Federal Media & Marketing Study 2020

Department of Defense Edition





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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: 1,198





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

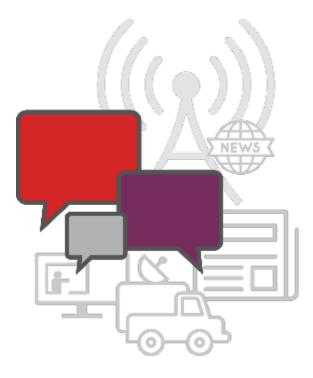
- Print
- Digital & social sites

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

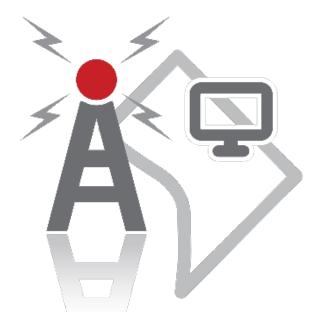
- Over 20 sites
- New this year
 - Apple tv+
 - Disney+
 - o TikTok
 - WhatsApp



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

DEMOGRAPHICS Agency Type, Location, Uniform vs. Civilian Agency Type Location Uniform 100% 82% 64% 36% 18% Civilian or Independent Inside the Beltway Civilian employee Uniformed Defense or Military Outside the Beltway

FEDERAL MEDIA & MARKETING STUDY 2020



DEMOGRAPHICS Age

21 to 34
35 to 44
45 to 54
55+
30%
24%
20%
10%
10%
0%

2020

12

Top 10 Job Functions & Purchase Categories





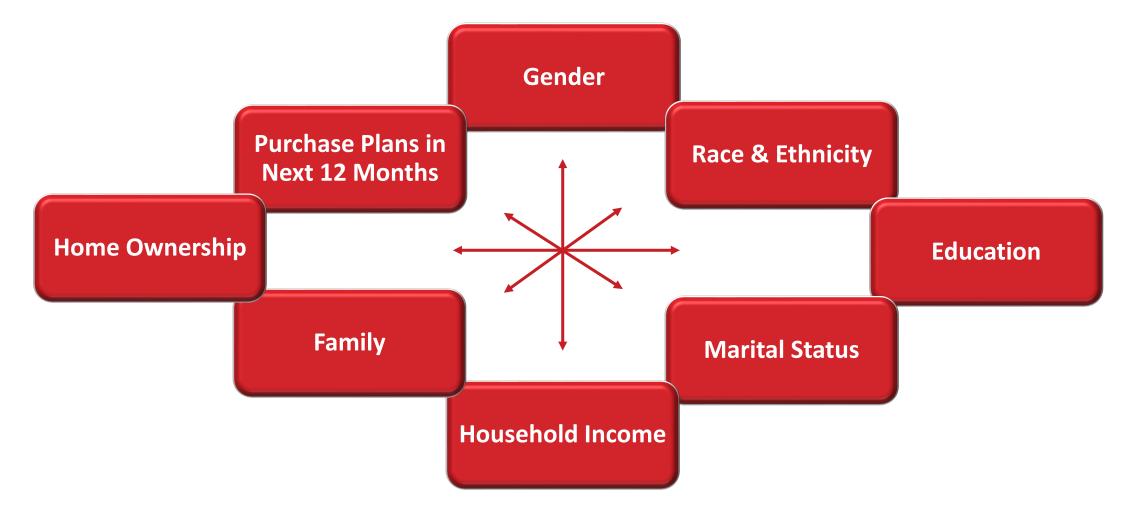
Job Functions	Product/Service Purchase Categories	
Informational technology, computers, systems	Computer systems/hardware	
Project/program management and administration	IT services	
Intel/security	Communications/telecommunications	
Cybersecurity	Software	
Training, education	Cybersecurity	
Purchasing,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







Other Demographics



Federal Environment

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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

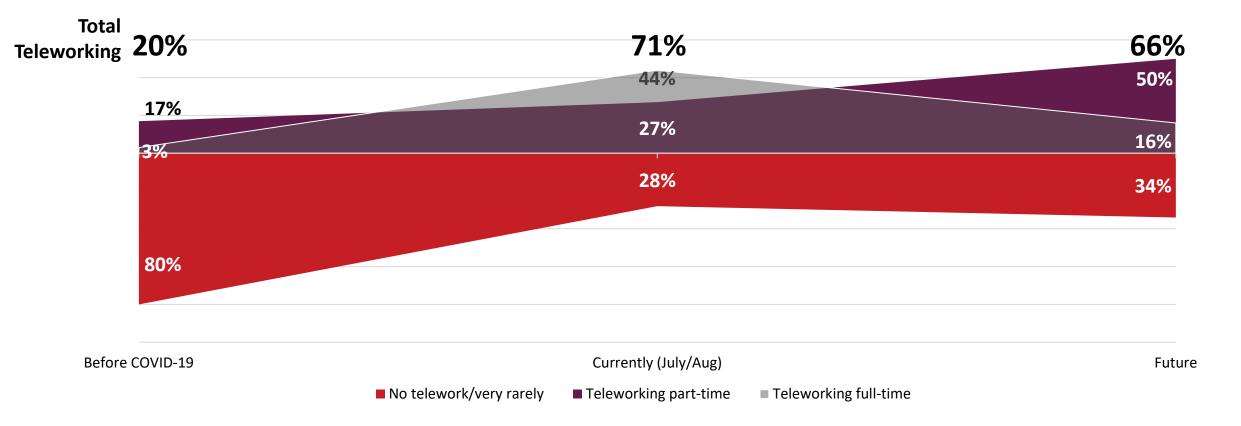


March 11: First confirmed COVID case among Capitol Hill staff

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

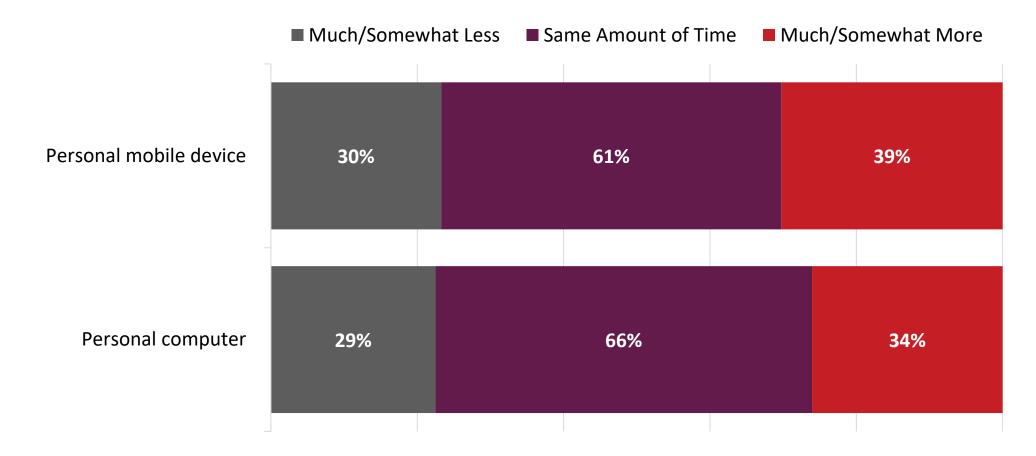


POTENTIAL IMPACT: Teleworking Frequency





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

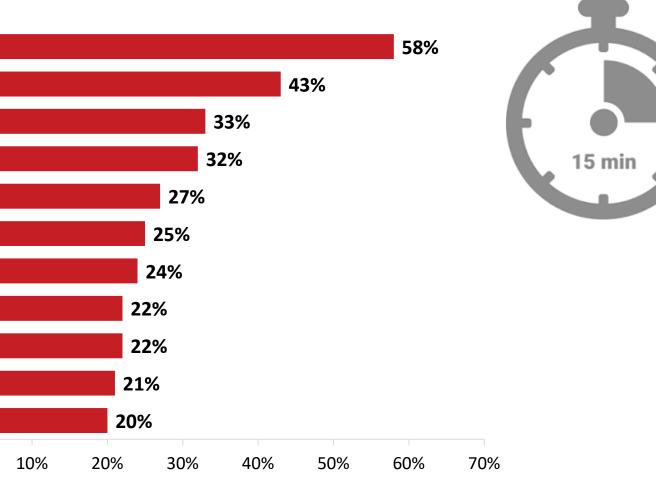


Media Habits

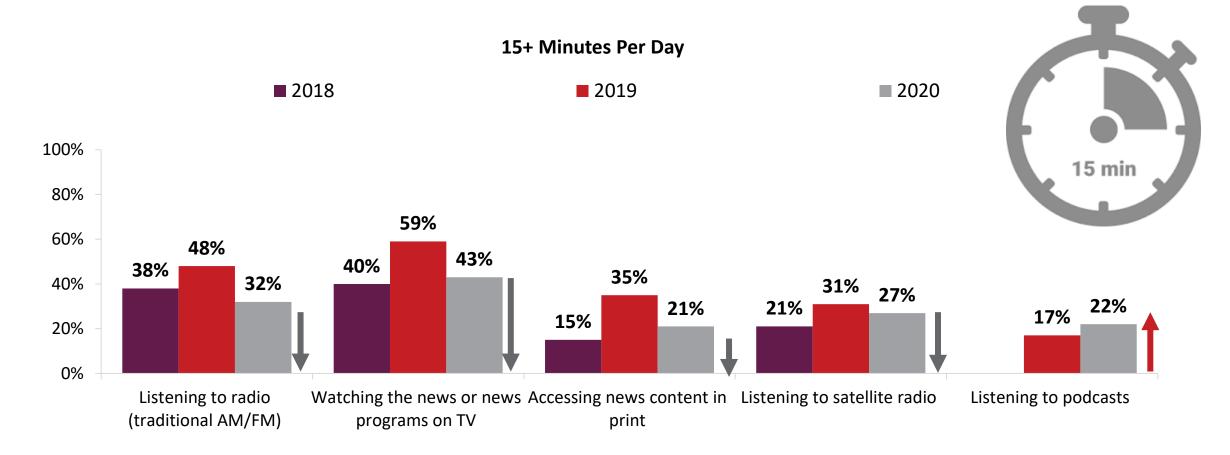
Time Spent on an Average Workday: 15+ Minutes Per Day

0%

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



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 social media sites Listening to podcasts Accessing news content in print Reading industry magazines in print Listening to online radio Listening to satellite radio Listening to radio (traditional AM/FM)

21%	48%	31%
26%	54%	20%
26%	55%	19%
31%	51%	18%
32%	47%	22%
33%	49%	18%
34%	53%	13%
35%	51%	14%
35%	50%	14%
38%	47%	15%
38%	48%	14%

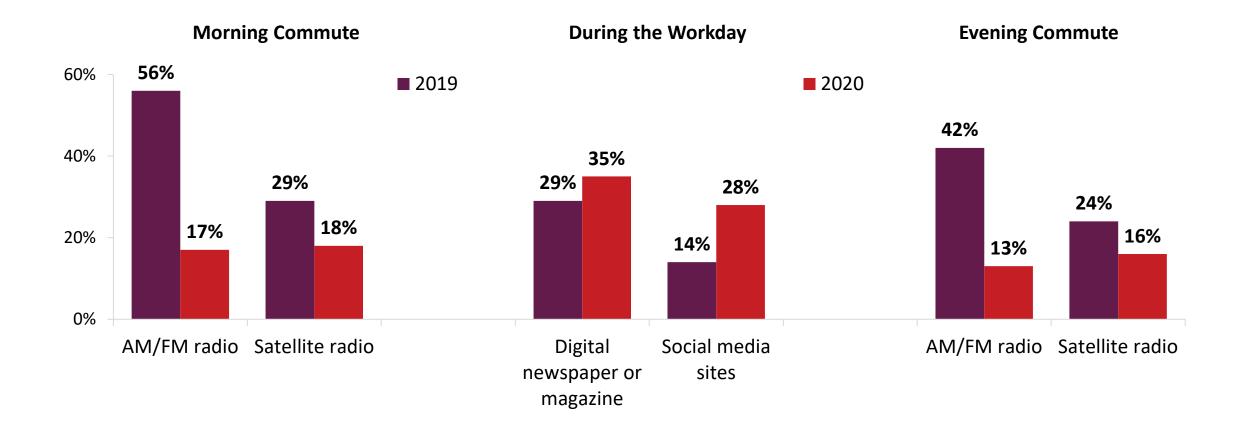


2020 Media Consumed During the Workday

		Wake Up	Morning Commute	During the Workday	Lunch Break	Evening Commute	After Work
Watching	Broadcast/cable TV	19%	1%	14%	9%	1%	50%
	Online streaming video	5%	0%	5%	8%	1%	51%
Listening	AM/FM radio	15%	17%	15%	6%	13%	11%
	Satellite radio	6%	18%	15%	5%	16%	13%
	Podcasts	9%	13%	16%	7%	11%	16%
Reading	National print newspaper or magazine	7%	1%	16%	10%	1%	15%
	Local print newspaper or magazine	10%	1%	15%	8%	1%	17%
	Digital newspaper or magazine	16%	2%	35%	25%	2%	28%
	Social media sites	17%	2%	28%	25%	2%	44%

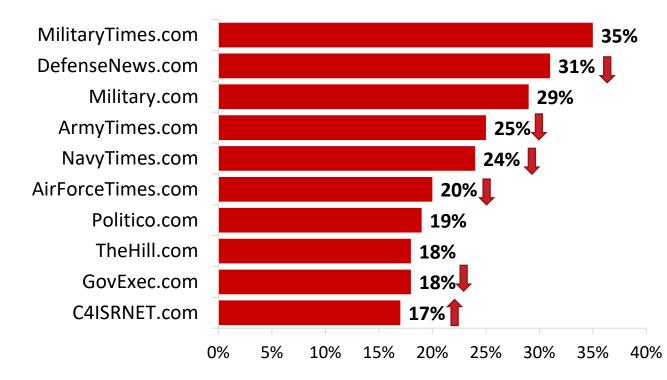


Telework Drives Decline in Radio Listenership

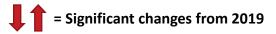


Digital Sites

Top Federally Focused Digital Sites Visited









Digital Sites: Looking Into the Future

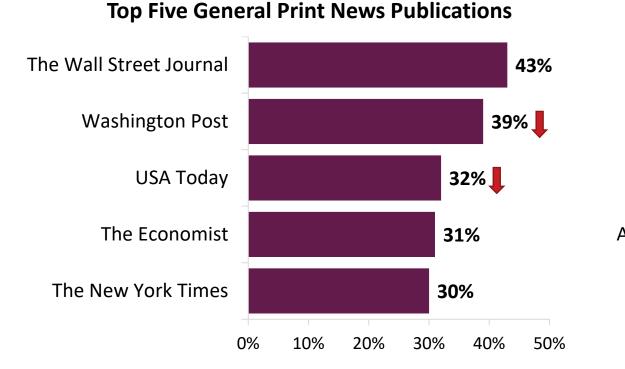
DefenseNews.com 29% 28% Military.com MilitaryTimes.com 23% GovExec.com 23% TheHill.com 21% Politico.com 21% Defensedaily.com 19% NavyTimes.com 18% AirForceTimes.com 18% FederalTimes.com 17% 0% 5% 10% 15% 20% 25% 30% 35%

Future Full-Time Teleworkers

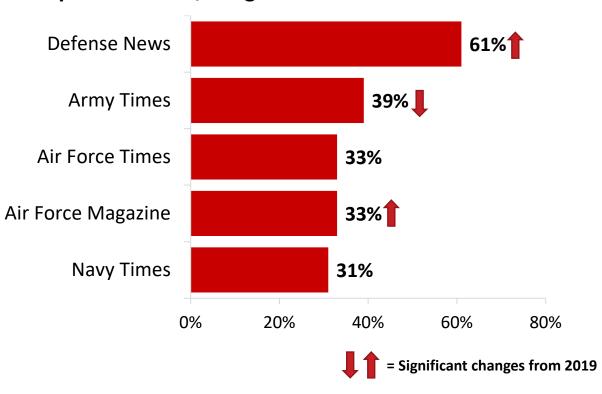
FEDERAL MEDIA & MARKETING STUDY 2020



Print News Publications



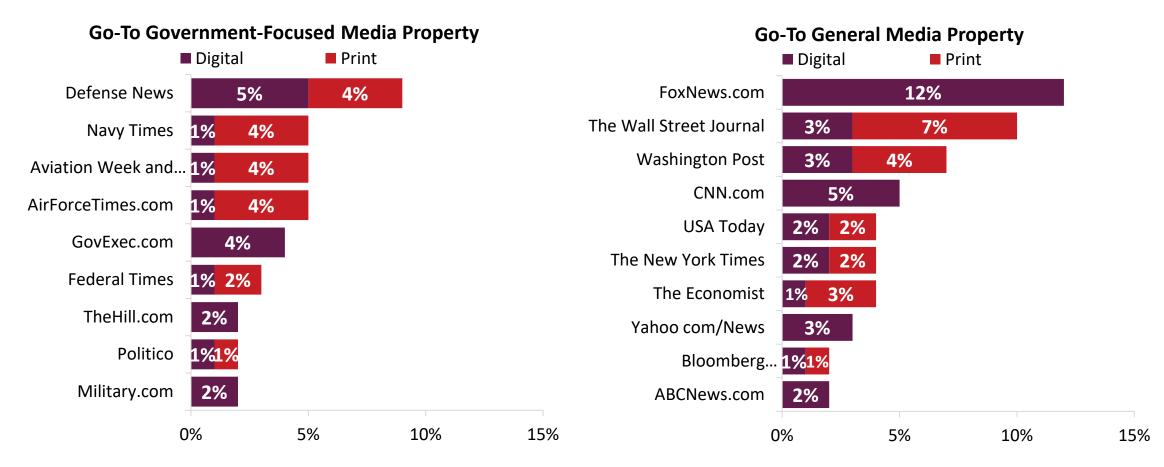
Top Five Federal/Congressional Print News Publications





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

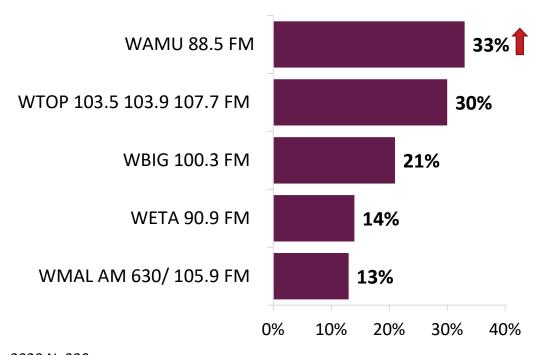
Respondents could select one digital or print media property as their "go-to" for news.



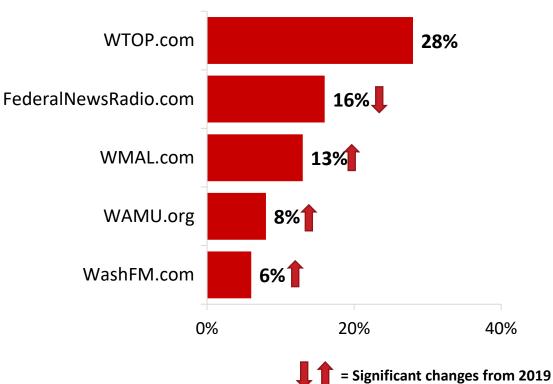
FEDERAL MEDIA & MARKETING STUDY 2020

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DC: Radio Listenership







Radio Websites

2020 N=220 2019 N=183

= Significant changes from 2019

DC: News Channel & News Program

CNN 42% Fox News 30% 4 NBC WRC 23% 5 FOX WTTG 23% 7 ABC WJLA 16% 0% 20% 40% 60%

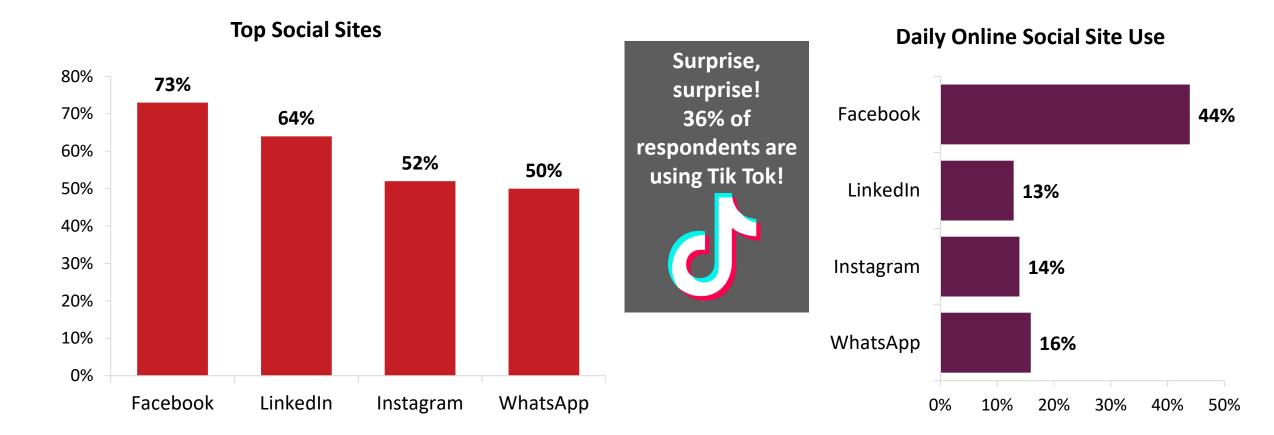
TV News Channels

Meet the Press (NBC)34%Face the Nation (CBS)31%Fox News Sunday (Fox News)21%Defense News Weekly14%Government Matters (ABC)12%0%20%40%60%

News Programs

2020 N=220 2019 N=183 29

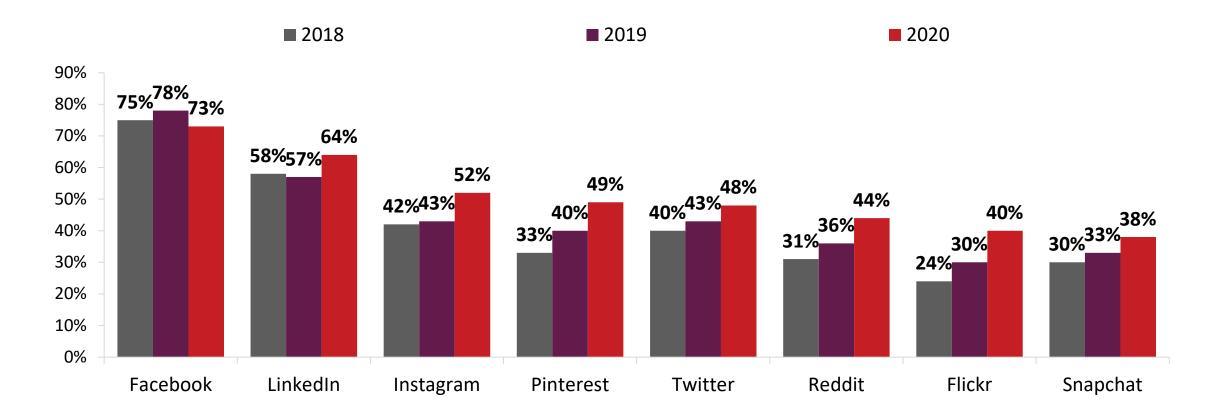
Social Media Usage



30



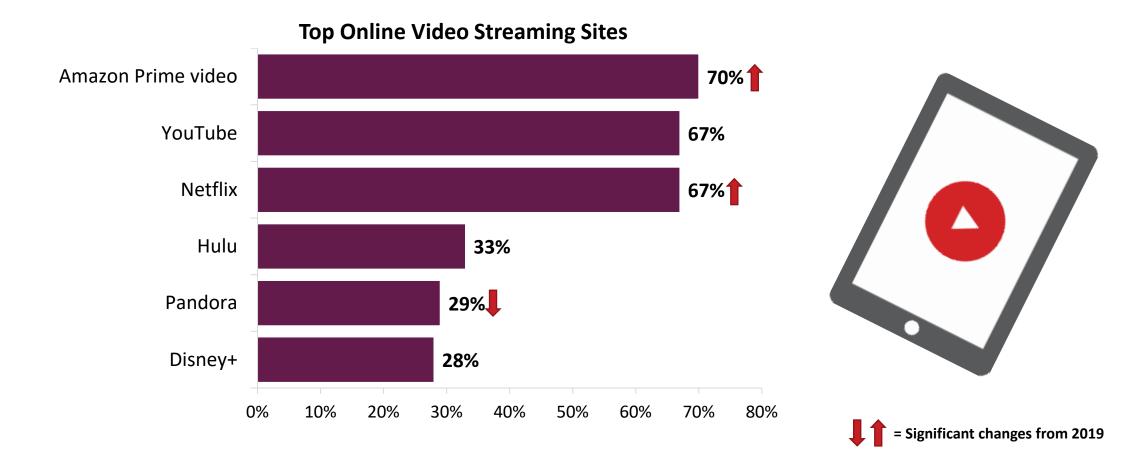
TREND 2018-2020 Social Media Usage



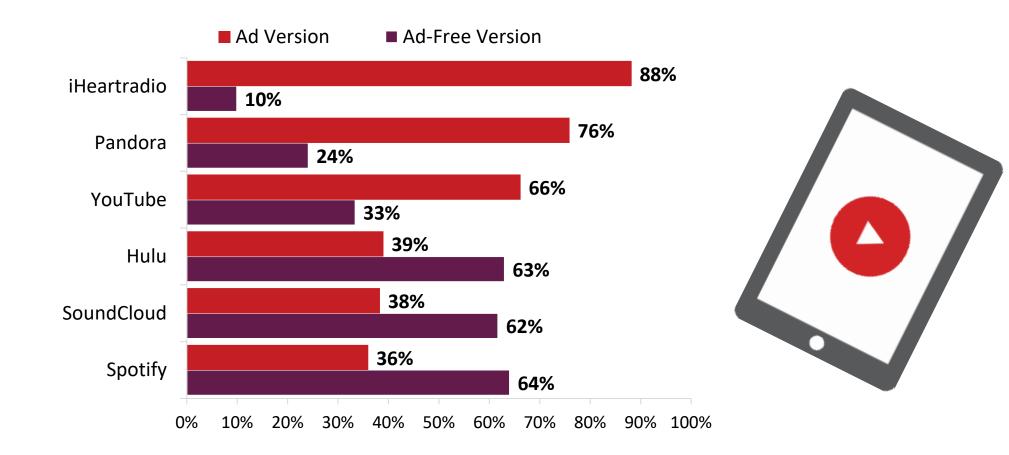
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Online Video Streaming

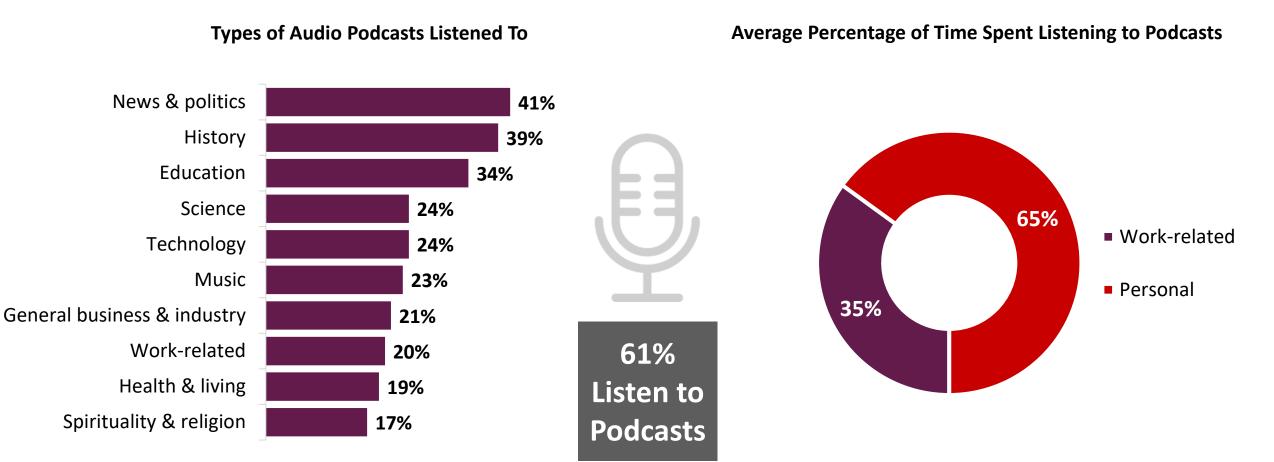








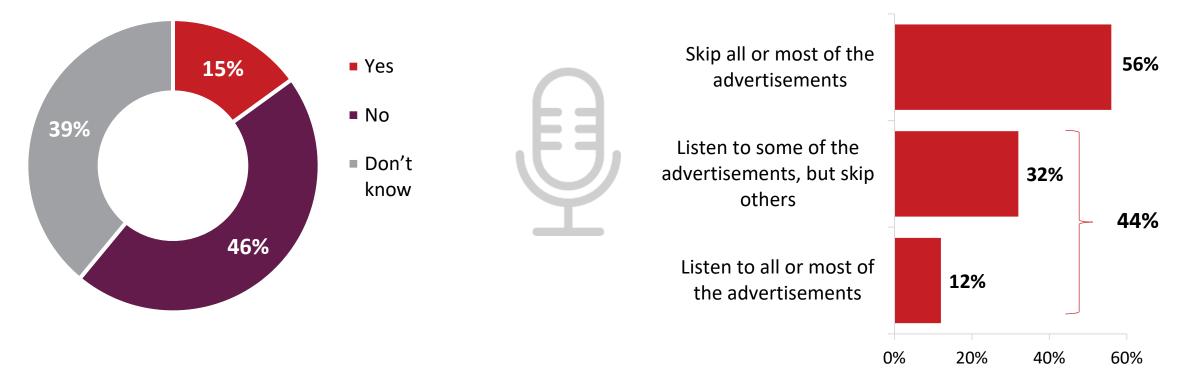
Podcast Listenership





Have Heard a Work-Related Ad During a Podcast

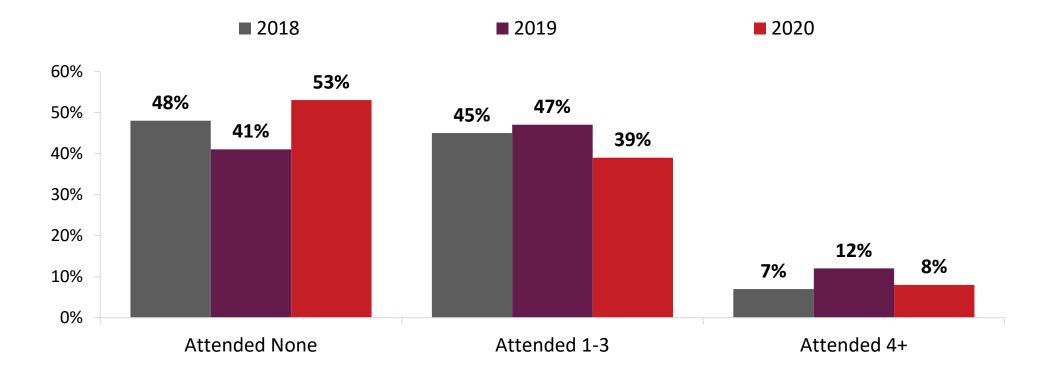
Listening to or Skipping Ads in Podcasts



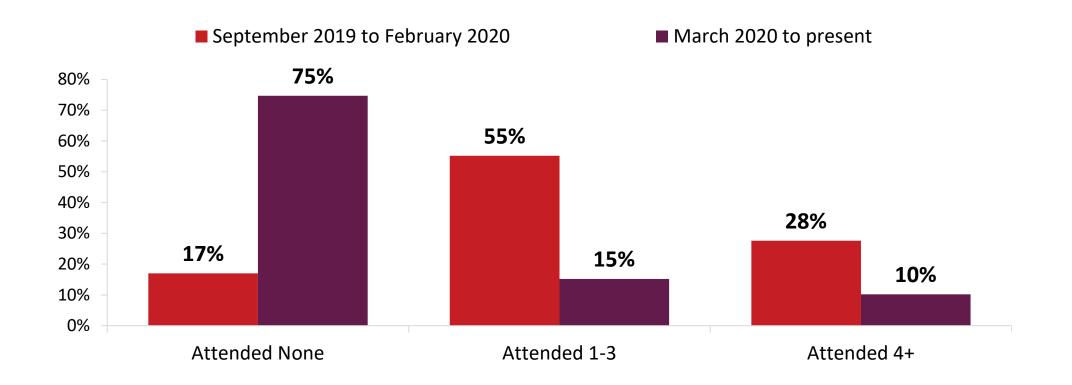
MARKETING BEYOND MEDIA: Events & Webinars



TREND 2018-2020 Event Attendance Significantly Down in 2020

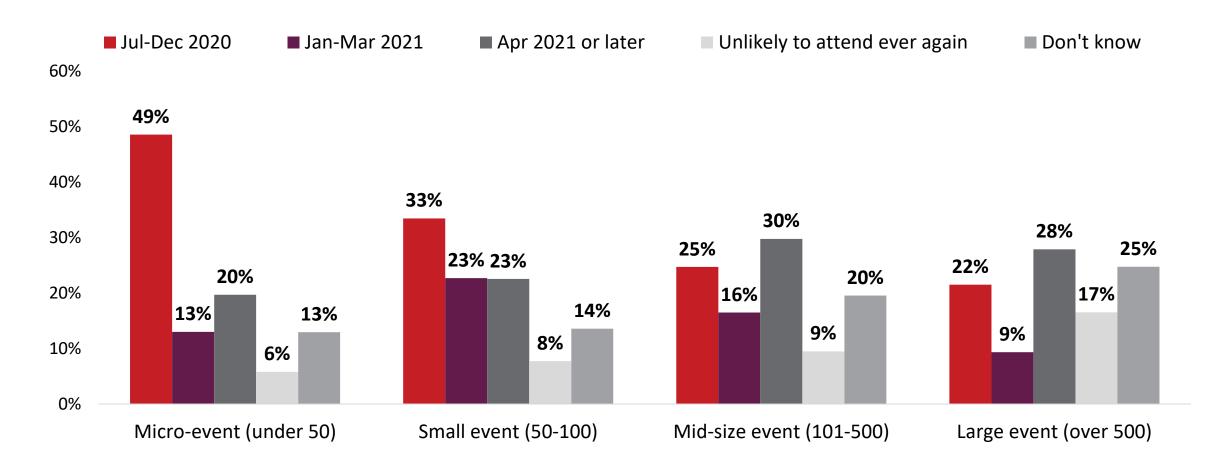


Event Attendance Significantly Down, Especially Since March

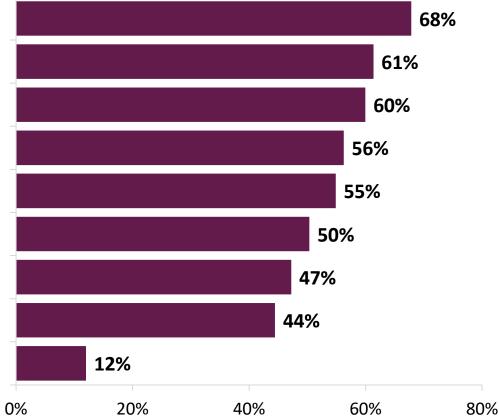




Comfort Level for In-Person Event Participation by Size

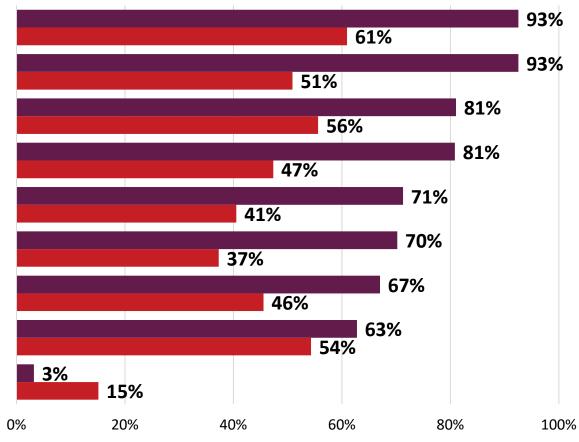


Safety Protocols Needed to Feel Comfortable Attending Event



Providing hand sanitizer throughout the venue Housekeeping staff actively cleaning and disinfecting hard surfaces Setting up chairs and tables further apart according to physical distancing guidelines 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

Safety Protocols Are Less of a Concern Outside the Beltway



Providing hand sanitizer throughout the venue

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

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

Checking temperatures of attendees upon arrival

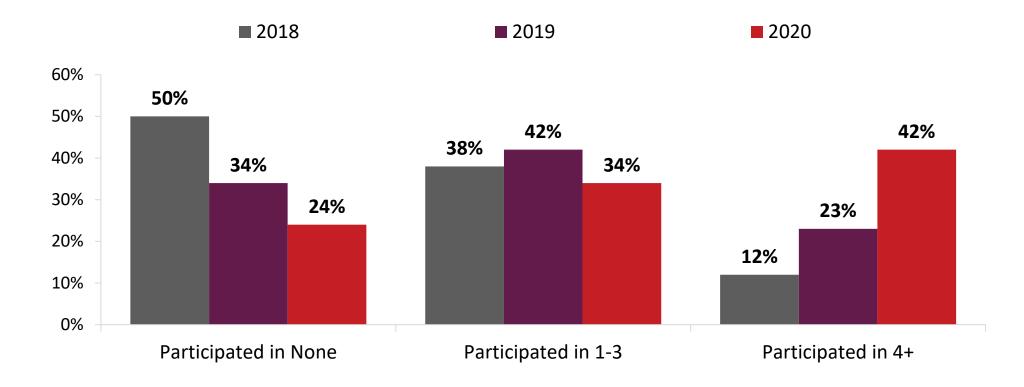
Providing complimentary masks on-site

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

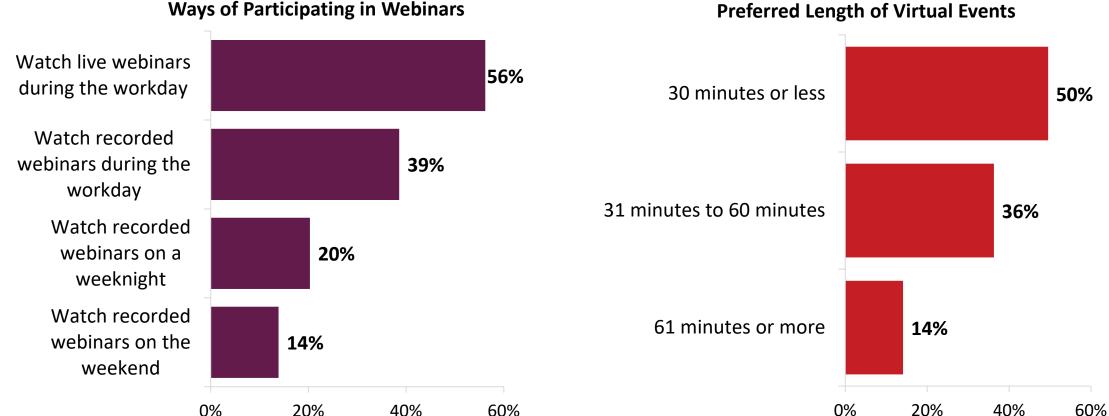
DC Non-DC



TREND 2018-2020 Webinar Participation Dramatically Increases



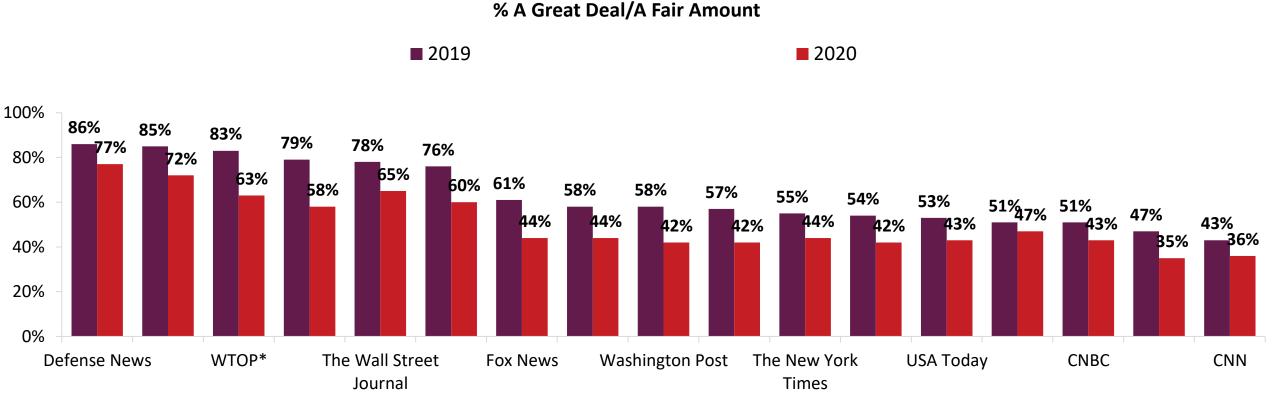




Preferred Length of Virtual Events

Trust & Confidence

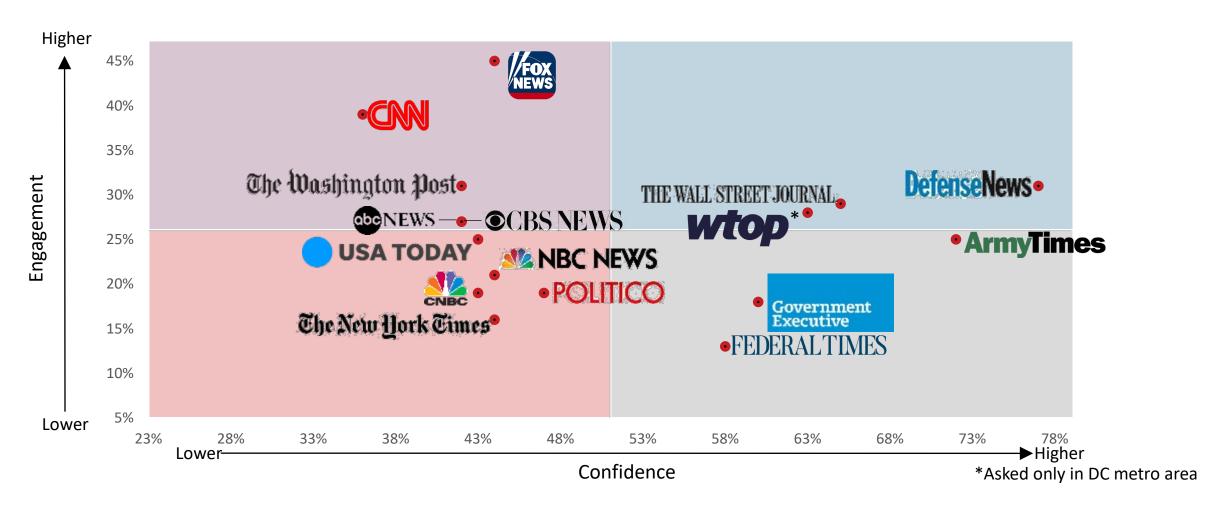




*Asked only in DC metro area



Marketing Impact

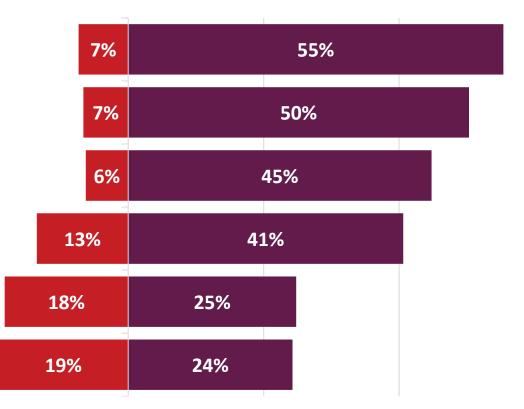




Trusted Sources of Information

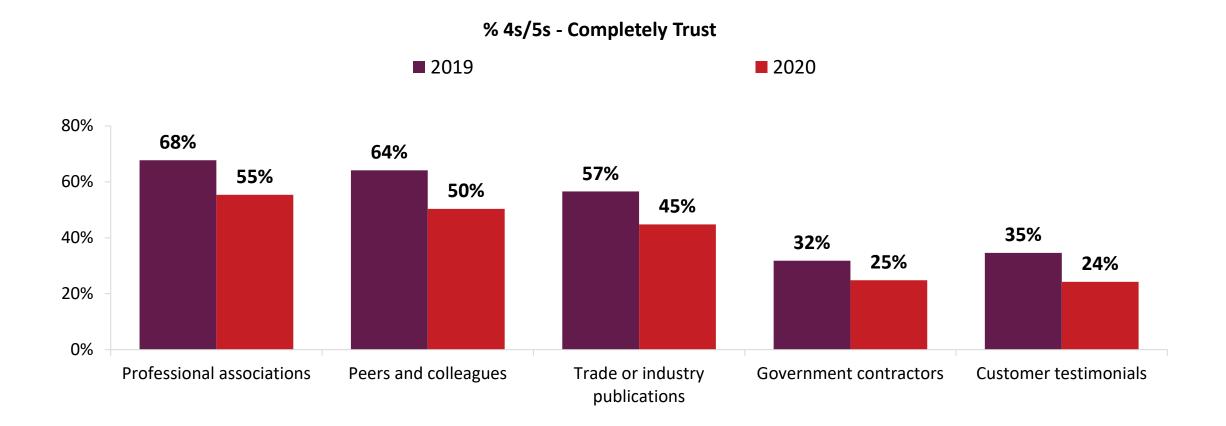
Professional associations Peers and colleagues Trade or industry publications Research firms **Government contractors** Customer testimonials

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

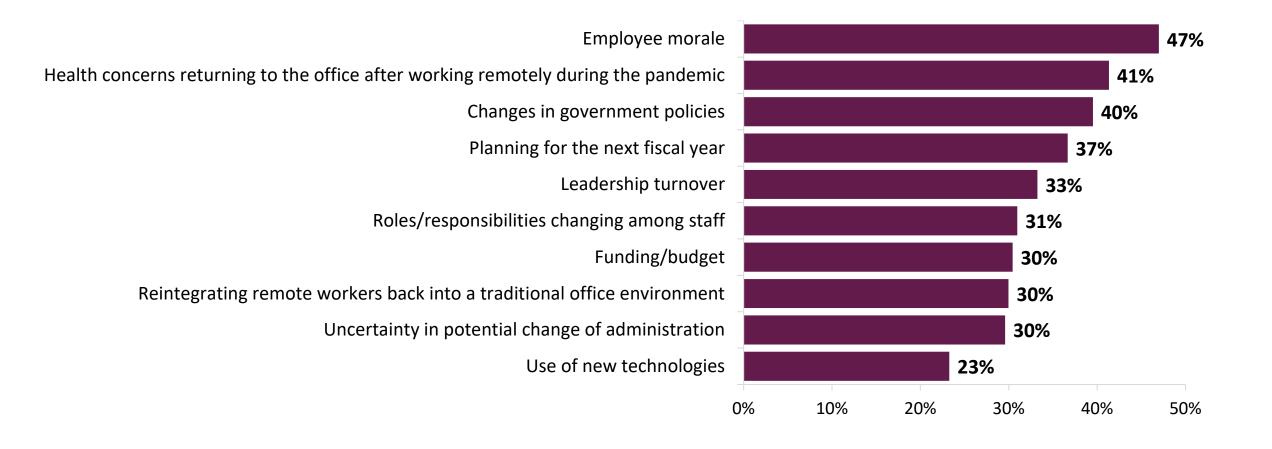




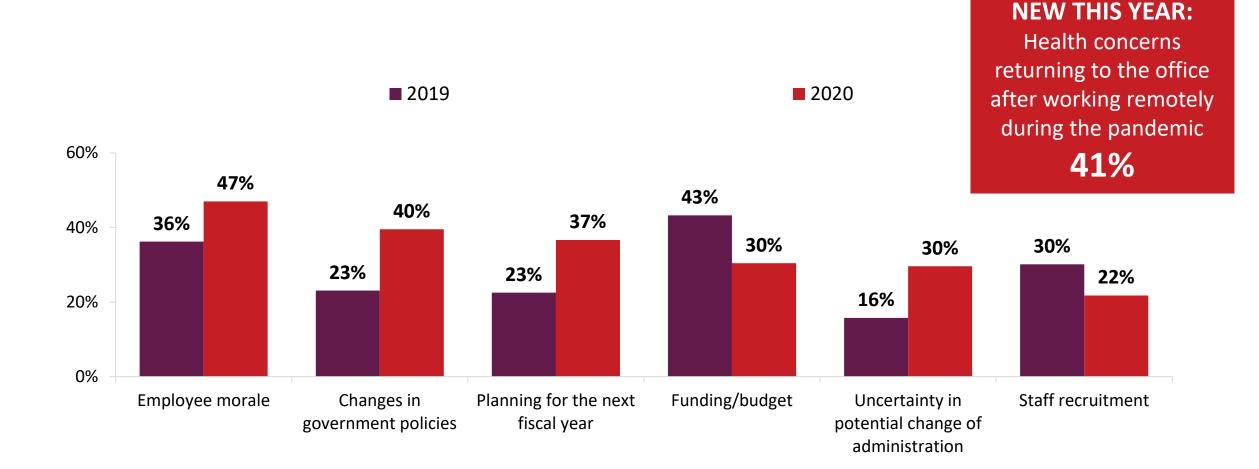
Overall Decline in Trust Evident



Feds Predict Top Challenges in Upcoming Year



Environmental Uncertainties Increase Anxieties



Federal Media & Marketing Dashboard

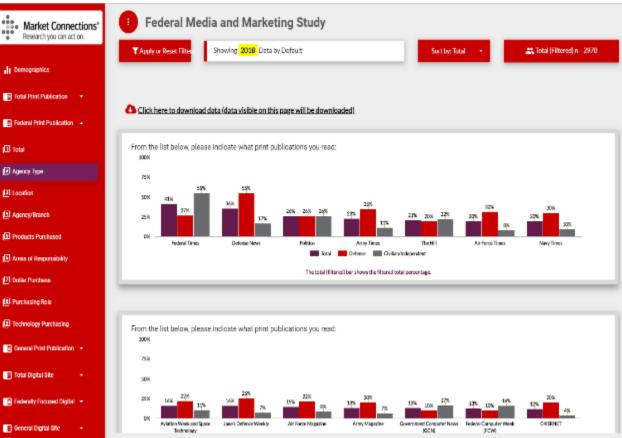


Federal Media & Marketing Dashboard

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

