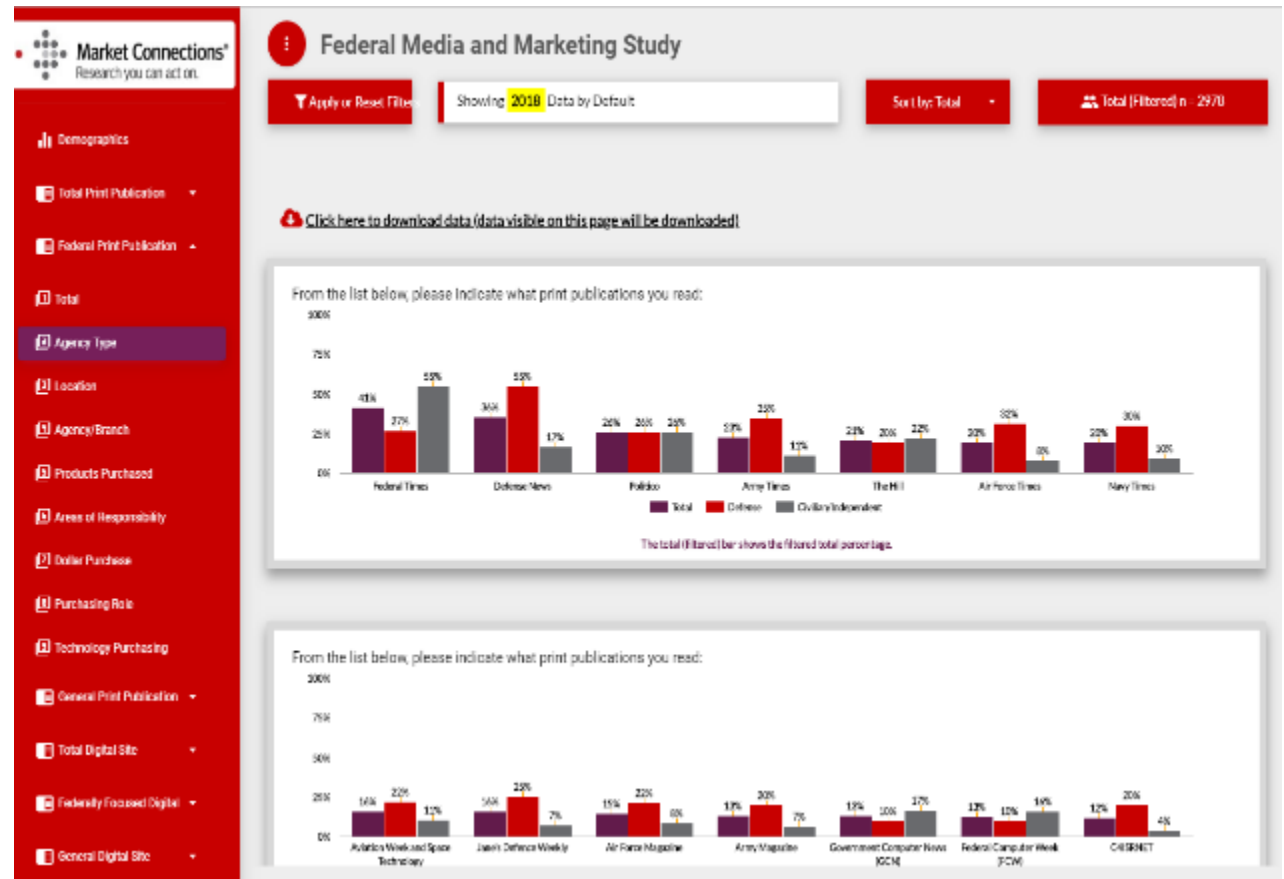
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