



Federal Media & Marketing Study

2008-2018



Market Connections®

Research you can act on.



Background and 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, 2018
- Sample size: Approximately 3,000
- Data weighted to ensure publications were not over- or under-represented in sample



Topics Covered

Demographics

- Agency/Location
- Age/Education
- 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

FEDERAL & CONGRESSIONAL MEDIA

- Over 65 media properties
- New this year
 - DefAeroReport.com

BUSINESS & NEWS MEDIA

- Over 30 media properties
- New this year
 - AOL.com/News
 - Axios.com
 - BusinessInsider.com
 - Yahoo.com/News

TECHNOLOGY & INDUSTRY

- Over 20 media properties
- New this year
 - GeekWire.com

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:** Political party affiliation
- **News:** Confidence in media sources and top source for breaking news
- **Advertising:** Video and work-related targeted ads
- **Federal environment:** Expected FY19 budget & procurement process sentiments
- **Lifestyle:** Smart device use





2018 Study Highlights and Trends

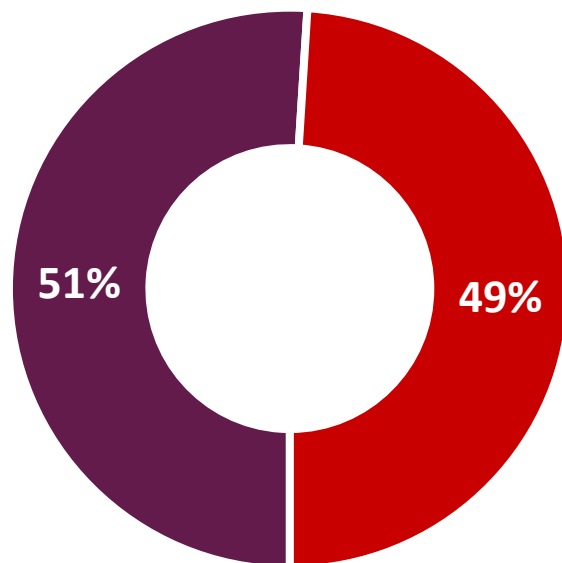


| Demographics

DEMOGRAPHICS

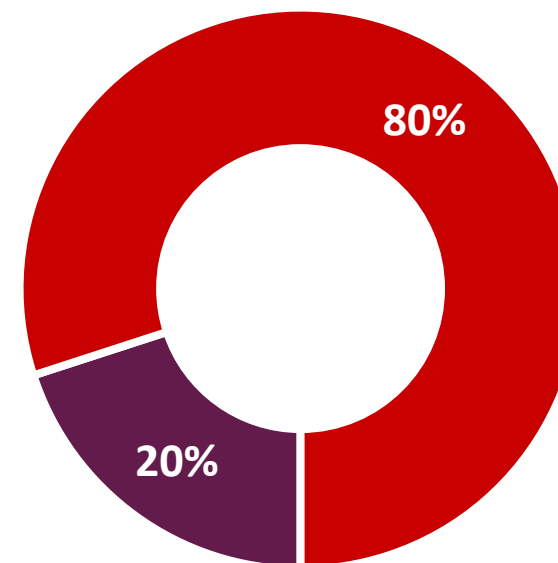
Agency Type & Location

Agency Type



■ Civilian or Independent ■ Defense or Military

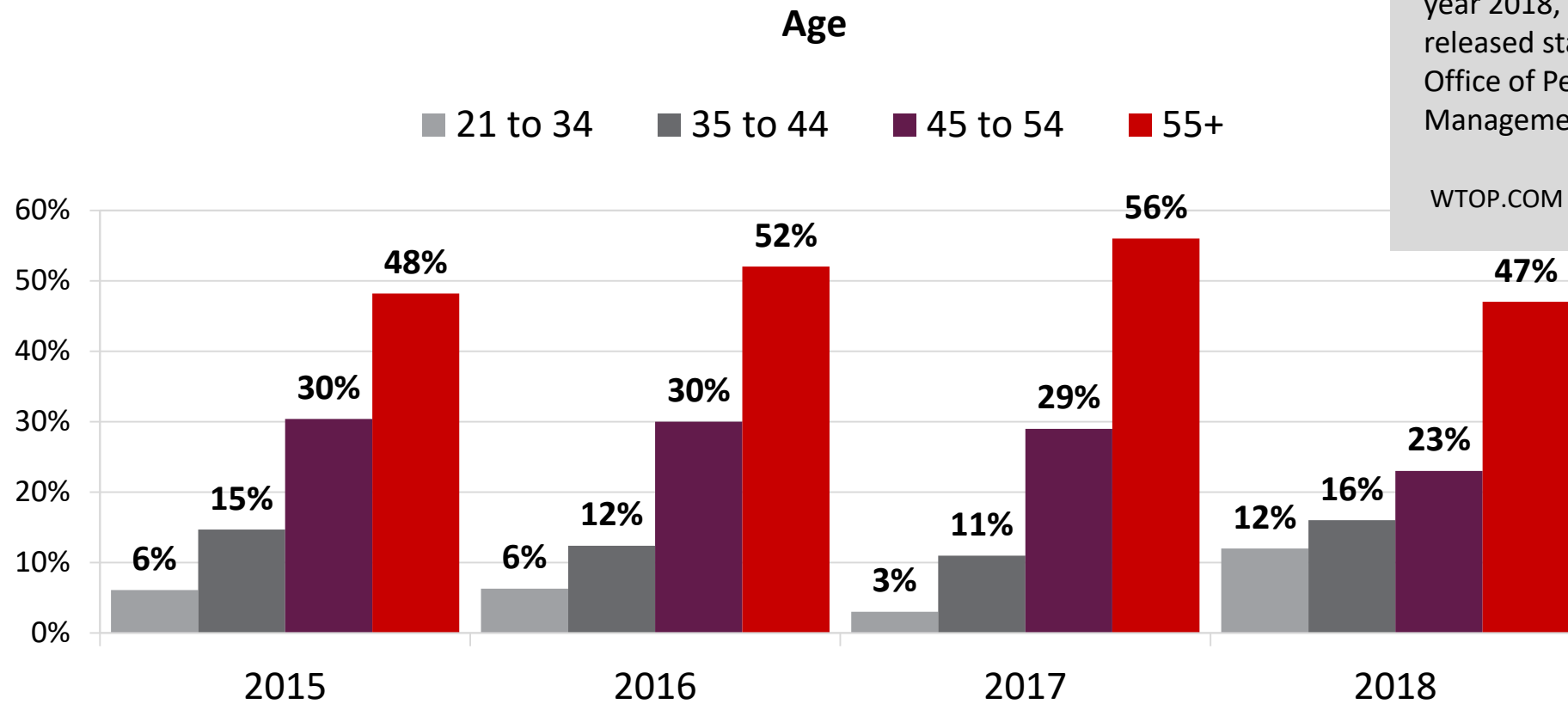
Location



■ Inside the beltway ■ Outside the beltway

TREND 2015-2018

Age



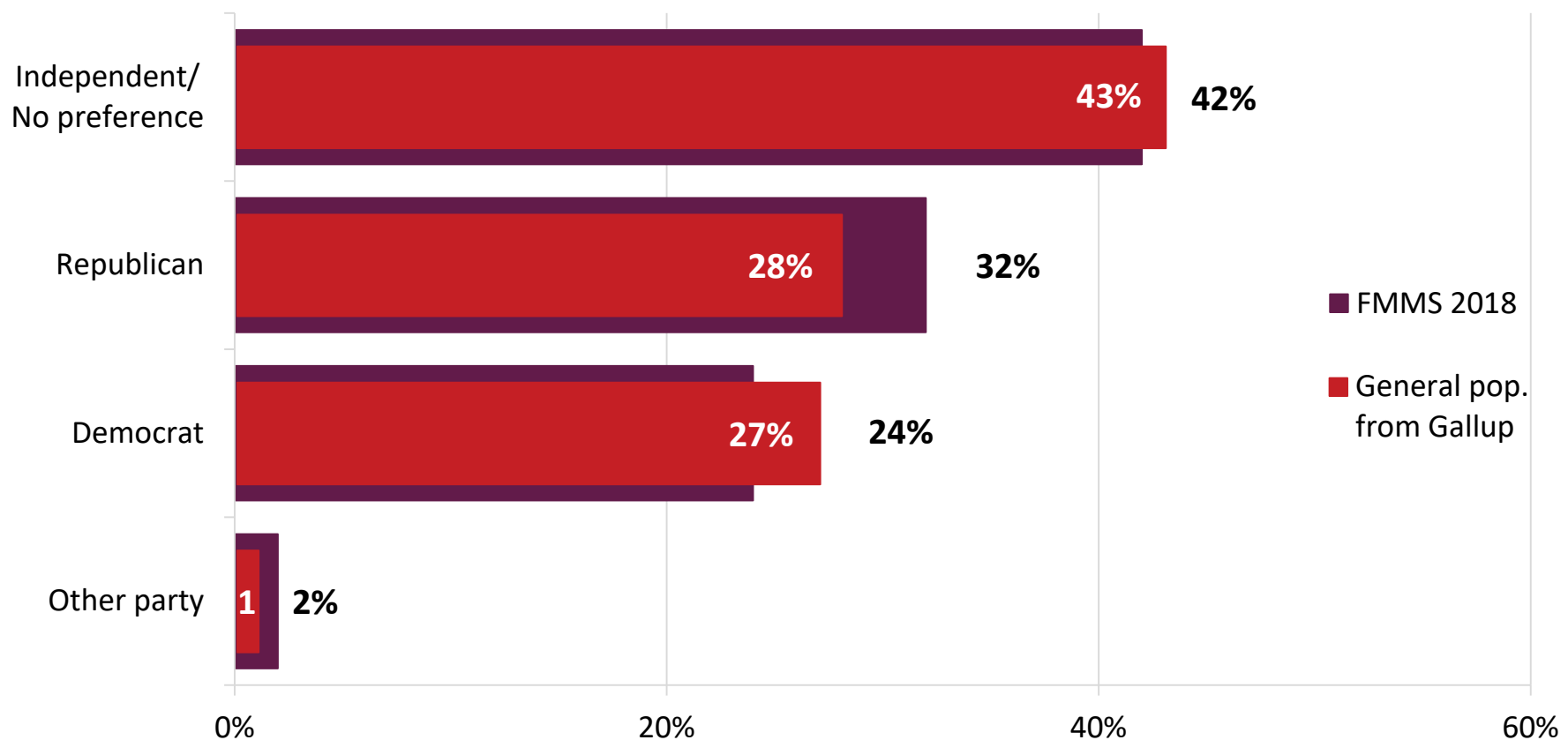
“Federal retirement claims increased 24 percent in fiscal year 2018, according to newly released statistics from the Office of Personnel Management.”

WTOP.COM (October 18, 2018)

DEMOGRAPHICS

Political Affiliation

NEW!
2018



Top Ten Job Functions & Purchase Categories

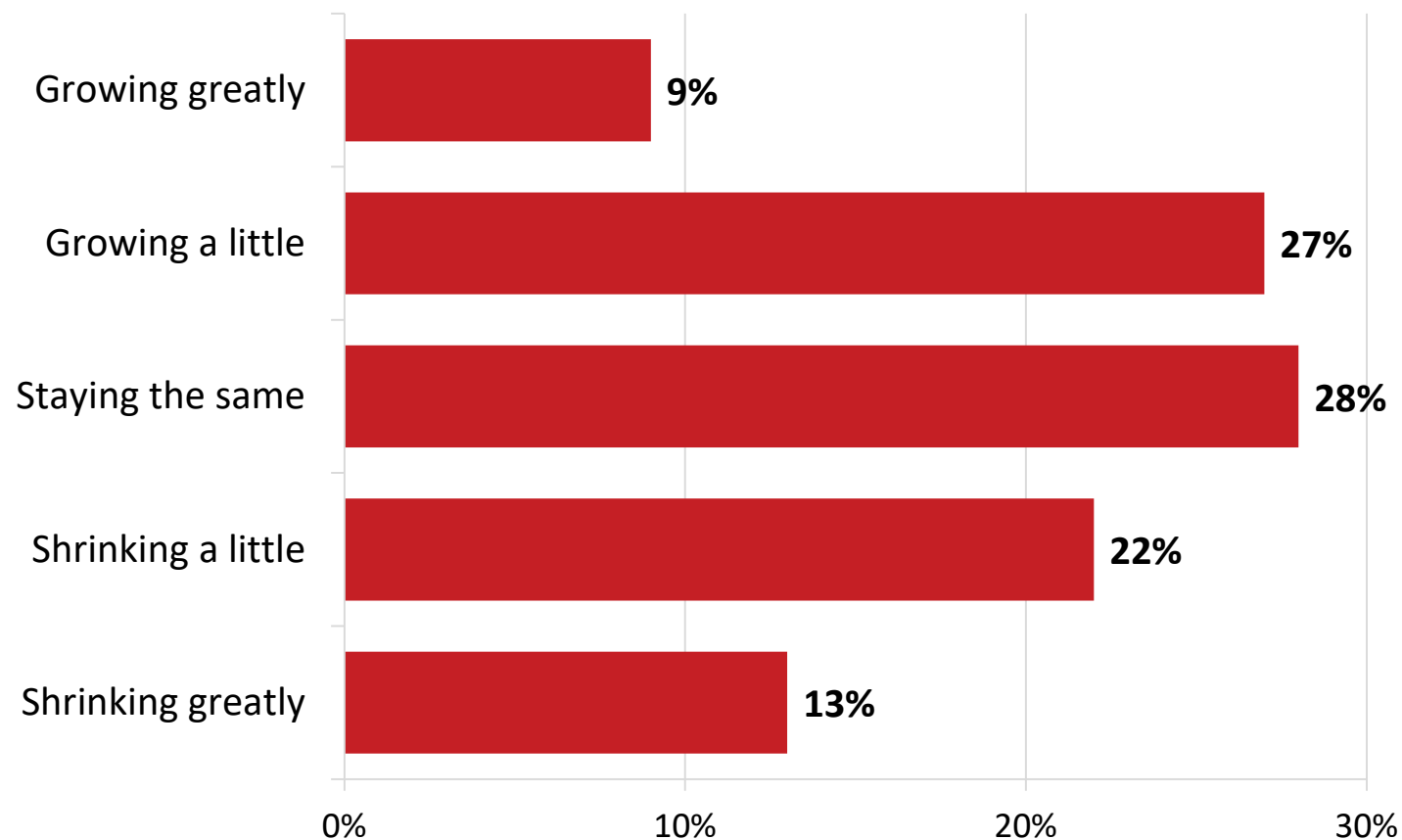
| Job Function | Product/Service Purchase Categories |
|--|--|
| Administration and office services | Computer systems/hardware |
| Project/program management | Education/training classes and services |
| Accounting, budget and finance | Office equipment and supplies |
| Training, education | Communications/telecommunications |
| Purchasing, contracting, procurement | Software |
| Executive and command | Furniture/furnishings |
| Human resources, personnel, benefits | IT services |
| Informational technology, computers, systems | Big data/analytics |
| Medical, health | Building/facilities/real estate/office space |
| Intel/security | Aviation/aerospace products and services |





Federal Environment

Expected Budget at Work in FY19

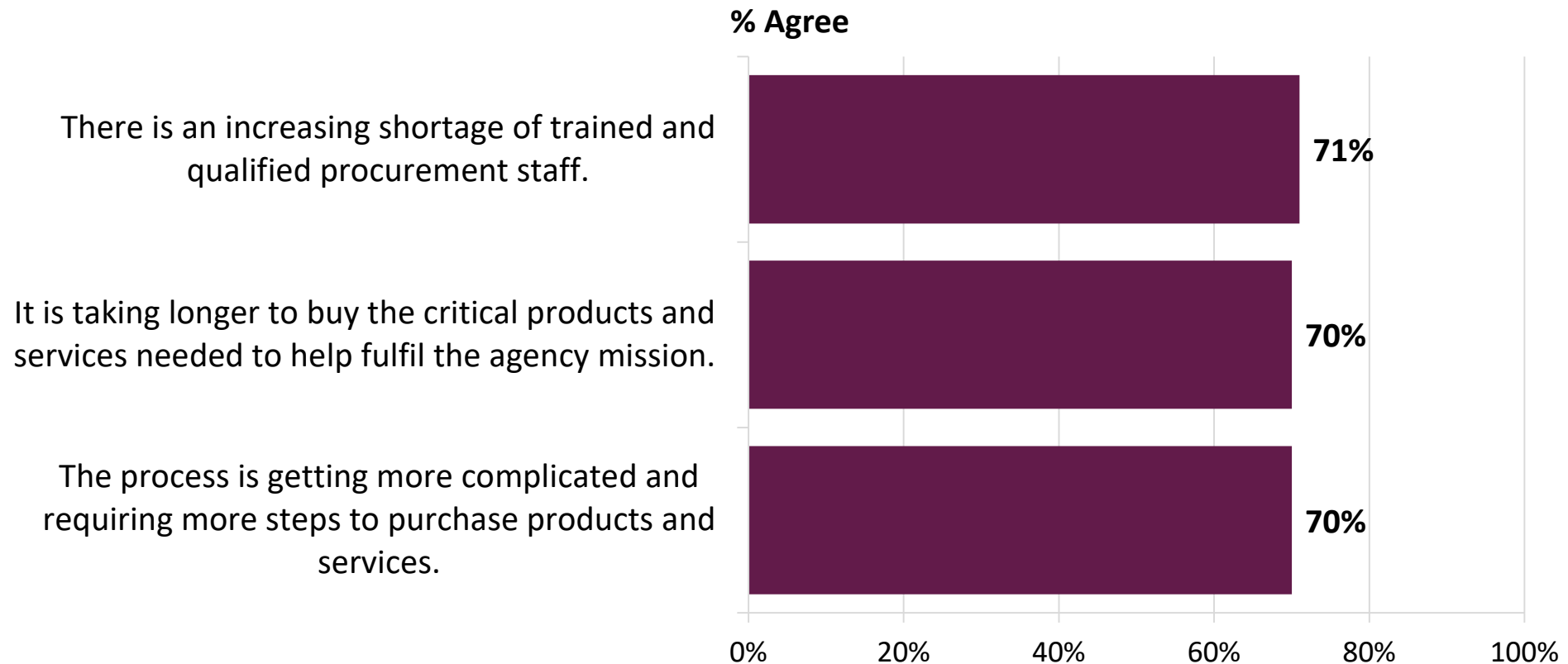
NEW!
2018

| | Defense or Military Agency | Civilian or Independent Agency |
|-----------|----------------------------|--------------------------------|
| Growing | 44% | 28% |
| Shrinking | 26% | 46% |

| | IT Purchaser | Non-IT Purchaser |
|-----------|--------------|------------------|
| Growing | 40% | 32% |
| Shrinking | 32% | 39% |

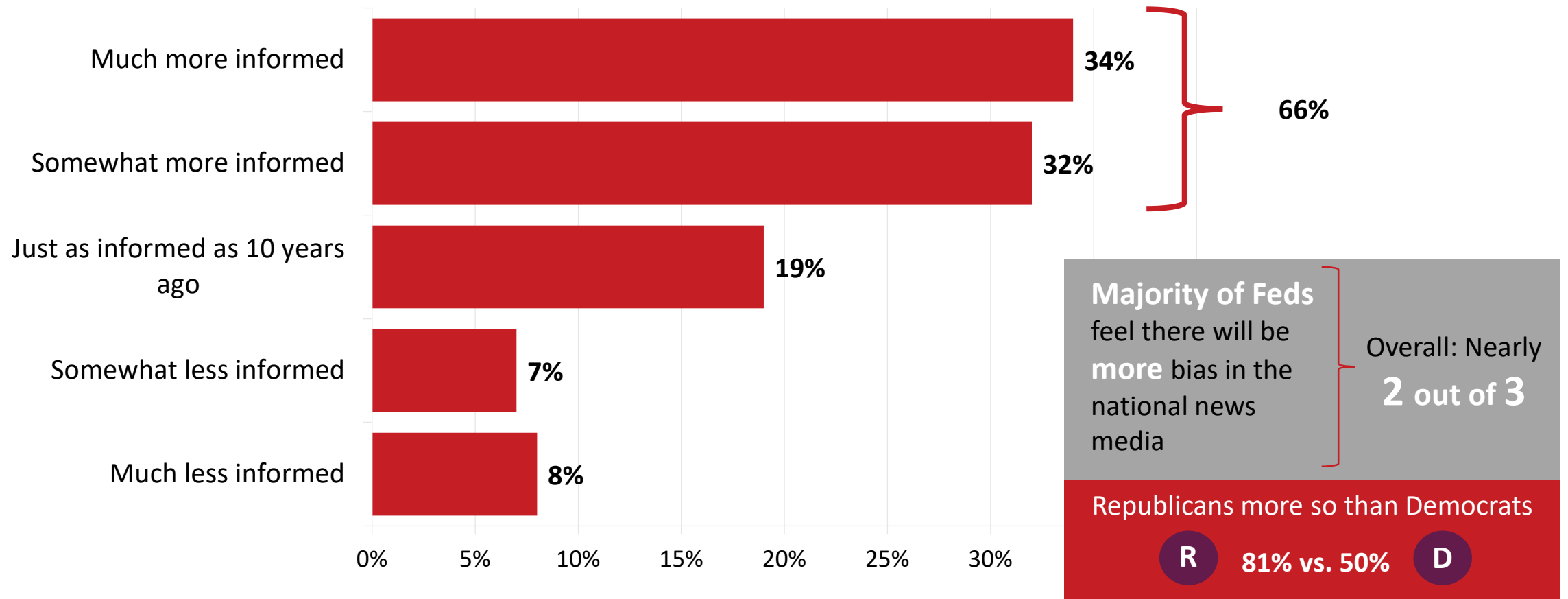
Federal Procurement Process Sentiments

NEW!
2018

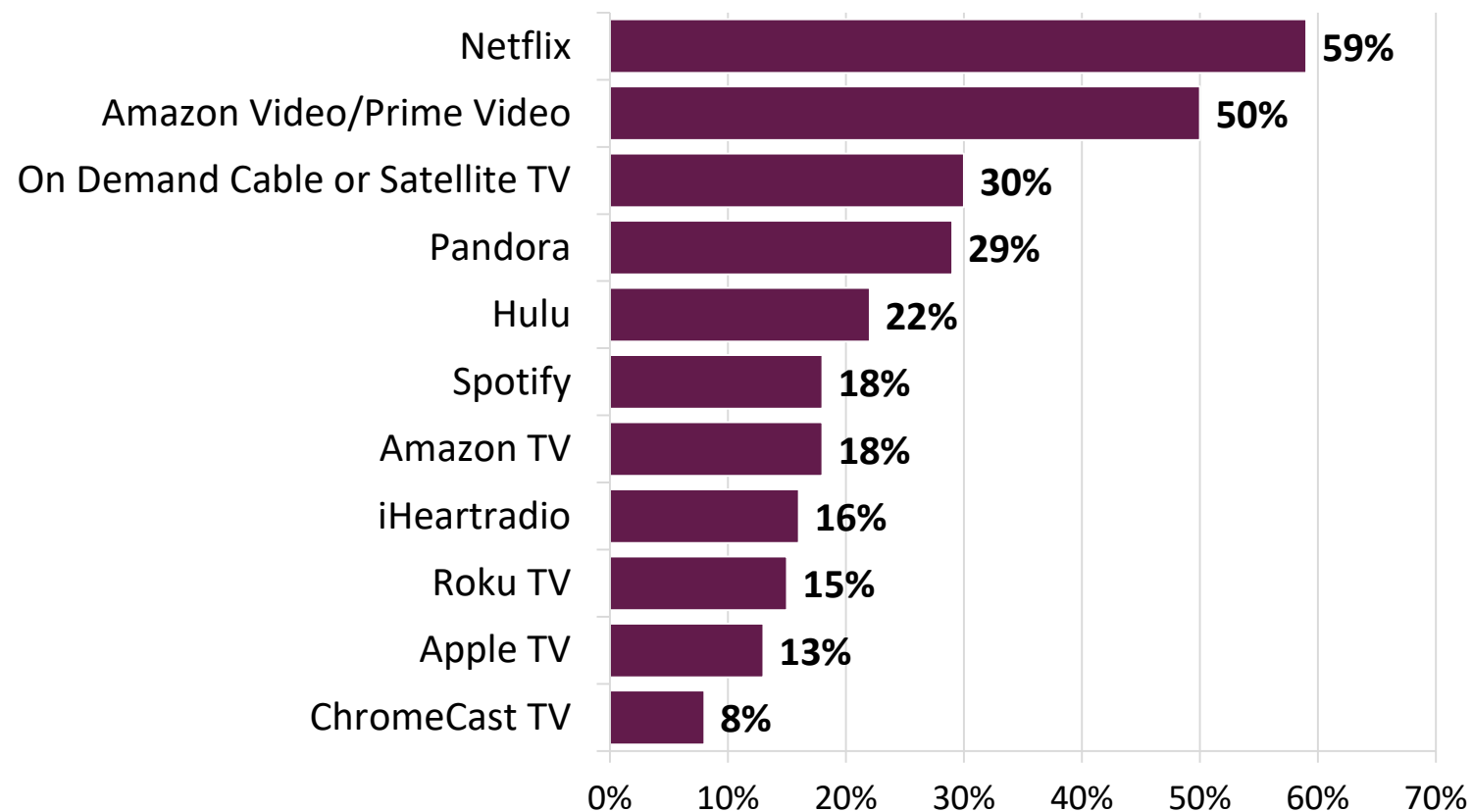


2018 vs 2008: Feeling Informed About News and Politics

NEW!
2018

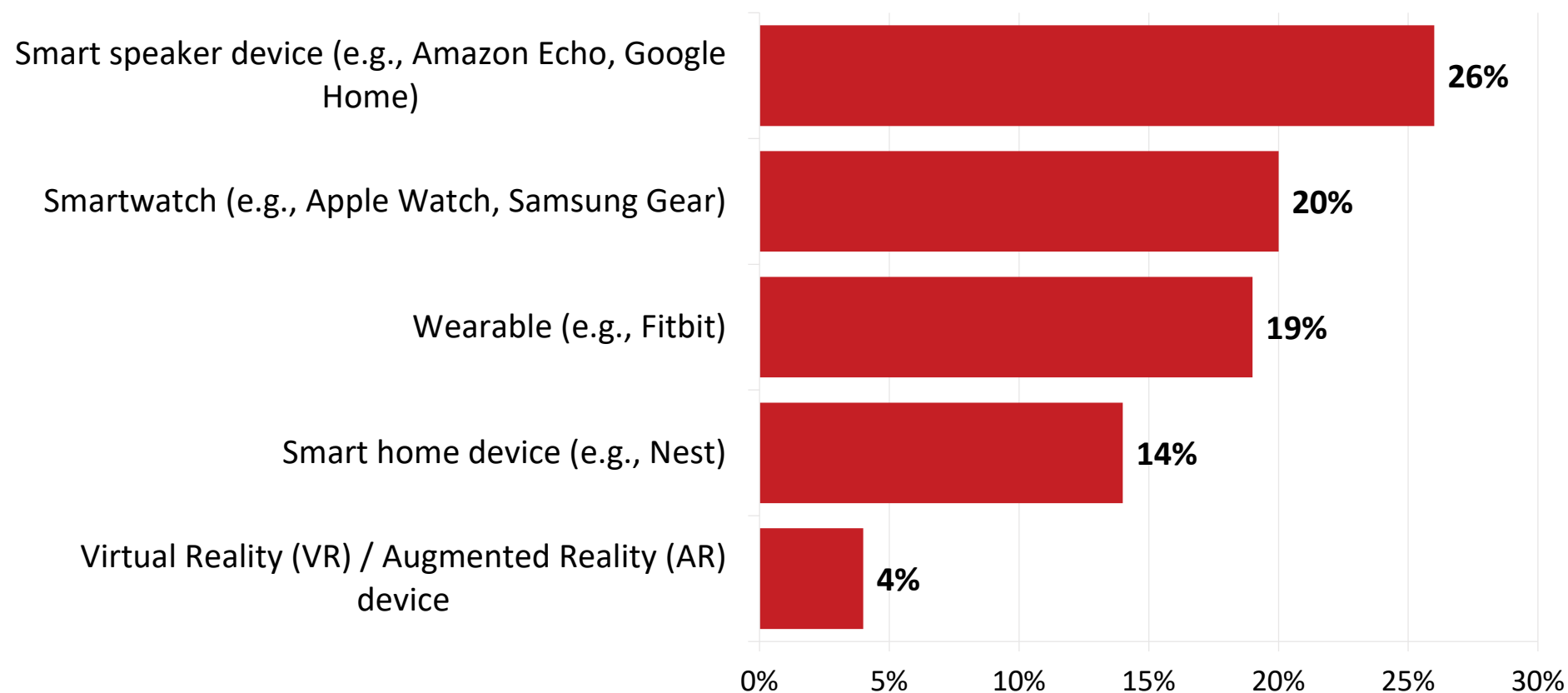


Lifestyle Media Streaming Services and Devices



Smart Device Use

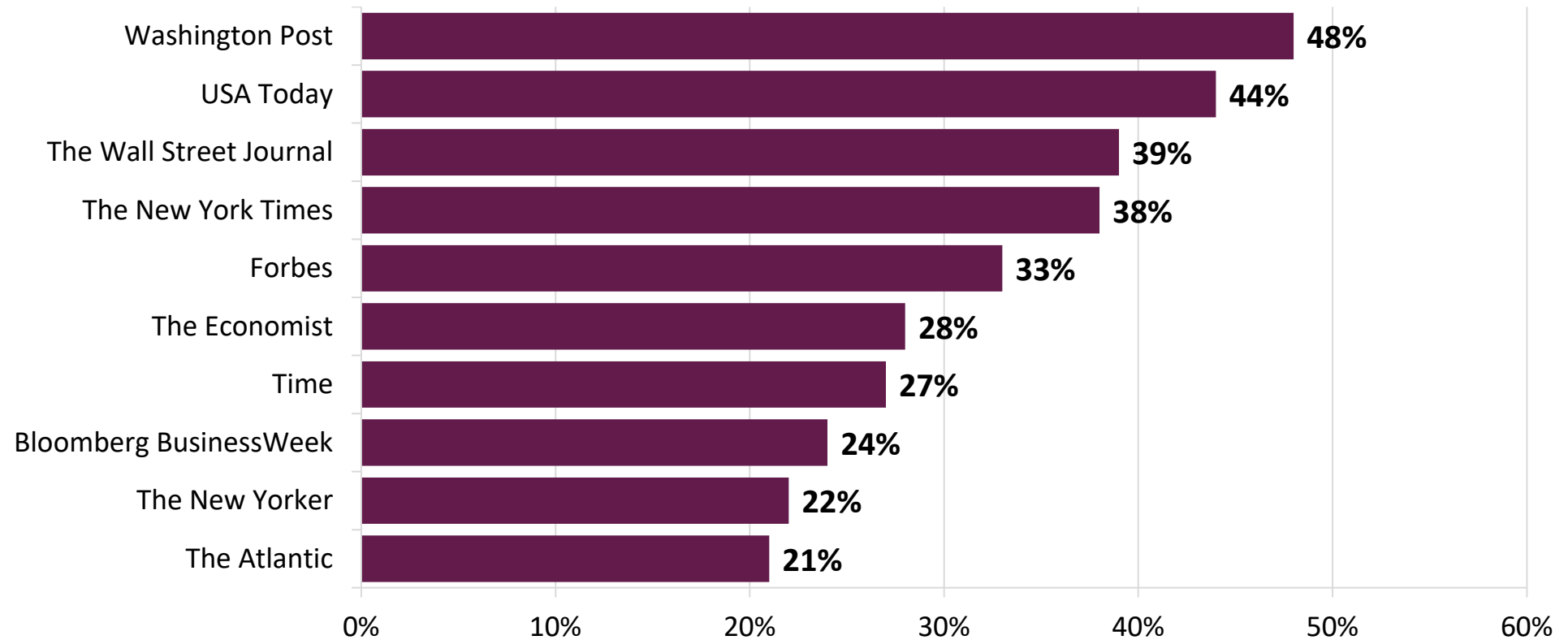
NEW!
2018



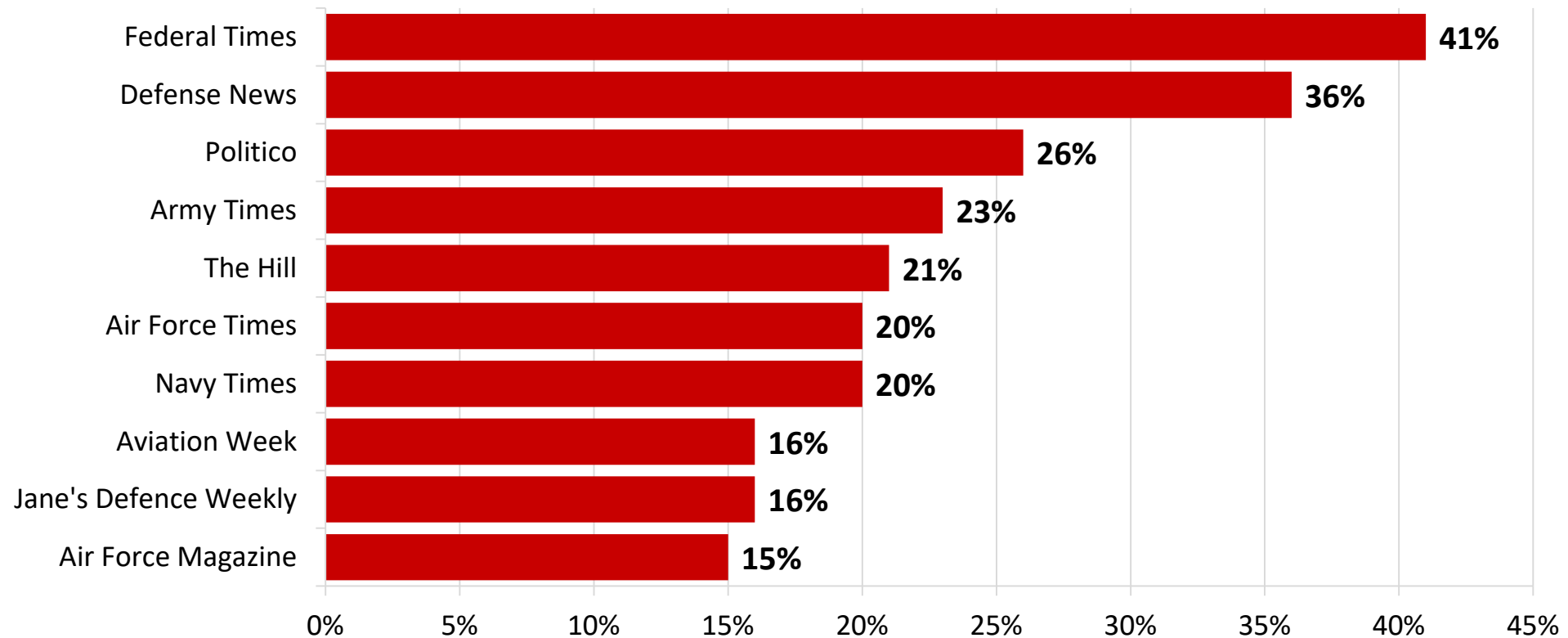


Media Results

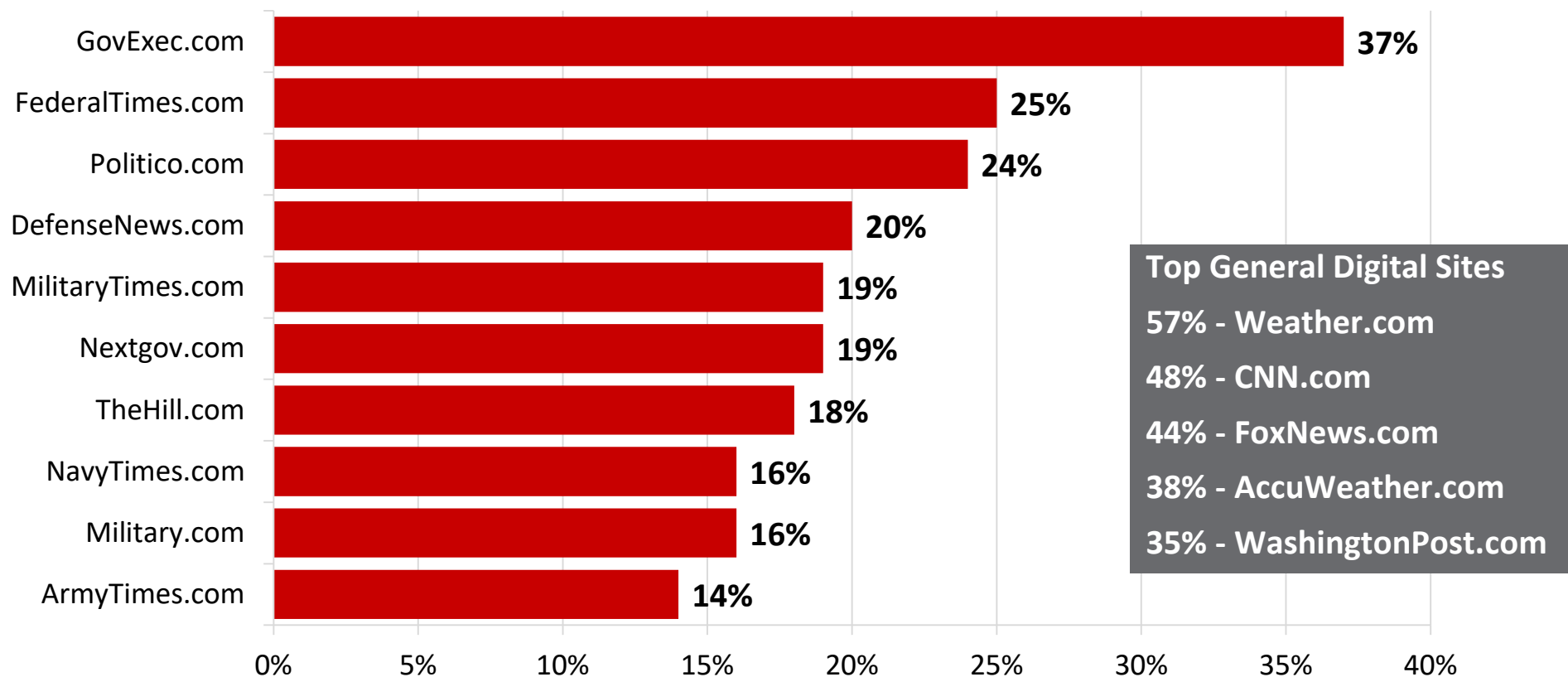
Top Print Business & News Publications Read



Top Print Federal & Congressional Publications Read

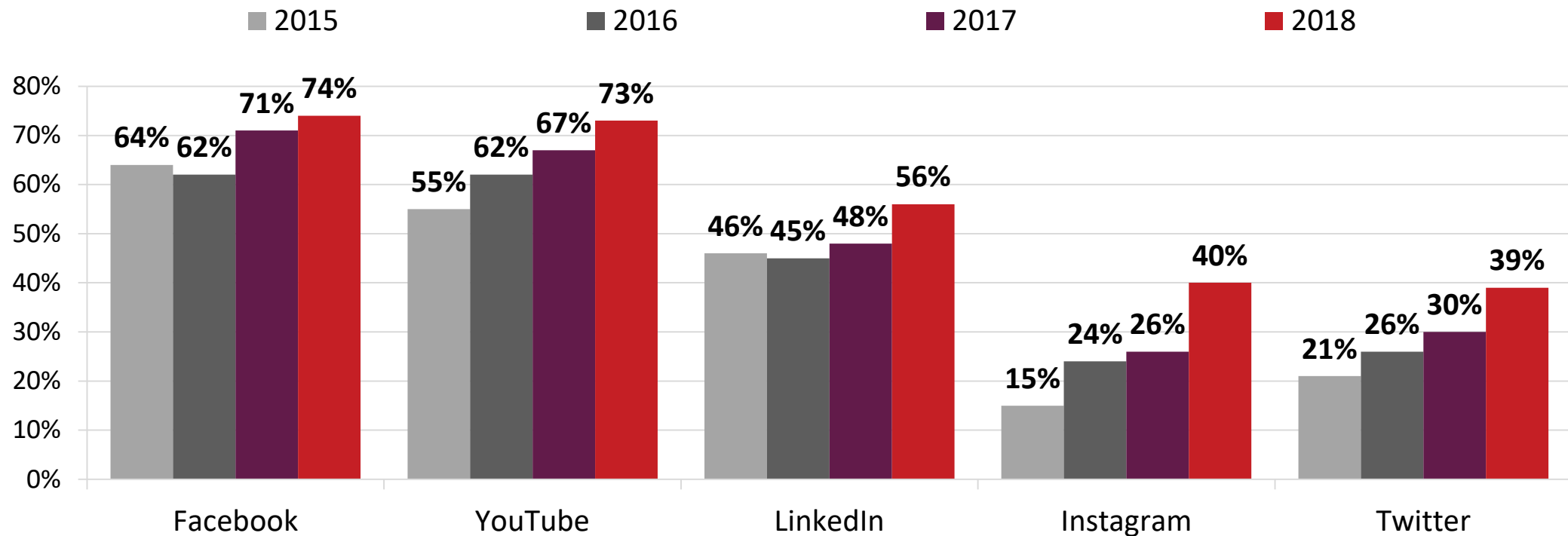


Top Federally Focused Digital Sites Visited



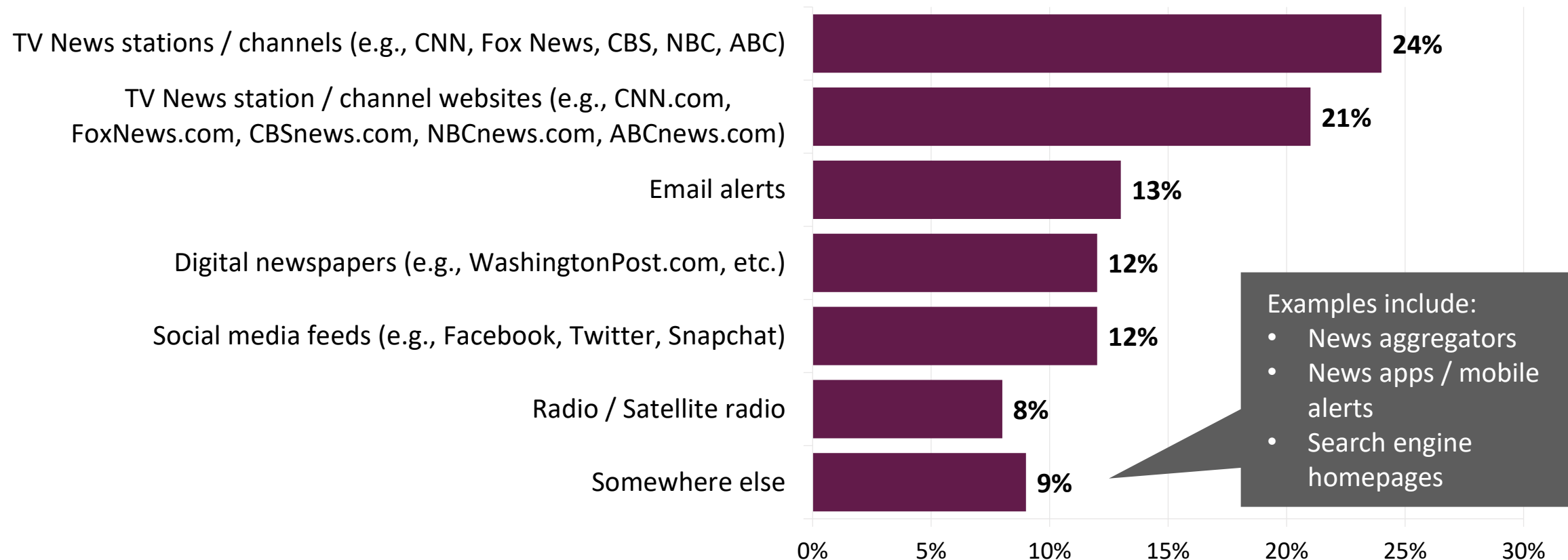
TREND 2015-2018

Top Online Social Sites



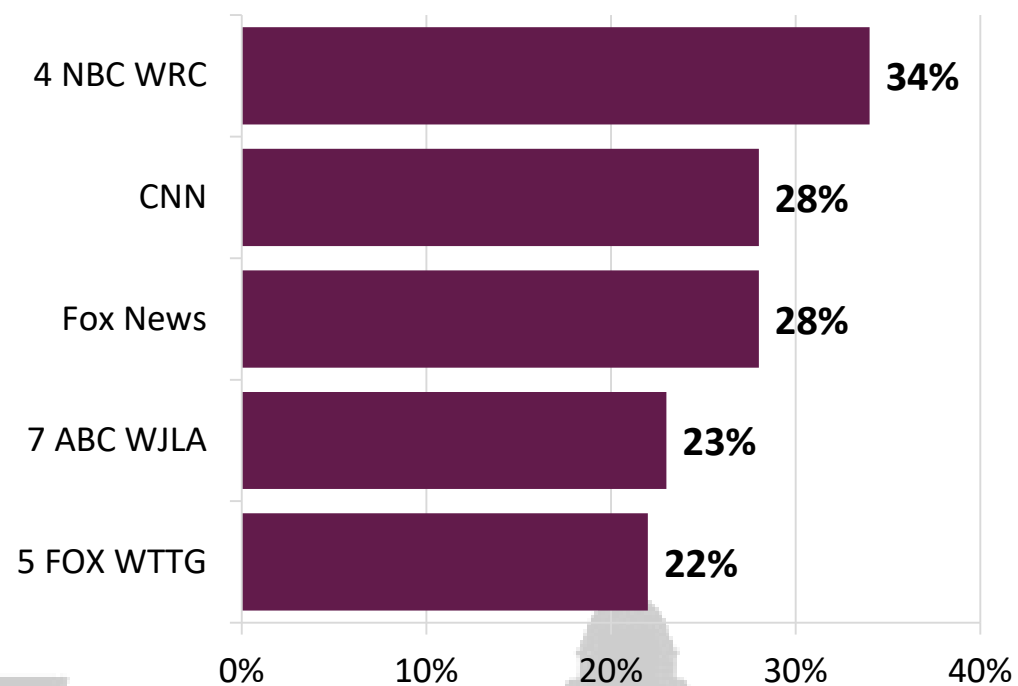
Go-To Source for Breaking News

NEW!
2018

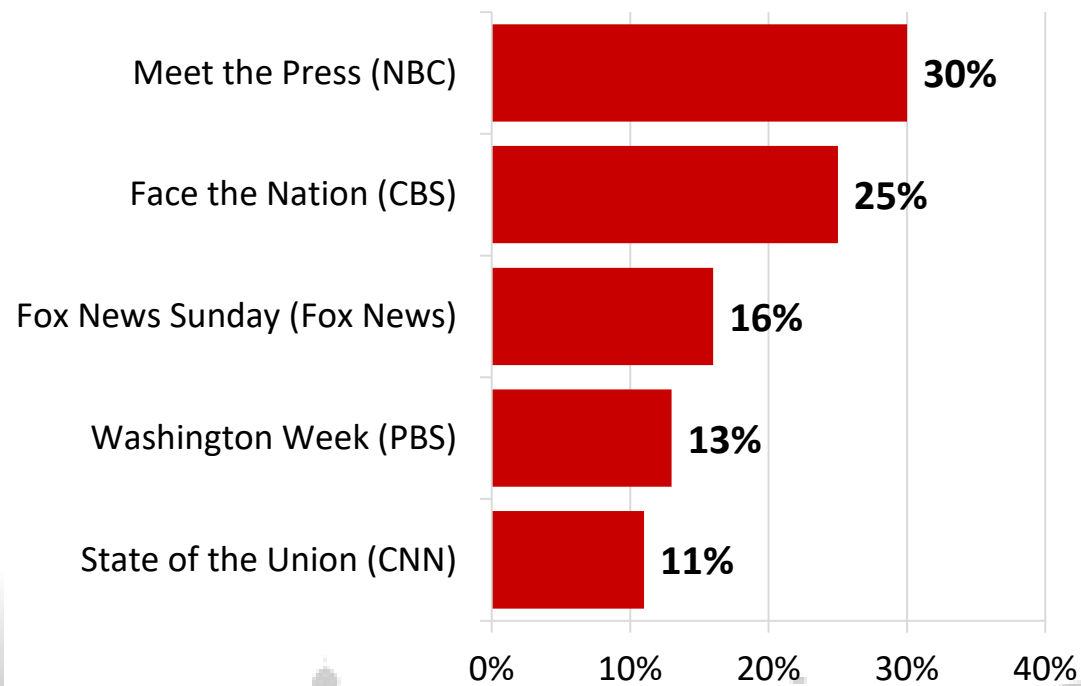


DC METRO AREA TV News Top Five

TV News Channels

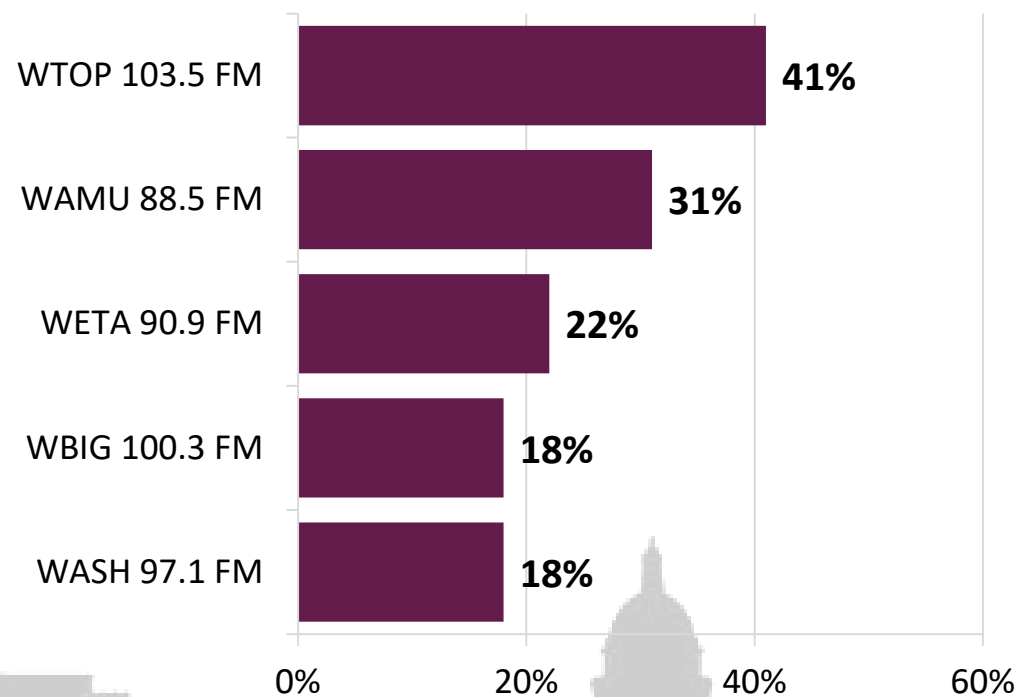


News Programs

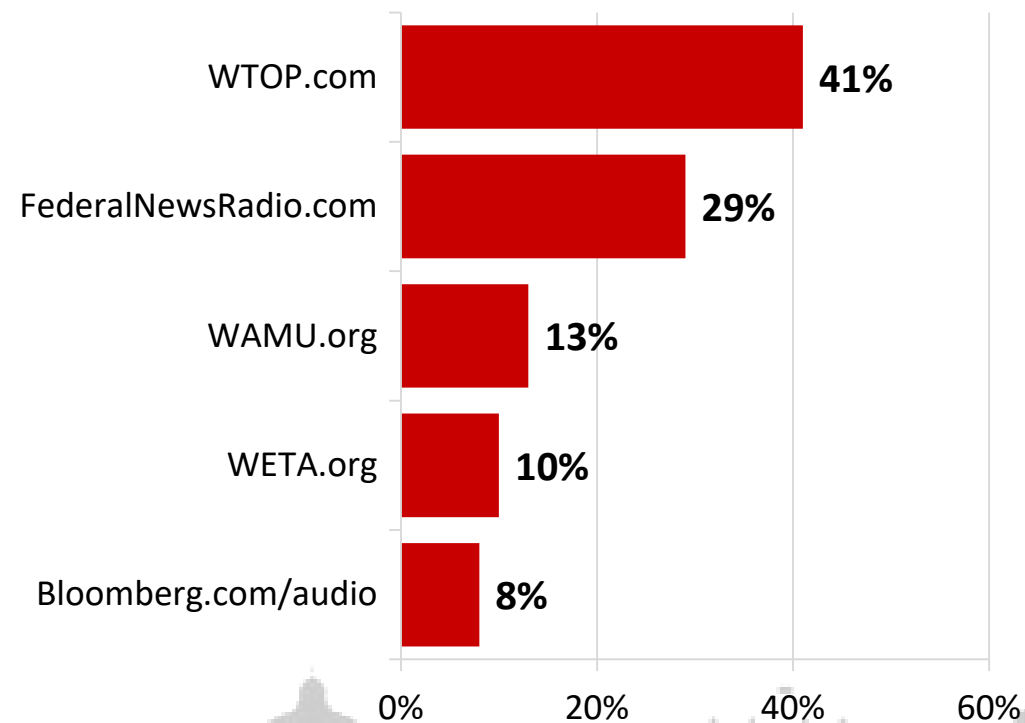


DC METRO AREA Radio Top Five

Radio Stations



Radio Websites

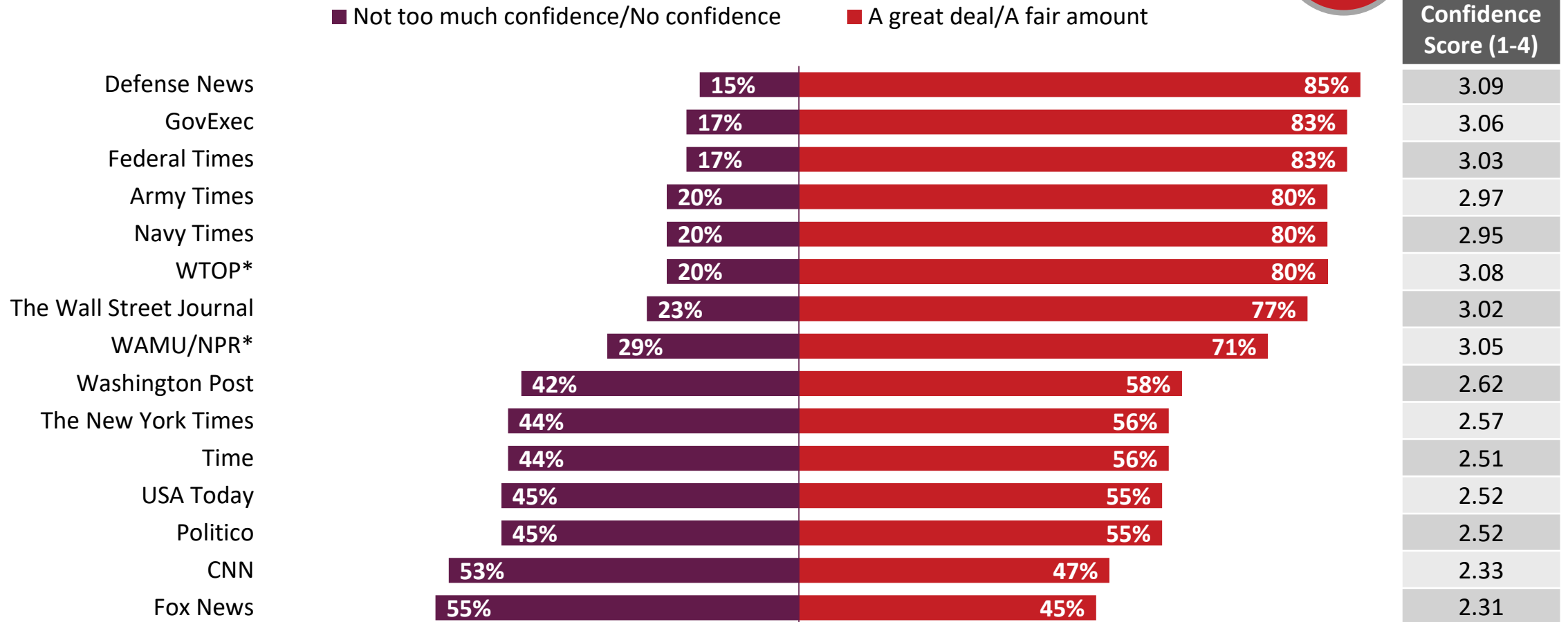




Confidence & Marketing Impact Index

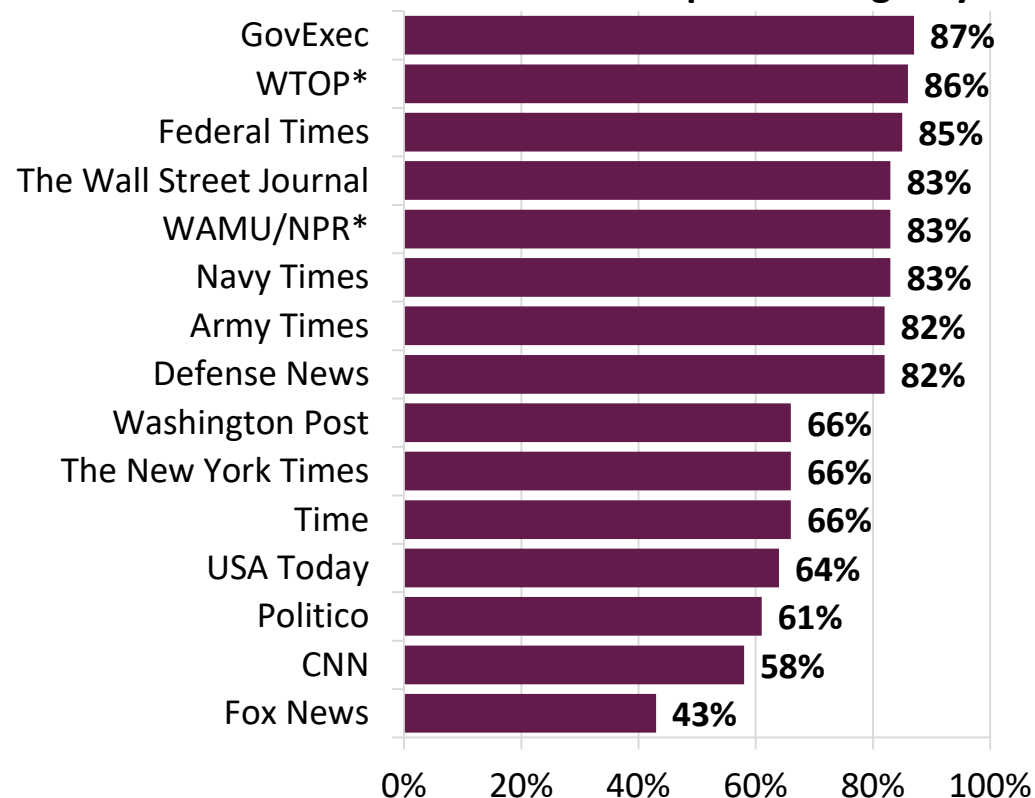
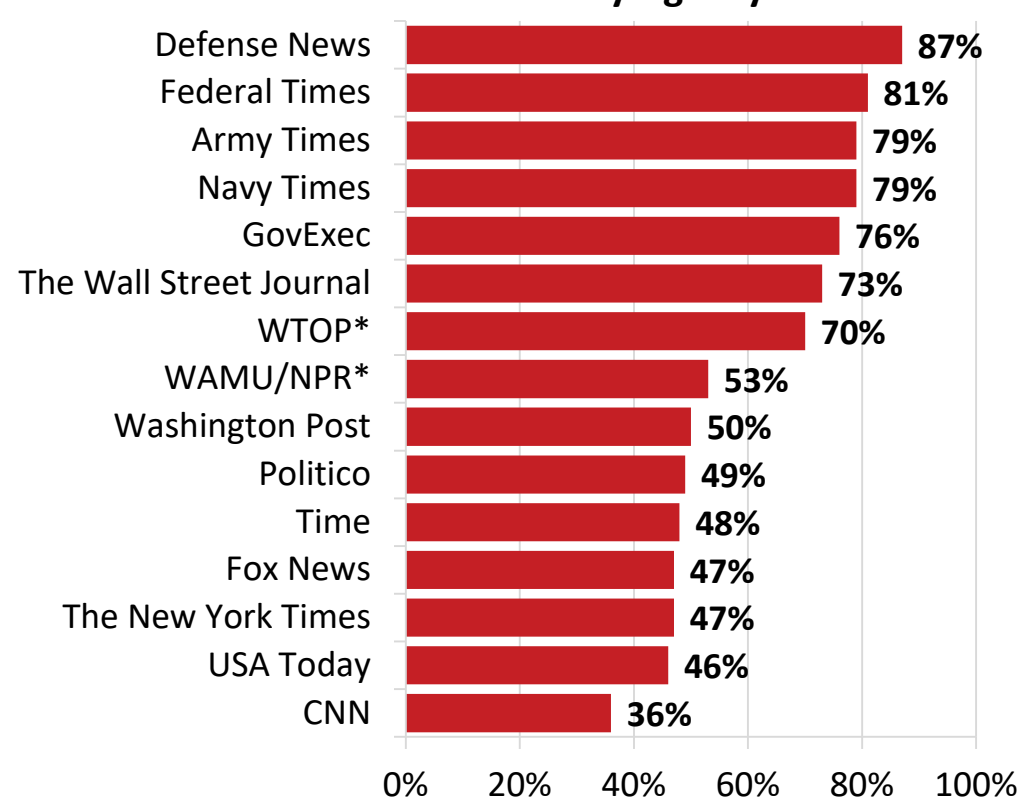
Confidence in News

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2018



*Asked only in DC metro area

Confidence in News by Agency Type

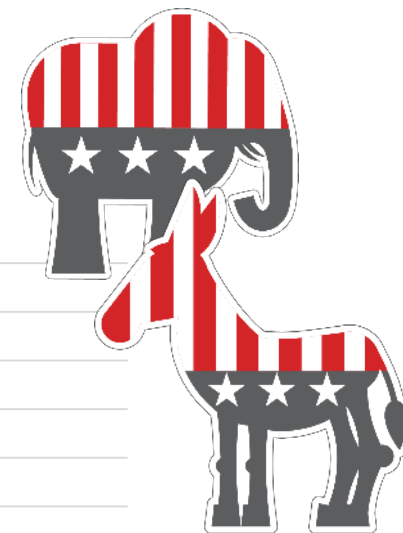
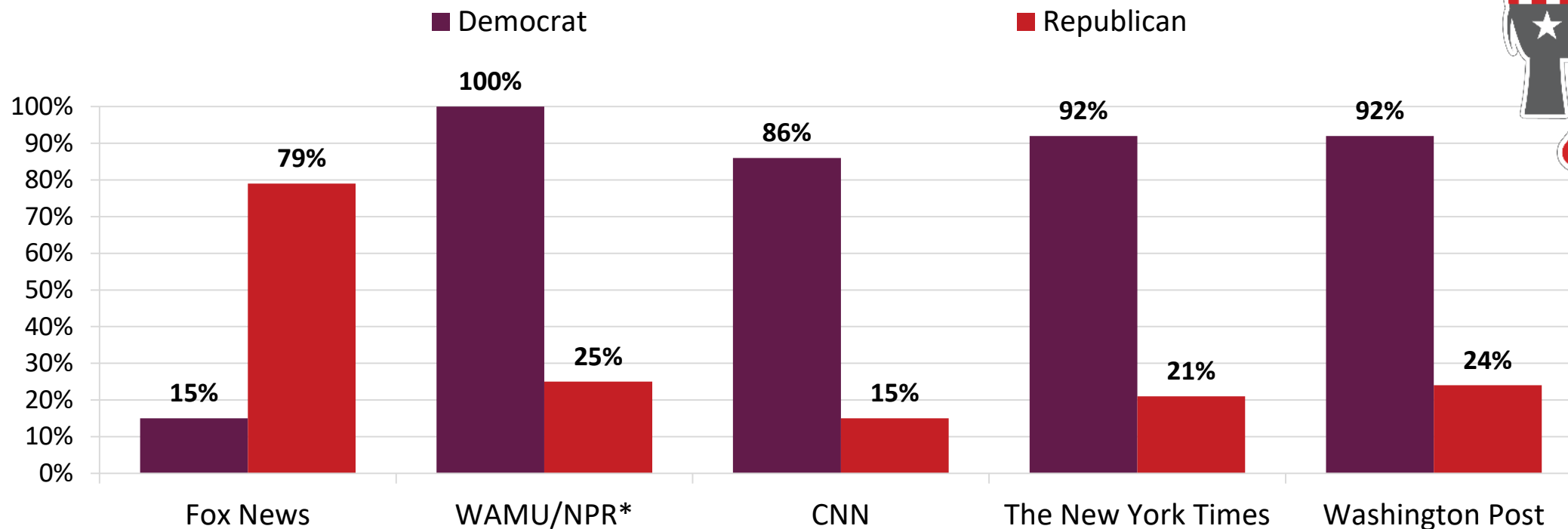
NEW!
2018**% A Great Deal/A Fair Amount****Federal Civilian or Independent Agency****Defense or Military Agency**

*Asked only in DC metro area

Confidence in News by Political Party: Top Five Gaps

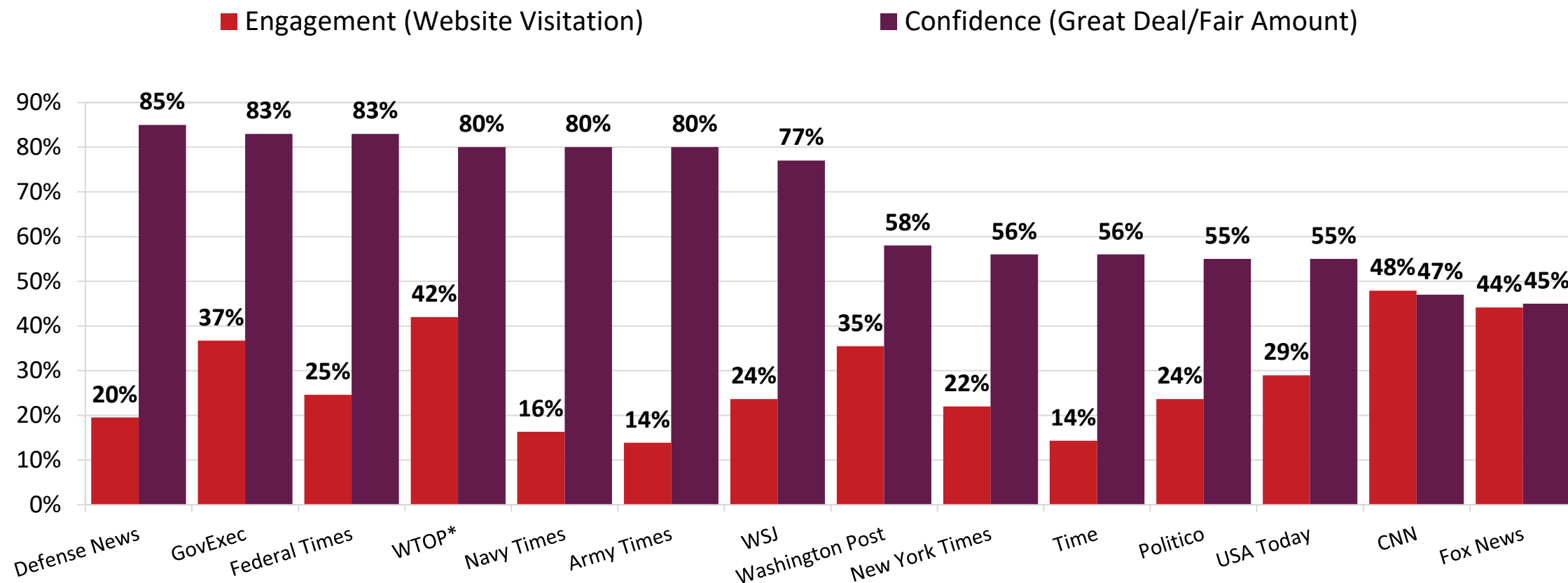
NEW!
2018

% A Great Deal/A Fair Amount



*Asked only in DC metro area

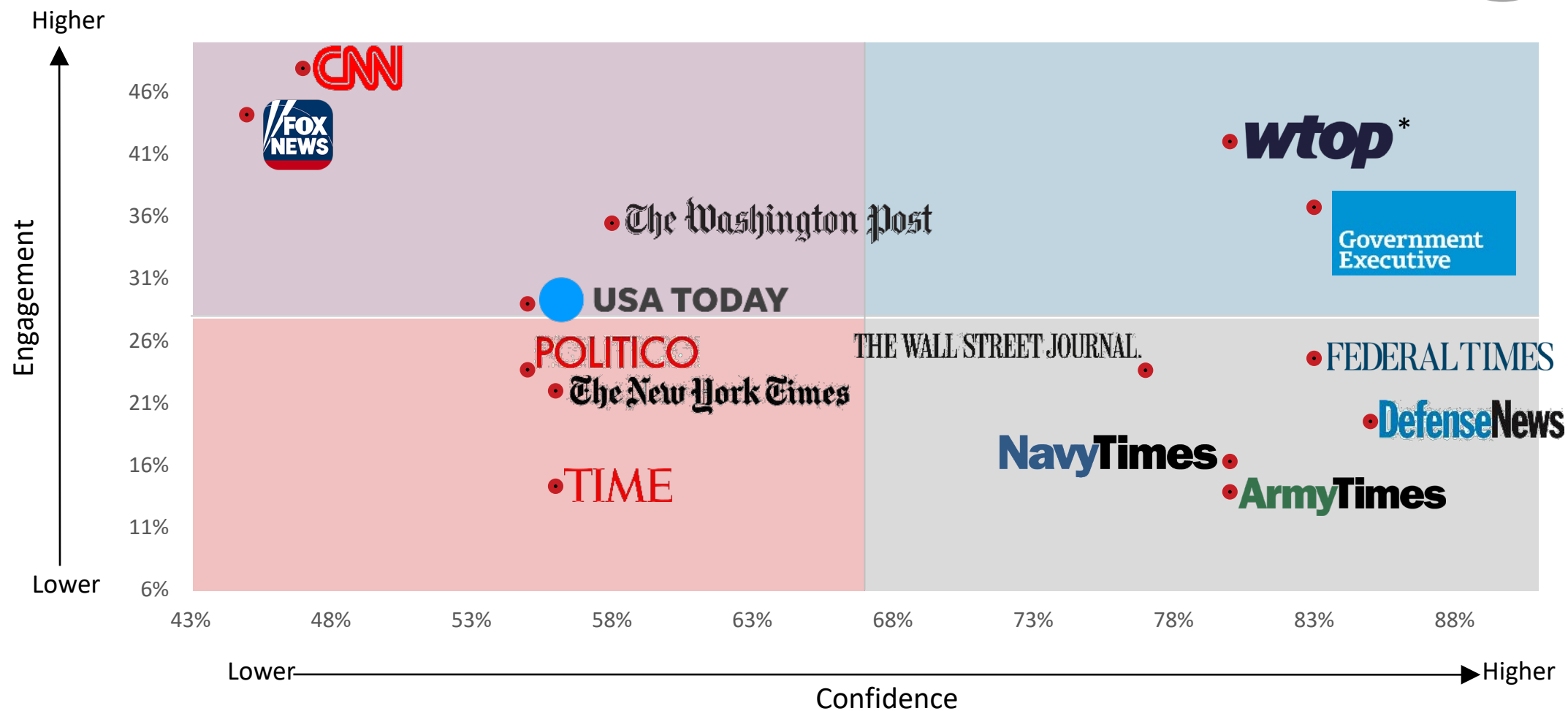
Website Visitation Frequency and Confidence in Source

NEW!
2018

*Asked only in DC metro area

Marketing Impact

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2018



* Asked only in DC metro area

MARKETING IMPACT INDEX - COMPONENTS

Website Visitation Frequency and Confidence in Source

NEW!
2018



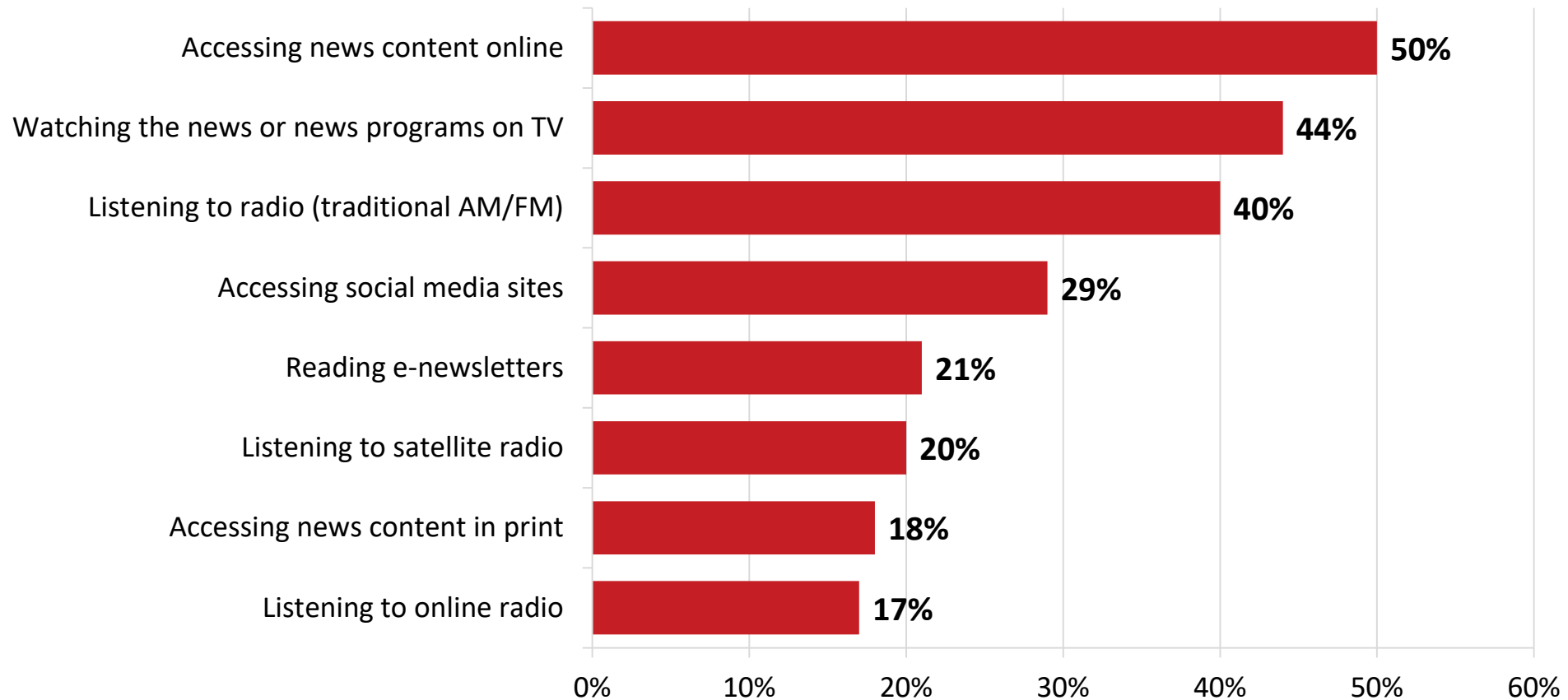


Marketing Tactics

Most Trusted Sources of Information

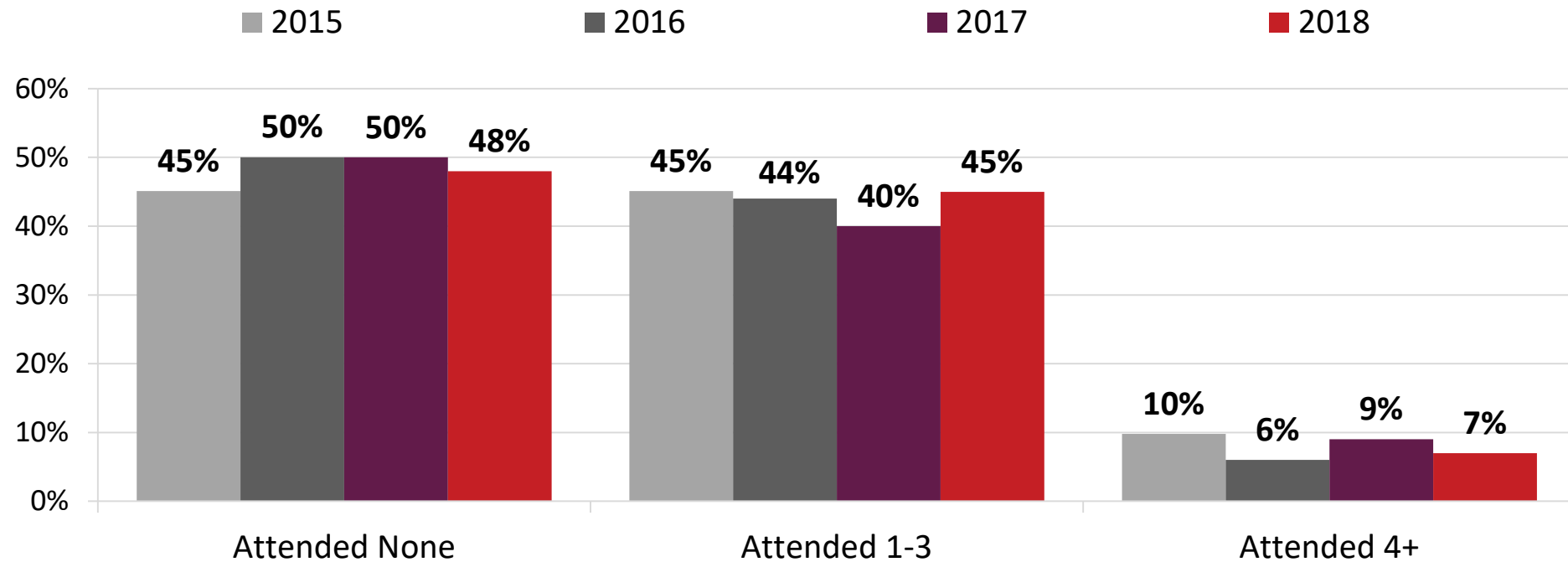


Time Spent on an Average Workday: 15+ Minutes Per Day



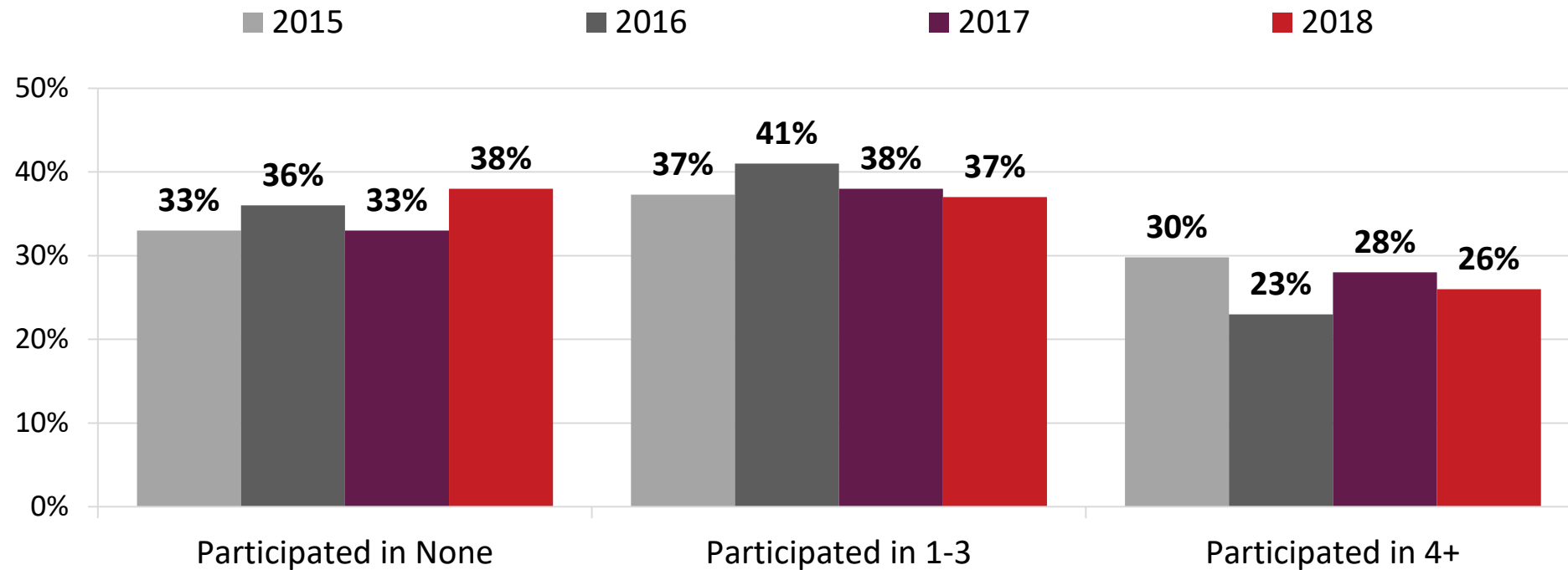
TREND 2015-2018

Event Attendance in Past 12 Months



TREND 2015-2018

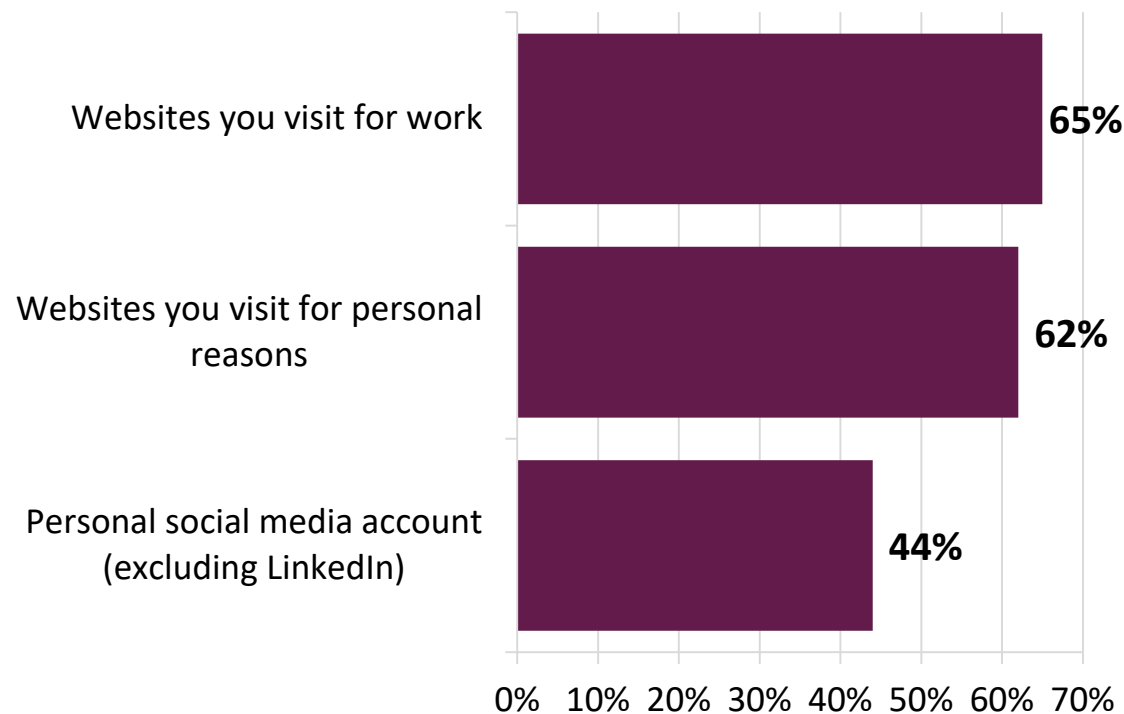
Webinar Participation in Past 12 Months



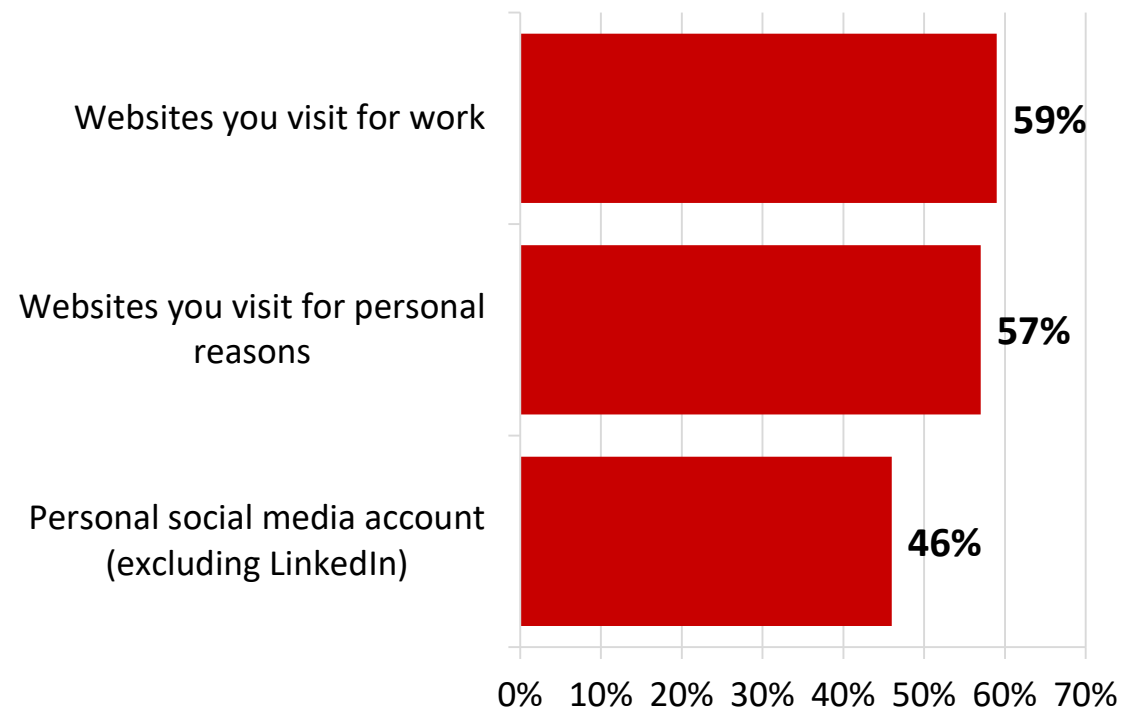
Work-Related Targeted Ads or Content Online

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Have Seen Work-Related Ads



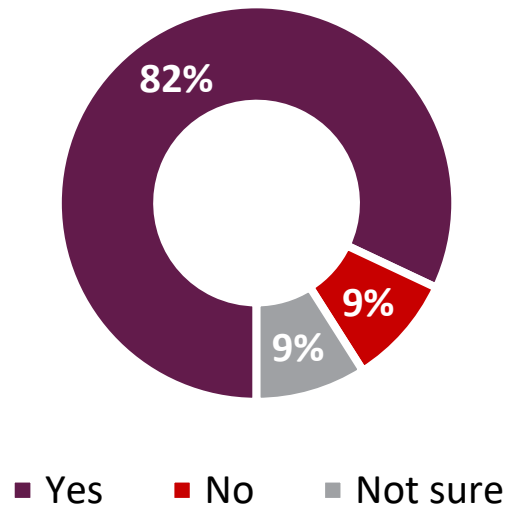
Have Clicked on Work-Related Targeted Ads



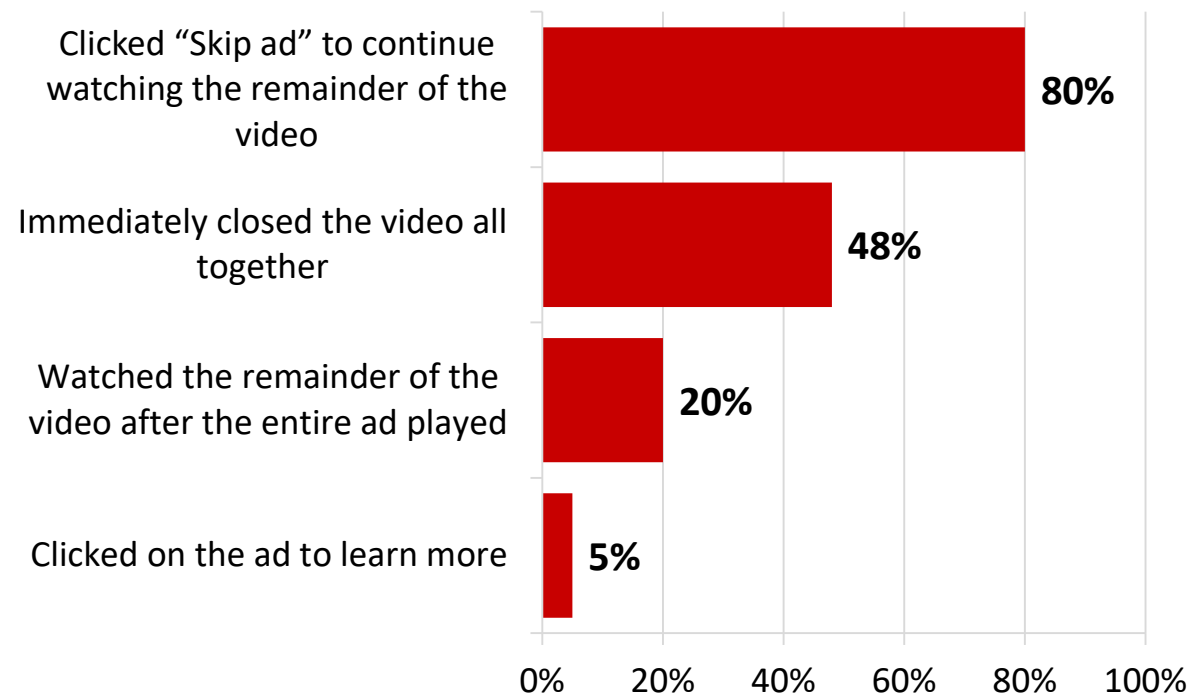
Advertising in the Middle of Online Videos

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2018

**Have Seen Advertising in
the Middle of an Online Video**



Action After Seeing the Advertisement





Media Habits in a Time of Change

Changing Environment

Looking at change and managing outreach



THE PROCUREMENT PROCESS

- Taking *LONGER*
- Getting more *COMPLICATED*
- Increasing *SHORTAGE* of trained procurement staff

MEDIA DOLLARS MUST BE ON TARGET

- Broad awareness
- Niche audience

Changing Environment

We need to look at our audience and not just the media source



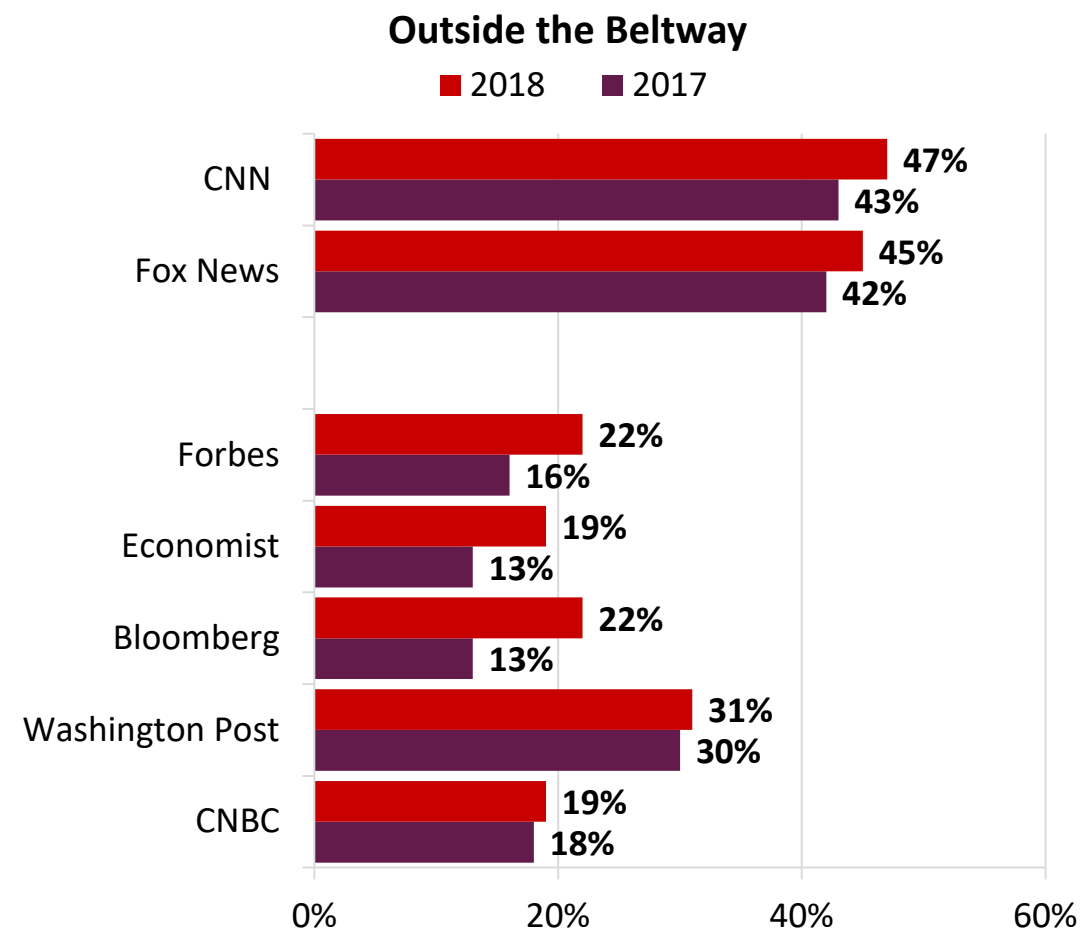
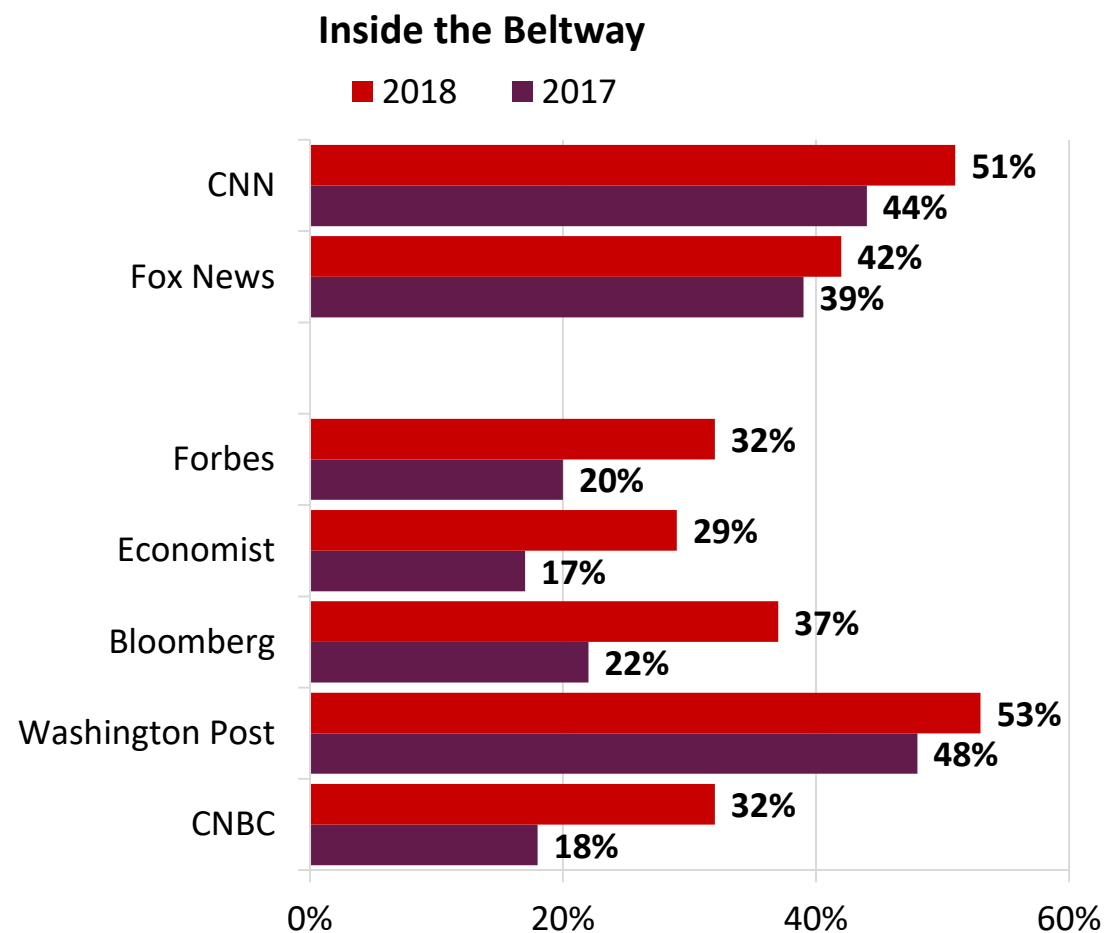
ENGAGEMENT

- Has federal executive engagement with the media changed?

LOCATION

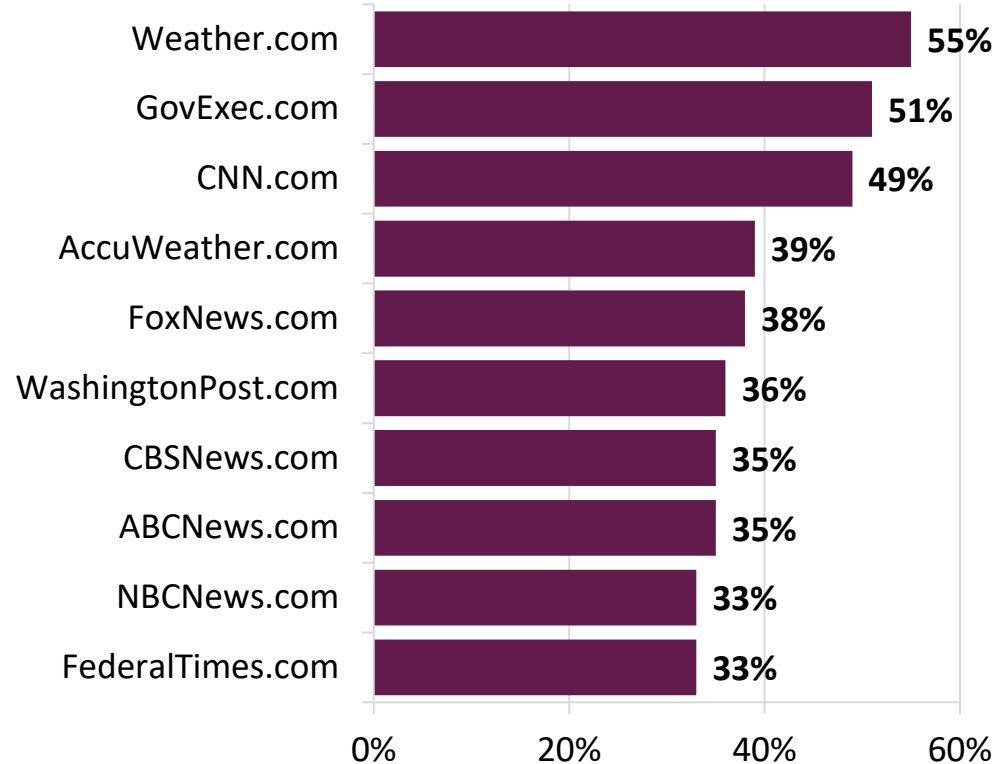
- Where they are located has a major impact on their preference for news

Digital Site Differences by Location

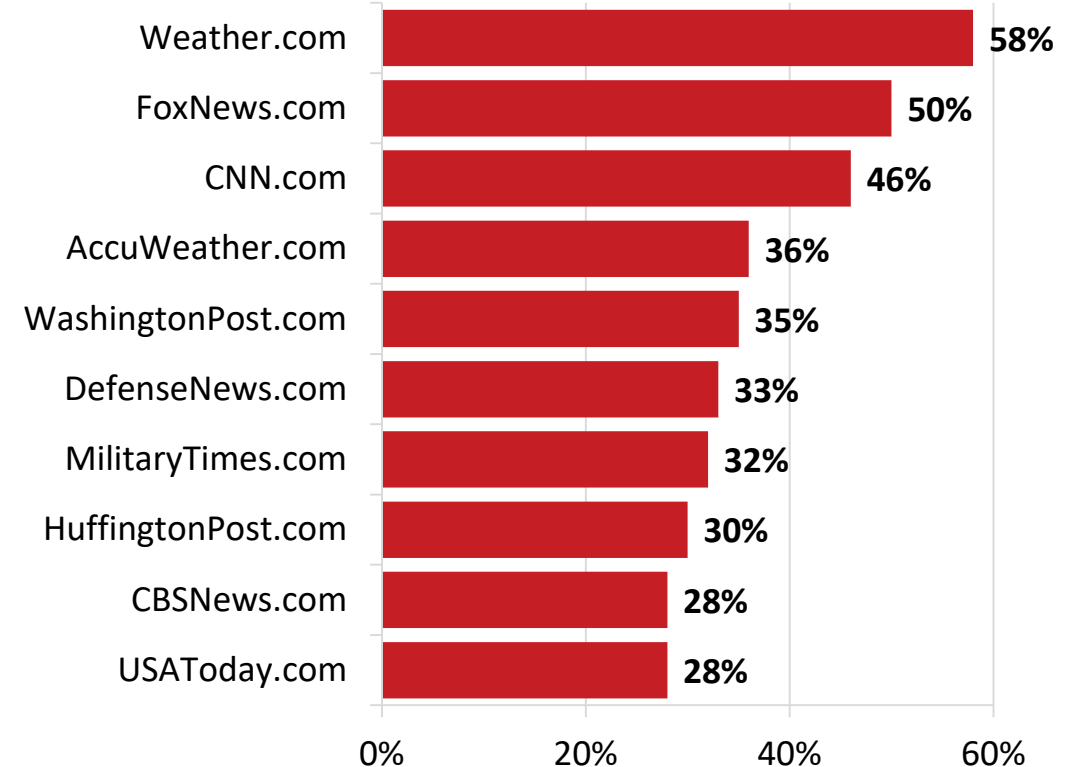


Top Digital Sites Visited by Agency Type

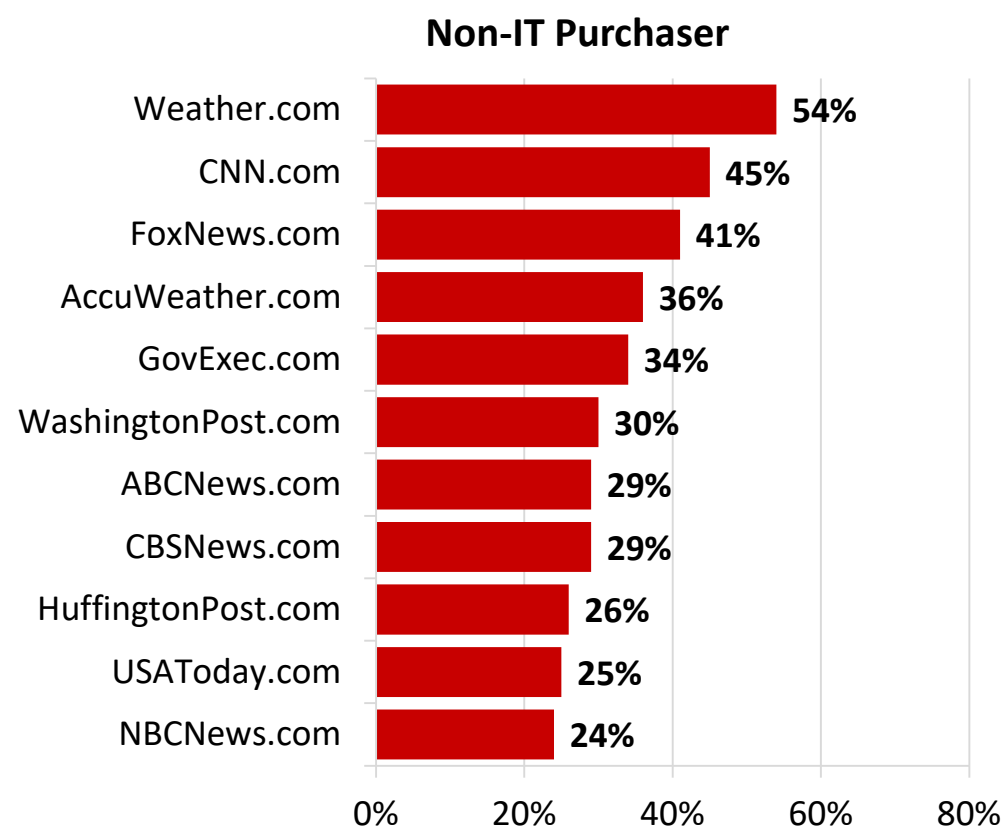
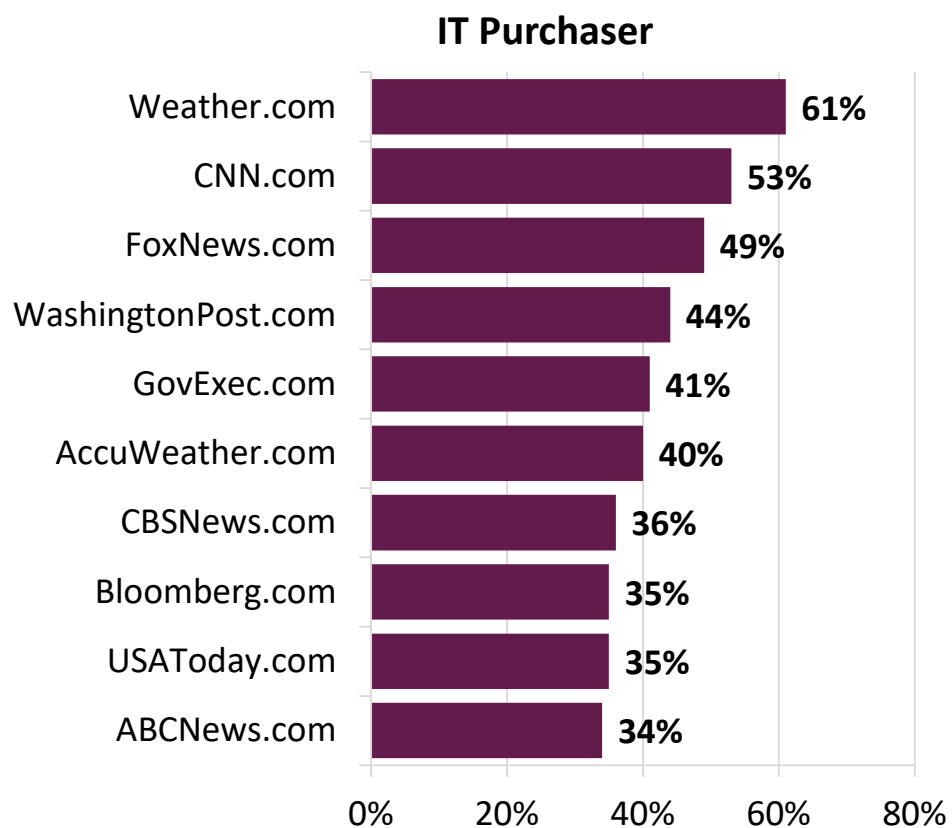
Federal Civilian or Independent Agency



Defense or Military Agency



Top Digital Sites Visited: IT vs. Non-IT





Federal Central

FEDERAL CENTRAL

Support for Your Strategic Marketing & Communications

- Build the foundation before the plan
- Includes the Federal Media & Marketing Study interactive media planning dashboard
 - Standard and customizable reports to define:
 - Where to reach your target audience
 - Which media to select
 - How to weigh your media options
- Additional unique Market Connections federal market studies, reports and information at your fingertips



**PURCHASE ACCESS TO
FMMS DASHBOARD**

[MarketConnectionsInc.com/
fmms2018study](https://MarketConnectionsInc.com/fmms2018study)



FEDERAL CENTRAL

Federal Media & Marketing Dashboard

- 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

