

February 13, 2019





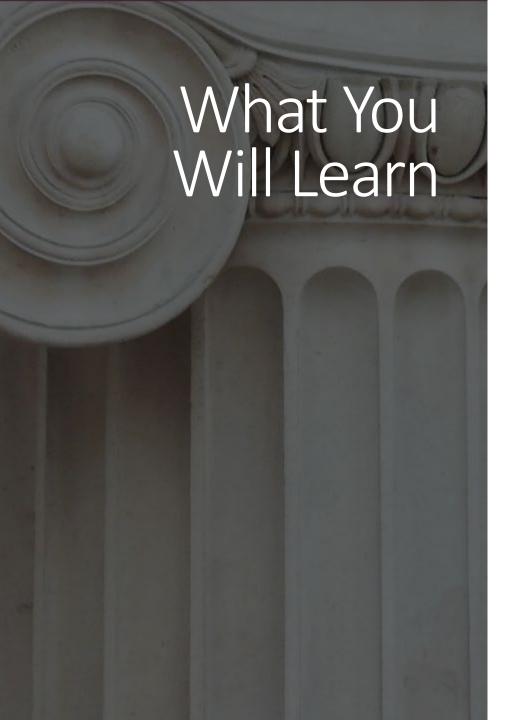
Moderator:
Mari Canizales Coache
Marketing Manager

Presenter:

Aaron Heffron
President









- Have the challenges of 2018 carried into 2019?
- What can B2C marketing tell us about the changing landscape?
- What has been the media evolution in the federal market?
- What resources are available to help?



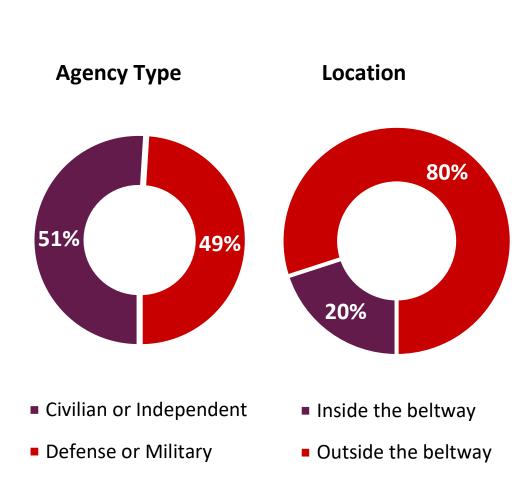


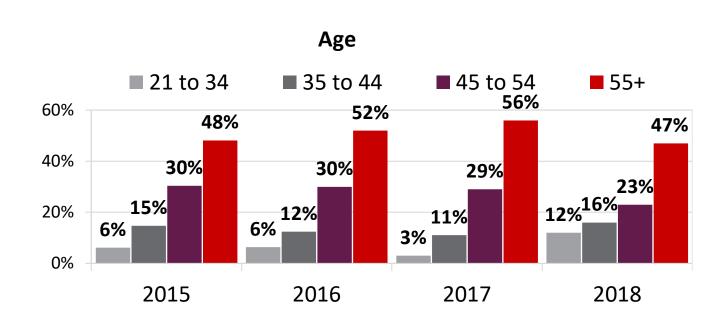
# What is the Federal Media and Marketing Study?

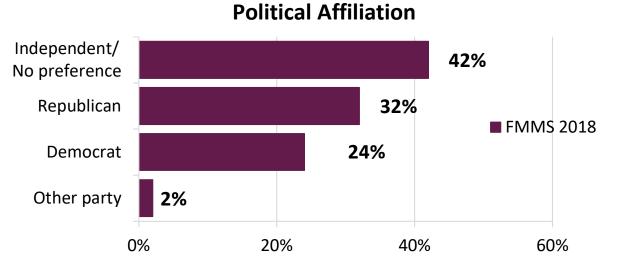
- Annual survey of federal employees since 2008
- Builds on surveys of tens of thousands of employees in civilian and defense agencies
- Comprehensive respondent base of decision-makers responsible for a wide variety of products and services
- Questions covering over 200 media outlets (including print, online and over-the-air) and other marketing channels/tools
- Survey fielded in June August, 2018



# Demographics







# 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





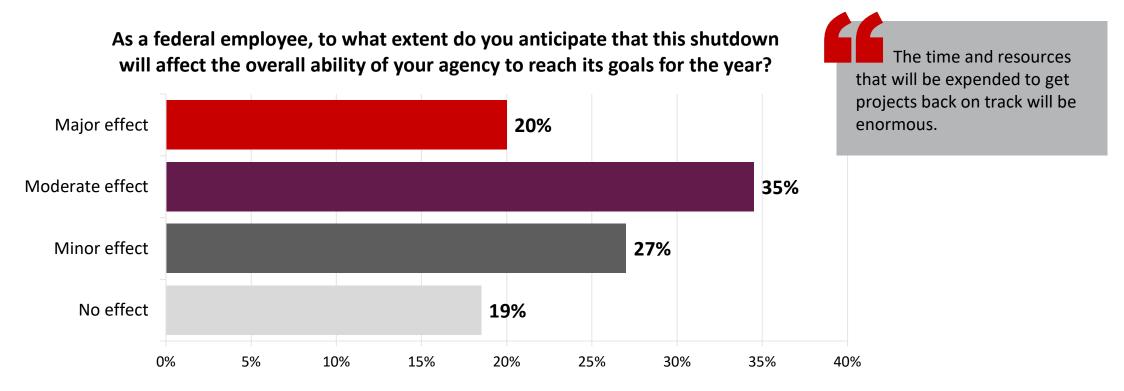






# Ability to Reach Agency Goals

Federal workers and federal contractors are going to have to work in partnership going forward given concerns about achieving goals, reduced scope and timelines.



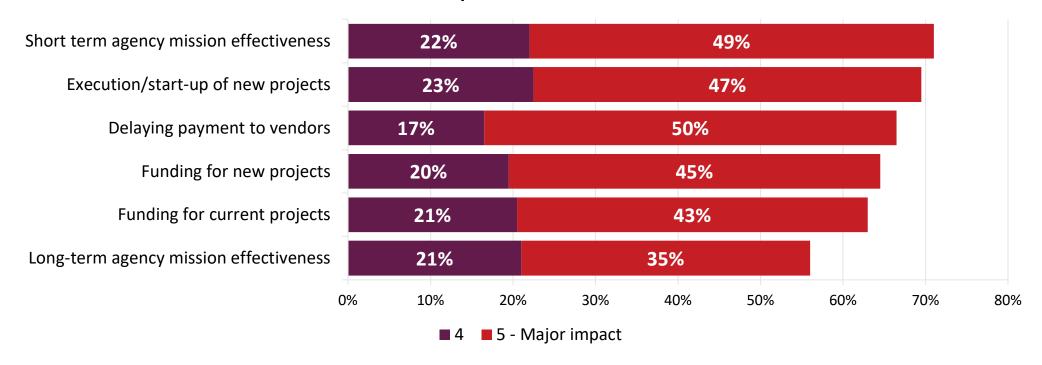
Source: 2019 Market Connections PulsePoll™: Delivering on Mission? Effects of the 2019 Government Shutdown



# Agency Effectiveness

Top impacts of this shutdown include short term agency mission effectiveness and the execution/start-up of new projects. Payment and funding for new and current projects may also be impacted.

#### Impact of shutdown

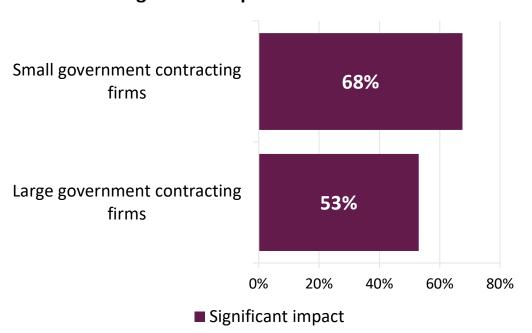


Source: 2019 Market Connections PulsePoll™: Delivering on Mission? Effects of the 2019 Government Shutdown

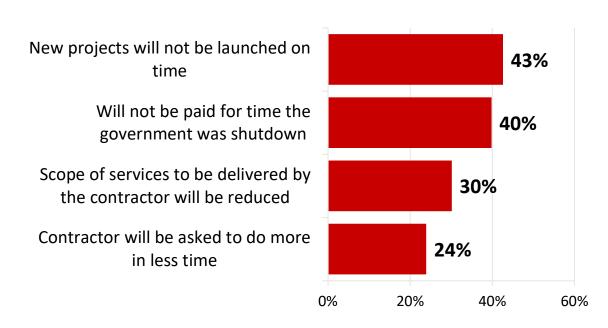
# Significant Impact on Contractors

Contractors are going to have to be prepared to deliver more with less and be ready to take on work with shorter timelines with a chance they will not be paid for this past month's work.

#### **Significant impact on contractors**



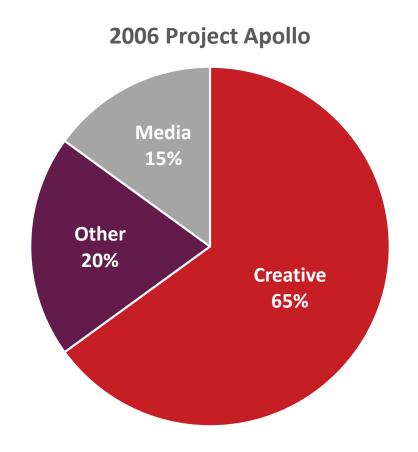
#### How will contractors be affected by the shutdown?

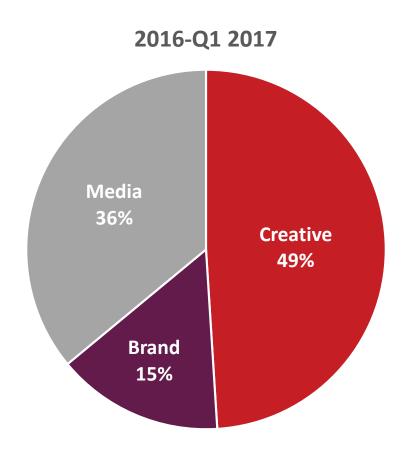


Source: 2019 Market Connections PulsePoll™: Delivering on Mission? Effects of the 2019 Government Shutdown



### Percent Sales Contribution: Creative vs. Media



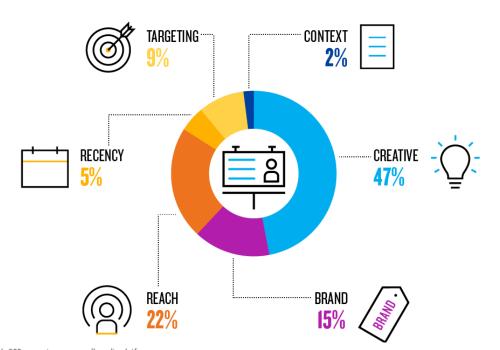


Source: Nielsen Catalina Solutions

# Why Are Eyeballs Important? A Lesson From the Consumer World

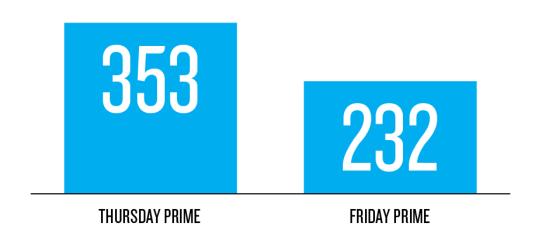
Creative is important in advertising, but even more important than a strong brand, is the reach you have and when you reach people.

#### PERCENT SALES CONTRIBUTION BY ADVERTISING ELEMENT



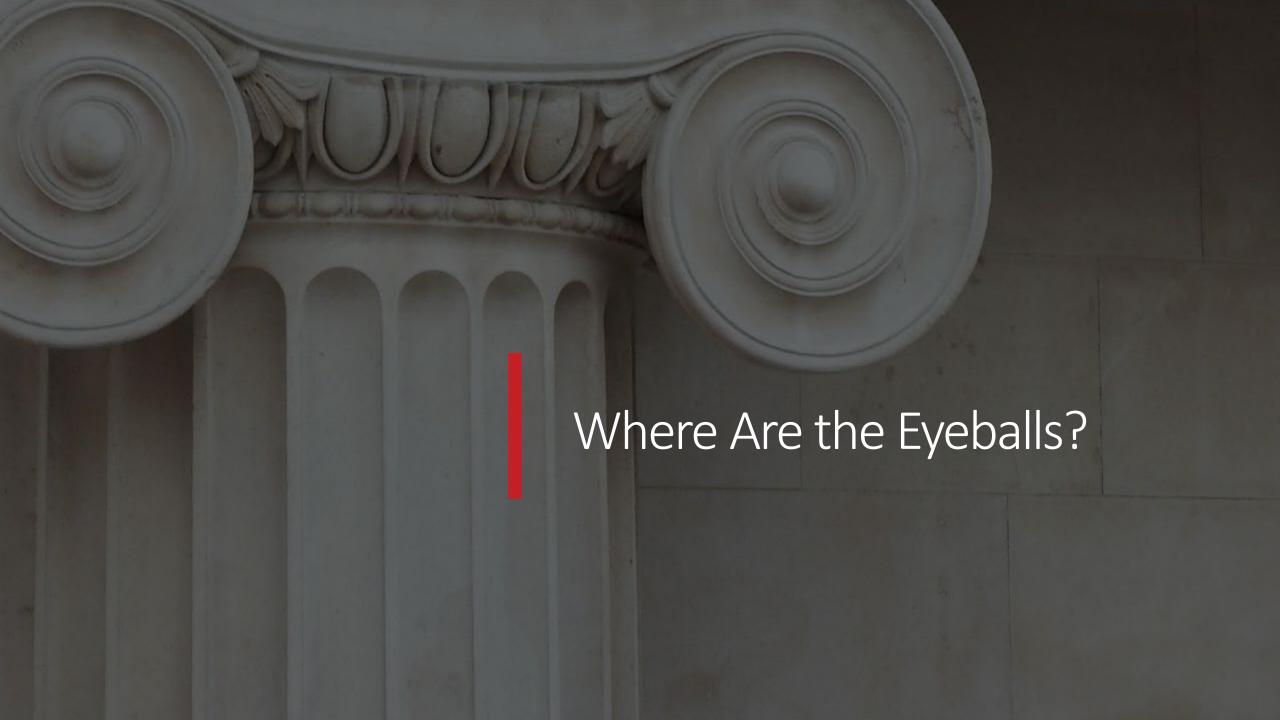
THURSDAY/FRIDAY PRIME DRIVES WEEKEND SALES

Sales Index vs. Any Other Programming



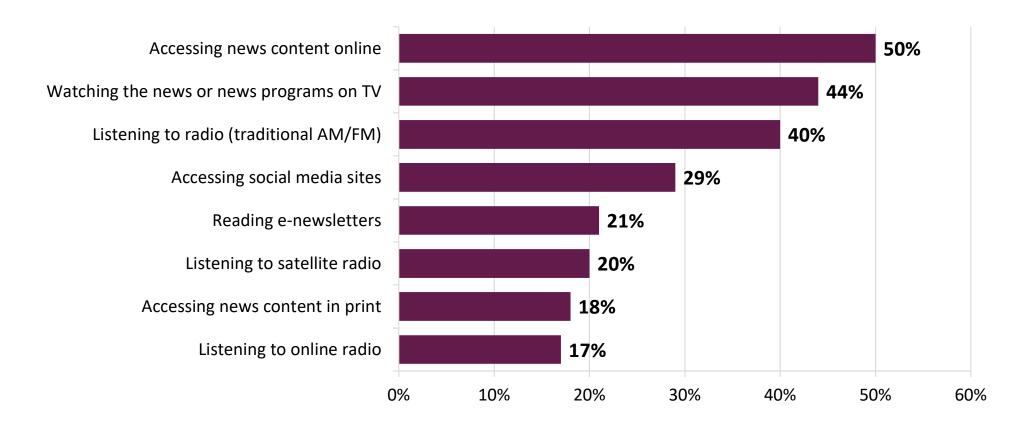
Note: Advertising lift measured on a 3-day rolling exposure window. Thursday/Friday Prime does not include: News, Sports, Children's or Spanish Language
Source: Nielsen

Nearly 500 campaigns across all media platforms Source: Nielsen Catalina Solutions © 2017; Period 2016-Q1 2017



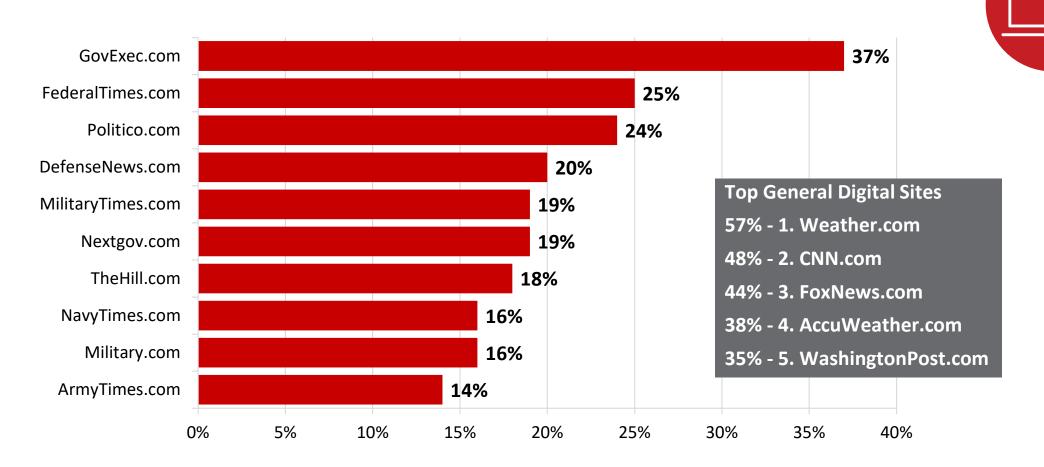
## Time Spent on an Average Workday: 15+ Minutes Per Day

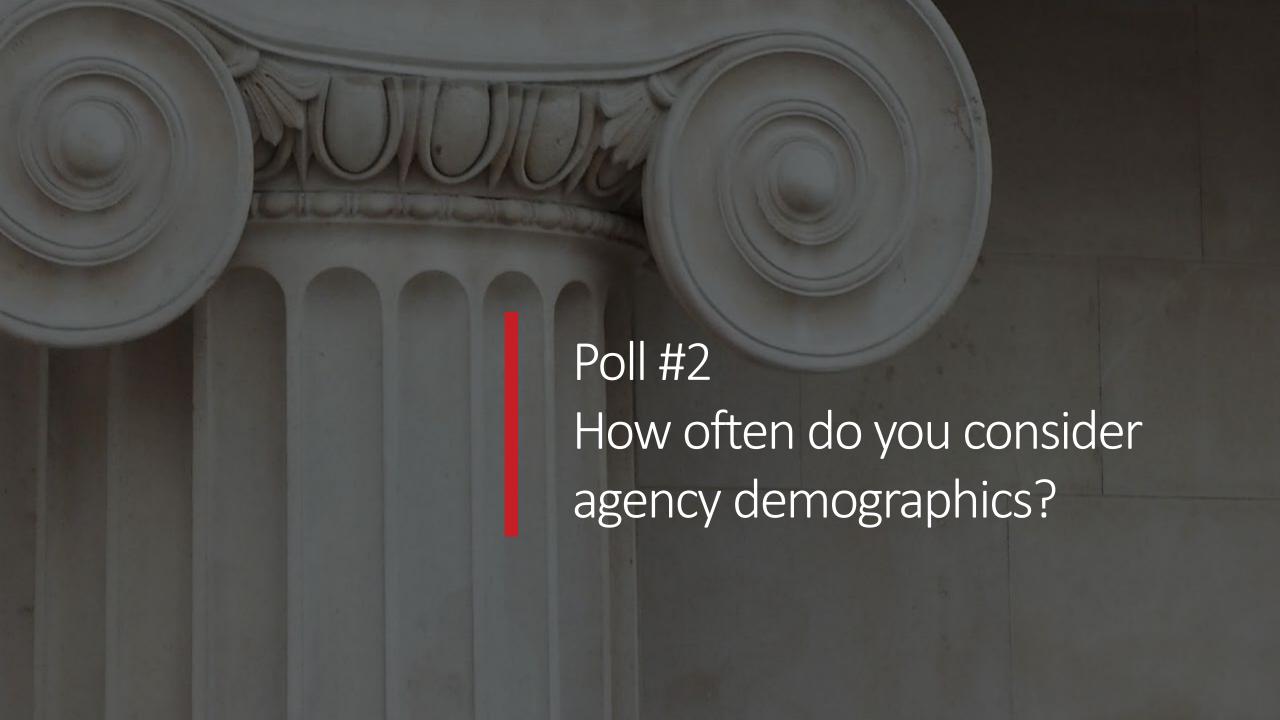
With Feds accessing news, social media and radio online, marketers need to strongly consider these channels.





# Top Federally Focused Digital Sites Visited

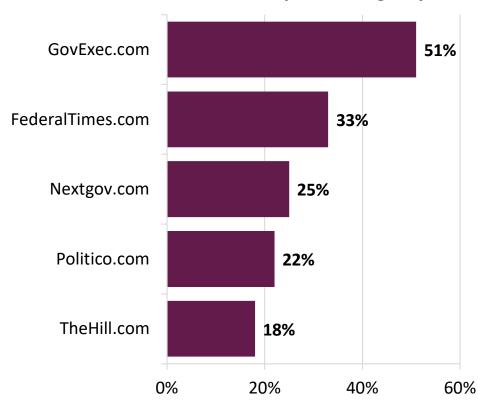




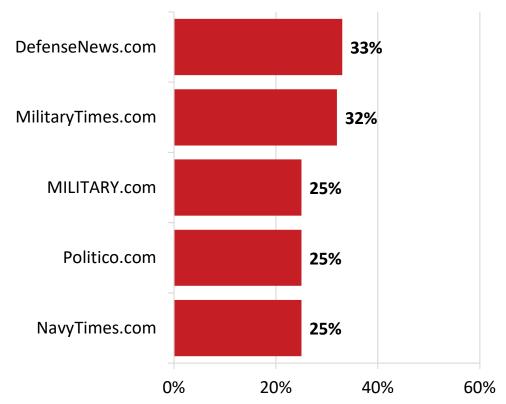
# Top Five Federal Digital Sites Visited by Agency Type



#### **Federal Civilian or Independent Agency**

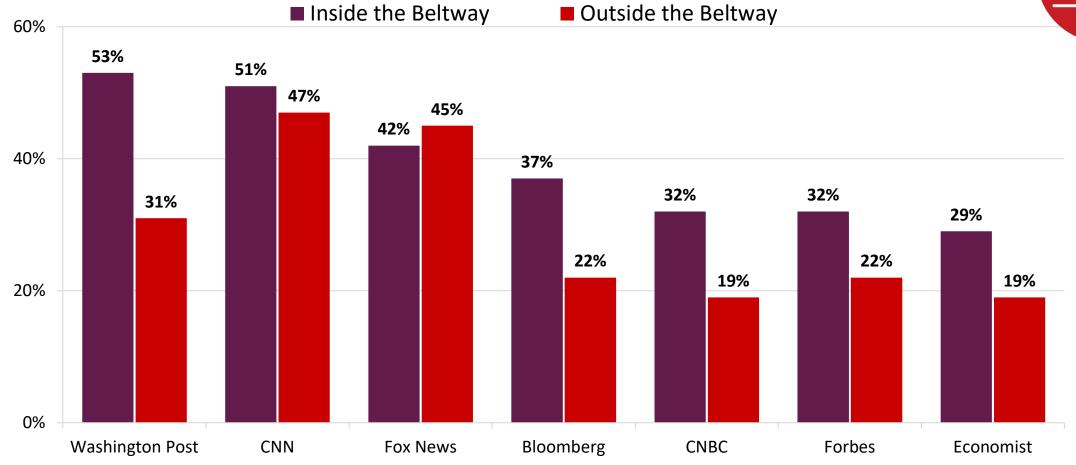


#### **Defense or Military Agency**

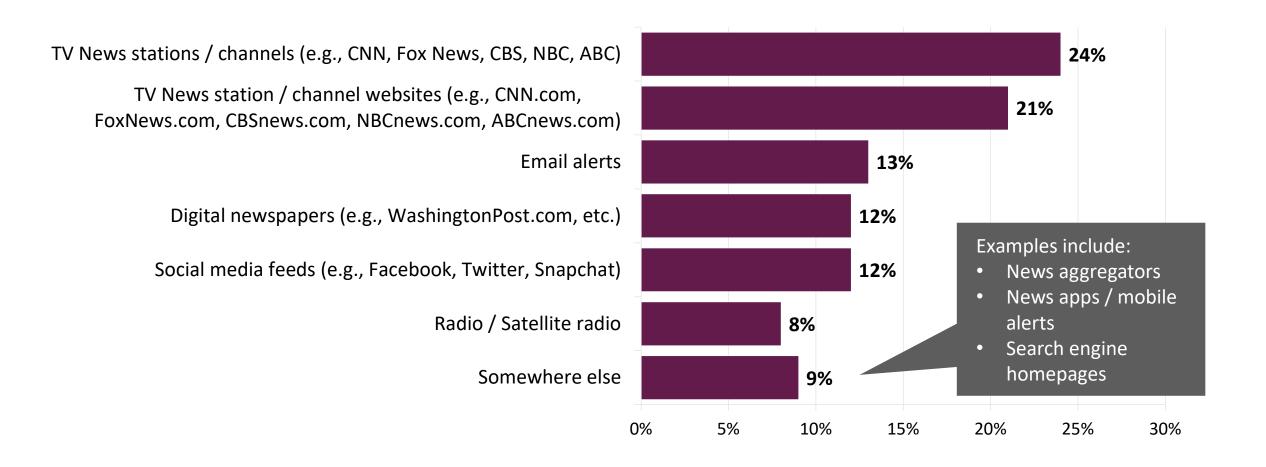


## Digital Site Differences by Location





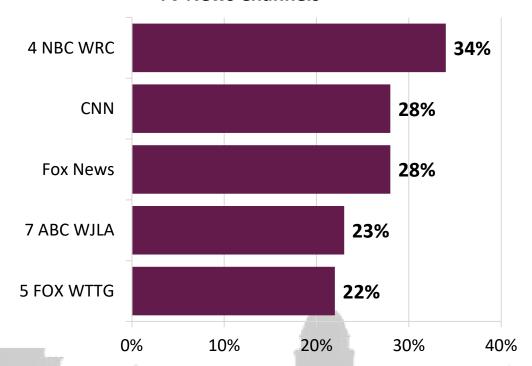
## Go-To Source for Breaking News

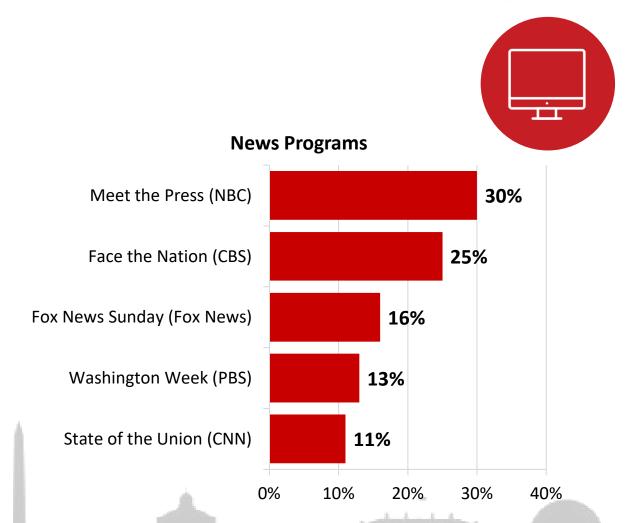


#### DC METRO AREA

## TV News Top Five

#### **TV News Channels**

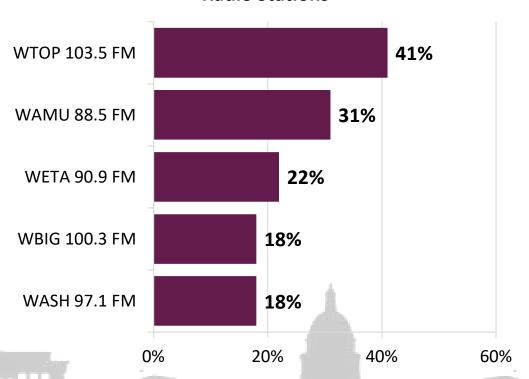


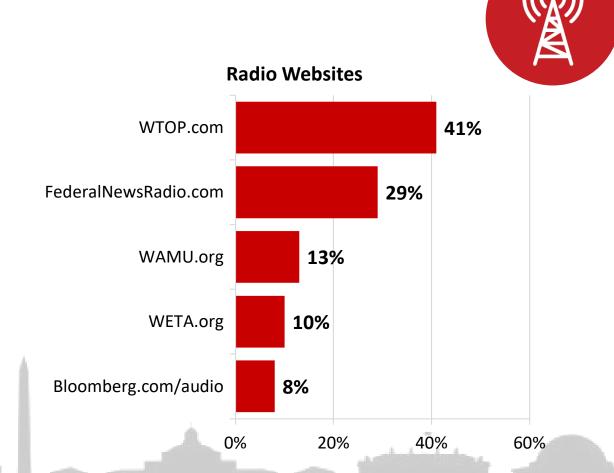


#### DC METRO AREA

# Radio Top Five

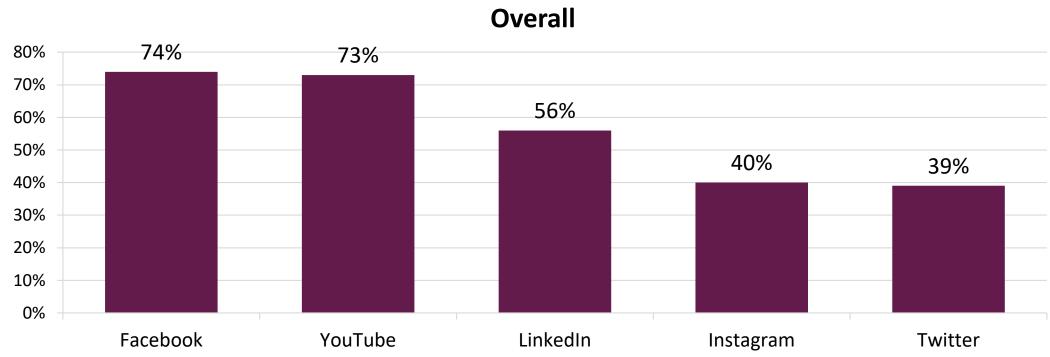
#### **Radio Stations**





# Top Online Social Sites

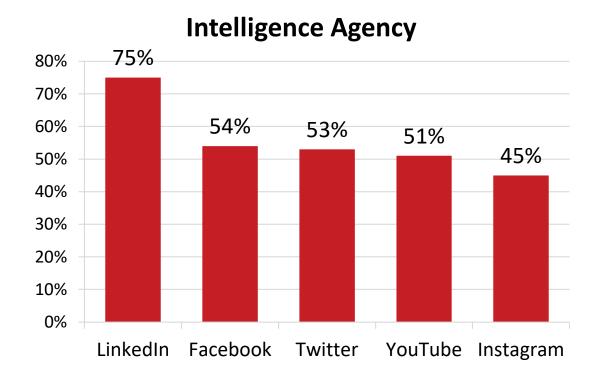




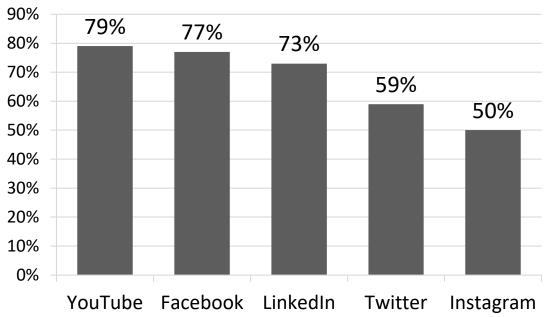
## How Are Specific Demographics Using Social Media?







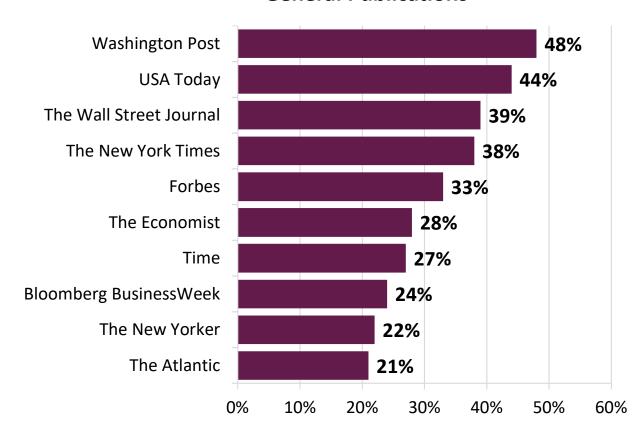
#### **Cloud Computing Purchasers**



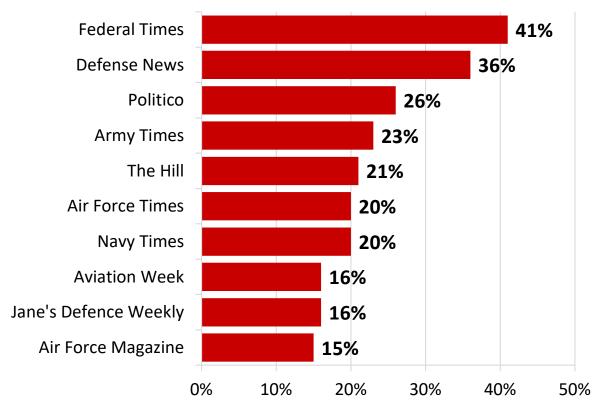
# Top Print Publications Read



#### **General Publications**

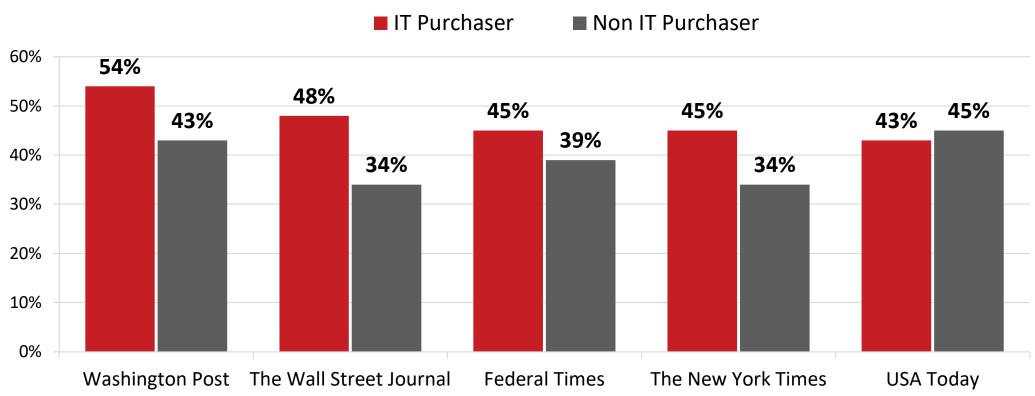


#### **Federal Publications**



## Top Five Print Publications: IT vs. Non-IT Purchasers











- Market to the Mission (and how you can get them there.)
- Master your Media Metrics.
- M anage and M easure your brand.



# Download the Overview

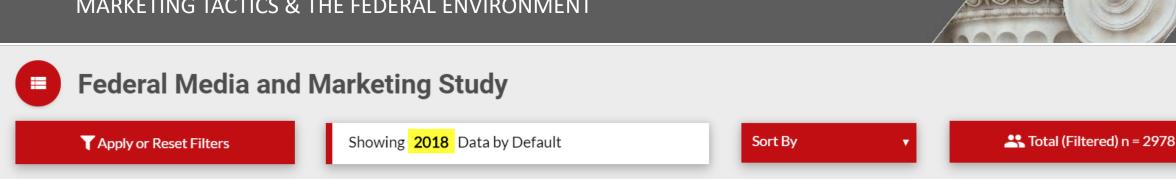
To download the entire Federal Media & Marketing Study Overview from the breakfast visit:

marketconnectionsinc.com/fmms2018study

# Federal Central

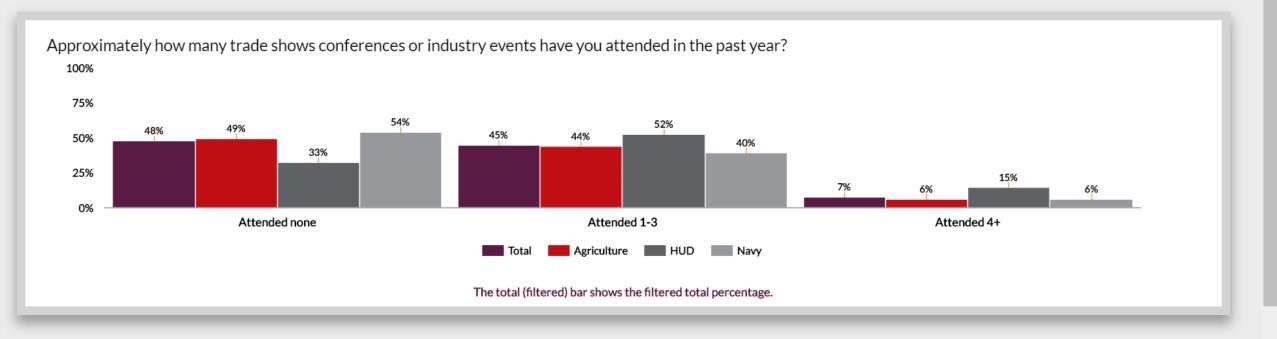
Support for Your Strategic
Marketing & Communications
marketconnectionsinc.com/
fedcentral

- Build the foundation before the plan
- Includes the Federal Media & Marketing Study interactive media planning dashboard
- Additional unique Market Connections federal market studies, reports and information



Click here to download data (data visible on this page will be downloaded)

TChange Selection Options Here..



# Join Us

PART THREE of the Federal Media & Marketing Study webinar series:

Confidence, Trust & Its Impact on Federal Marketing

Thursday, March 14, 2-2:30 p.m. EST

To Register:

https://bit.ly/2SsoXs8





#### **Aaron Heffron**, *President*

aaronh@marketconnectionsinc.com 703.966.1706

#### Mari Canizales Coache, Marketing Manager

maric@marketconnectionsinc.com 703.972.5893

