Federal Media & Marketing Study 2020

IT Purchaser Edition





Table of Contents



Setting the Stage: Background	3
Setting the Stage: Demographics	9
Federal Environment	14
Media Habits	18
Marketing Beyond Media: Events & Webinars	36
Trust and Confidence	45
Federal Media & Marketing Dashboard	52

SETTING THE STAGE: Background

Methodology

- Comprehensive respondent base
 - Market Connections proprietary Government Insight Panel
 - Third-party databases
 - Print publications
 - $_{\circ}$ Digital sites
- Over 200 media outlets
- Online survey fielded in Summer 2020
- Data weighted to ensure publications were not over- or under-represented in sample
- Total weighted sample size: 1,043



Topics Covered

Demographics

- Agency
- Location
- Age

Job functions

• Over 25 job functions

Purchase responsibility

 Over 40 product/service purchase categories

Events, webinars

Trusted sources of information

Time spent with media

Media usage

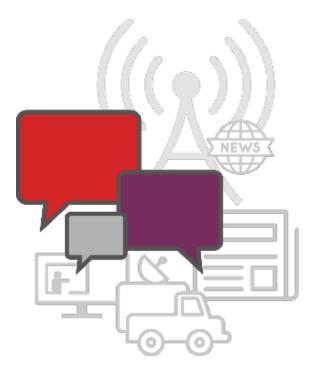
- Print
- Digital & social sites

Washington, DC

• Print, digital, broadcast

Confidence in media

...and much more





Government Media

- Over 65 media properties
- New this year
 - \circ AirForceMag.com
 - Armada International
 - Armor & Mobility
 - InsideDefense.com
 - National Defense Magazine
 - ShephardMedia.com

Business & News Media

• Over 30 media properties

Technology & Industry

• Over 20 media properties

Social Media & Lifestyle

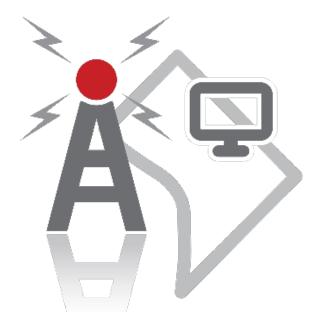
- Over 20 sites
- New this year
 - Apple tv+
 - Disney+
 - o TikTok
 - WhatsApp



WASHINGTON DC METRO AREA

Local Media: Print, Broadcast and Digital

- 18 AM/FM radio stations
- 11 television news networks
- Nine early morning political commentary programs
- Five local publications
- Companion sites

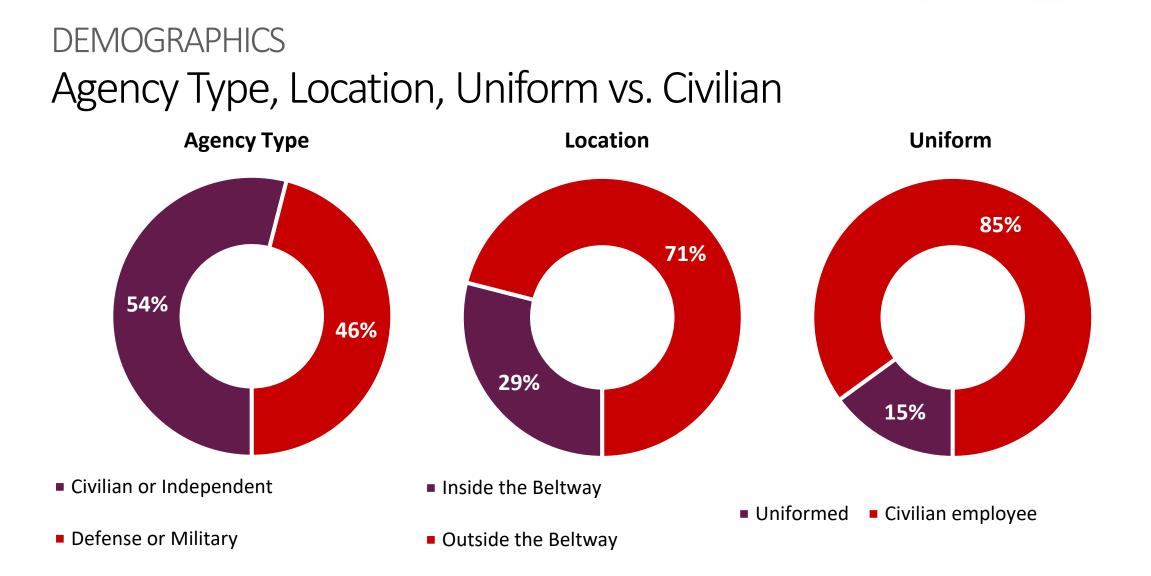


New This Year

- Events and Webinars: Pre-COVID-19 vs. present inperson event attendance, comfort in attending by event size, desired safety protocols, desired length of online events
- **Teleworking:** How level of telework has affected media habits
- Streaming Services: Use of ad vs. ad-free services
- **Demographics:** Community type



SETTING THE STAGE: Demographics



FEDERAL MEDIA & MARKETING STUDY 2020



DEMOGRAPHICS Age

21 to 34
35 to 44
45 to 54
55+
40%
40%
27%
22%
9%
9%
9%

2020

Top 10 Job Functions & Purchase Categories

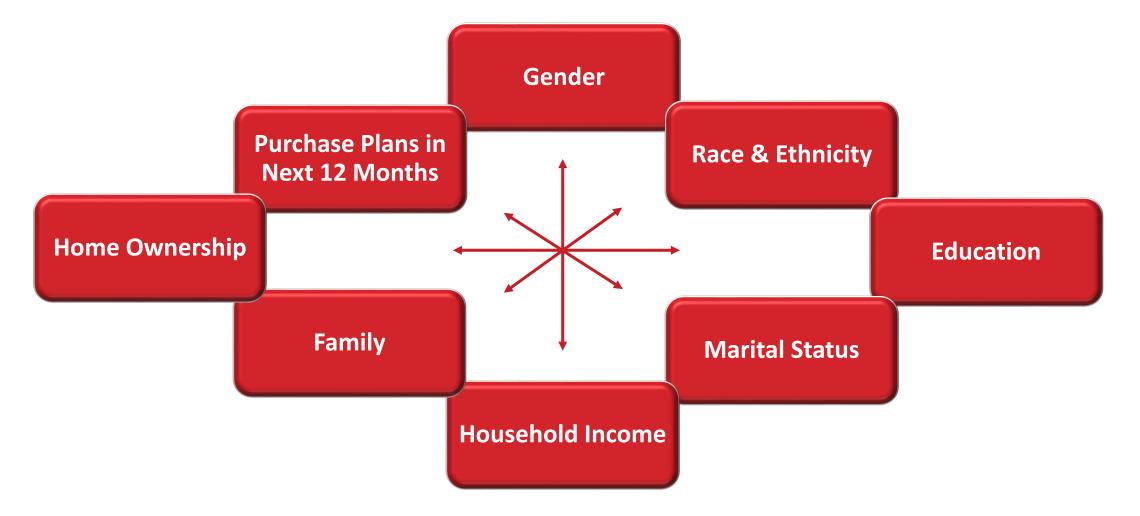




Job Functions	Product/Service Purchase Categories
Informational technology, computers, systems	Computer systems/hardware
Cybersecurity	IT services
Project/program management and administration	Software
Purchasing, contracting, procurement	Communications/telecommunications
Accounting, budget and finance	Big data/analytics
Administration and office services	Cybersecurity
Communications/telecommunications	Education/training classes and services
Training, education	Consulting services
Intel/security	IT security
Data science	Office equipment and supplies

12

Other Demographics



Federal Environment

15

2020: A Push Out of the Office

January 31: The
Trump
administration
declared the
coronavirus outbreak
to be a public health
emergency in US

March 13: OMB encourages agencies to increase teleworking options May 19: CDC releases 60-page guidance to businesses, restaurants, schools and other establishments on how to reopen

July-August: Market Connections conducted surveys for 2020 FMMS

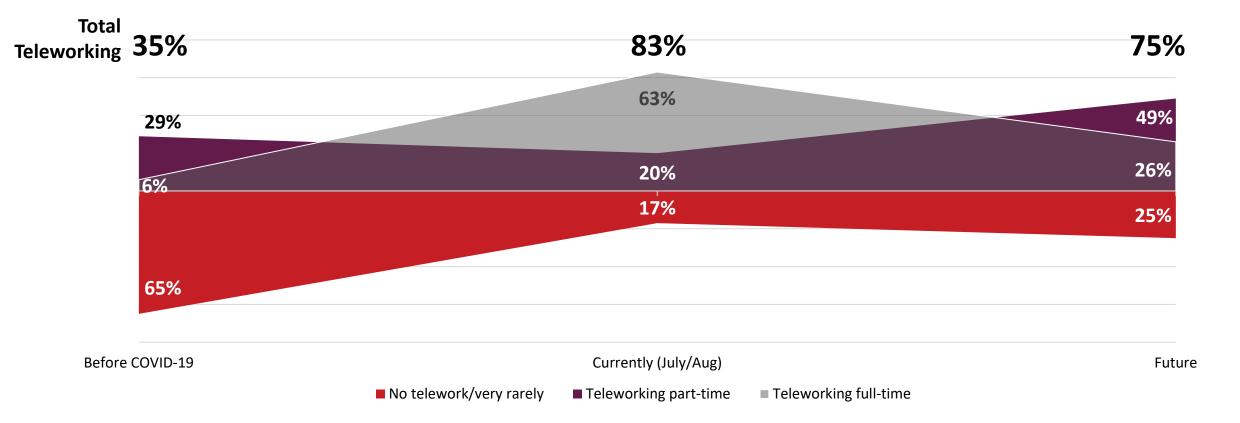


March 11: First confirmed COVID case among Capitol Hill staff

March 29: White House extends social distancing guidelines **April-June:** Market Connections surveys show 90% of federal employees teleworking

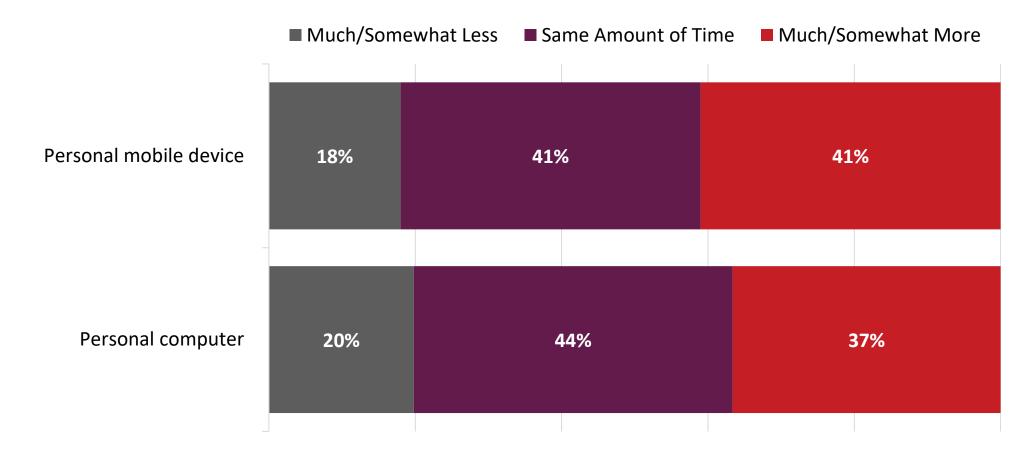


POTENTIAL IMPACT: Teleworking Frequency



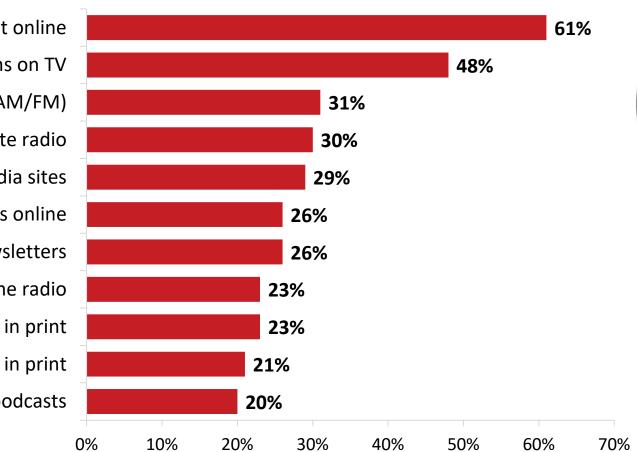


POTENTIAL IMPACT: Use of Personal Devices for Work Since March 2020



Media Habits

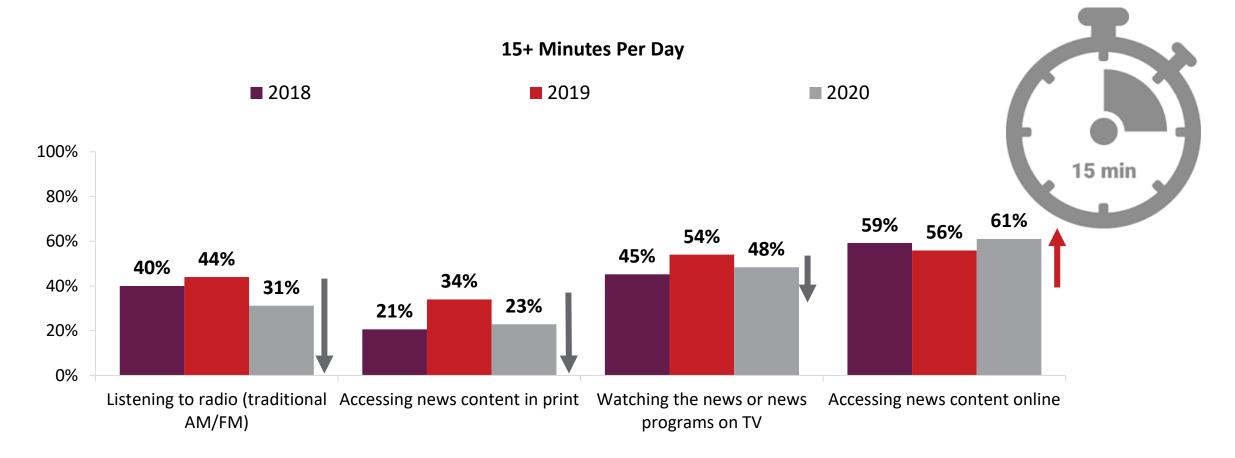
Time Spent on an Average Workday: 15+ Minutes Per Day



Accessing news content online Watching the news or news programs on TV Listening to radio (traditional AM/FM) Listening to satellite radio Accessing social media sites Reading industry magazines online Reading e-newsletters Listening to online radio Accessing news content in print Reading industry magazines in print Listening to podcasts

15 min

Some Channels Up, Some Down





Much/Somewhat Less Time

Same Amount of Time on a Workday

Much/Somewhat More Time

Accessing news content online Watching the news or news programs on TV **Reading e-newsletters** Reading industry magazines online Accessing news content in print Accessing social media sites Listening to podcasts Listening to online radio Reading industry magazines in print Listening to satellite radio Listening to radio (traditional AM/FM)

20%	47%	32%
26%	48%	26%
28%	55%	18%
29%	55%	16%
34%	54%	12%
34%	49%	17%
35%	50%	15%
35%	50%	15%
36%	54%	11%
37%	50%	13%
38%	49%	13%

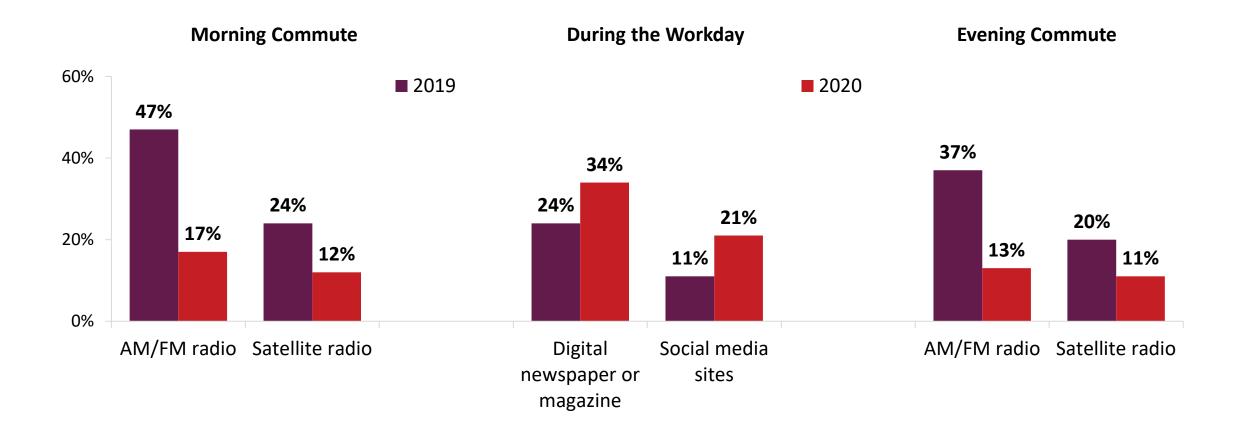


2020 Media Consumed During the Workday

		Wake Up	Morning Commute	During the Workday	Lunch Break	Evening Commute	After Work
Watching	Broadcast/cable TV	22%	1%	14%	11%	1%	54%
	Online streaming video	5%	1%	6%	5%	1%	52%
Listening	AM/FM radio	16%	16%	14%	7%	12%	16%
	Satellite radio	8%	14%	12%	6%	13%	17%
	Podcasts	7%	10%	14%	9%	8%	19%
Reading	National print newspaper or magazine	8%	2%	14%	11%	1%	18%
	Local print newspaper or magazine	10%	2%	14%	10%	1%	20%
	Digital newspaper or magazine	16%	2%	32%	23%	2%	26%
	Social media sites	18%	3%	19%	22%	1%	41%



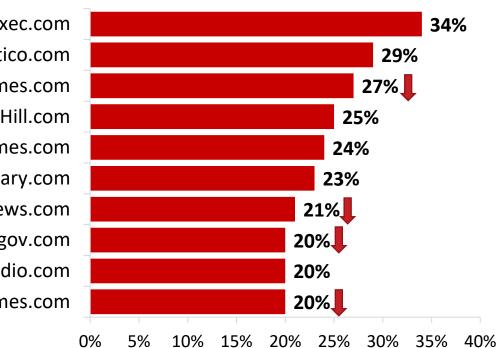
Telework Drives Decline in Radio Listenership

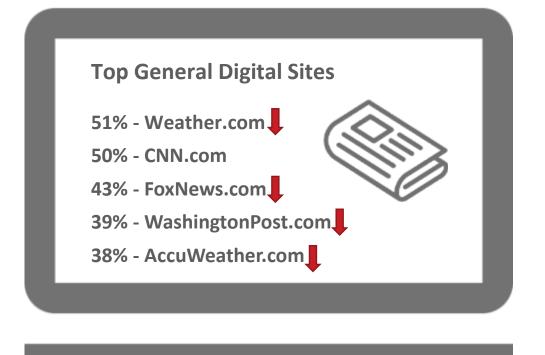


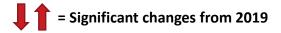
Digital Sites

Top Federally Focused Digital Sites Visited

GovExec.com Politico.com FederalTimes.com TheHill.com MilitaryTimes.com DefenseNews.com Nextgov.com FederalNewsRadio.com ArmyTimes.com









Digital Sites: Looking Into the Future

GovExec.com 39% 33% Politico.com TheHill.com 27% FederalTimes.com 27% FederalNewsRadio.com 24% FedSmith.com 23% WTOP.com 22% Nextgov.com 21% DefenseNews.com 20% Military.com 18% 0% 5% 10% 15% 20% 25% 30% 35% 40% 45%

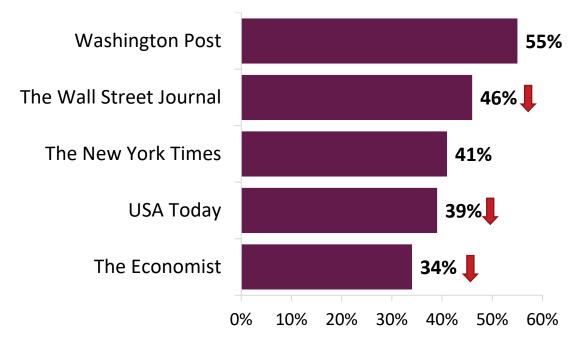
Future Full-Time Teleworkers

FEDERAL MEDIA & MARKETING STUDY 2020

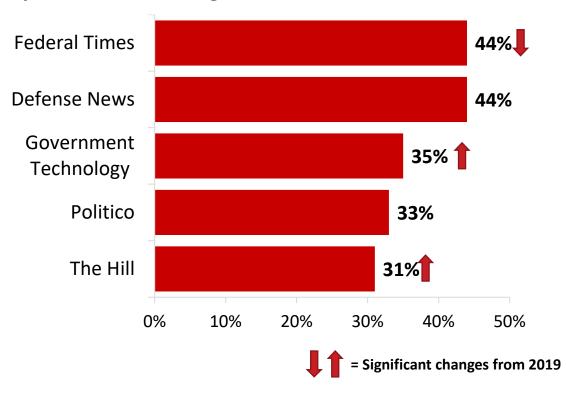


Print News Publications

Top Five General Print News Publications



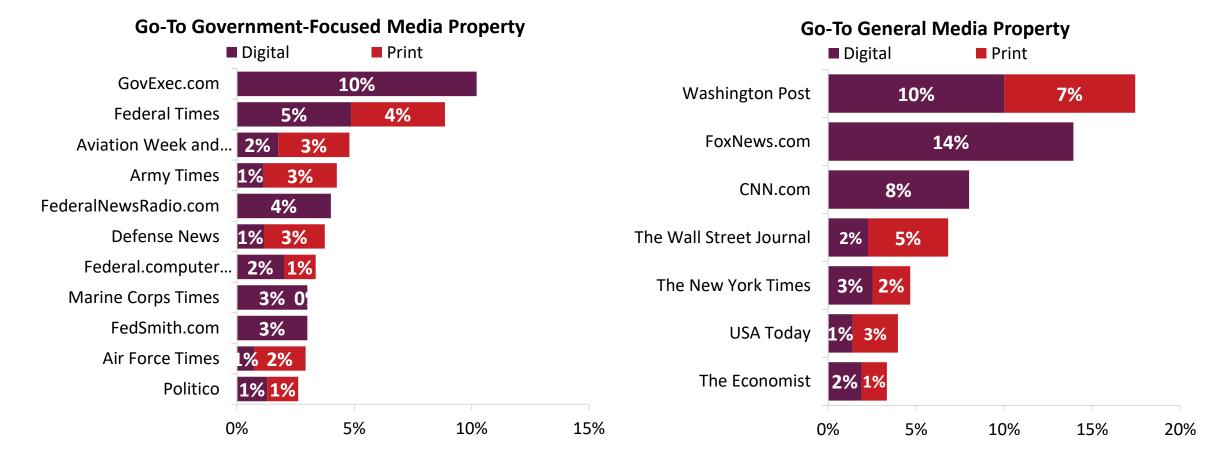
Top Five Federal/Congressional Print News Publications





Digital or Print ONE <u>Go-To Source</u> for News

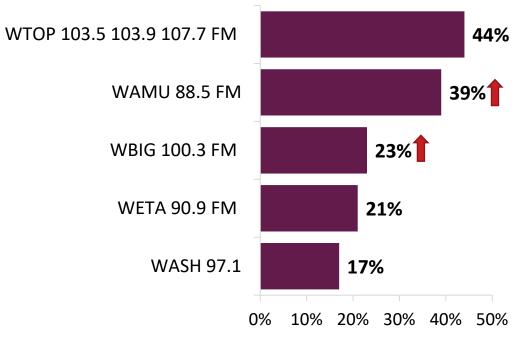
Respondents could select one digital or print media property as their "go-to" for news.



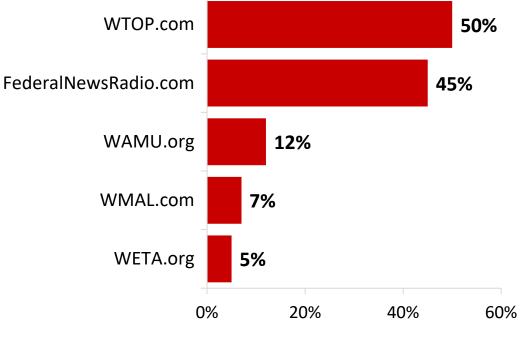
FEDERAL MEDIA & MARKETING STUDY 2020



DC: Radio Listenership



Radio Stations



Radio Websites

2020 N=301 2019 N=262

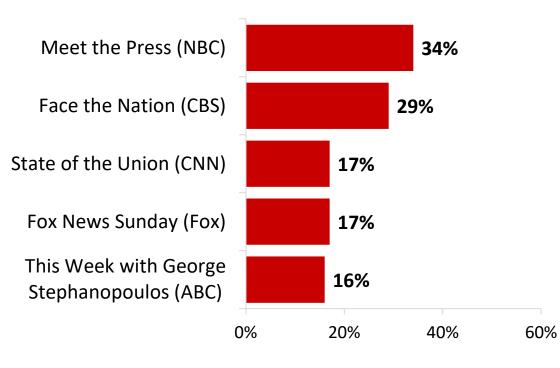
= Significant changes from 2019

29

DC: News Channel & News Program

CNN 39% 4 NBC WRC 35% MSNBC 28% 9 CBS WUSA 23% 5 FOX WTTG 21%

TV News Channels



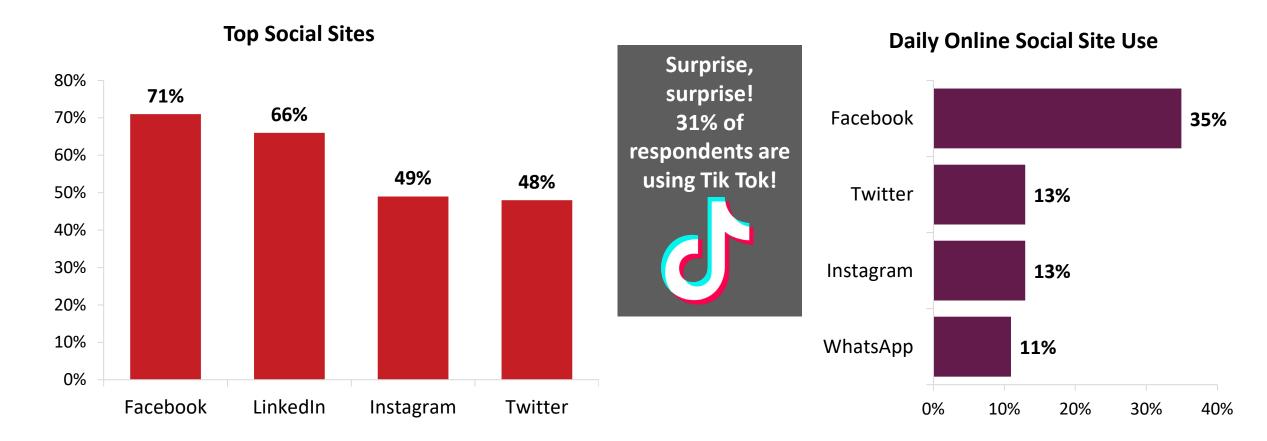
News Programs

2020 N=220 2019 N=183

= Significant changes from 2019

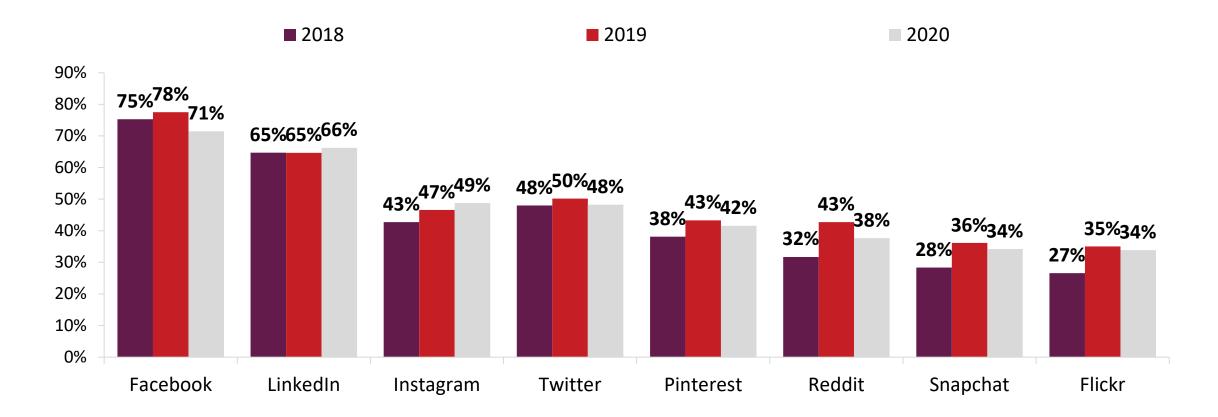
MULK OV

Social Media Usage





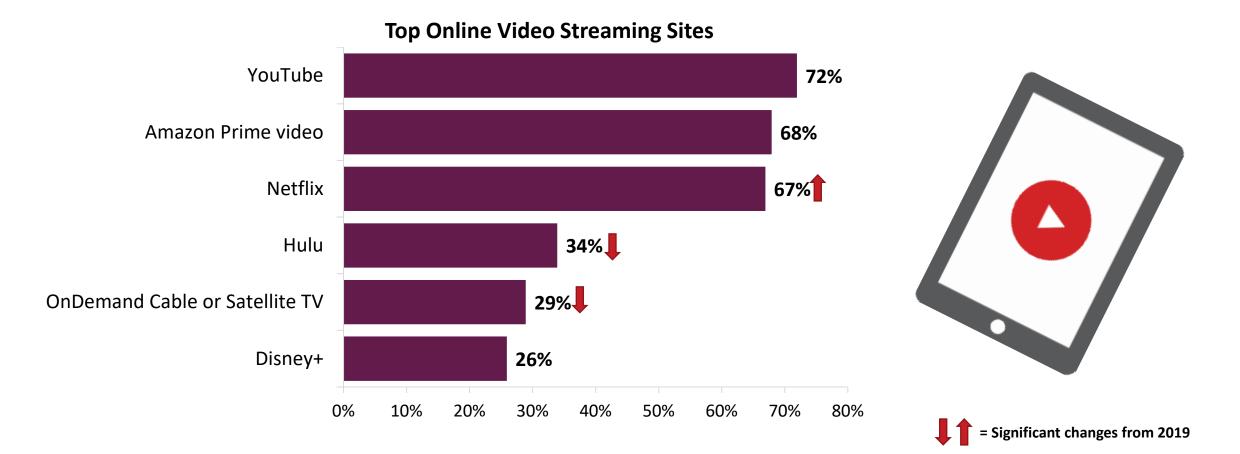
TREND 2018-2020 Social Media Usage



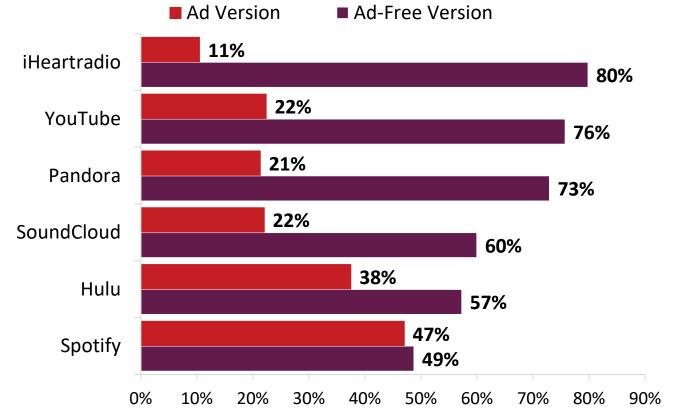
FEDERAL MEDIA & MARKETING STUDY 2020



Online Video Streaming



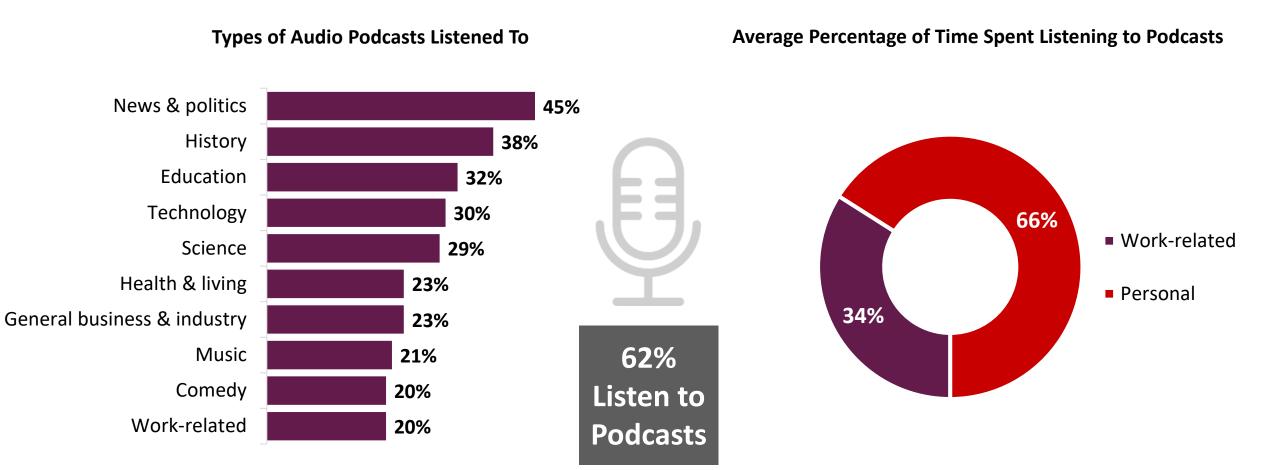








Podcast Listenership



Ads in Podcasts – Are Feds Paying Attention?



0%

40%

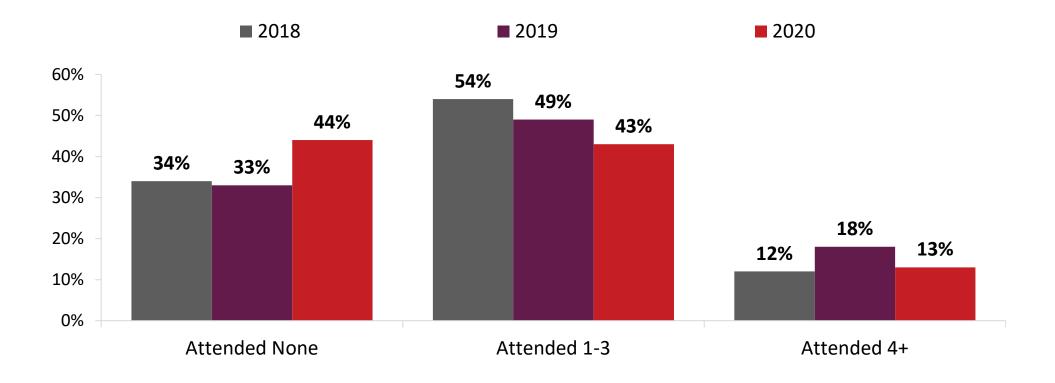
60%

20%

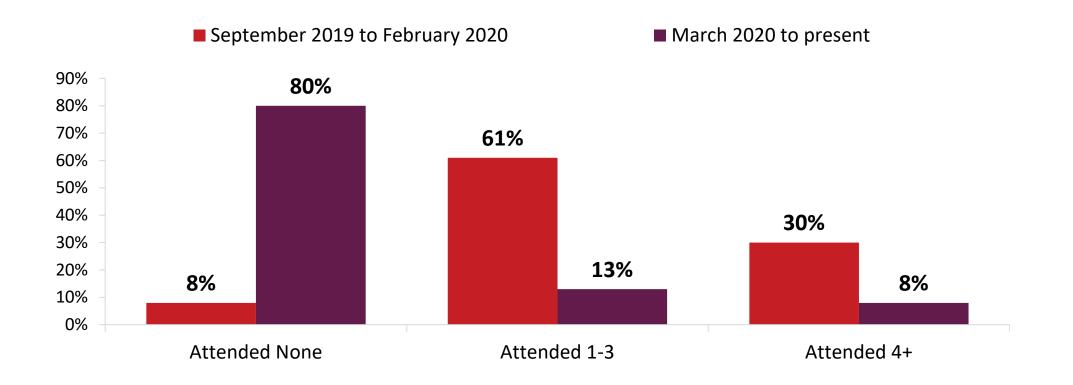
MARKETING BEYOND MEDIA: Events & Webinars



TREND 2018-2020 Event Attendance Down in 2020

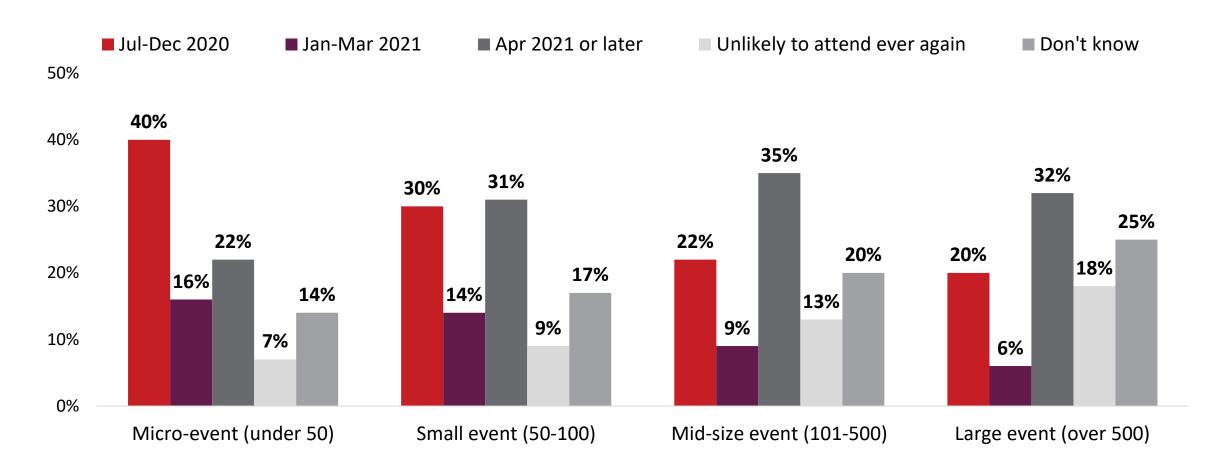


Event Attendance Significantly Down, Especially Since March

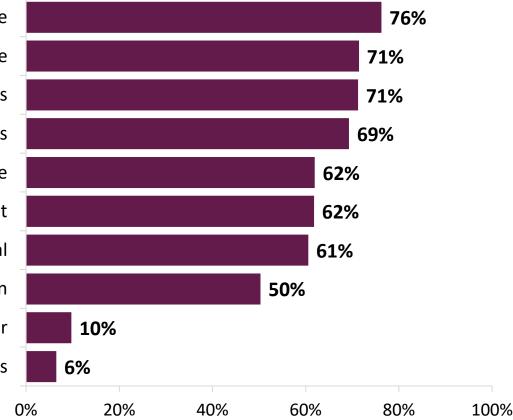




Comfort Level for In-Person Event Participation by Size

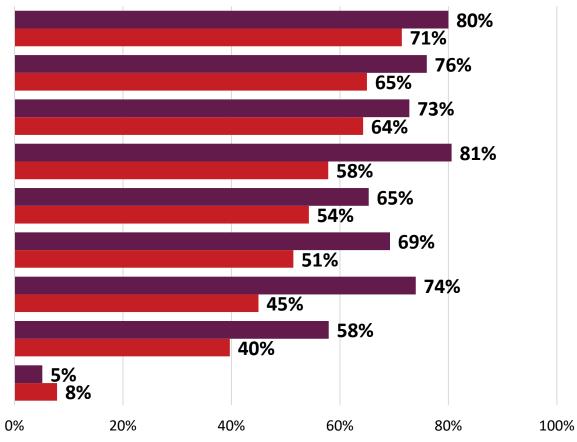


Safety Protocols Needed to Feel Comfortable Attending Event



Providing hand sanitizer throughout the venue Providing complimentary masks on-site Setting up chairs and tables further apart according to physical distancing guidelines Housekeeping staff actively cleaning and disinfecting hard surfaces Reducing the number of attendees allowed in the event space Food being individually served, rather than a self-serve buffet Checking temperatures of attendees upon arrival Beverages being individually served, rather than a self-service station Other None of the above – I feel comfortable attending events without extra protocols

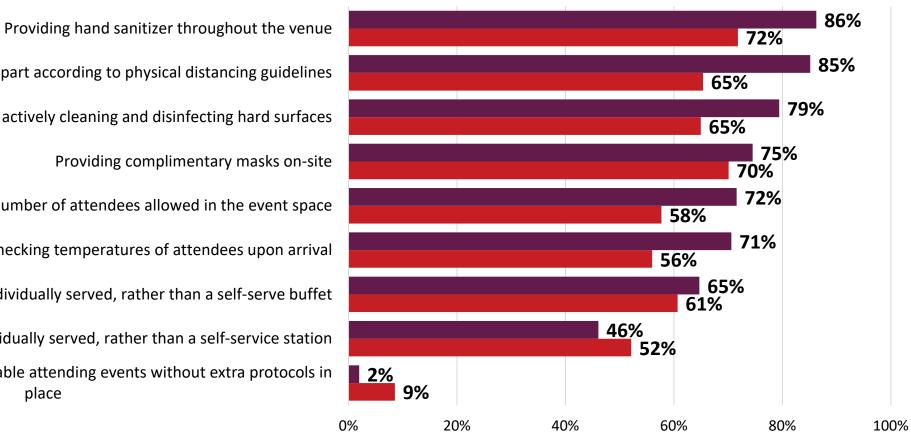
Safety Protocols Are Less of a Concern Among Those in Defense



Providing hand sanitizer throughout the venue Providing complimentary masks on-site Housekeeping staff actively cleaning and disinfecting hard surfaces Setting up chairs and tables further apart according to physical distancing guidelines Checking temperatures of attendees upon arrival Food being individually served, rather than a self-serve buffet Reducing the number of attendees allowed in the event space Beverages being individually served, rather than a self-service station None of the above – I feel comfortable attending events without extra protocols in place

Civilian Defense

Safety Protocols Are Less of a Concern Outside the Beltway



Setting up chairs and tables further apart according to physical distancing guidelines Housekeeping staff actively cleaning and disinfecting hard surfaces Providing complimentary masks on-site Reducing the number of attendees allowed in the event space Checking temperatures of attendees upon arrival Food being individually served, rather than a self-serve buffet

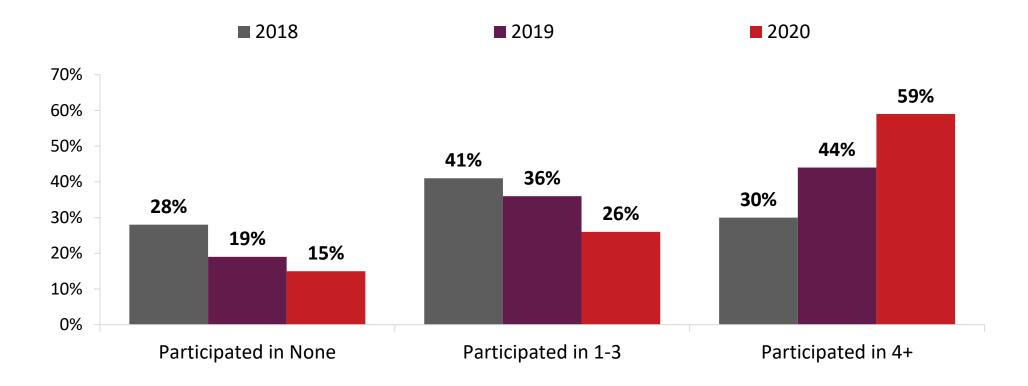
Beverages being individually served, rather than a self-service station

None of the above – I feel comfortable attending events without extra protocols in place

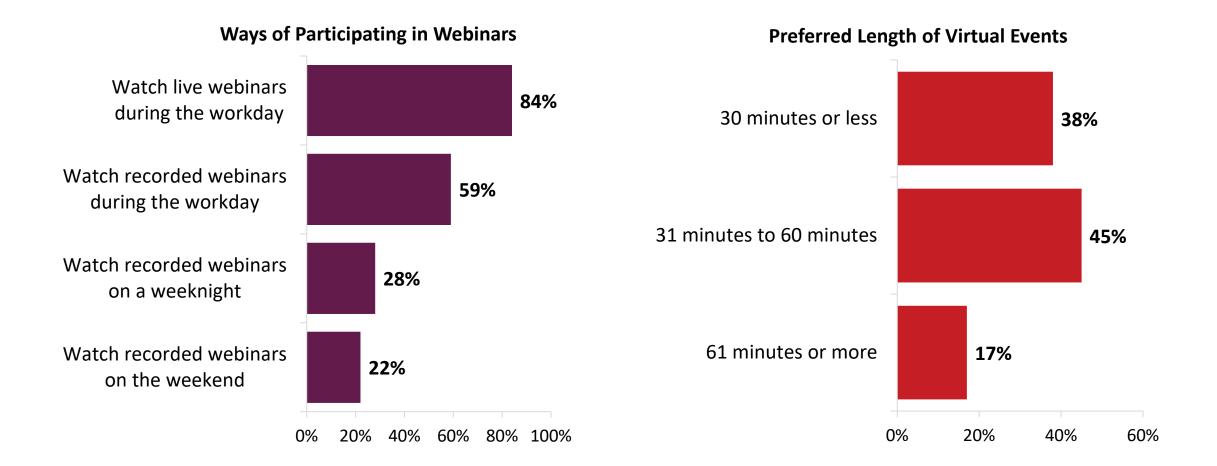
DC Non-DC



TREND 2018-2020 Webinar Participation Dramatically Increases



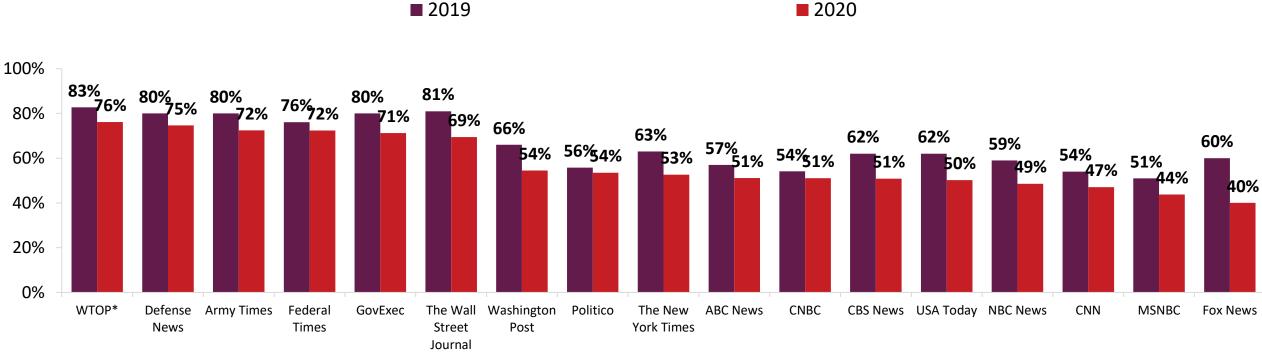




Trust & Confidence



% A Great Deal/A Fair Amount

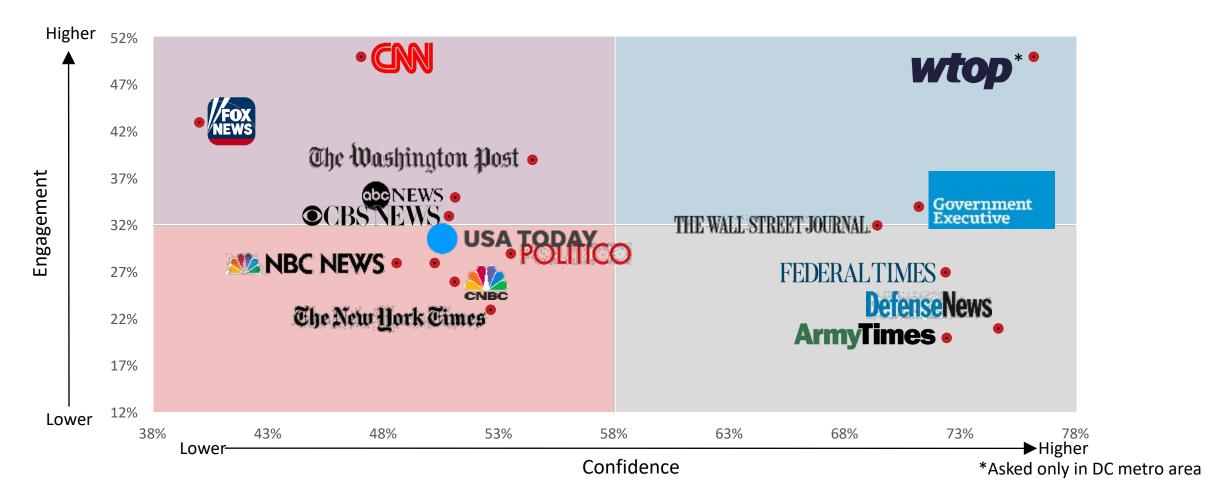


2019

*Asked only in DC metro area



Marketing Impact



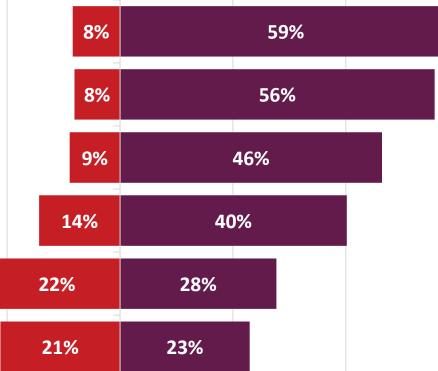


Trusted Sources of Information



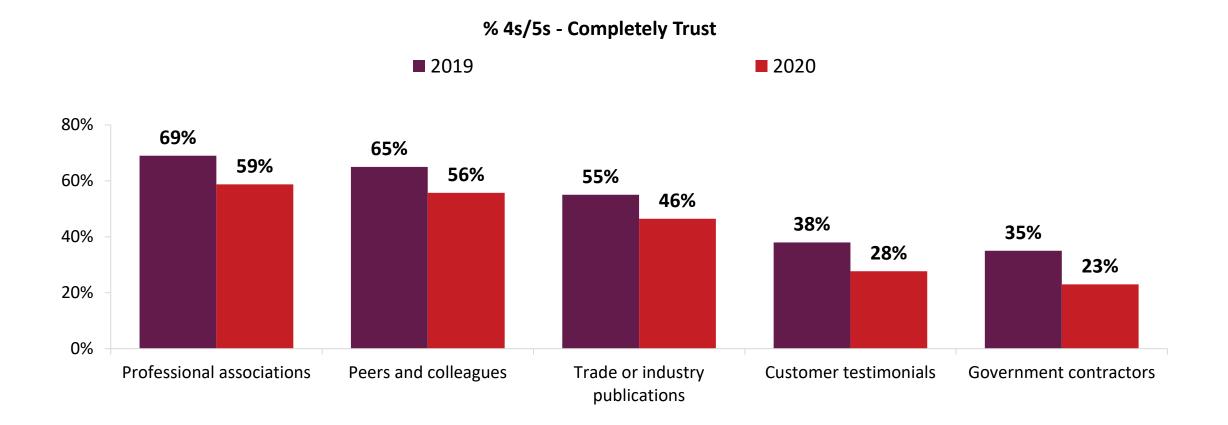




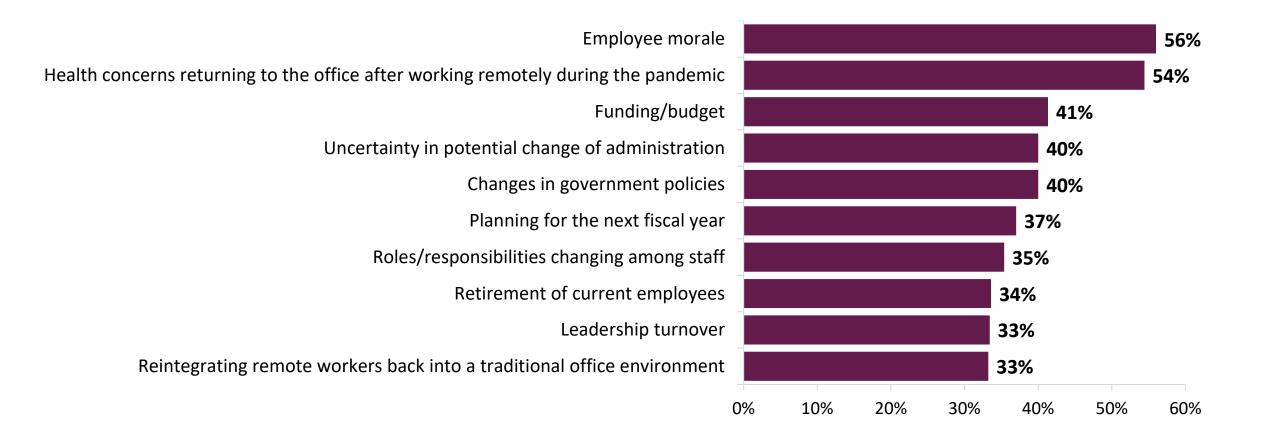




Overall Decline in Trust Evident

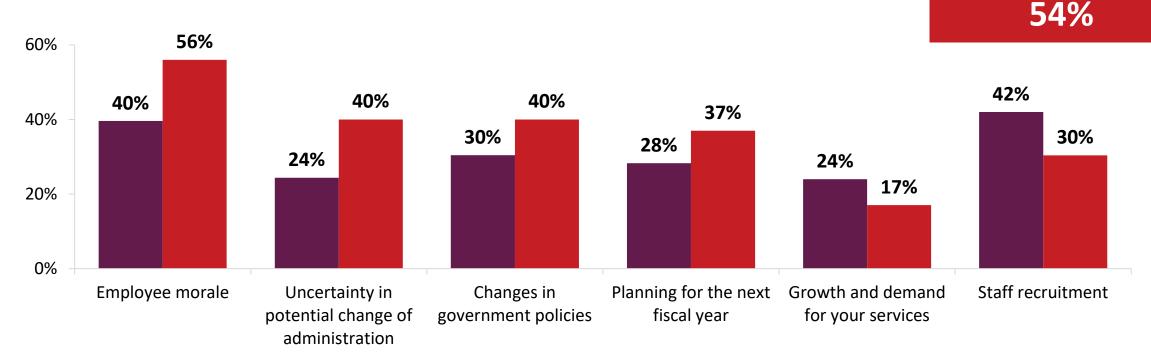


Feds Predict Top Challenges in Upcoming Year



2019 2020





NEW THIS YEAR: Health concerns returning to the office after working remotely during the pandemic

51

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/fmms2020study



Contact Information

Aaron J. Heffron

President aaronh@marketconnectionsinc.com 703.966.1706

Laurie Morrow

Vice President, Research Strategy lauriem@marketconnectionsinc.com 571.257.3845

