





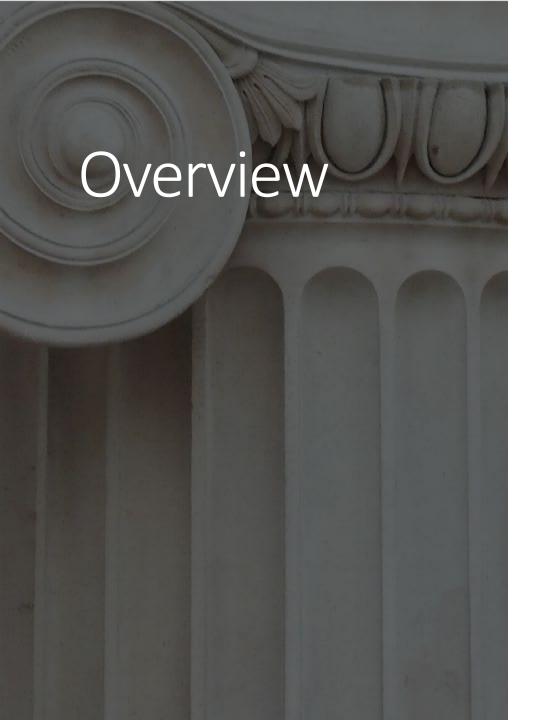


PLATINUM SPONSOR



STRATEGIC PARTNER







- Setting the Stage
- Where Are They Physically and Mentally?
- Finding a Media Equilibrium
- Beyond Traditional Media
- Observations and Takeaways



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 2021
- Data weighted to ensure publications were not over- or under-represented in sample
- Total weighted sample size: approximately 2,700



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

...and much more



FEDERAL MEDIA & MARKETING STUDY 2021

Publications & Digital Sites

Government Media

Over 65 media properties

Business & News Media

- Over 30 media properties
- New this year
 - Expedia.com
 - Newsmax.com
 - o OANN.com
 - MSNBC.com
 - Priceline.com
 - Thecipherbrief.com
 - TripAdvisor.com
 - Warriormaven.com
 - WashingtonTimes.com

Technology & Industry

Over 20 media properties

Social Media & Lifestyle

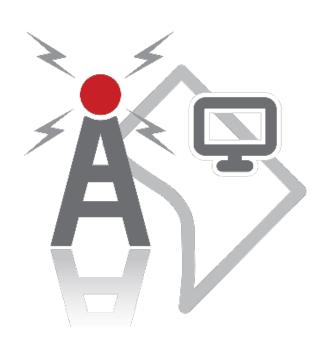
- Over 20 sites
- New this year
 - Peacock
 - Paramount
 - HBOMax
 - Parler
 - MeWe
 - Gab



WASHINGTON DC METRO AREA

Local Media: Print, Broadcast and Digital

- 20 AM/FM radio stations
- 11 television news networks
- Eight early morning political commentary programs
- Four local publications
- Companion sites



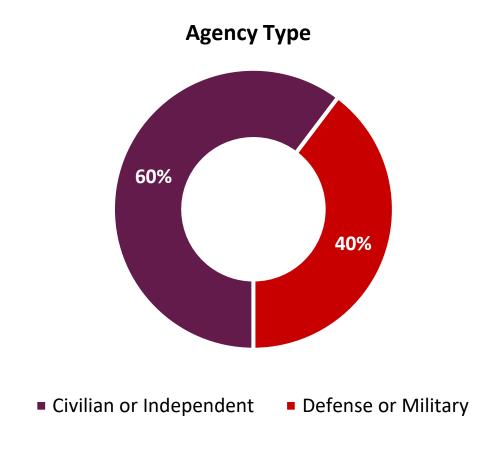
New This Year

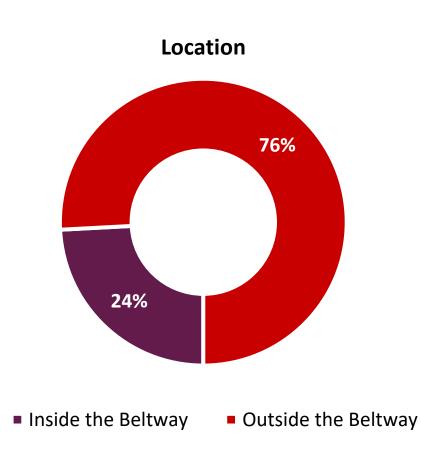
- News: Where are they going for local news?
- **Social media:** Are federal employees using it for work-related purposes?
- **Events:** What are plans for future event attendance and what is the preference when they are hybrid events?
- **Webinars:** Does the webinar host matter?
- Effects of COVID-19: How are agencies changing standard operating procedures?
- **Staff and Recruitment:** What are agency plans for future staffing?



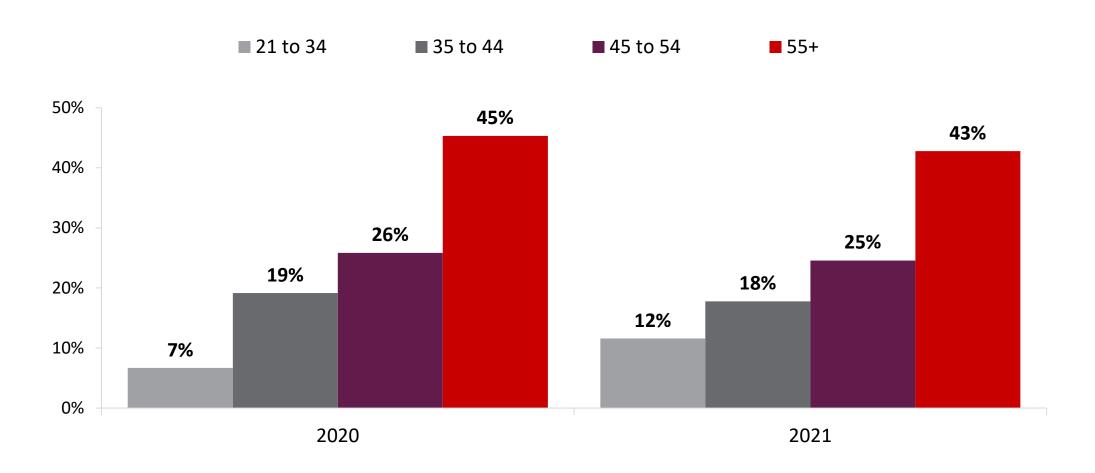


Agency Type and Location









Top Job Functions & Purchase Categories







Job Functions	Product/Service Purchase Categories
Project/program management and administration	Computer systems/hardware
Informational technology, computers, systems	Software
Purchasing, contracting, procurement	IT services
Administration and office services	Consulting services (project management, management advisory services)
Accounting, budget and finance	Communications/telecommunications
Training, education	Education/training classes and services
Cybersecurity	Office equipment and supplies (copiers, fax machines, supplies, etc)
Communications/telecommunications	Cybersecurity
Engineering/architecture	Cloud computing services
Executive and command	IT security

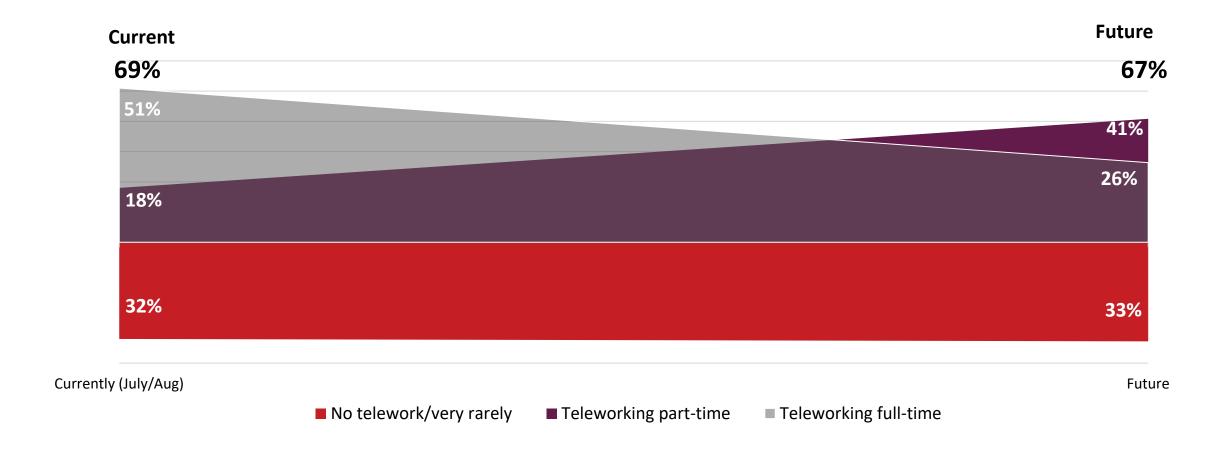








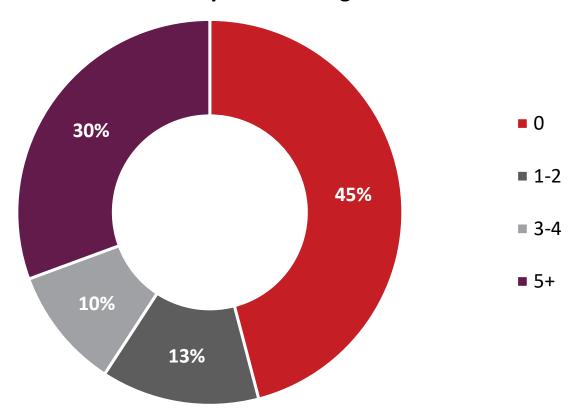
Teleworking: A Third Don't Expect to Telework in the Future



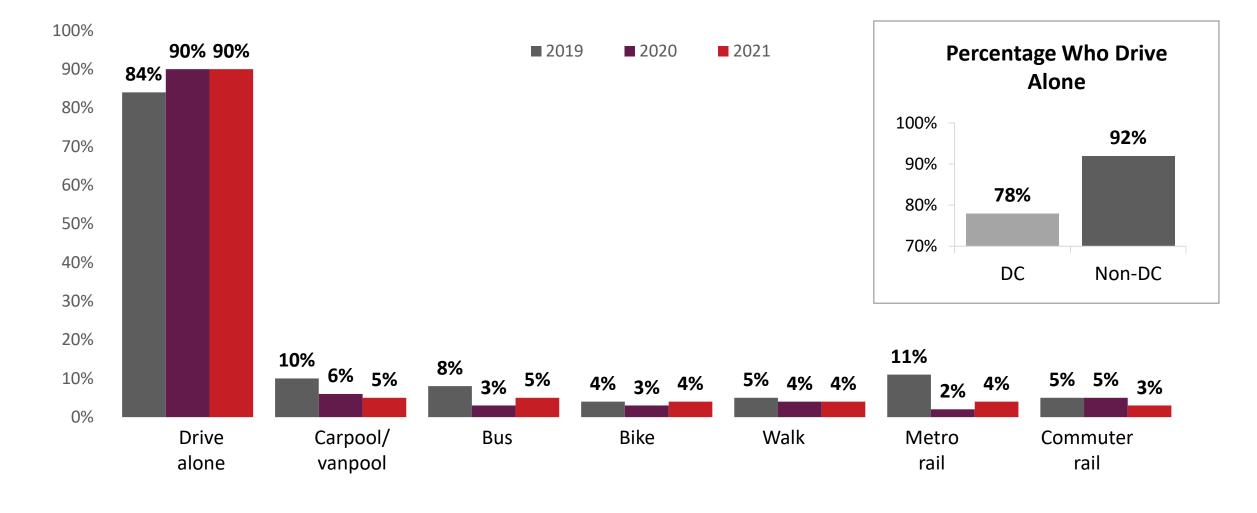
FEDERAL MEDIA & MARKETING STUDY 2021

One-third Commute to Office Every Day

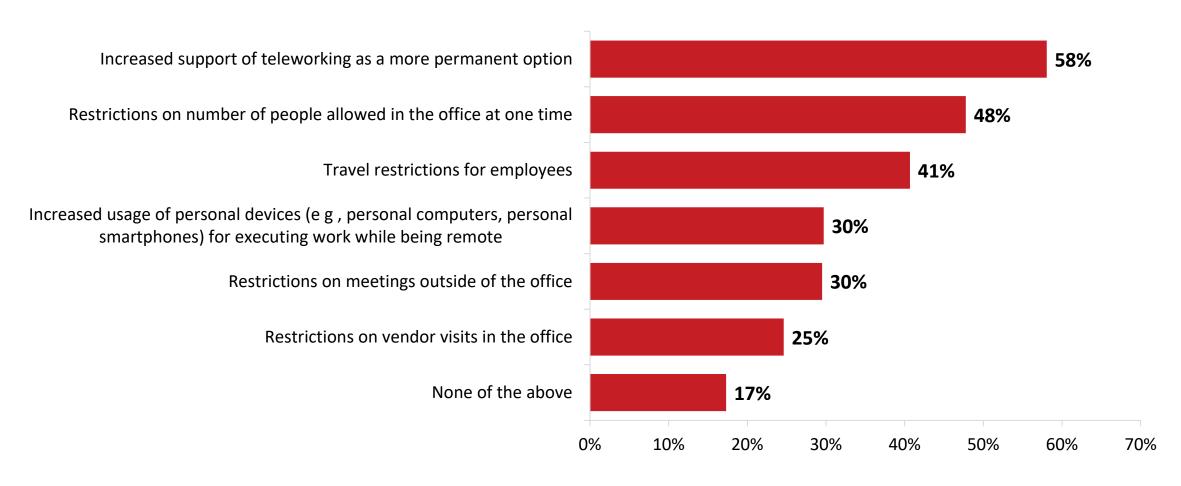




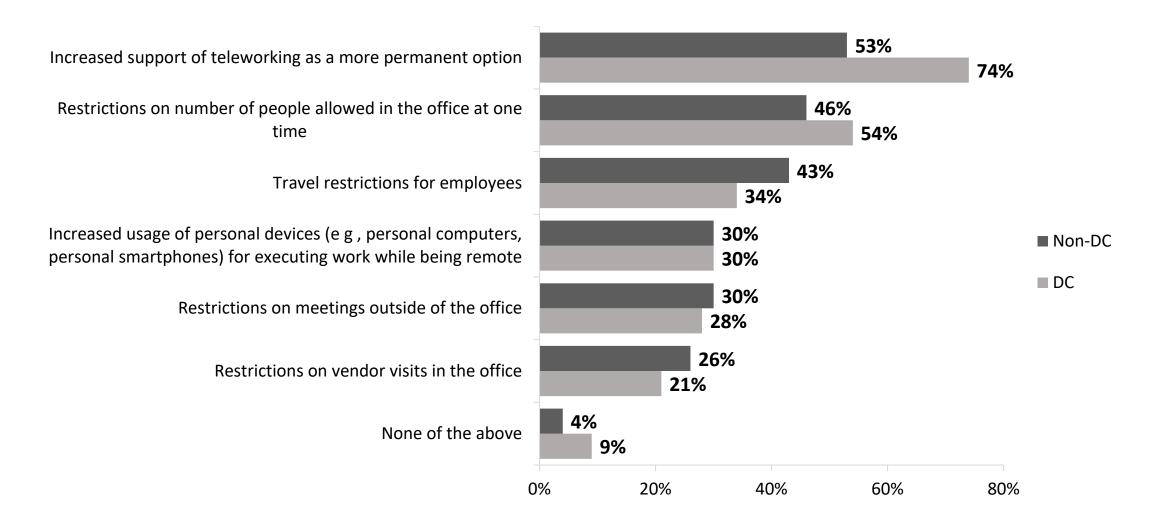
Among Those Commuting, Most Drive Alone



Restrictions in Response to COVID-19 Limit Physical Interaction

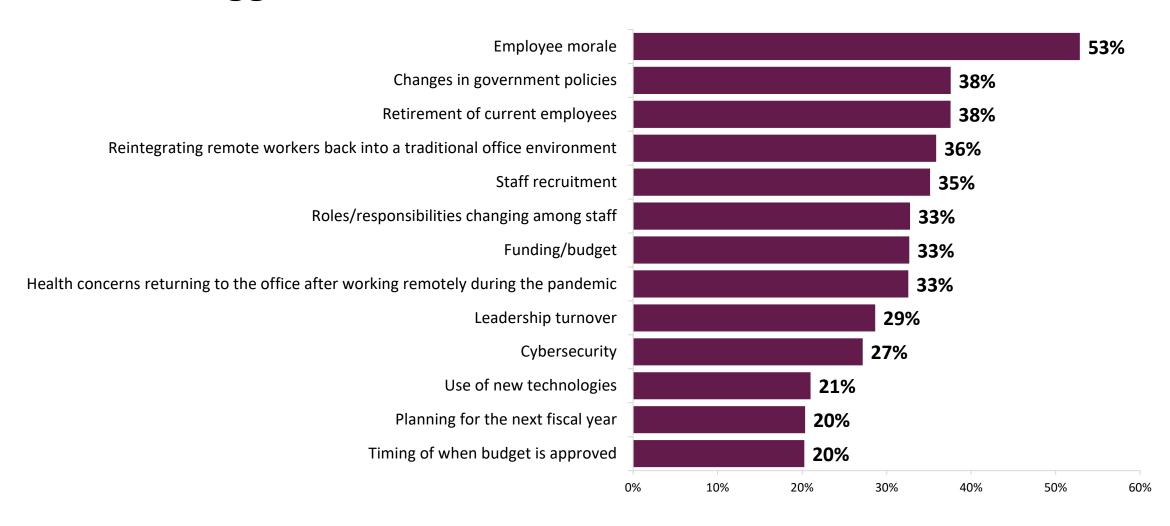


And D.C. Has More Restrictions Than Non-D.C.

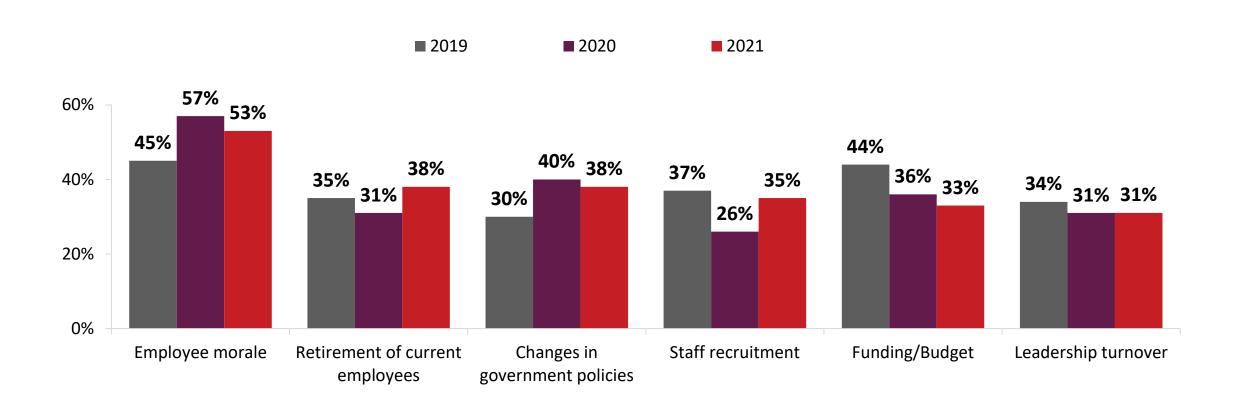




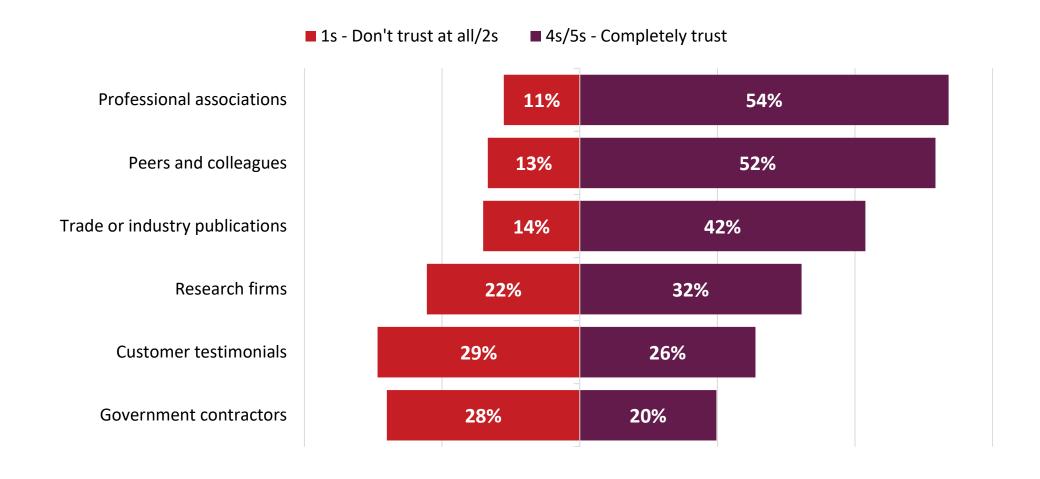
Morale Biggest Concern in Next Year



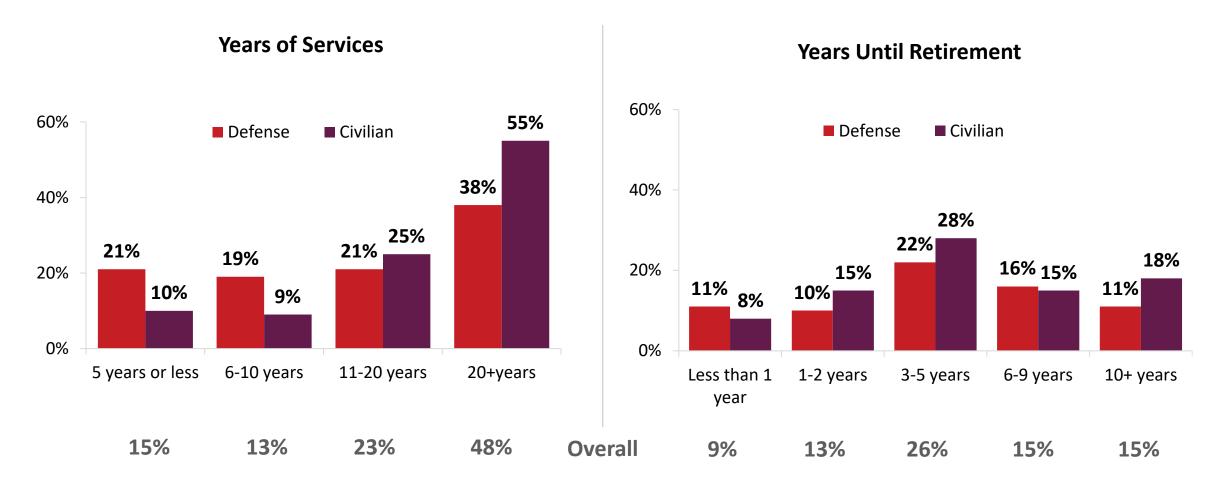
The More Concerns Change, the More They Stay the Same



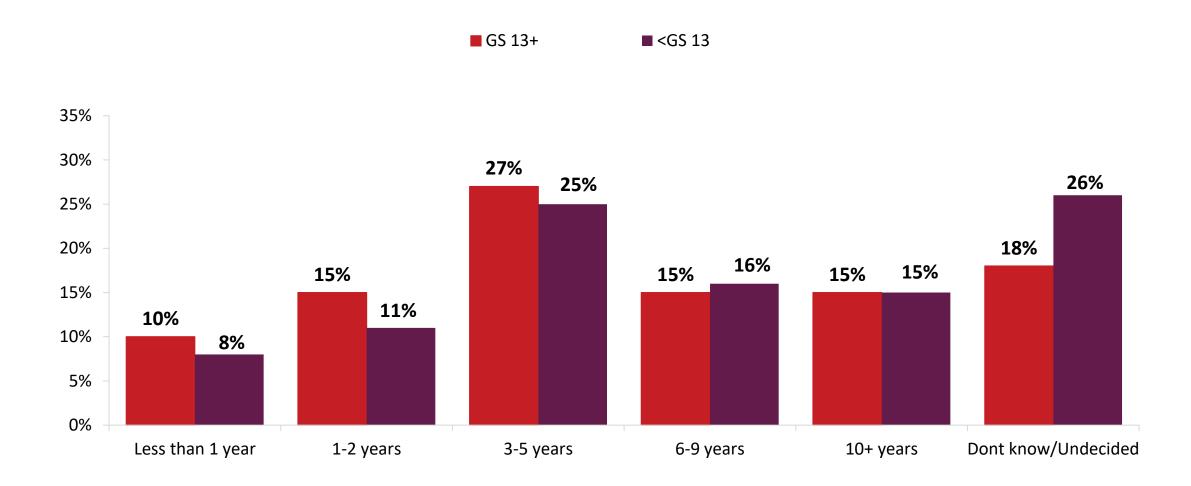
Lack of Trust Intensifies, Especially Toward Contractors



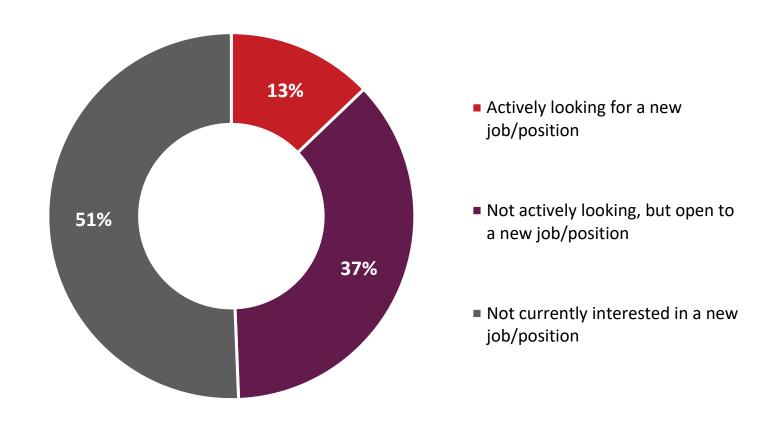
Half of Experienced Public Servants Plan to Retire within Five Years



Plans to Retire by Grade

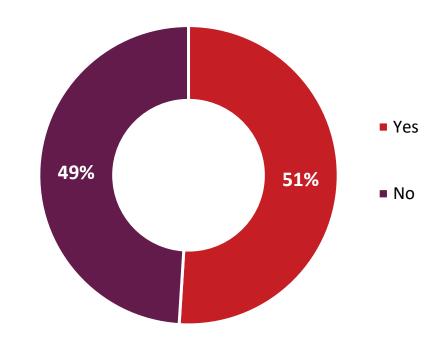


Half Are Open to New Opportunities

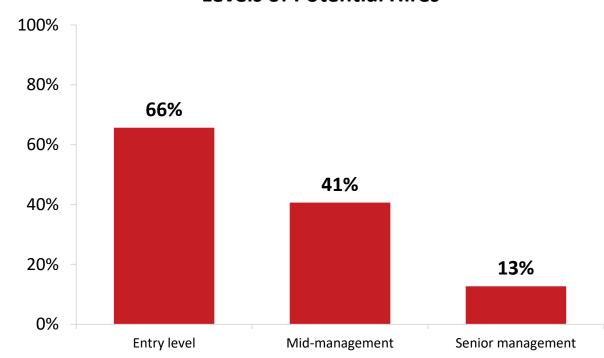


Everyone Faces Staffing Needs

Plan to Increase Staff in Next 12 Months



Levels of Potential Hires*



*Only asked of those who plan to increase staff



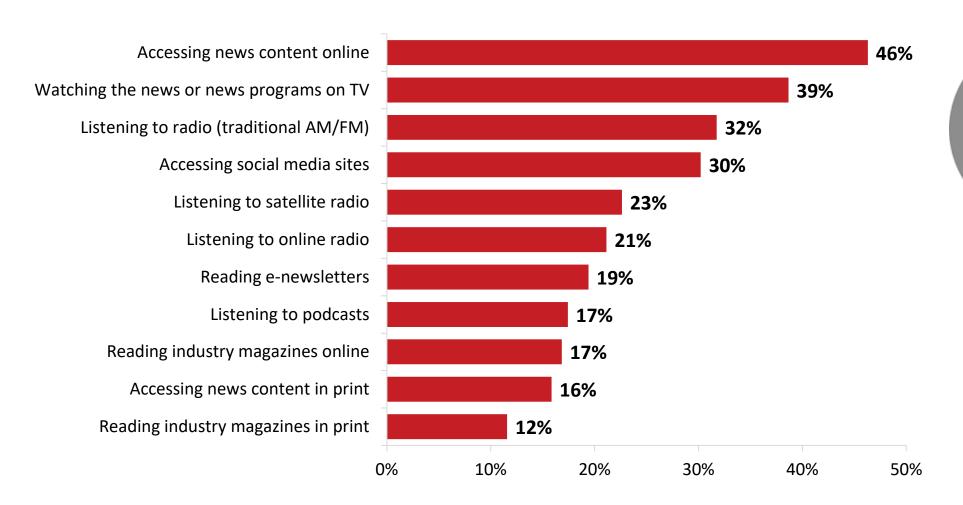
Other Recruitment Data: What We Gathered



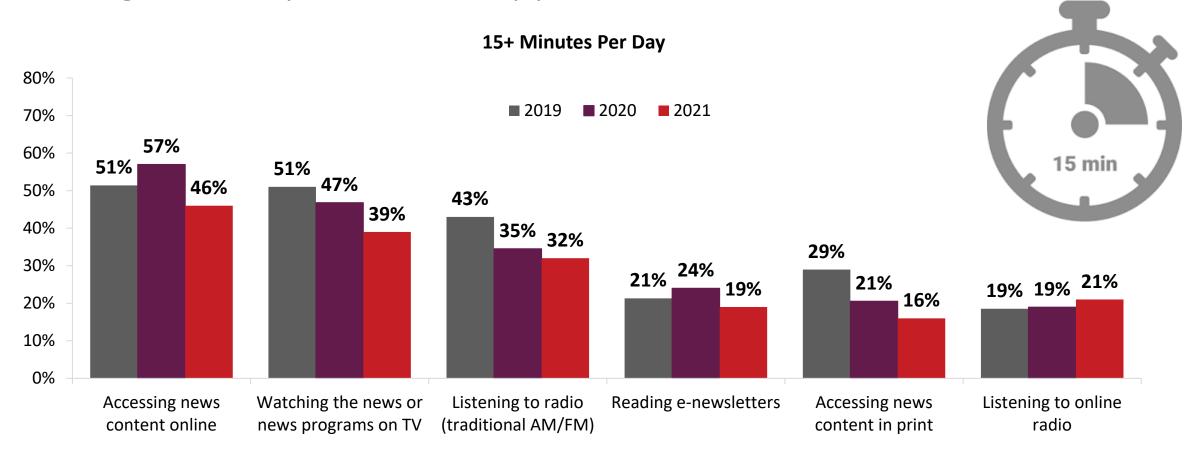


15 min

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



Average Time Spent Has Dropped since 2020





Limited Net Change in Time Spent on Each Activity Since March 2020, but a Few Areas Did Drop

■ 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

Accessing social media sites

Reading industry magazines online

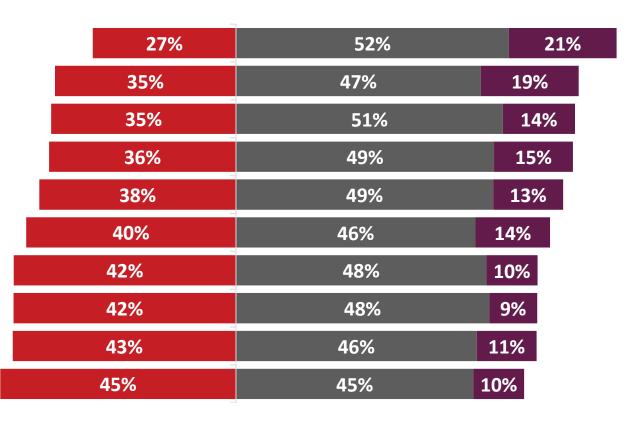
Listening to podcasts

Listening to online radio

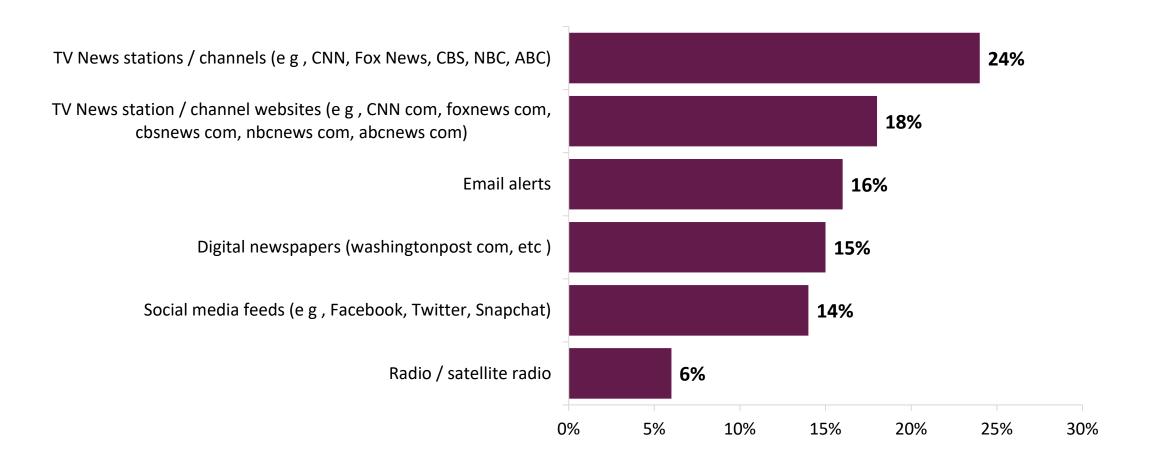
Reading industry magazines in print

Listening to radio (traditional AM/FM)

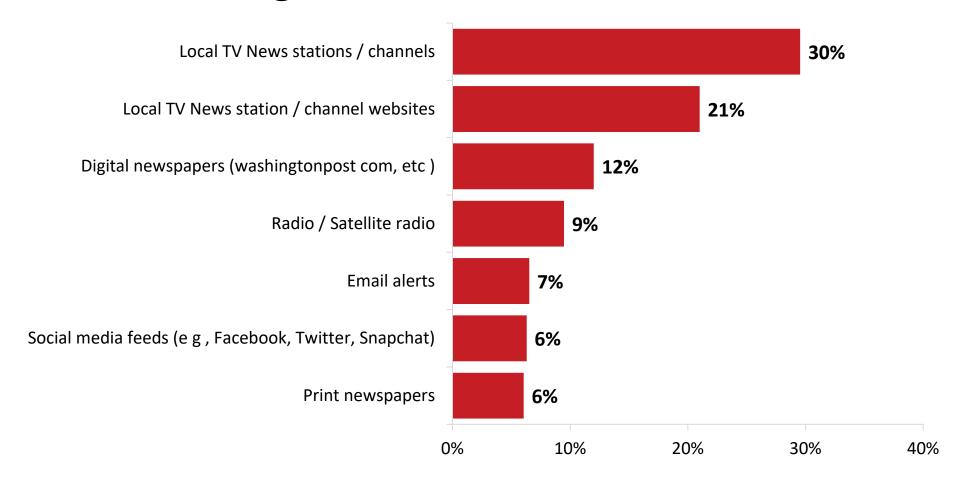
Listening to satellite radio



TV Is Still the Go-To for Breaking News

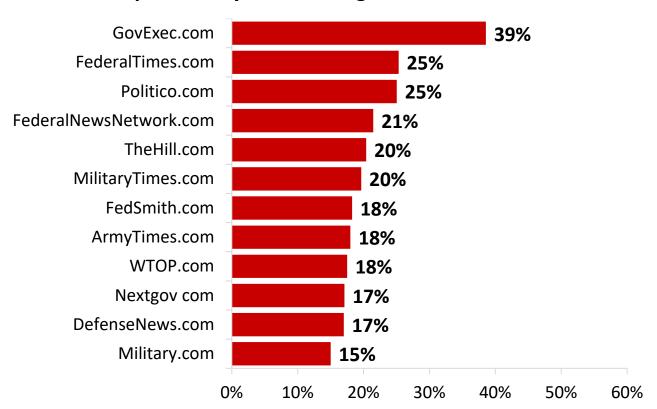


TV Remains Strongest for Local News as Well



Digital Sites

Top Federally Focused Digital Sites Visited



Top General Digital Sites

54% - Weather.com

46% - CNN.com

42% - WashingtonPost.com

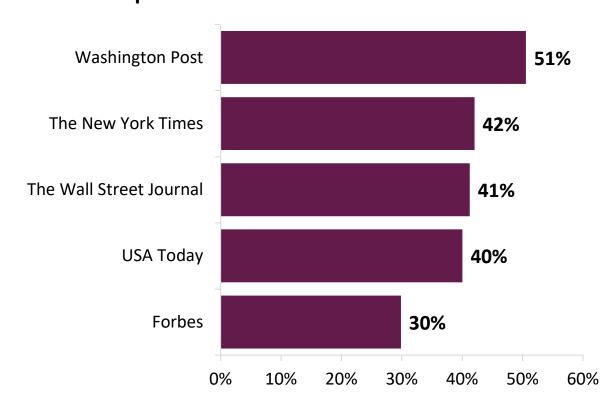
38% - AccuWeather.com

37% - Foxnews.com

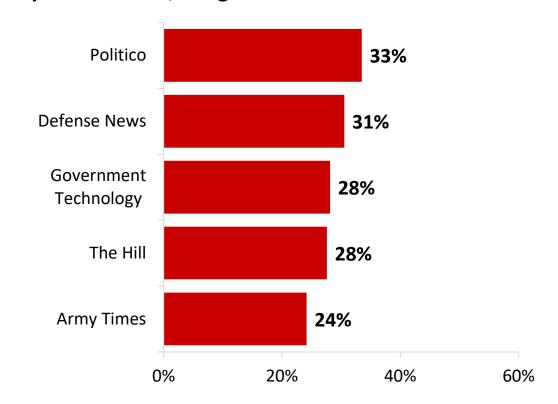


Print News Publications Most Regularly Read

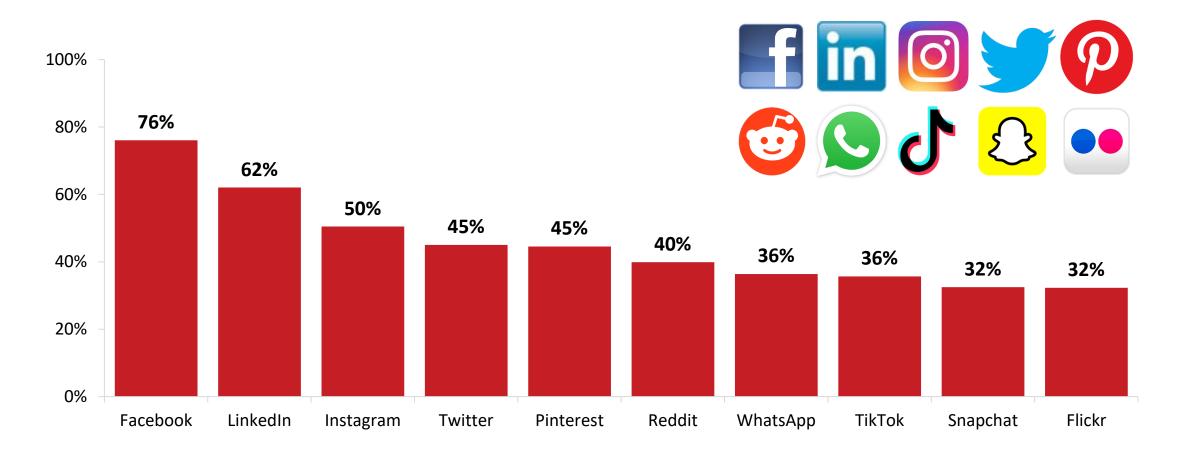
Top Five General Print News Publications



Top Five Federal/Congressional Print News Publications

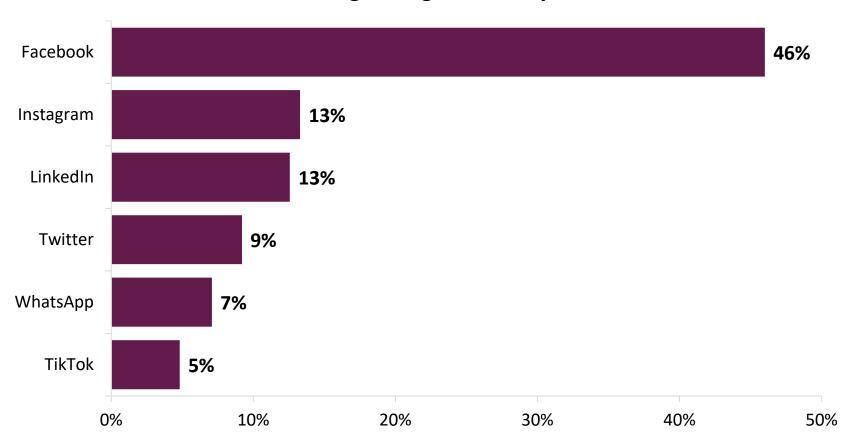


Social Media Usage Steady with a Lot of Diversity

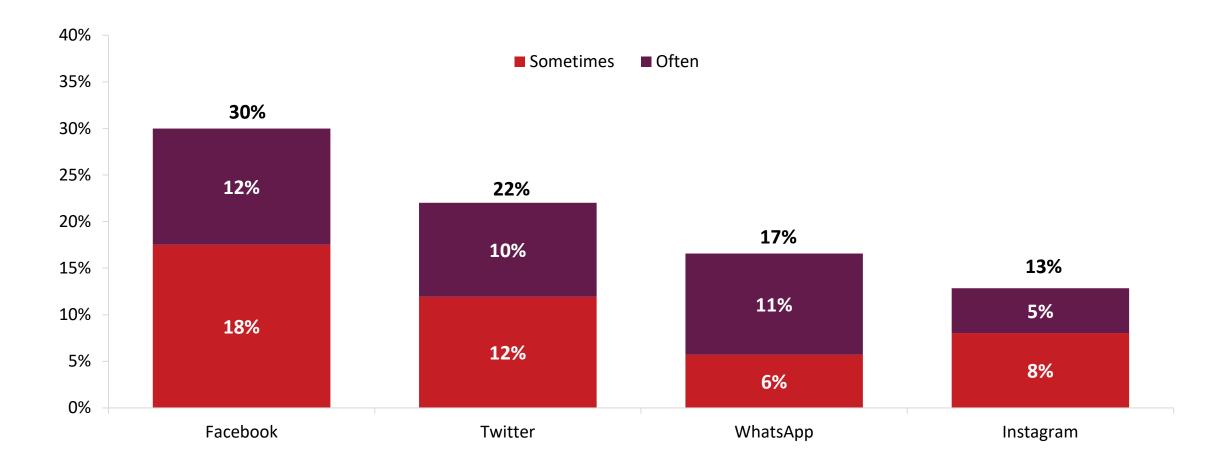


Power Posters: Facebook Gets Significant Daily Usage

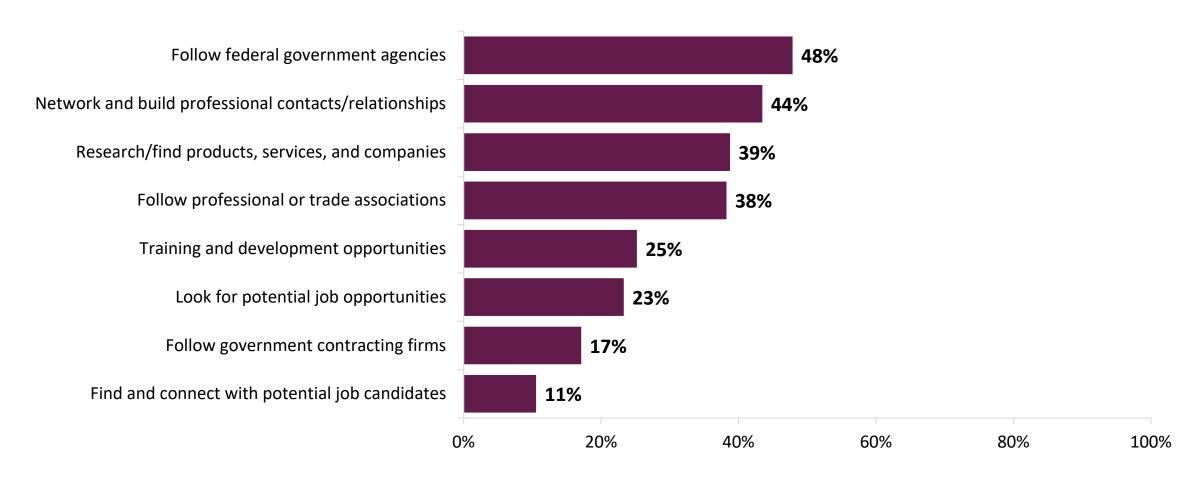
Percentage Using Each "Daily"



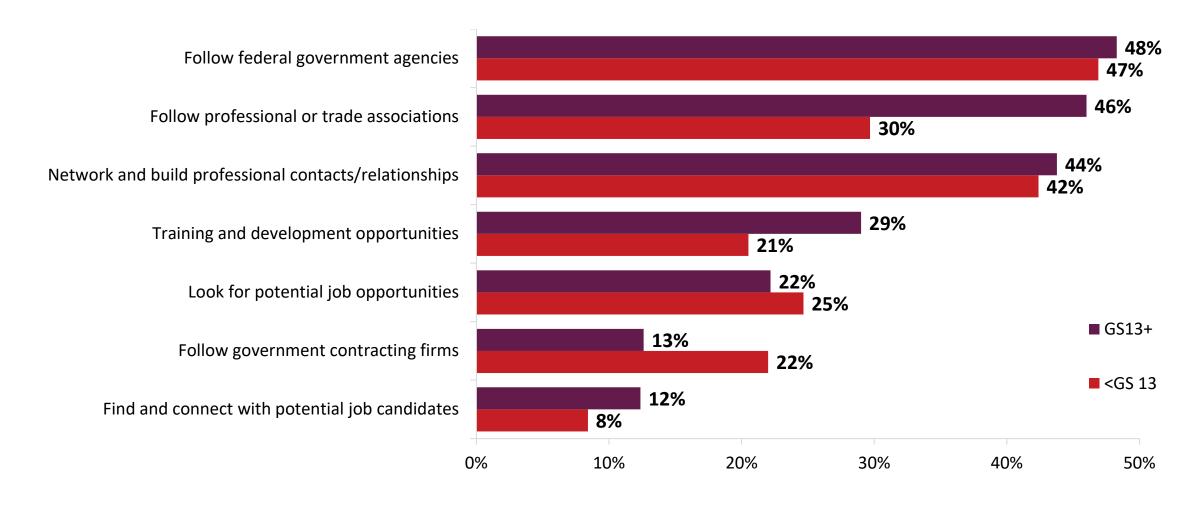
More than One-third Use Traditionally Personal Social Media for Work



Social Media Is Used to Follow Agency News and to Network

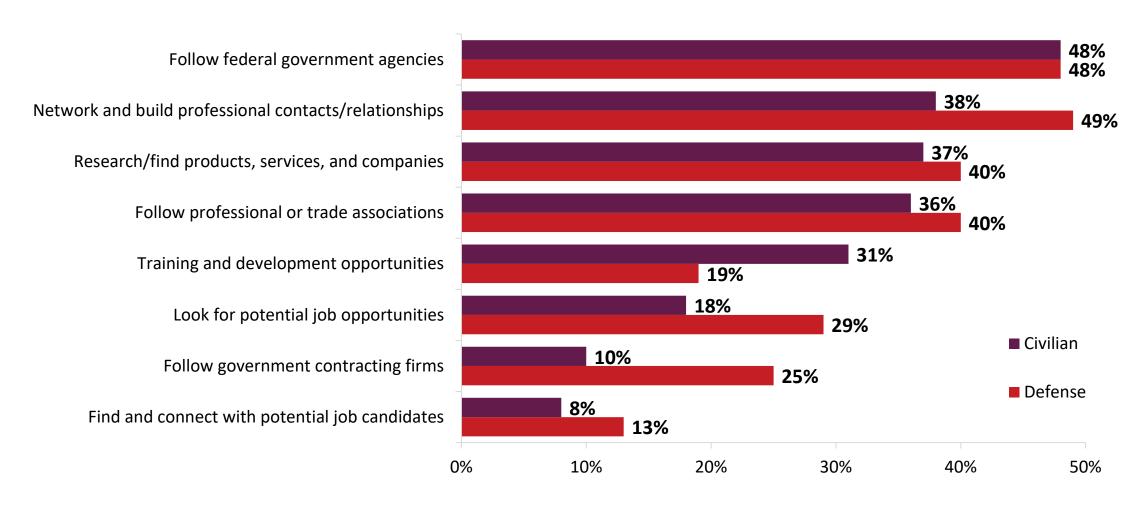


Trade Associations Attractive to GS13+ on Social Media

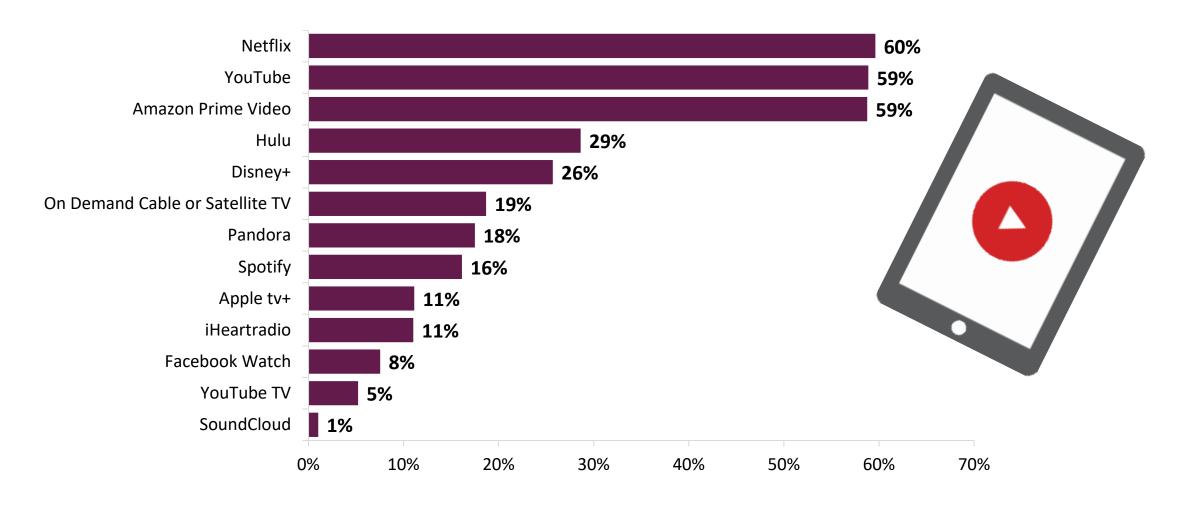




Defense More Likely To Use Social Media for Variety of Reasons



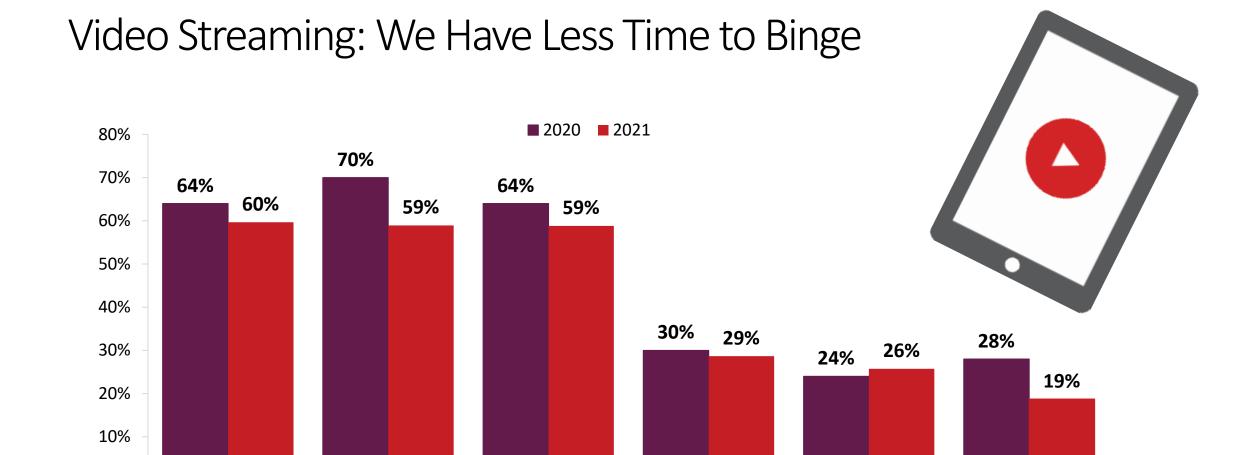
Streaming Sites



0%

Netflix

YouTube



Hulu

On Demand Cable or

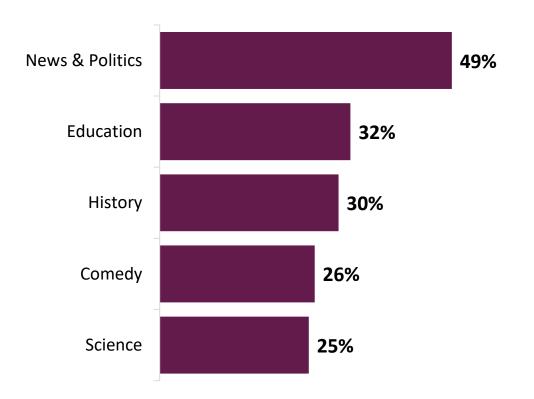
Satellite TV

Disney+

Amazon Prime Video

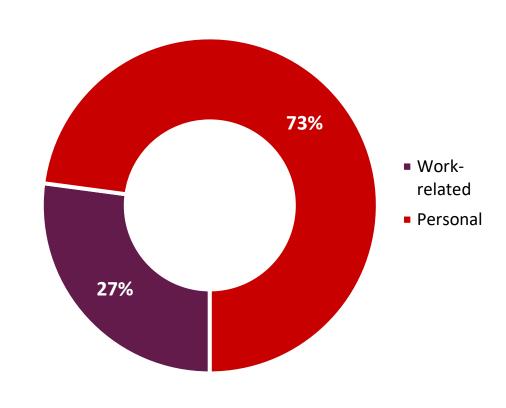
Podcast Listenership Down From 2020, News & Politics Rules

Top 5 Types of Audio Podcasts Listened To



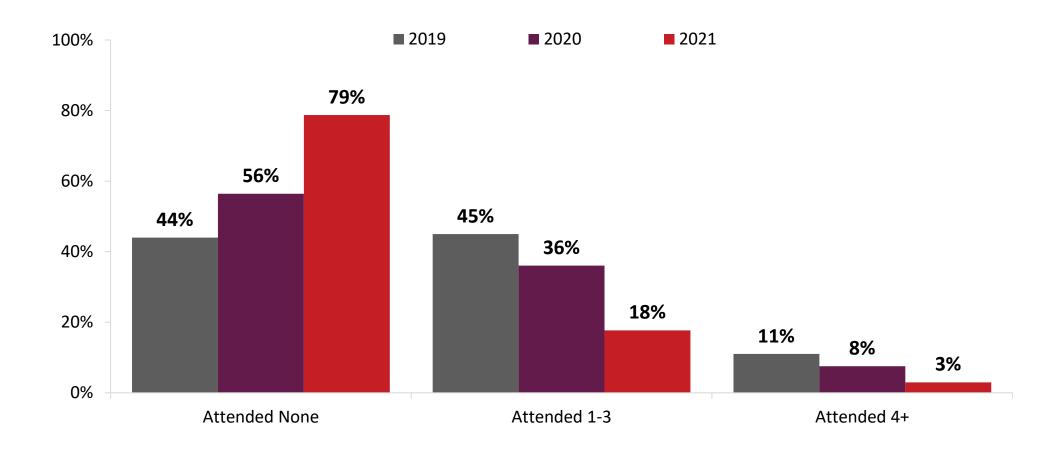


Work vs. Personal Podcast

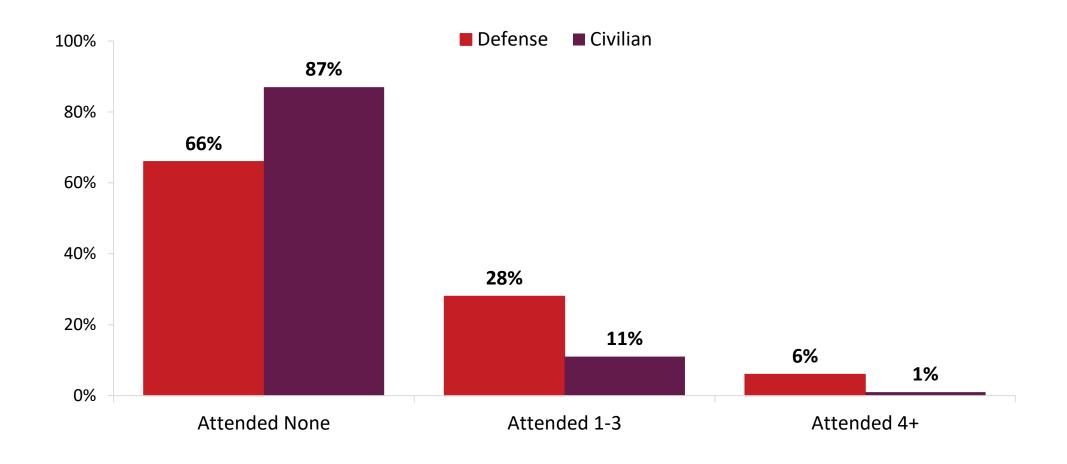




In-person Event Attendance Hits a Low



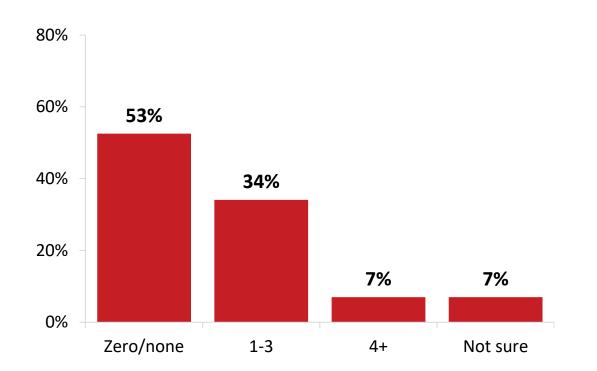
Defense Employees More Likely to Have Ventured Out



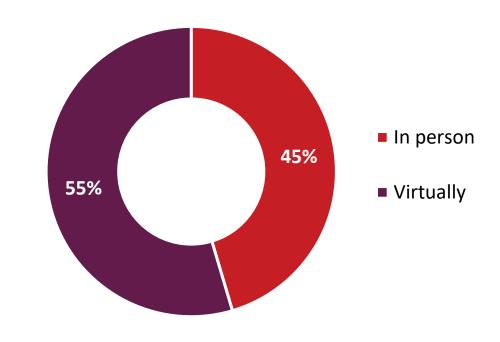


Back to Normal in 2022? Will Virtual Offerings Help or Hurt?

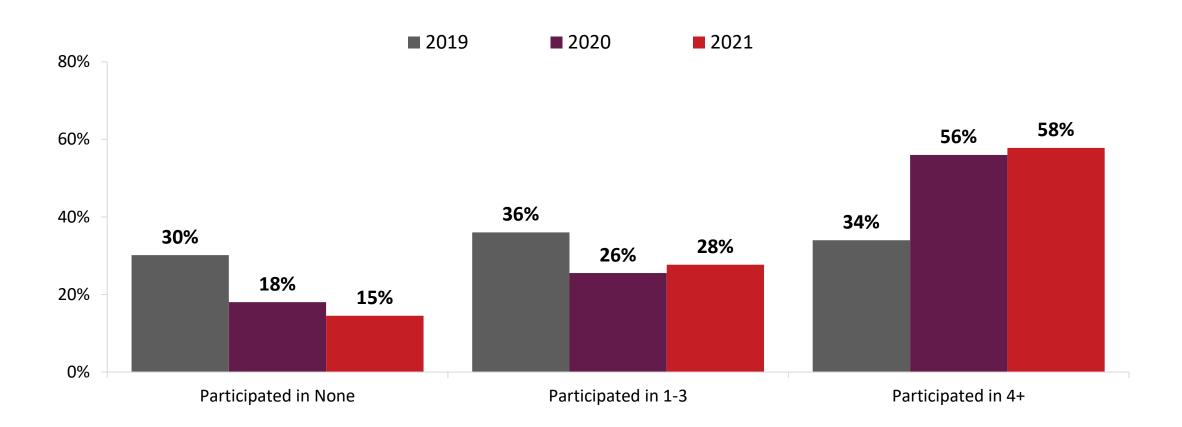
No. of Events Planning to Attend In Next Year



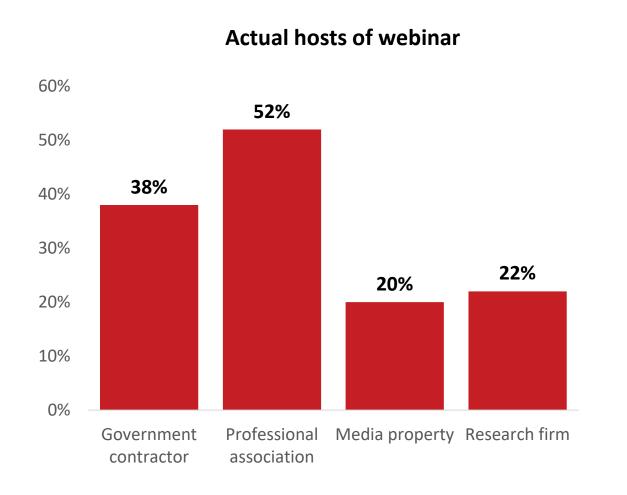
Hybrid Option: Would You Rather Attend

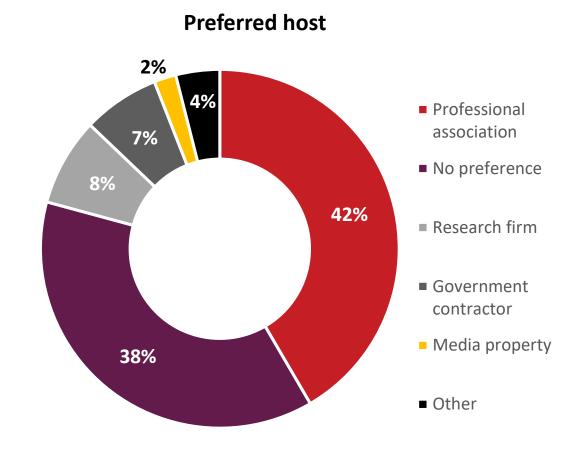


Webinars: Here to Stay



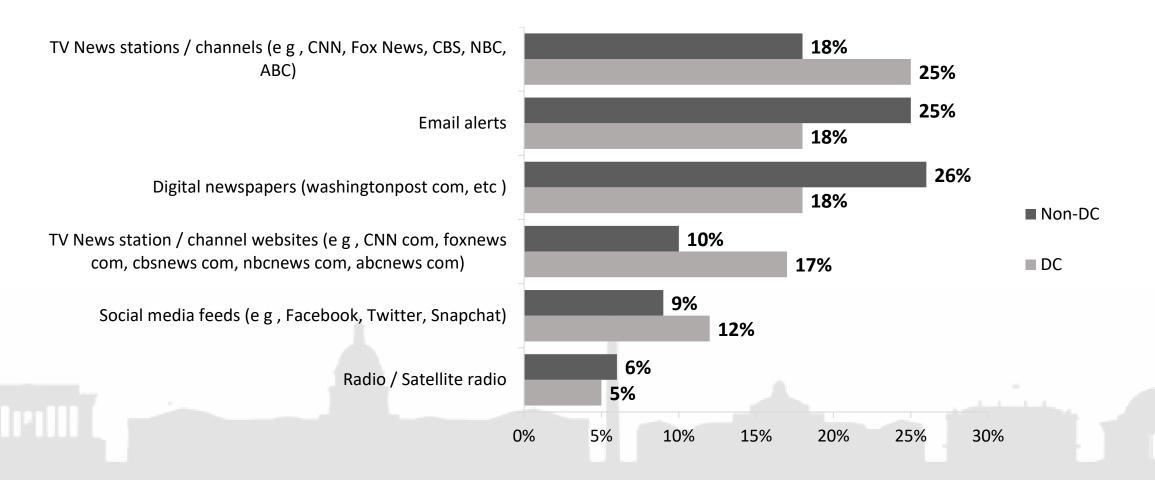
Variety of Webinar Hosts, Open to Options



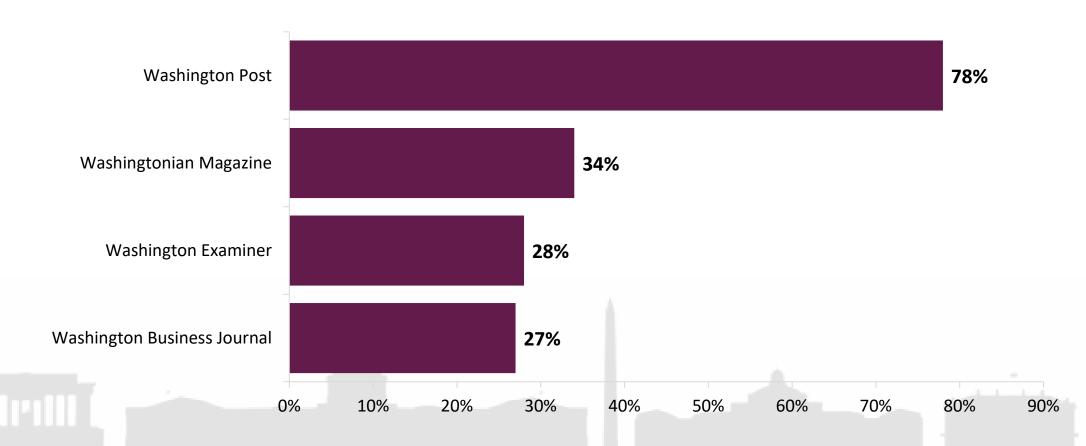




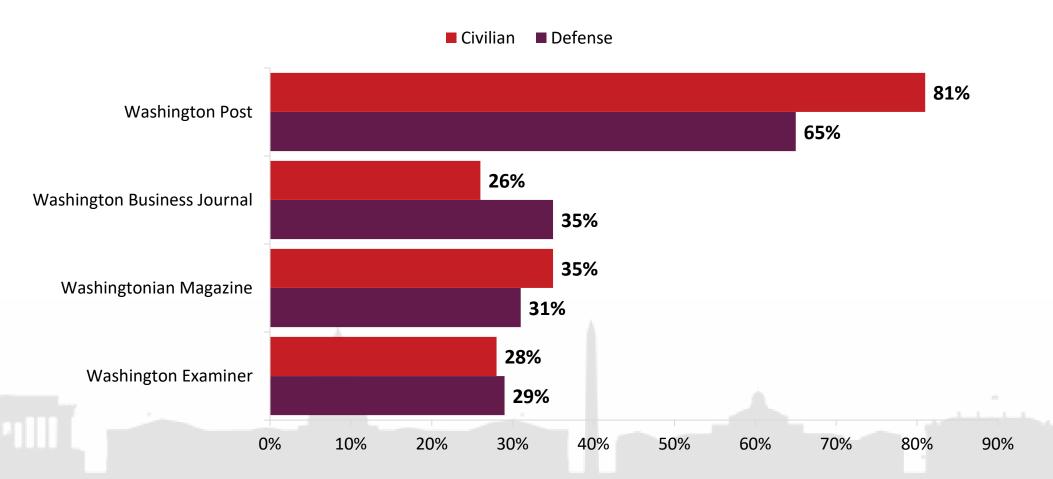
DC Goes to TV for Breaking News



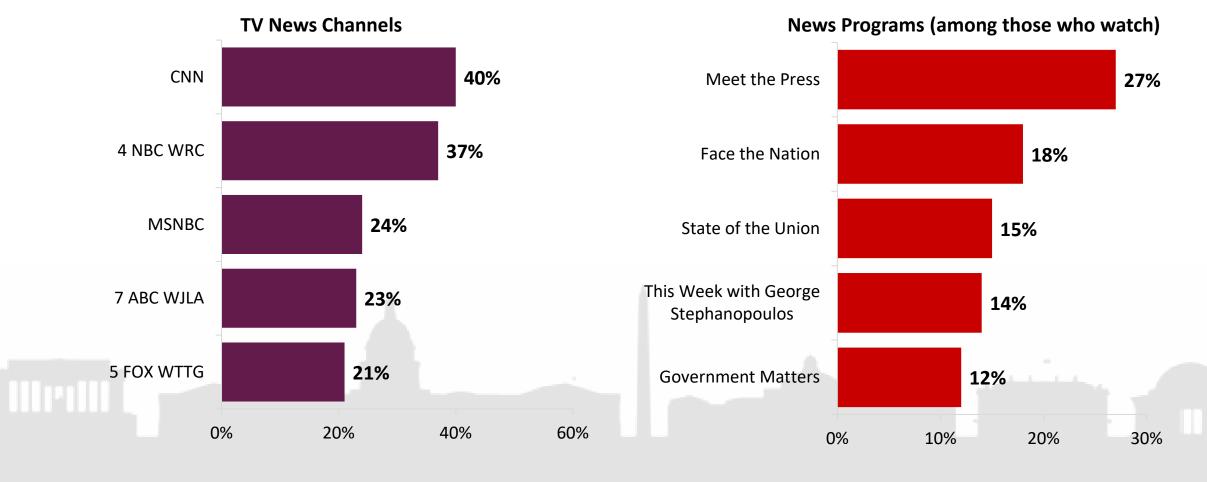
Washington Post Dominates Print Publications



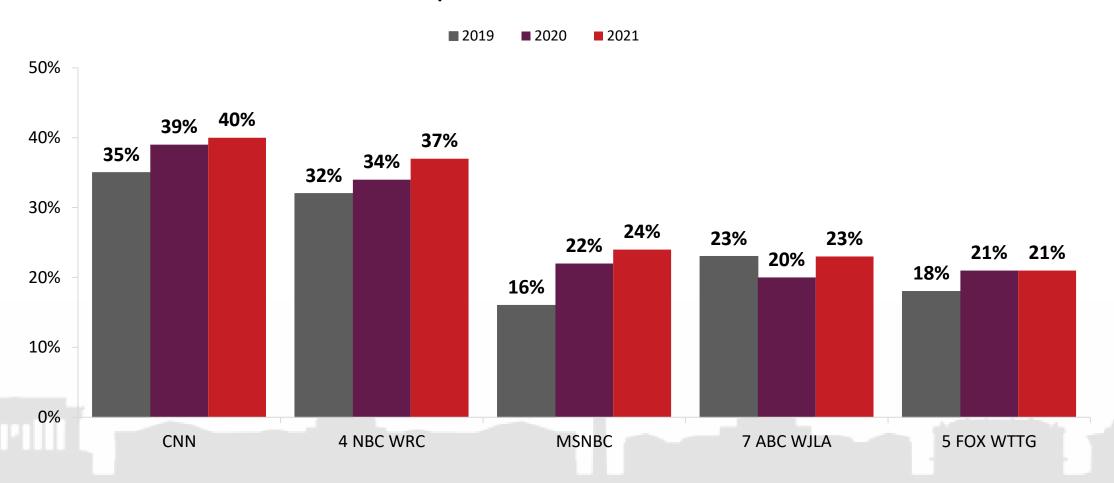
Civilian Agency Employees Lean More on Washington Post



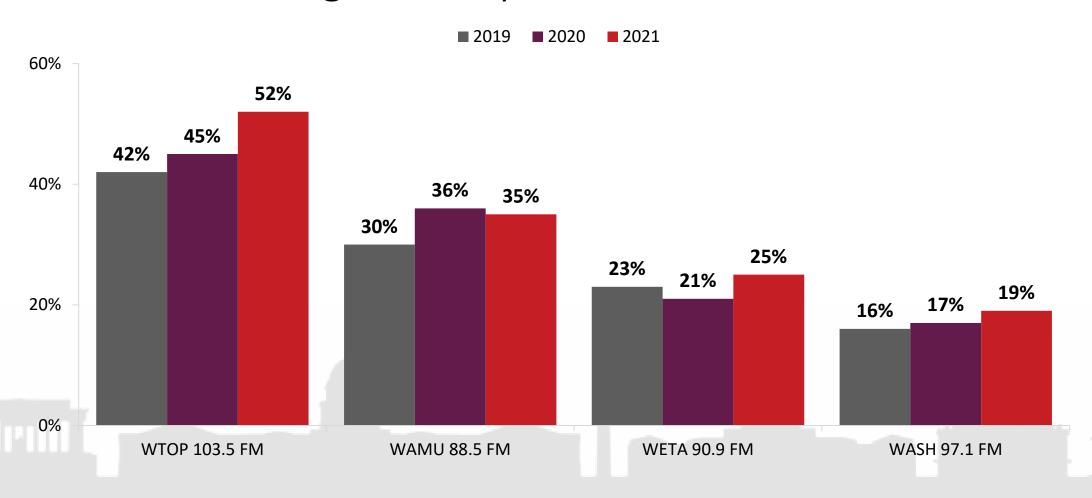
Top Five: CNN and NBC Dominate Channels; Meet The Press Most Popular News Program



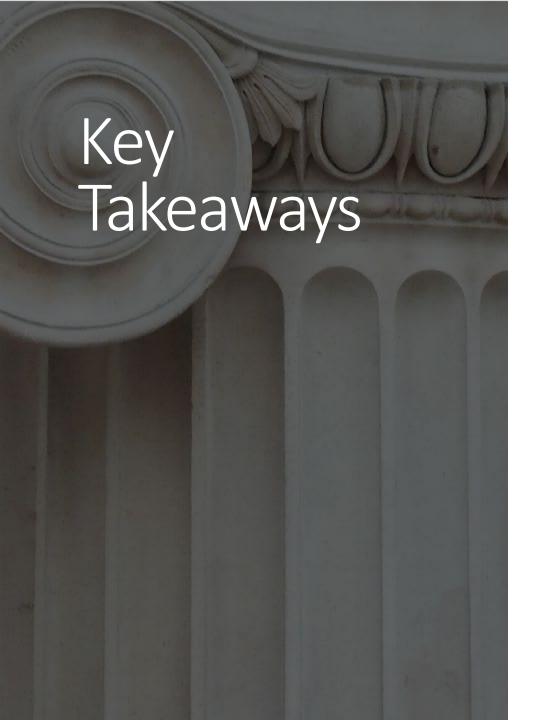
DC: WJLA Moves into Top Five, While Fox News Falls off List



DC Radio Listening Generally Rebounds



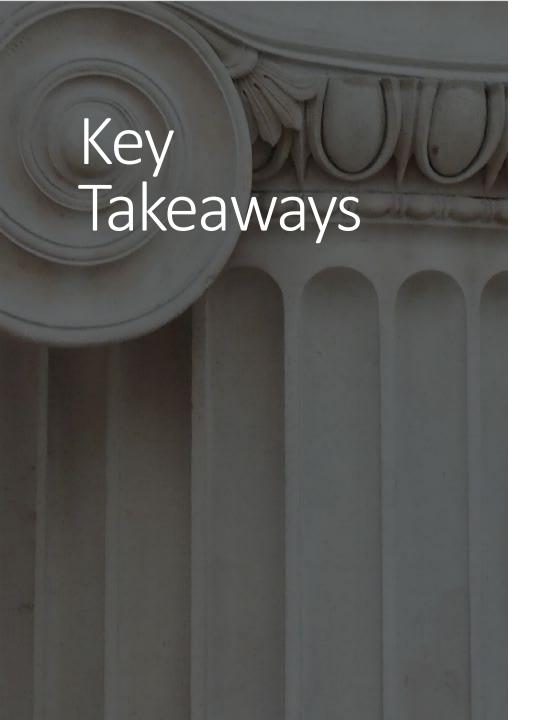






THE UNCERTAIN ENVIRONMENT CONTINUES TO ISOLATE MANY

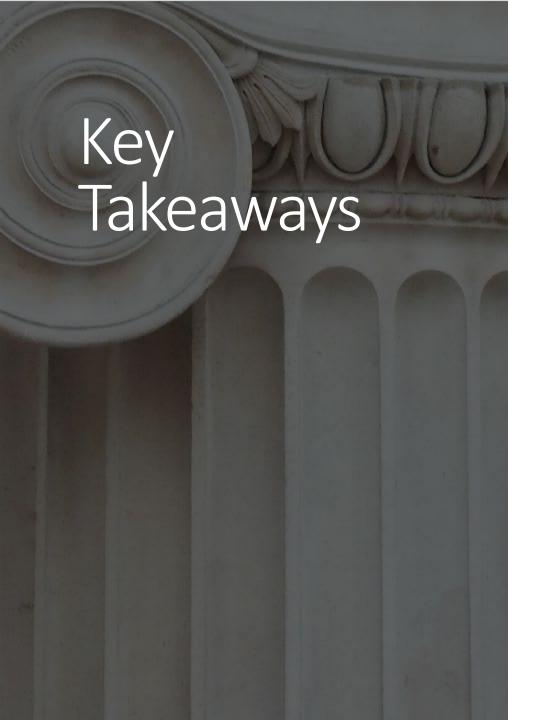
- It's all about me. Many are worried, cautiously looking out for their own concerns and issues first and trusting others (and the media) less.
- Disconnected and distant. Morale will continue to be low.
 People working at home may feel lack of connection. Hiring may be difficult.
- More than home alone. Federal workers, especially in DC, will be telecommuting, driving alone, or sitting in an office with very few people.
- Looking to the horizon. Individuals will be looking for new opportunities, evaluating retirement and continuing to leverage social media to make connections with people and improve their lives.





USE SOCIAL MEDIA TO BREAK DOWN BARRIERS, BUILD PERSONAL CONNECTIONS WITH CUSTOMERS

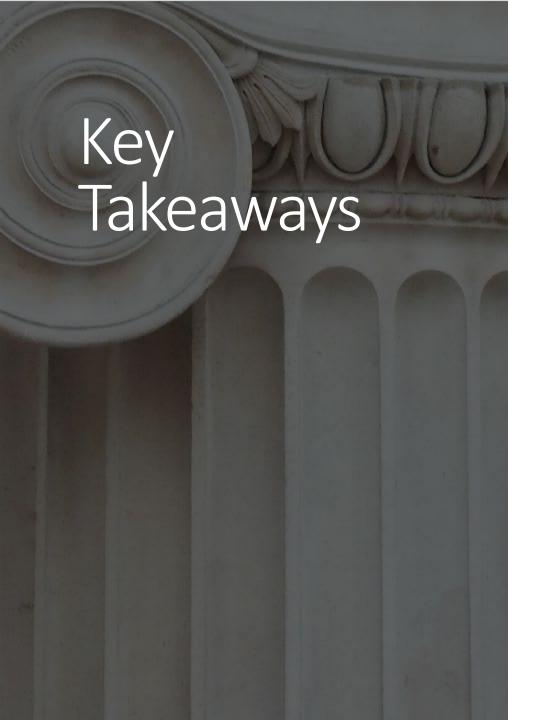
- Make it personal. Use of social media continues to grow, but contractors need to tell personal stories that relate connect to individuals.
- Reexamine your DoD social media strategy. Increased teleworking and remote access for DoD employees allows for greater access to personal devices.
- Leverage the personal connections. Consider leveraging their connection with professional and support associations on social media and consider them as a delivery vehicle for your message.





MESSAGE THE SAME BUT LEVERAGE DIFFERENT MEDIA INSIDE AND OUTSIDE OF DC

- DC is tuned in to TV. Digital media and email newsletters are more likely to connect outside of DC, while loyalty and frequency to TV websites (and many stations) in the DMV is high.
- Can federal marketing be local? Explore how to reach individuals in their cars outside of DC. Can strategic local radio reach lonely commuters?
- Diversify the buy. Morning and evening traffic and weather will continue to rebound and draw eyes and ears, but cross daypart buys will potentially roll up a larger, diverse audience. Digital publications can fill mid-day needs.
- News fatigue is real. Seek out personal interest segments within the news media versus the hard news segments.





LIVE EVENTS MAY NEVER BE FOR EVERYONE AGAIN, IT'LL BE A "WHAT'S IN IT FOR ME" DECISION

- Walk softly into 2022. Cautious rollout into live events is warranted through the beginning of 2022.
- First steps can be in DC and with DoD. With fewer restrictions, assume for the near term that more attendees will come from DC and/or DoD.
- **Be upfront with the benefits.** Teleworking may dampen the desire to attend one day local events; what's the ROI?
- Don't sabotage your own event. Toughest question to answer: Do I make hybrid virtual an option to my live event?

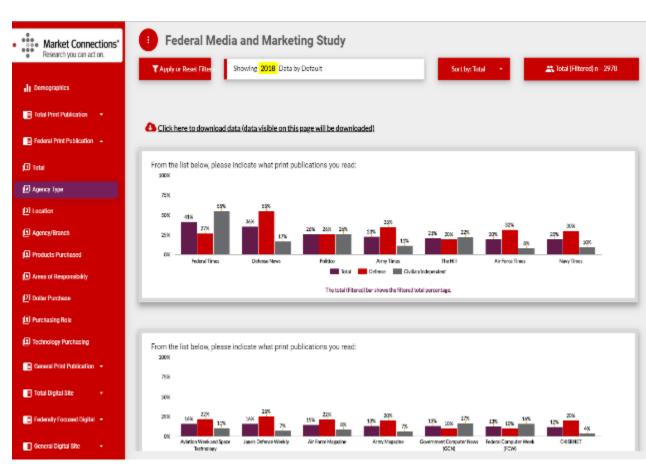


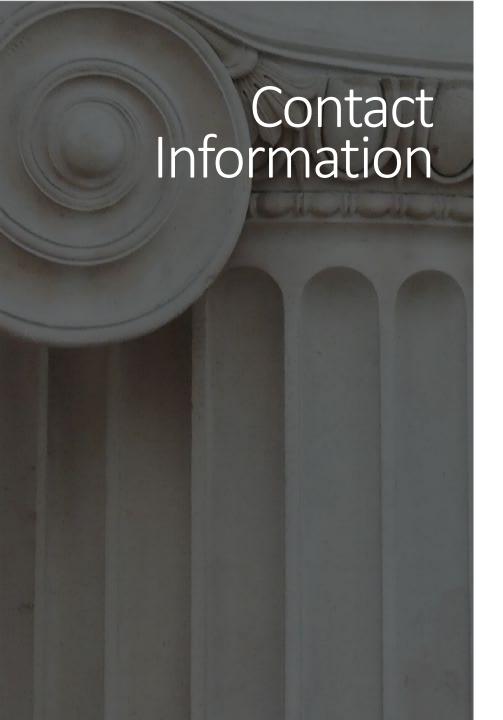
Federal Media & Marketing Dashboard

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

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- 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

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