



Market Connections
Research you can act on.

2012 Federal Media and Marketing Study Overview

April 12, 2012 | Fourth Annual Release

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Contents

- Study Goals and Background
- Methodology and Survey Topic Areas
- Study Highlights

Goals

- **Provide a single independent source of survey data that will:**
 - Assist companies targeting the federal government in developing marketing plans and guiding media placement
 - Help media outlets assess their position alongside both traditional and new media options
- **Provide instant access to all data with an easy-to-use online analytic tool.**

Expanded Topics

- **Mobile:** Exactly which mobile sites are federal executives visiting?
- **Tools:** Which hand-held devices are used most for accessing email, websites, video, social and other media?
- **Blogs:** Which are the most popular federal-focused blogs?
- **Job functions and purchase categories:** Cloud computing, Cybersecurity and Health IT have been added this year.



Survey Background

Background

What tools do we currently have to measure and compare media options in the federal market?

PRINT

- BPA/ABC statements qualify “receivership”
- Subscriber studies

WEB SITES

- Third party ad servers and measuring companies

Traditionally, the media community has had to evaluate *all* of these information sources *separately* for the federal market.

Methodology

- **Comprehensive respondent base**
 - 12 publications
 - Market Connections' proprietary databases
 - Associations and other websites
- **Over 109,000 unique email addresses**
- **Online survey fielded in January 2012 – March 2012**
- **Sample size: Over 3,700**
- **Data weighted to ensure publications were not over- or under-represented in sample**

Respondent Base

Armed Forces Journal

Aviation Week & Space
Technology

C4ISR Journal

Defense News

Defense Systems Magazine

Defense Technology International

DODBuzz.com

Federal Computer Week

Federal Times

Government Computer News

Government Executive

Government Security News

HSToday

Military.com

NCMA.org

Market Connections' databases

Topics Covered

DEMOGRAPHICS:

- Agency
- Location
- Age
- Gender
- Education
- Grade/rank

JOB FUNCTION

PURCHASE RESPONSIBILITY

TRADE SHOW, VIRTUAL TRADESHOW, WEBINAR ATTENDANCE

MEDIA USAGE INCLUDING:

- Print
- Web sites
- Blogs
- Social media
- Mobile sites
- DC Metro newspapers
- DC Metro radio
- DC Metro radio websites
- DC Metro TV news stations

Job Function

Accounting, budget and finance
Administration and office services
Aviation services/operations
Communications/telecommunications
Cloud computing
Cybersecurity
Engineering/architecture
Energy and environmental
Emergency response, safety
Executive and command
Facilities, real estate
Forestry, wildlife and environment
Health IT
Human resources, personnel, benefits

Information tech., computers, systems
Intel/ security
Law enforcement/ public safety
Legal, law, patent, copyright
Logistics
Maintenance and repair
Medical, health
Project/program management & admin.
Purchasing, contracting, procurement
Scientific, mathematics, R&D
Social sciences, welfare
Training, education

Note: Red text indicates new categories

Product and Service Purchase Categories

| | | |
|--|---|--|
| Aircraft | Engineering products and services | IT security |
| Aviation/aerospace products and services | Energy conservation products/services | IT services |
| Building/facilities/real estate/office space | Environmental engineering services | Law enforcement/fire/emergency |
| Command and control systems/C4ISR | Financial services | Legal services |
| Cloud computing services | Fleet or individual auto purchases/lease | Marketing/media services |
| Communications/Telecommunications | Furniture/furnishings | Office equipment, supplies |
| Computer systems/hardware | Ground maintenance | Ships and submarines |
| Consulting services | Health IT | Simulation/training equipment/services |
| Cybersecurity | Human resource services | Software |
| Defense comm. systems | Intel/ security | Travel services |
| Education/training classes and services | Laboratory, scientific and medical products | Weapons/combat systems |

Media Usage Details

- 39 publications
- 50 Web sites
- 15 Social media sites
- 37 Mobile sites
- 13 Blogs
- 16 DC Metro radio stations and their websites
- 10 TV news stations



Federal Publications

| | | |
|------------------------------------|---------------------------------|-------------------------------|
| Air Force Magazine | Federal Computer Week | Military Logistics Forum |
| Air Force Times | Federal Times | National Guard |
| Armed Forces Journal | Government Computer News | Naval Institute Proceedings |
| Army Magazine | Government Executive | Navy Times |
| Army Times | Government Product News | Seapower |
| Aviation Week and Space Technology | Government Security News | Security |
| Contract Management | Homeland Security Today | Security Management |
| C4ISR Journal | Jane's Defense Weekly | Signal |
| Defense News | Marine Corps Times | Special Operations Technology |
| Defense Systems | Military Engineer | The Officer |
| Defense Technology International | Military Information Technology | |

Note: Red text indicates new categories

Business & News Media Publications

Bloomberg BusinessWeek

Newsweek

Time

US News and World Report

USA Today

The Wall Street Journal

Washington Post



Federal Websites

| | | |
|-------------------------|----------------------|------------------------|
| AFCEA.org | FederalNewsRadio.com | NavyLeague.org |
| AirForceTimes.com | FederalTimes.com | NavyTimes.com |
| Armed ForcesJournal.com | GCN.com | NCMAHQ.org |
| ArmyTimes.com | GOV.AOL.com | Nextgov.com |
| AUSA.org | GovExec.com | NGAUS.org |
| AviationWeek.com | GovPro.com | ROA.org |
| C4ISRJournal.com | GSNMagazine.com | SAME.org |
| Defense.aol.com | HSToday.us | SecurityMagazine.com |
| DefenseNews.com | Janes.com | SecurityManagement.com |
| DefenseSystems.com | KMIImediagroup.com | USNI.org |
| DoDBuzz.com | MarineCorpsTimes.com | |
| FCW.com | MILITARY.com | |

Business & News Media Websites

Accuweather.com

BusinessWeek.com

CNBC.com

CNN.com

CSPAN.org

FoxNews.com

MSNBC.com

Newsweek.com

Time.com

USAToday.com

USNews.com

WashingtonPost.com

Weather.com

WSJ.com

WTOP.com



NEW THIS YEAR

Mobile Sites - Federal and General

ABC.com

AirForceTimes.com

ArmyTimes.com

AviationWeek.com

BloombergBusinessWeek.com

CBS.com

CNN.com

CNBC.com

CSPAN.org

DefenseNews.com

DefenseSystems.com

DoDBuzz.com

FCW.com

FederalNewsRadio.com

FederalTimes.com

FoxNews.com

GCN.com

GOV.AOL.COM

GovExec.com

GovPro.com

HLN.com

MarineCorpsTimes.com

MILITARY.com

MSNBC.com

NavyTimes.com

NBC.com

SecurityMagazine.com

Time.com

USAToday.com

USNews.com

WashingtonBusinessJournal.
com

WashingtonExaminer.com

WashingtonPost.com

WashingtonPostExpress.com
DC Rider

Washingtonian.com

WSJ.com

WTOP.com

Social Media – Federal and General

Discover

Facebook

Flickr

GSASInteract

GovLoop

GovTwit

LinkedIn

MySpace

Scribd

StumbleUpon

Twitter

Virtual Environments

Wikis

YouTube

Foursquare



Federal Blogs

The Best Defense

Dorobek Insider

FedBlog

Federal Daily

Federal News Radio

FedSmith

Federal Times

Government Executive

My Cup of IT

NextGov

Oh My Gov!

Project on Government Oversight
Blog

The TSA Blog



DC Metro Area

NEWSPAPERS/PUBLICATIONS WEBSITES & MOBILE:

Washington Post
Washington Times
Washington Examiner
Washington Post Express
Washingtonian Magazine
Washington Business Journal

TV NEWS STATIONS:

4 NBC WRC
5 FOX WTTG
7 ABC WJLA
9 CBS WUSA
News Channel 8 TBD
CNN
CNBC
HLN Headline News
Fox News
MSNBC



DC Metro Area Radio Stations & Websites

WAMU 88.5 FM

WETA 90.9 FM

WPGC 95.5 FM

WHUR 96.3 FM

WASH 97.1 FM

WMZQ 98.7 FM

WIHT 99.5 FM

WBIG 100.3 FM

WWDC 101.1 FM

WTOP 103.5 FM

WJFK 106.7 FM

WRQX 107.3 FM

WMAL 630 AM/105.9 FM

WTEM 980 AM

WFED 1500 AM

1067thefandc.com

federalnewsradio.com

mix1073fm.com

theedge1059.com

wmal.com

espn980.com

wamu.org

washfm.com

wbig.com

weta.org

whur.com

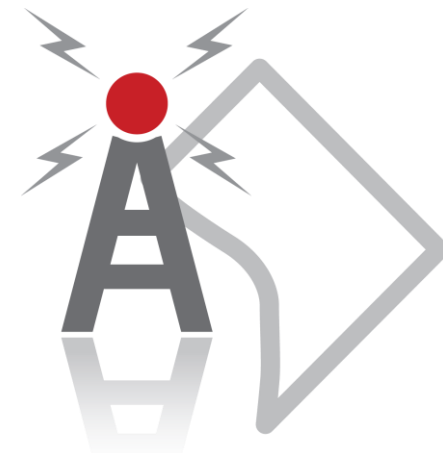
dc101.com

wmzq.com

wpgc.radio.com

wtop.com

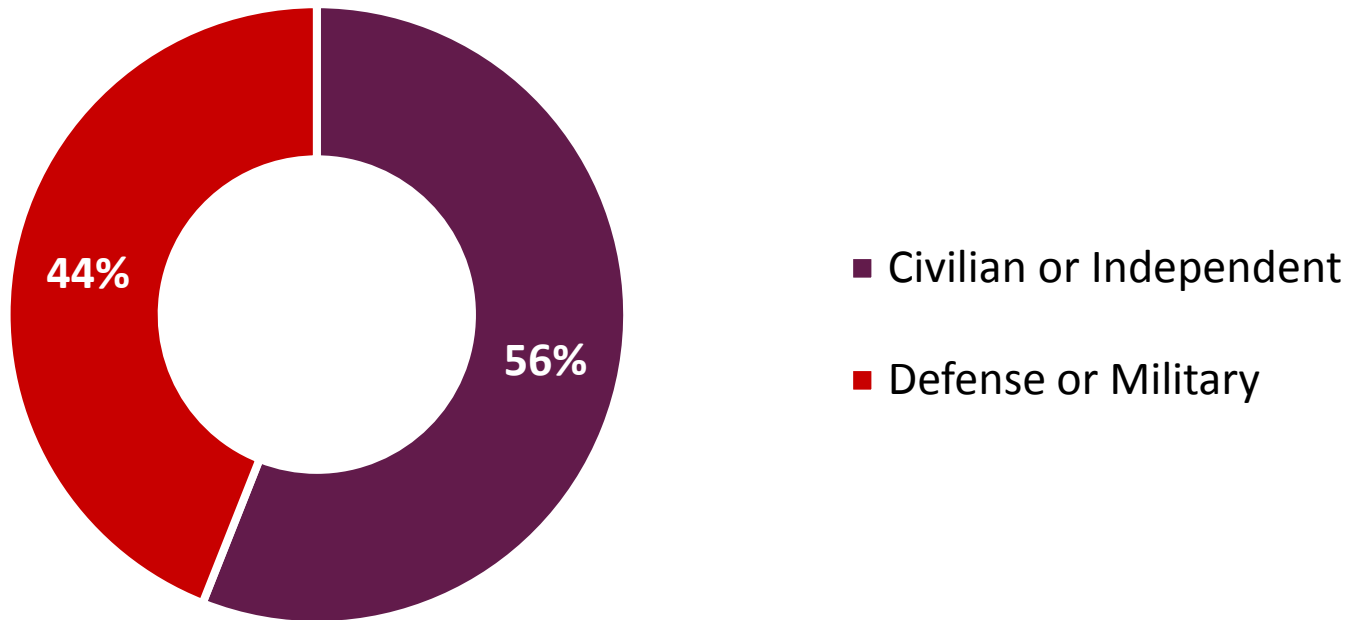
hot995.com



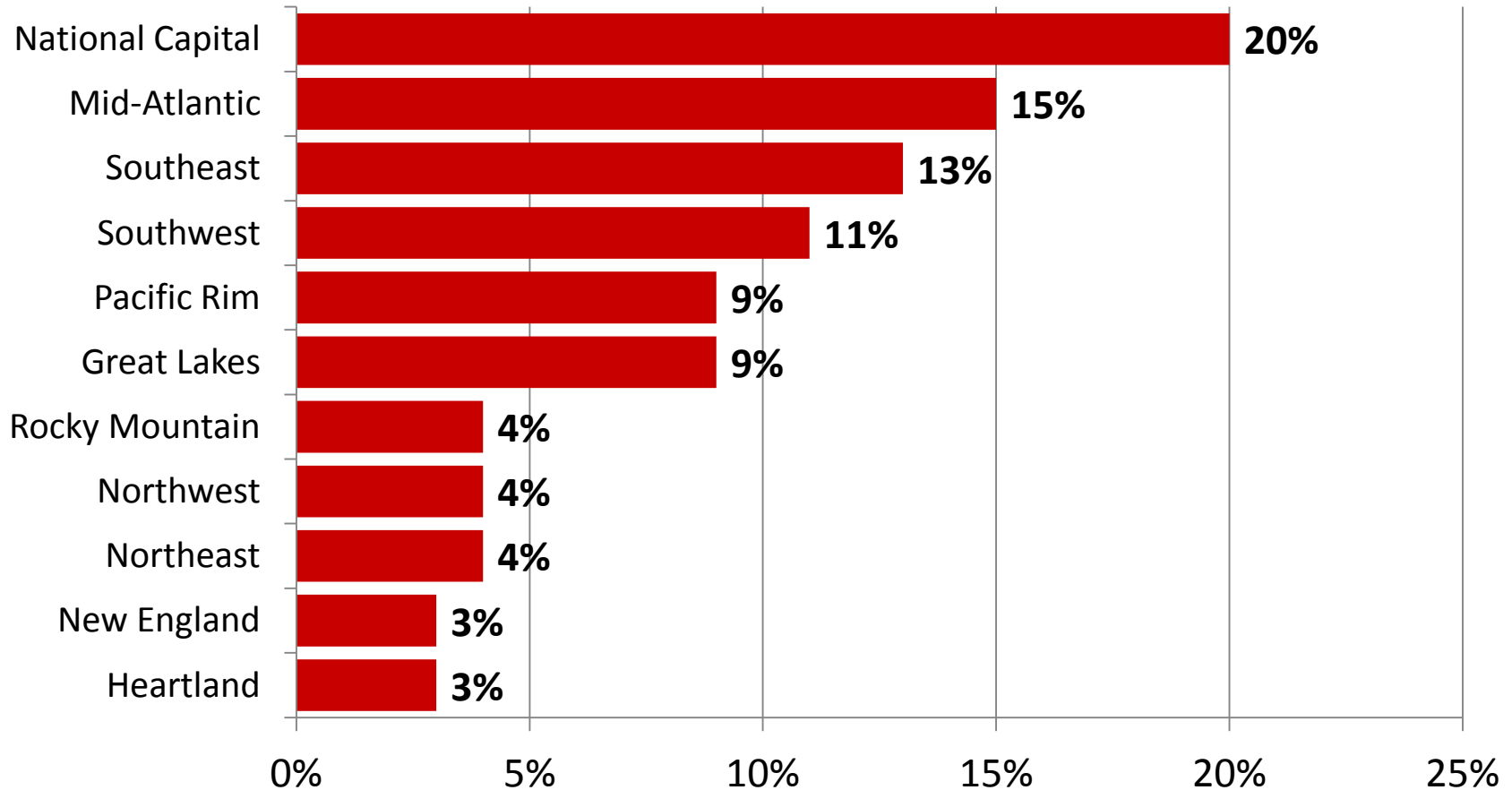


Study Highlights

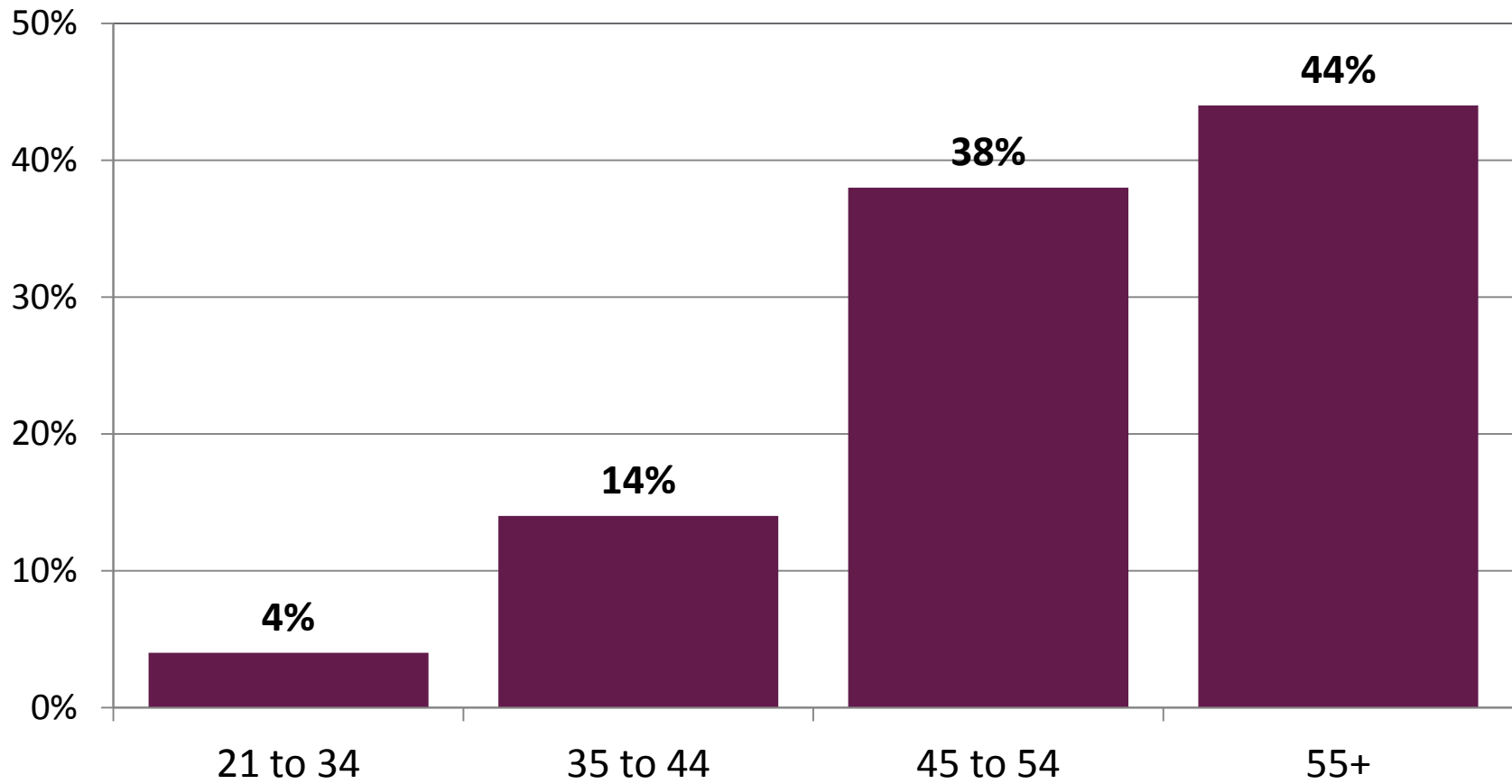
Demographics: Agency Type



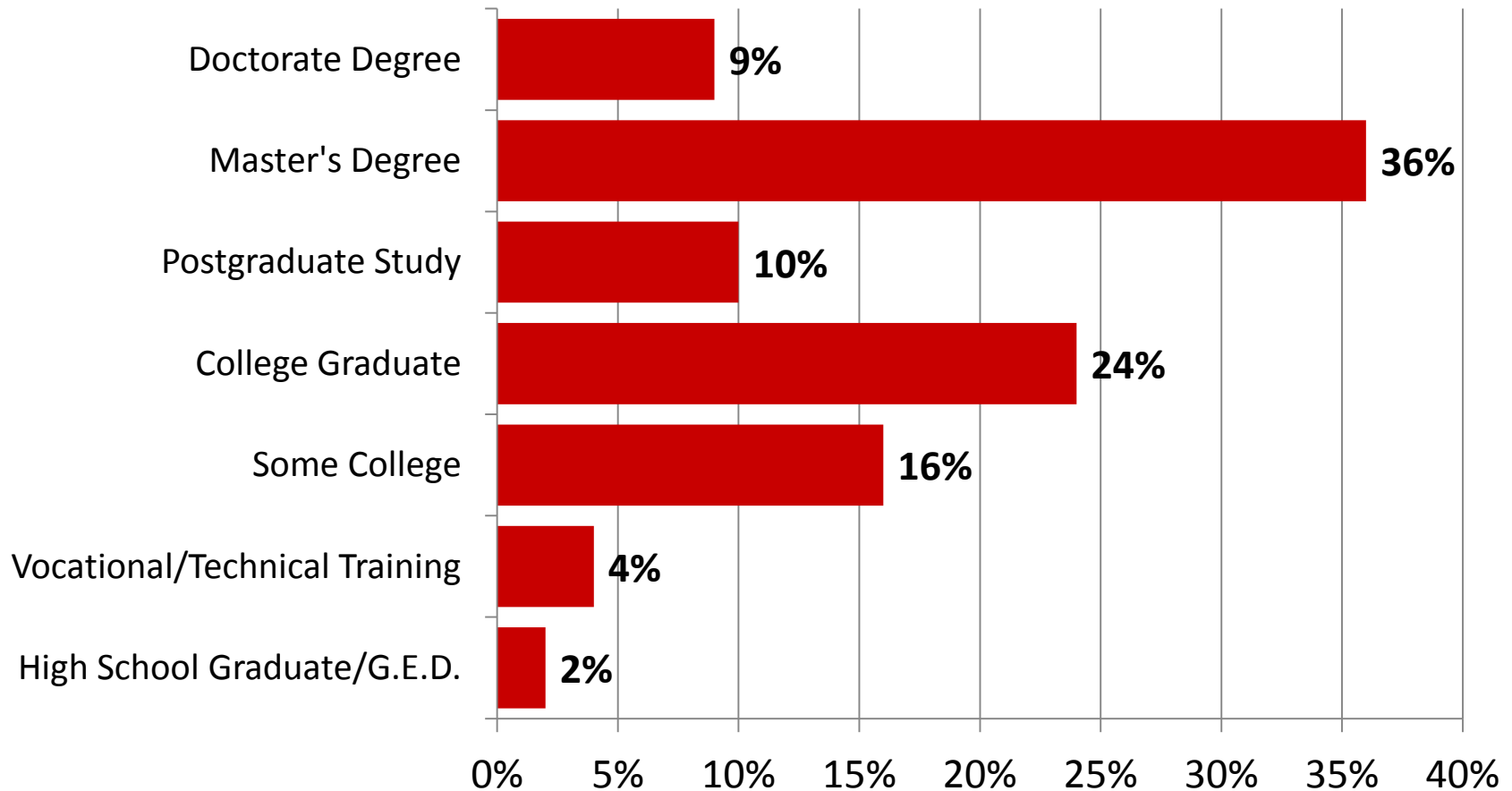
Demographics: GSA Region



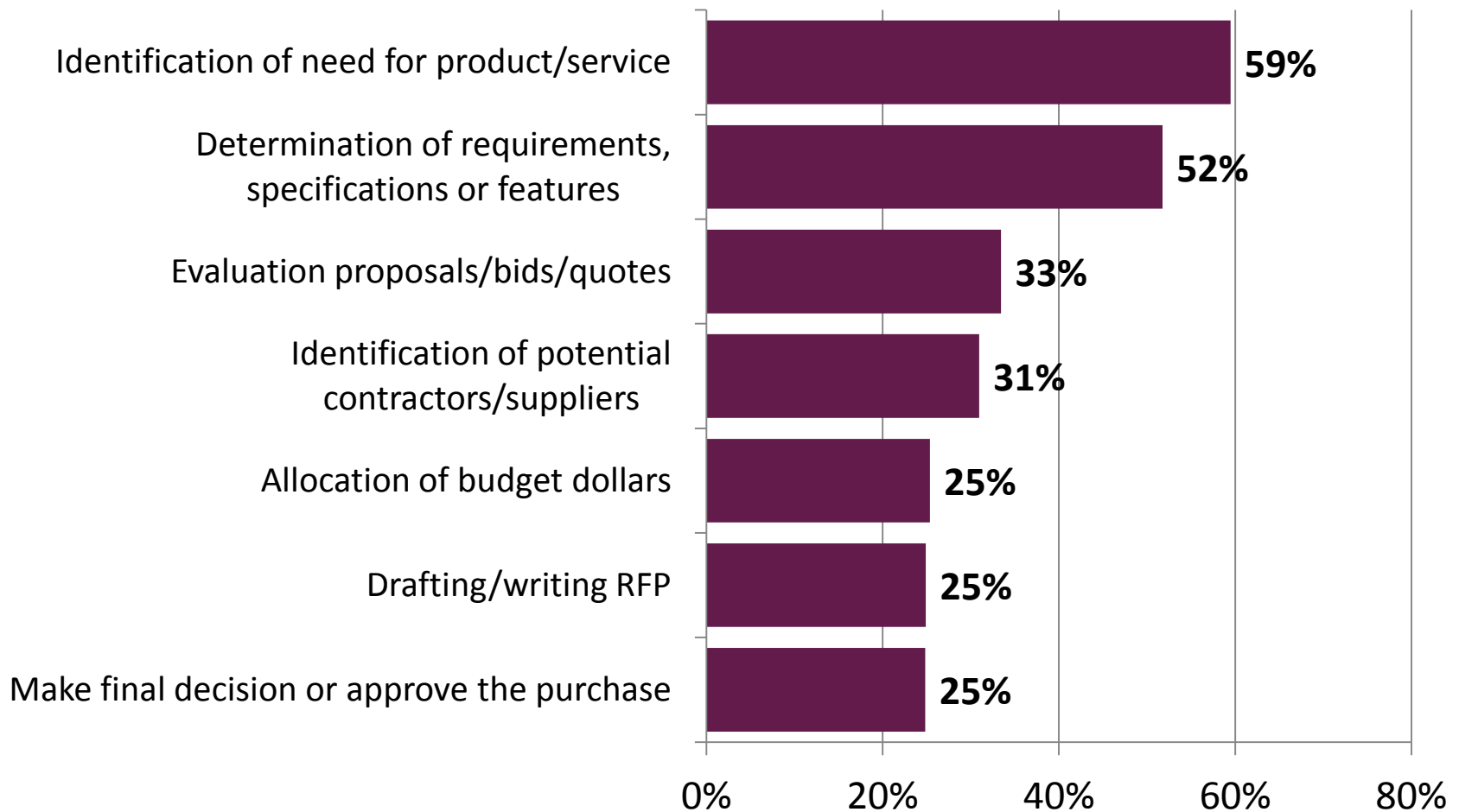
Demographics: Age



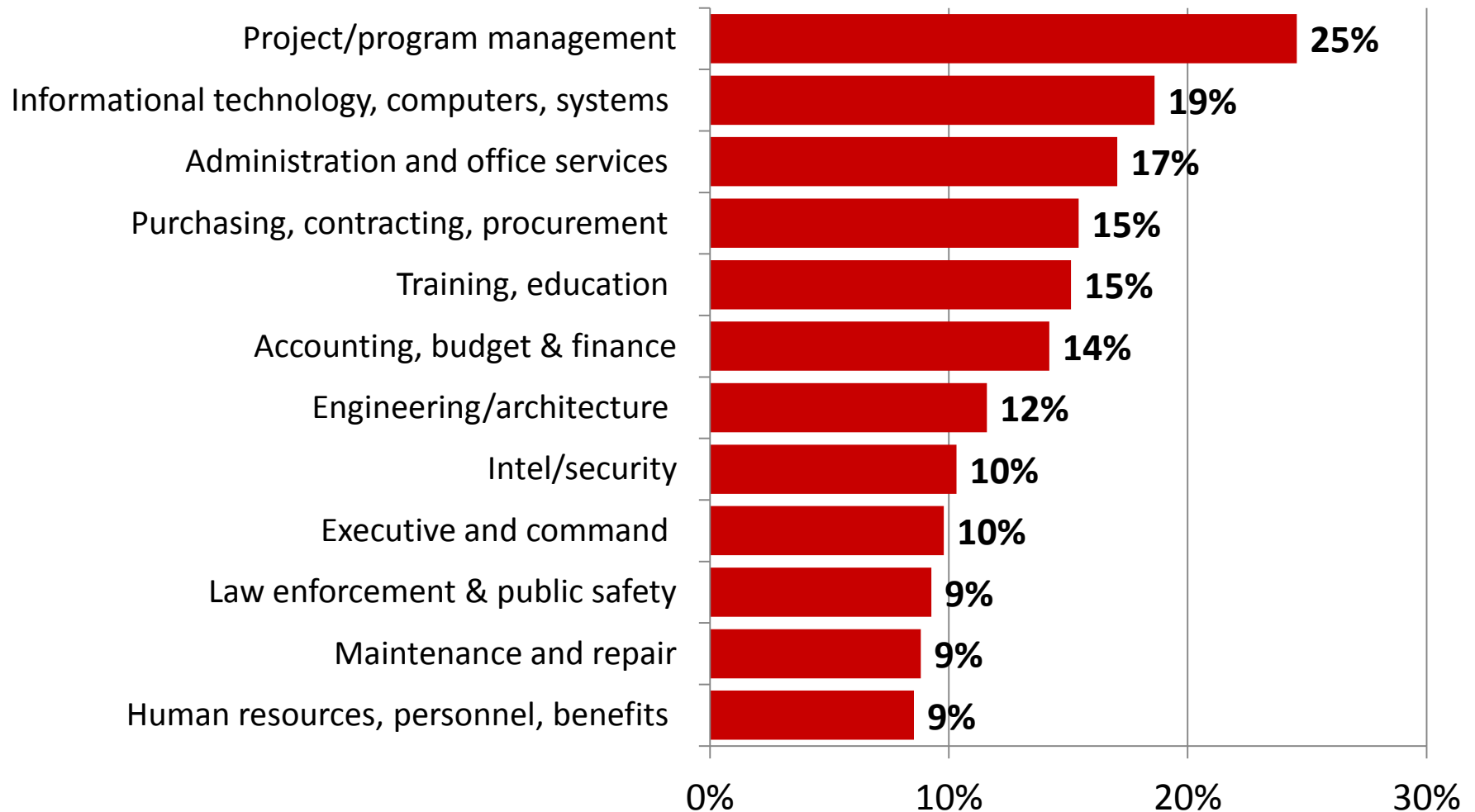
Demographics: Education



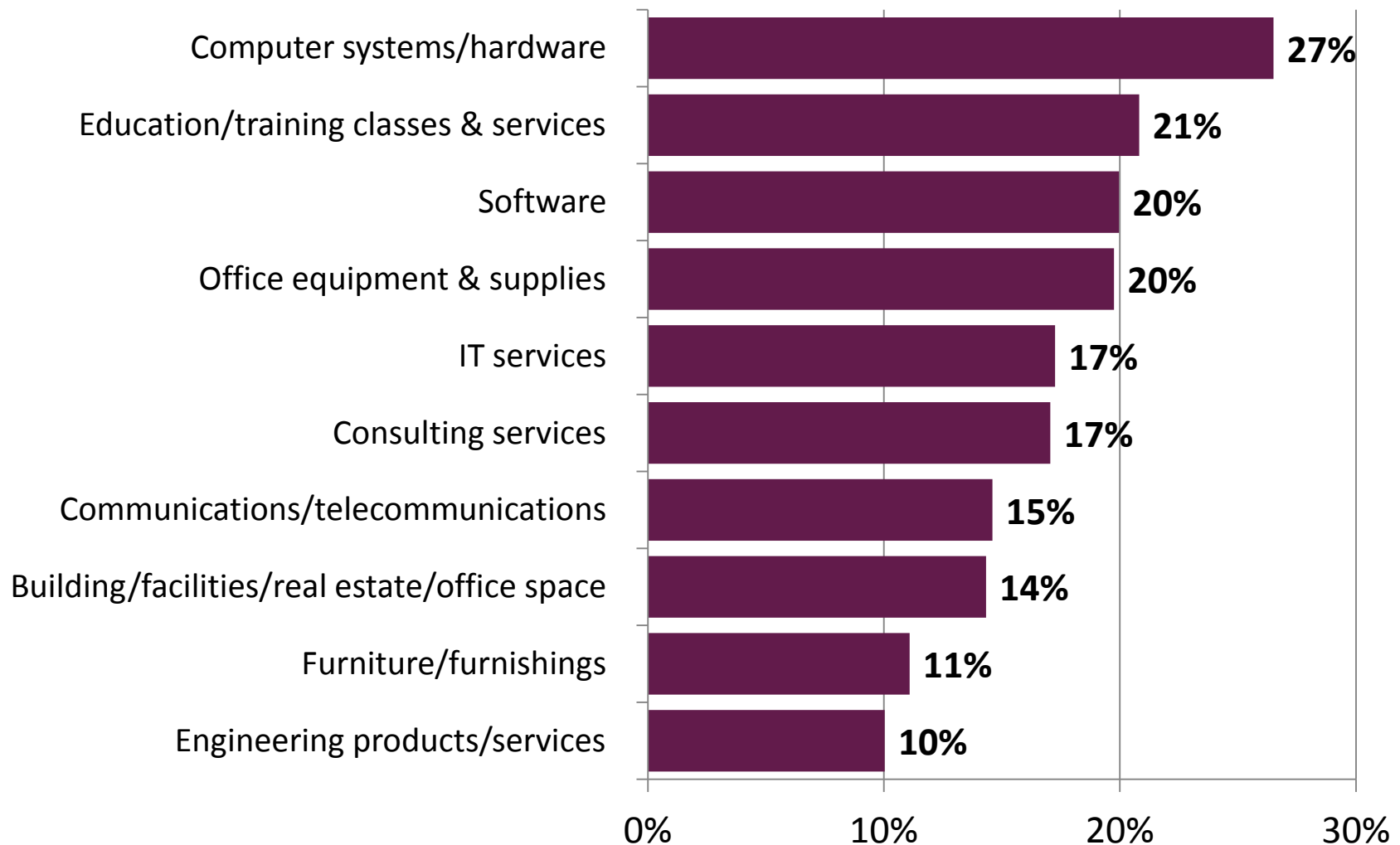
Involvement in Purchase Process



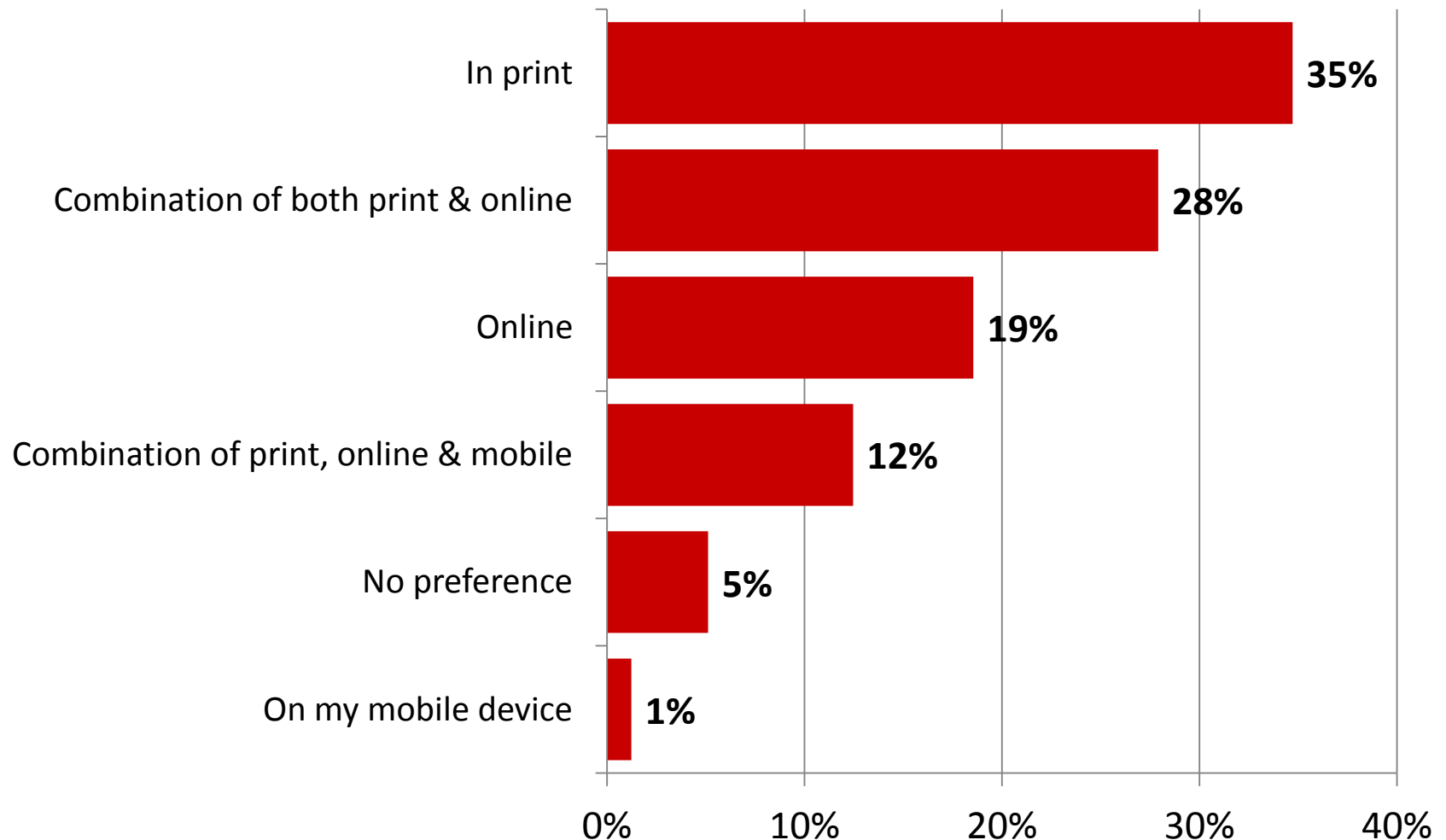
Top Job Functions



Top Product and Service Purchase Categories

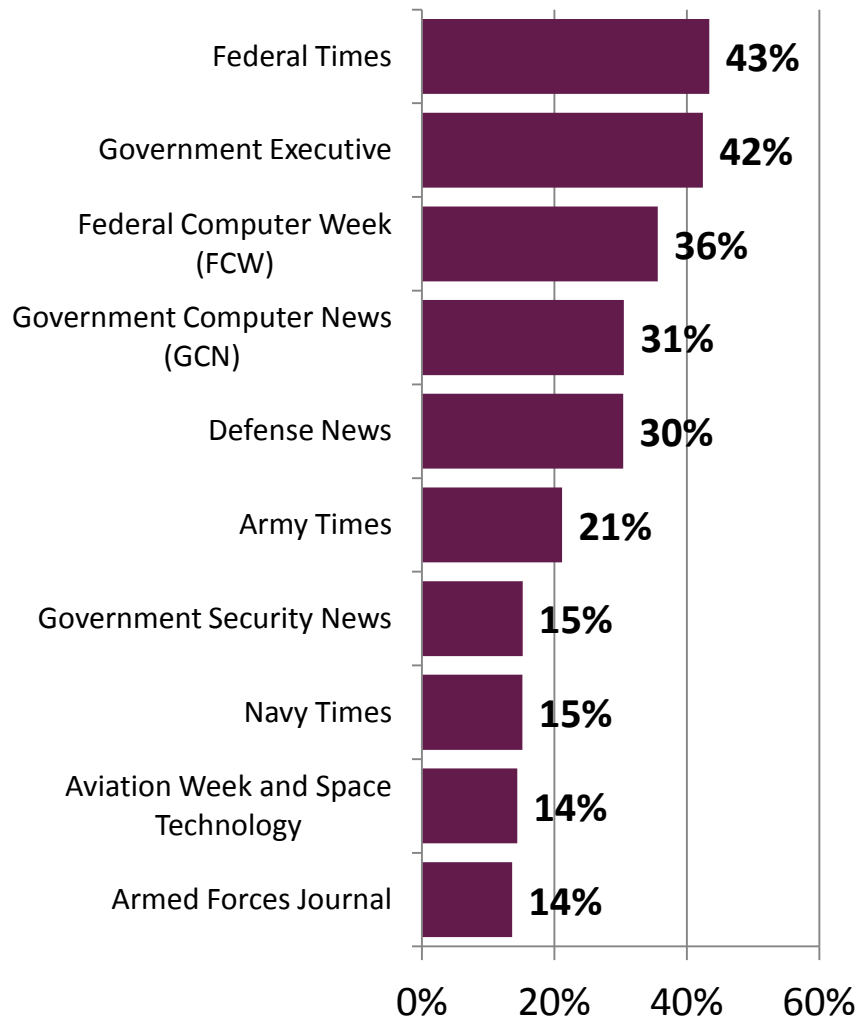


Preferences to Read Trade Publications

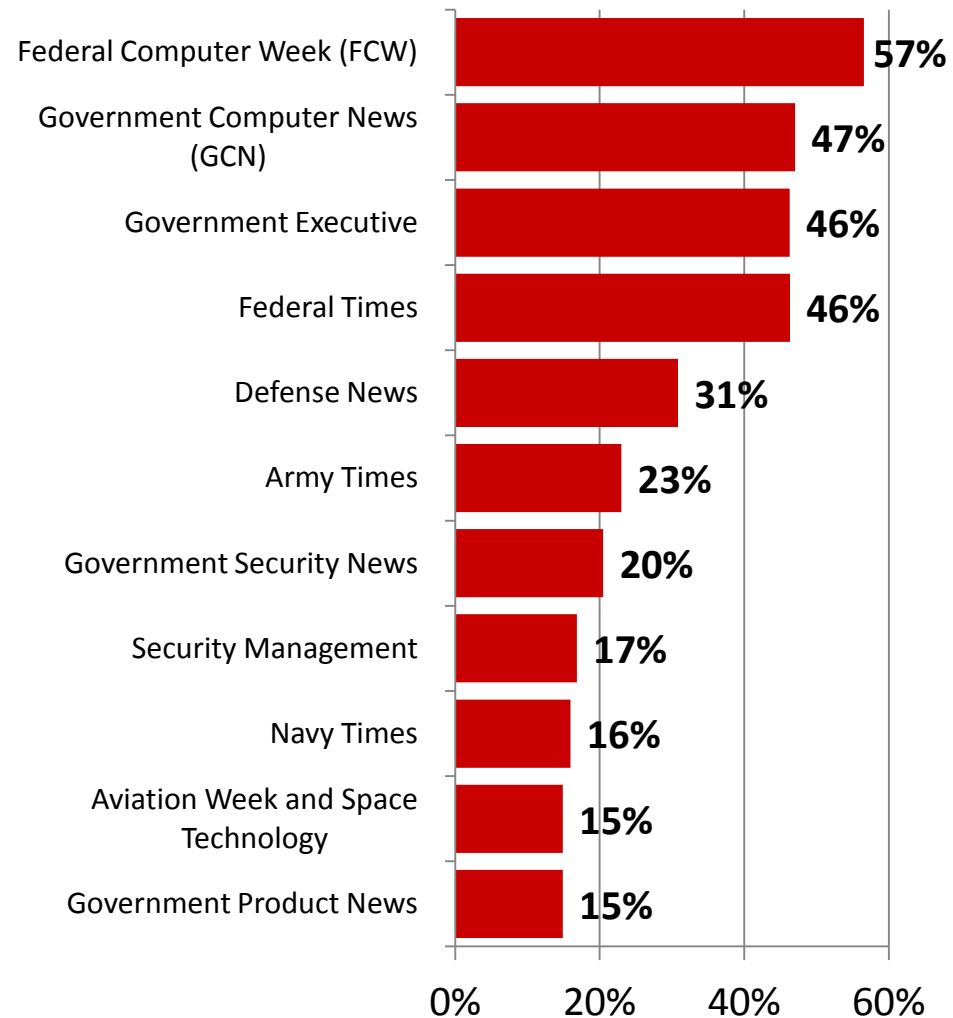


Top Federal Publications Read

Total Sample

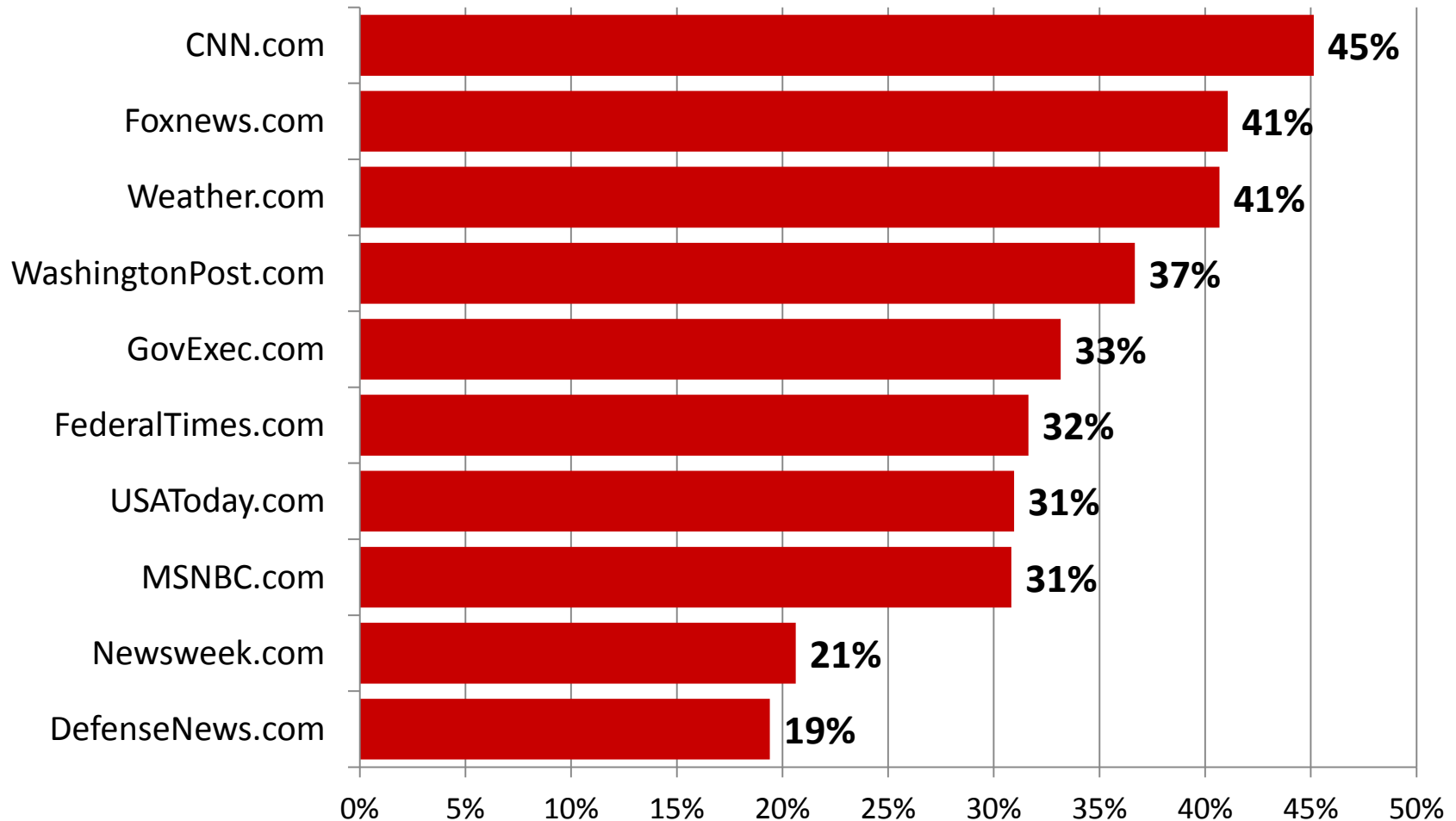


IT Purchasers

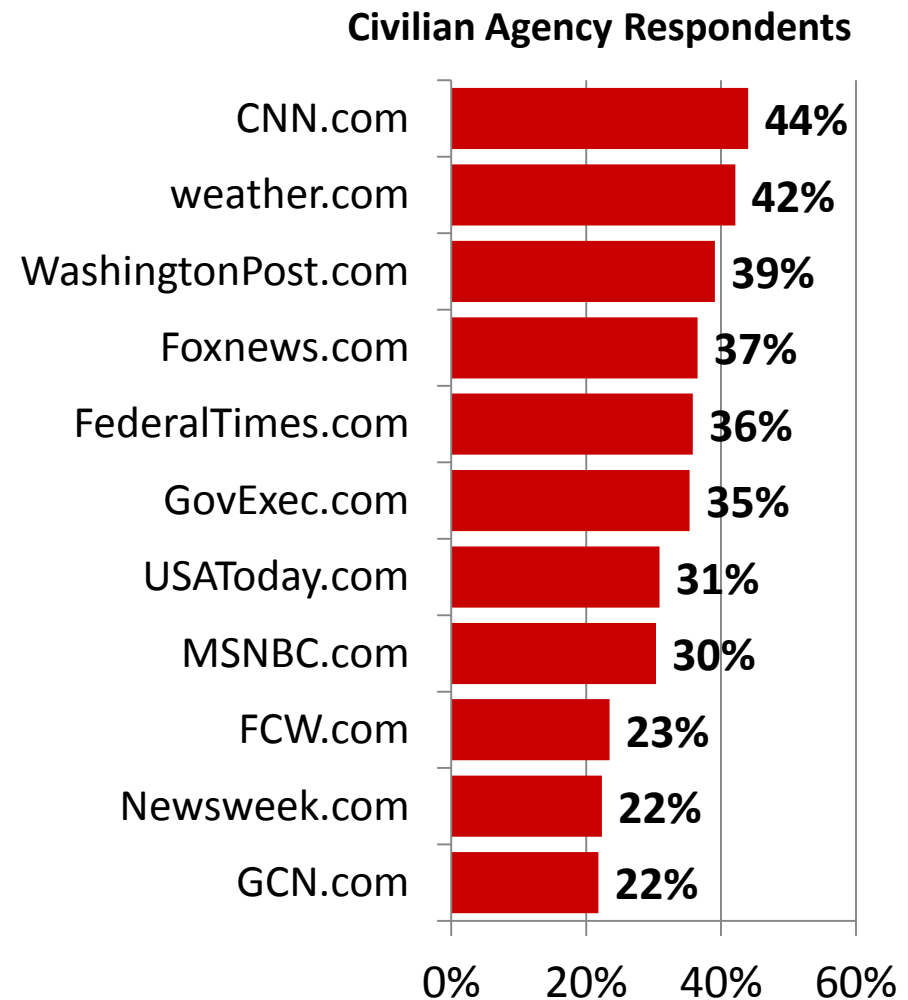
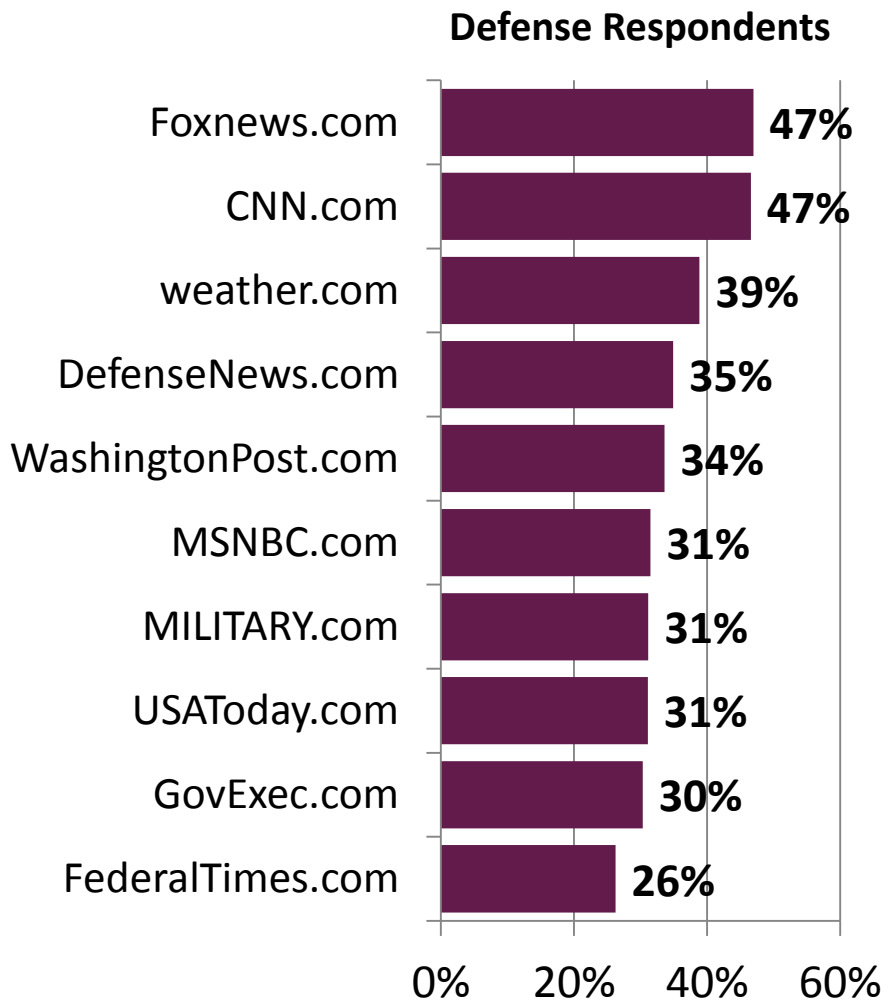


Top Websites Visited

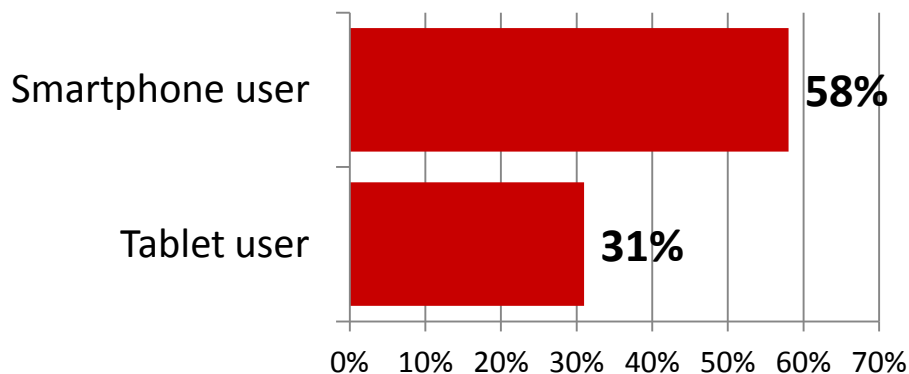
Total Sample



Top Websites Visited



Mobile Device Usage

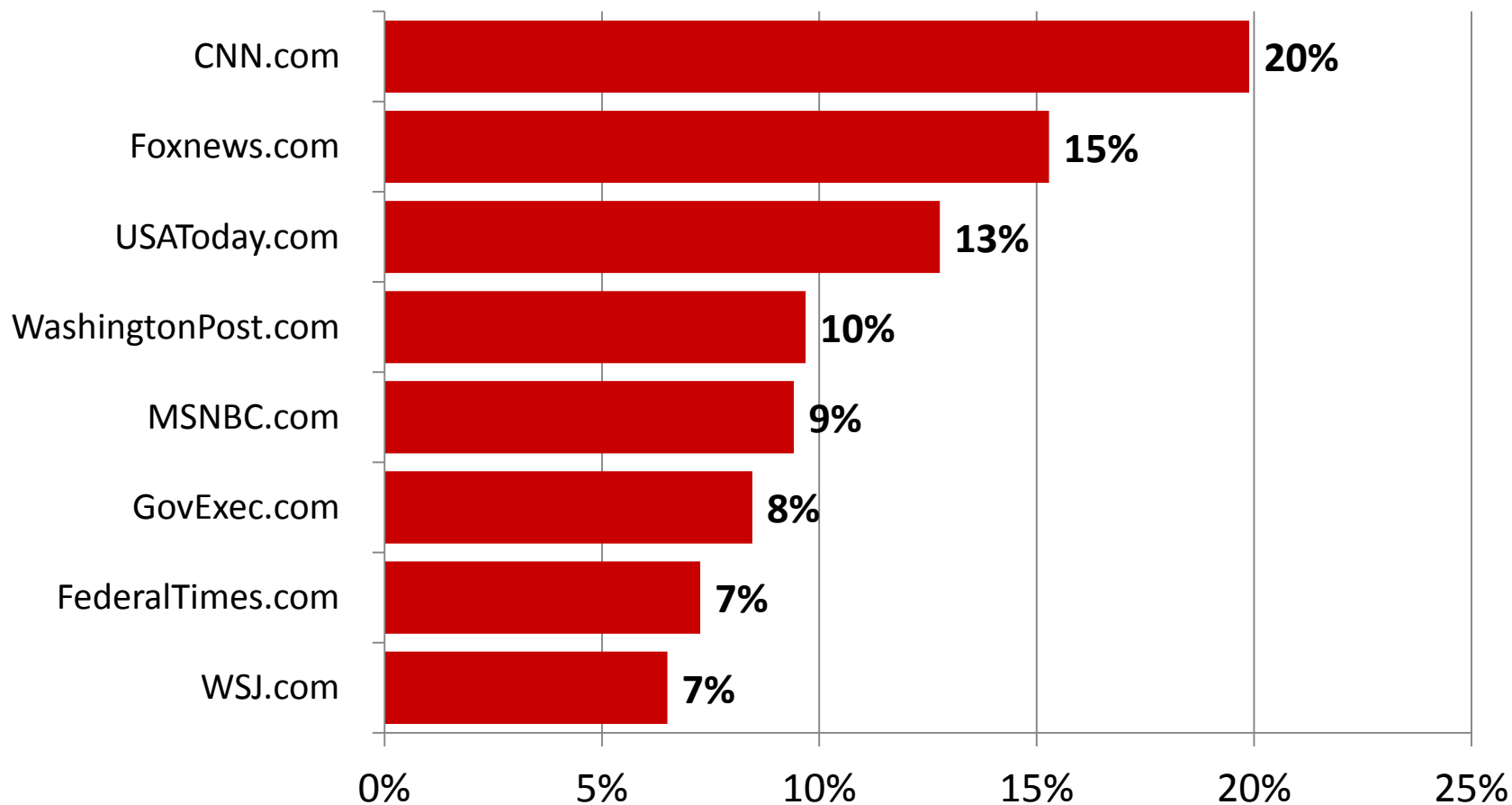


| | Blackberry Use | iPhone/Android Use | Tablet Use |
|----------------|-------------------|-----------------------|---------------|
| Work Email | 30% | 12% | 8% |
| Personal Email | 10% | 36% | 18% |
| Social Media | 4% | 24% | 17% |
| News Websites | 9% | 27% | 21% |
| Videos | 1% | 19% | 20% |

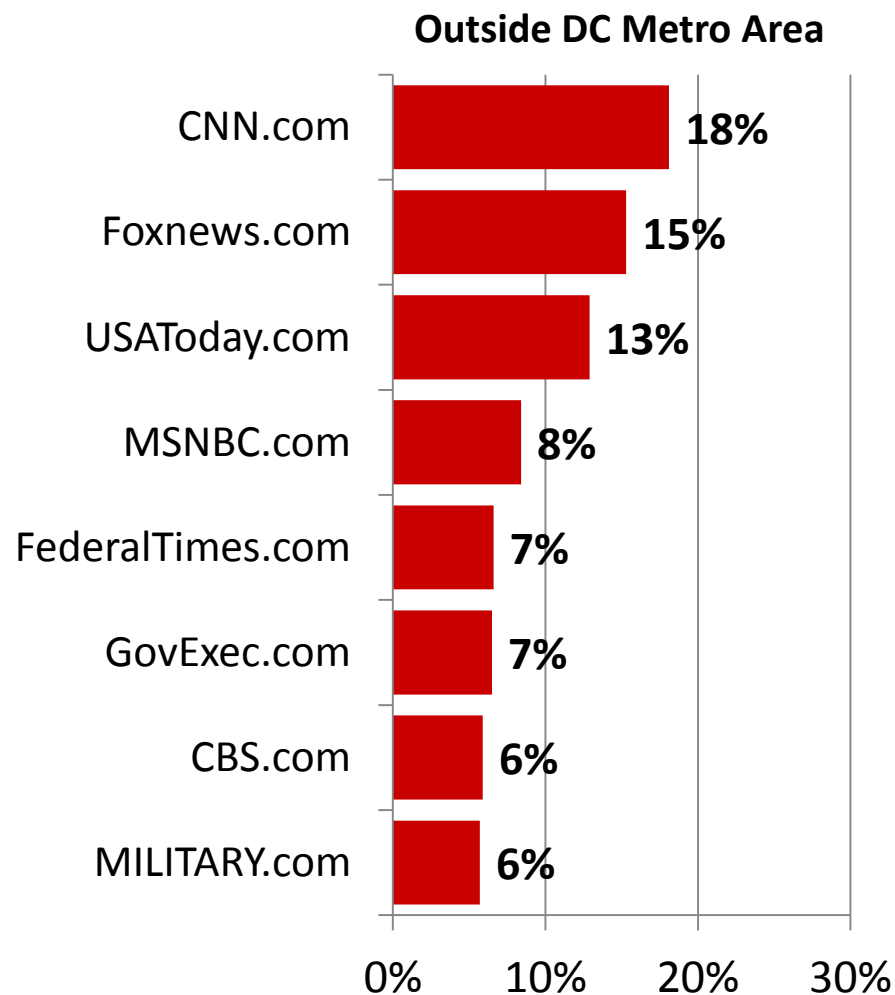
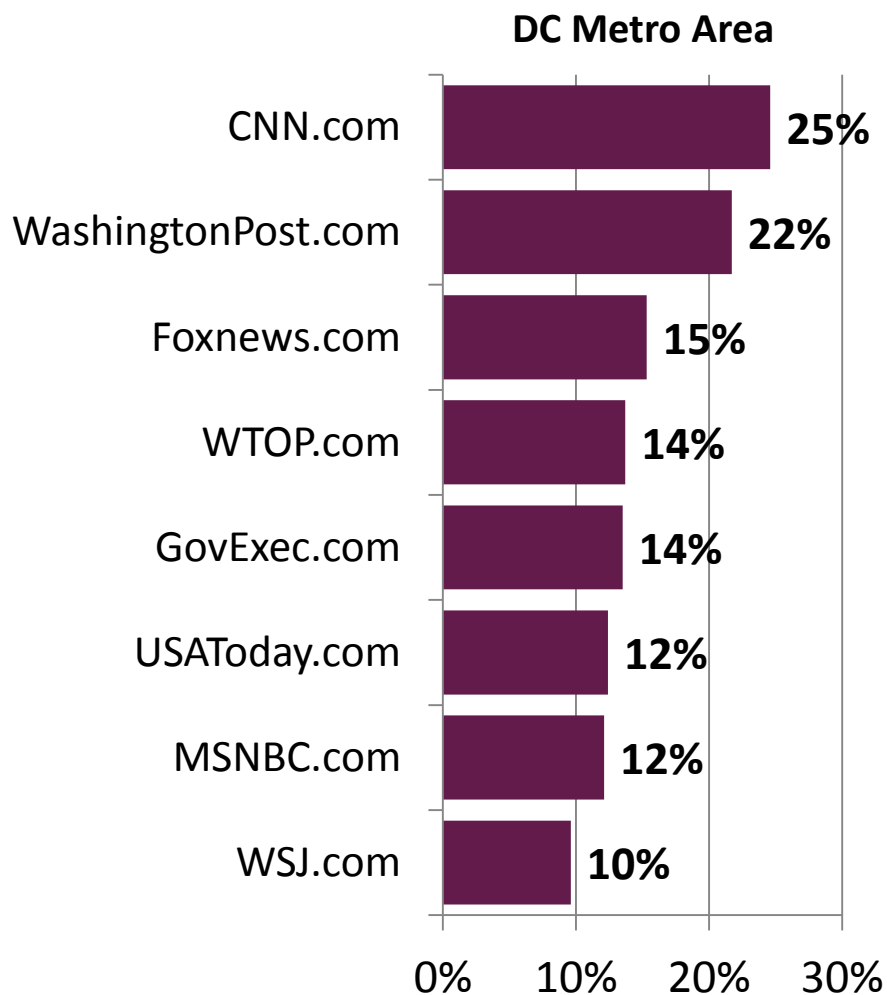
NEW THIS YEAR

Top Mobile Sites Visited

Total Sample

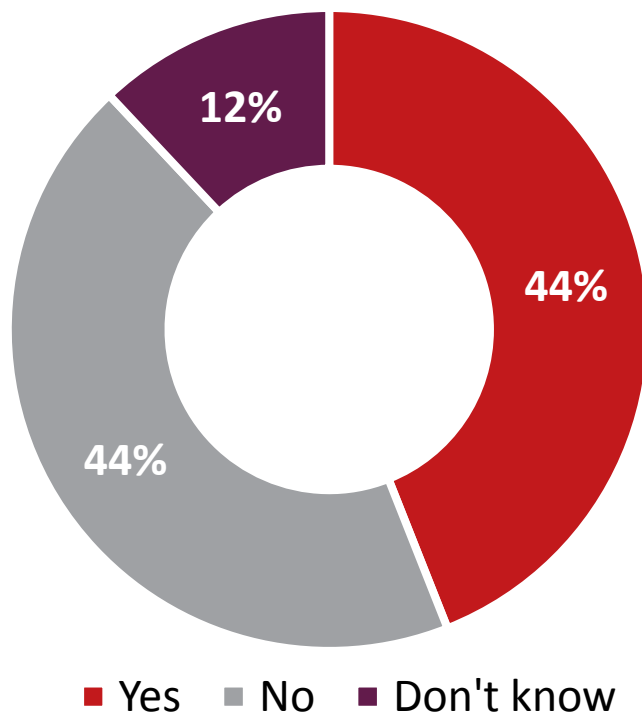


Top Mobile Sites Visited by Location

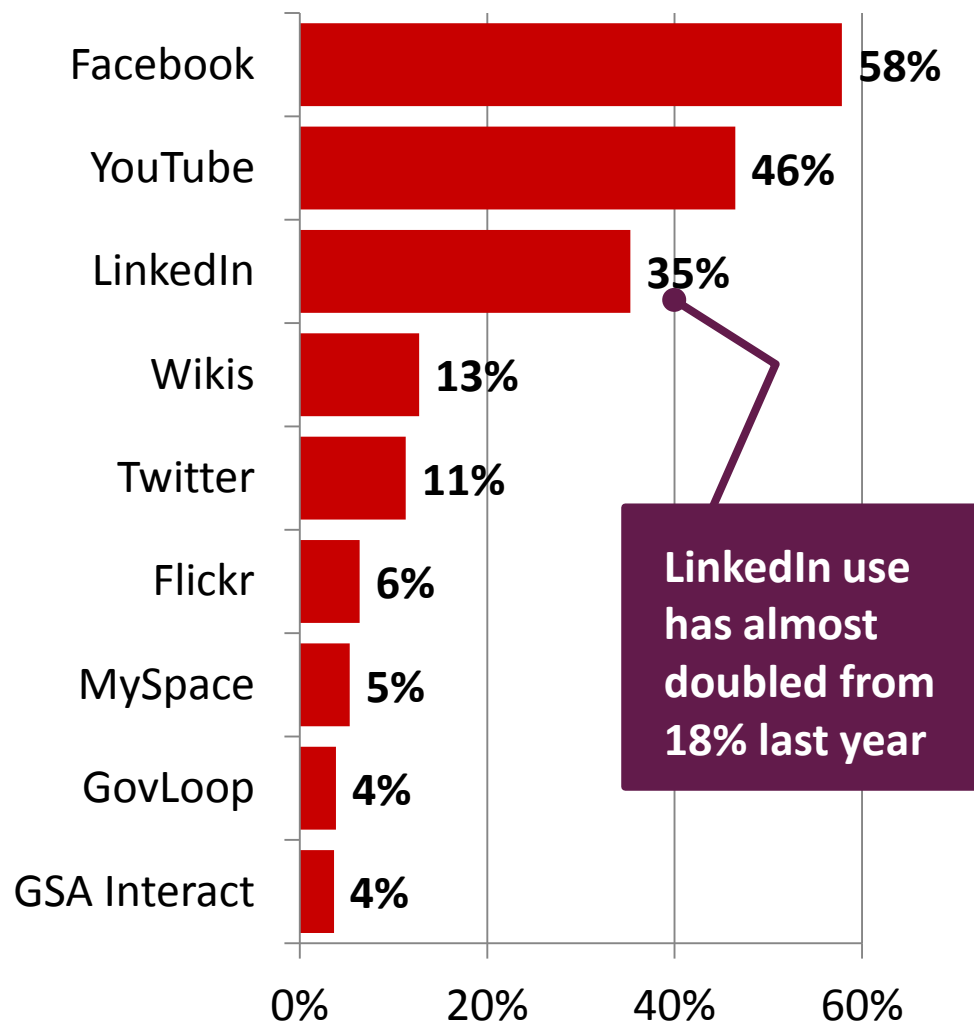


Online Social Sites

Are you allowed to access social networking sites at work?

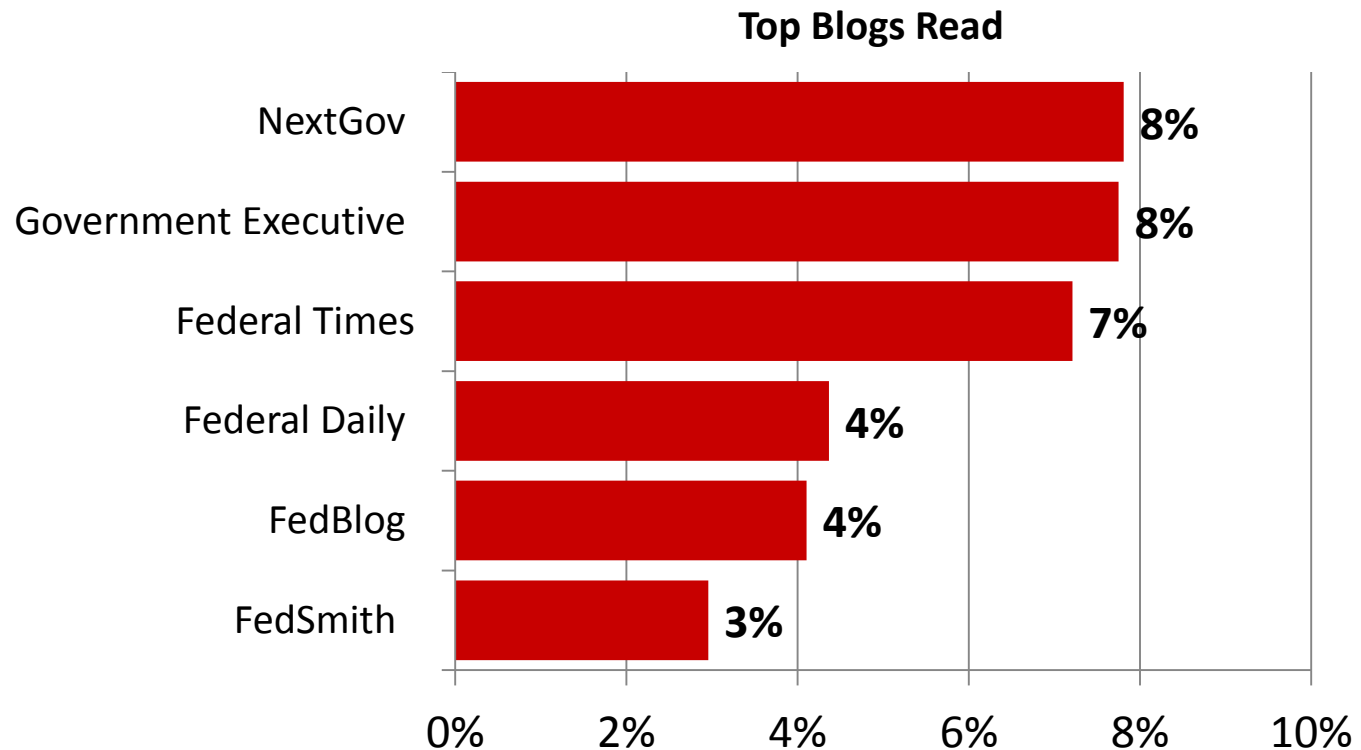
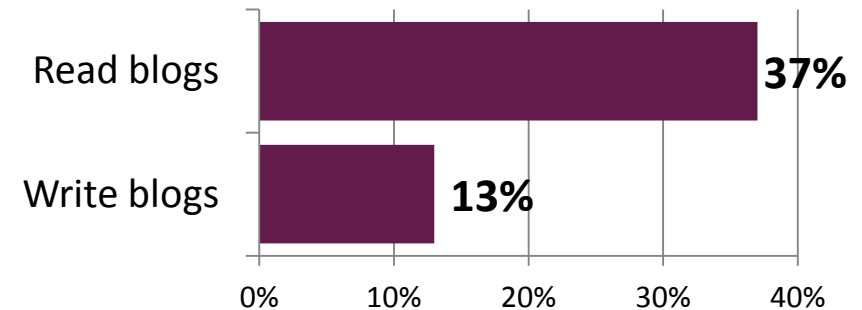


Total Use

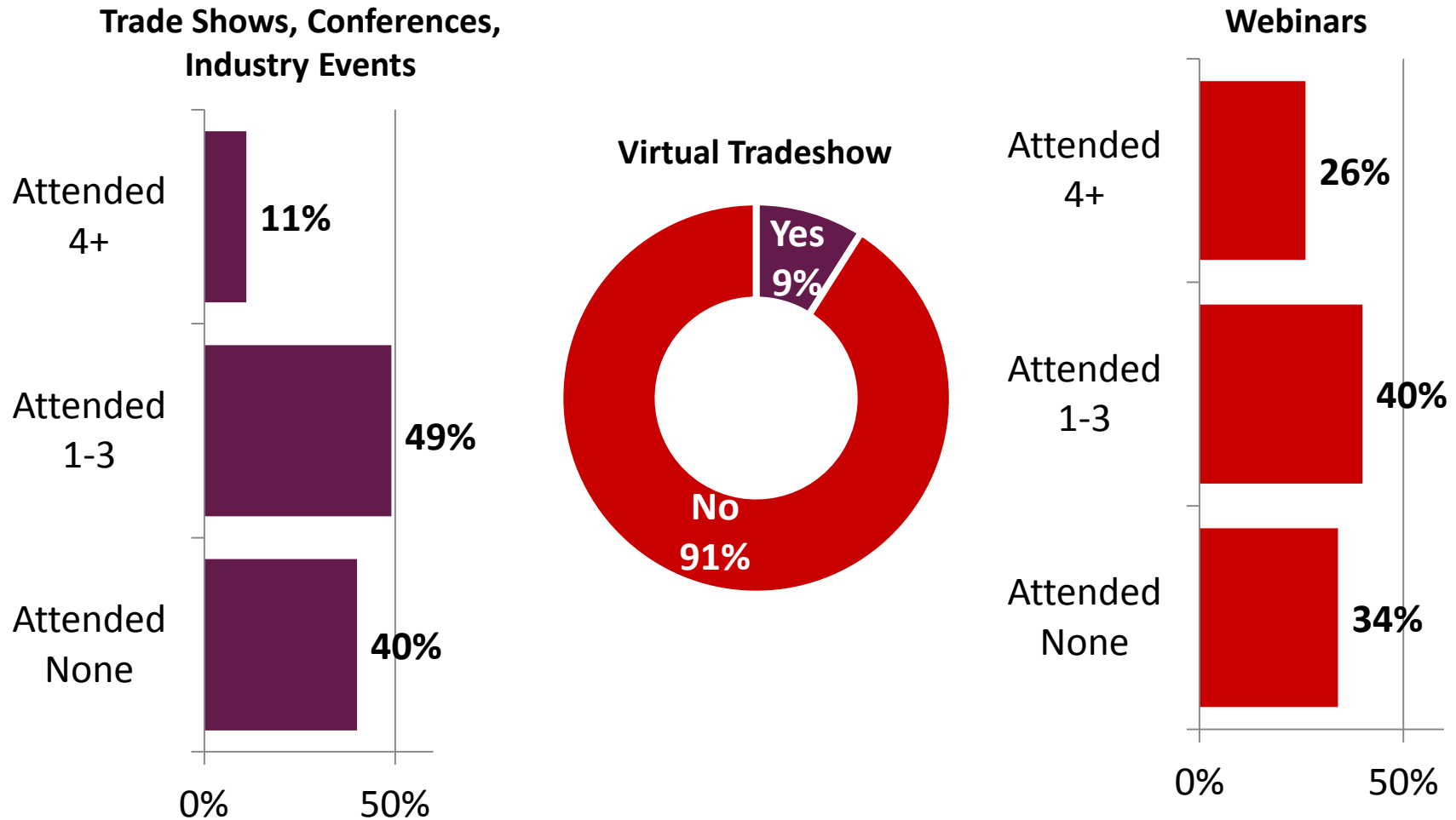


NEW THIS YEAR

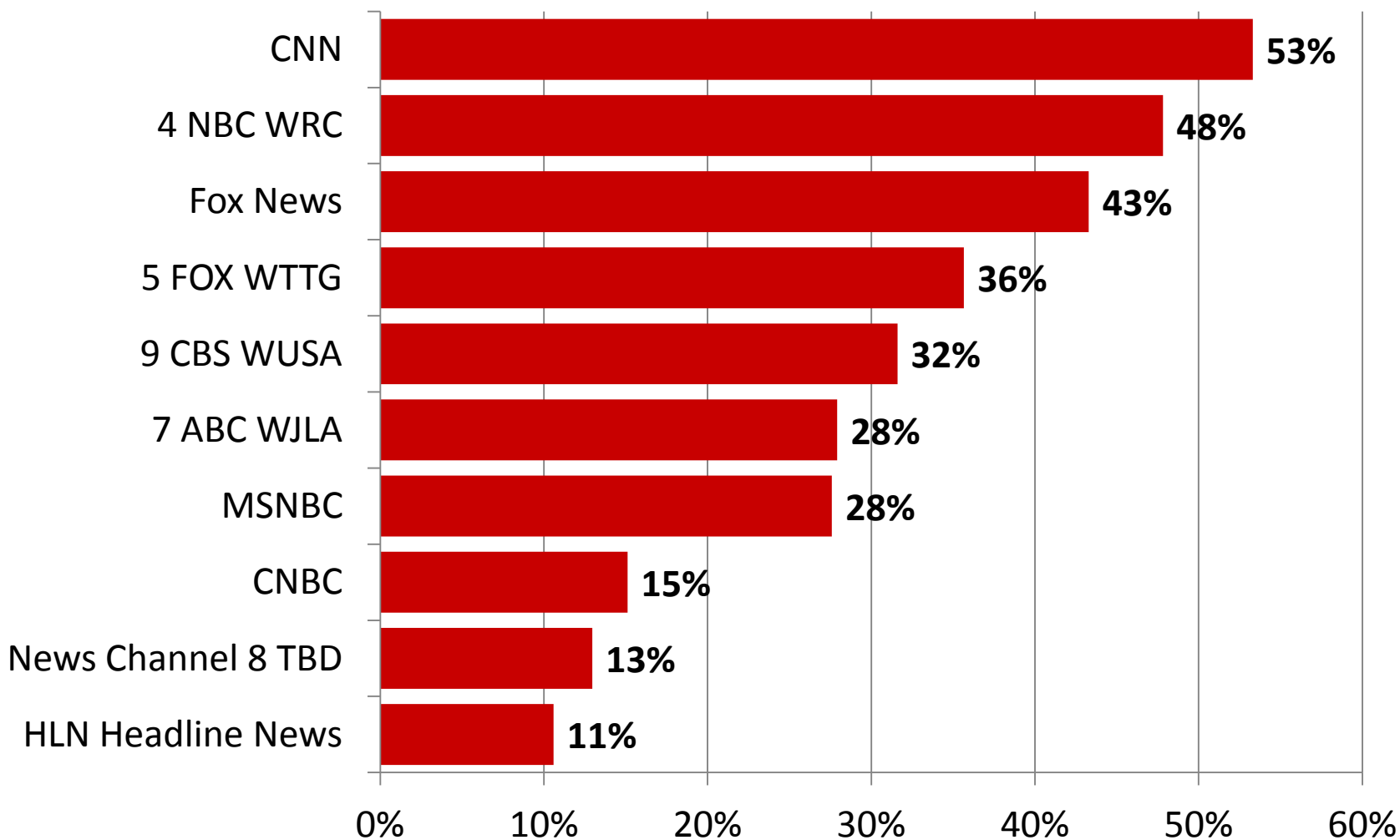
Blog Readership



Event Attendance in Past 12 Months

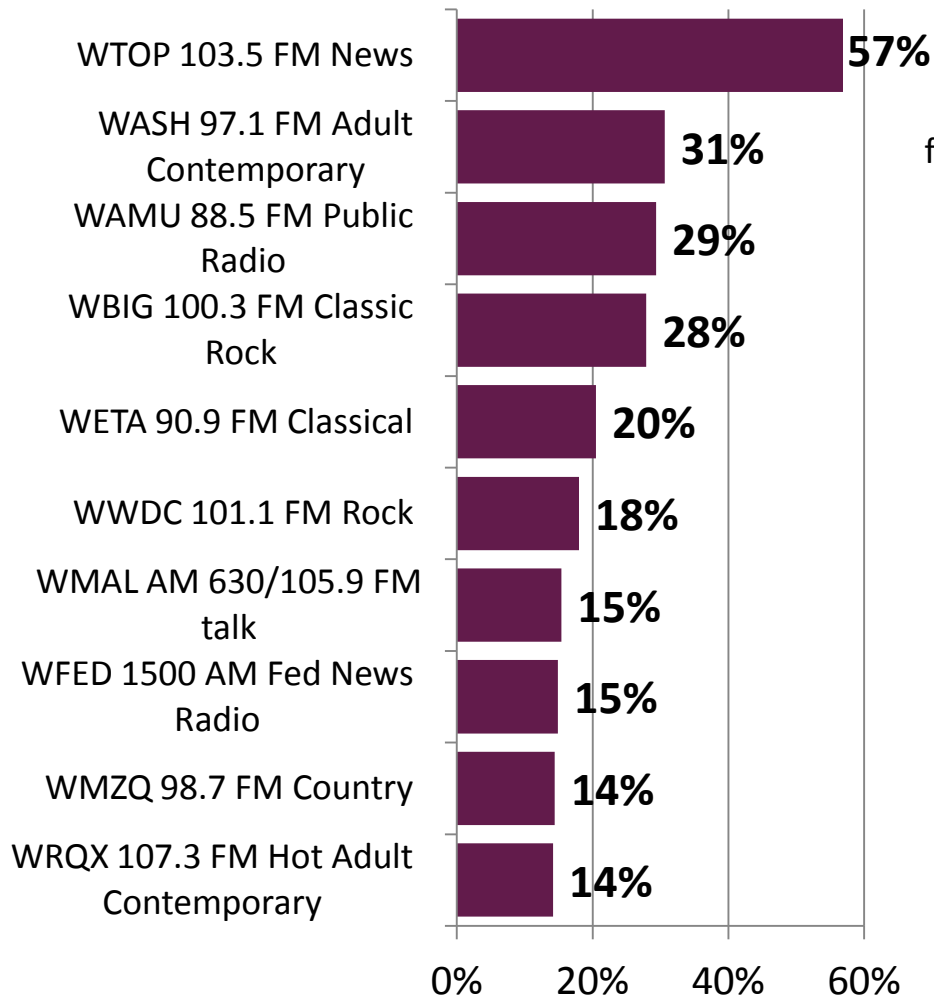


DC Metro Area: TV News

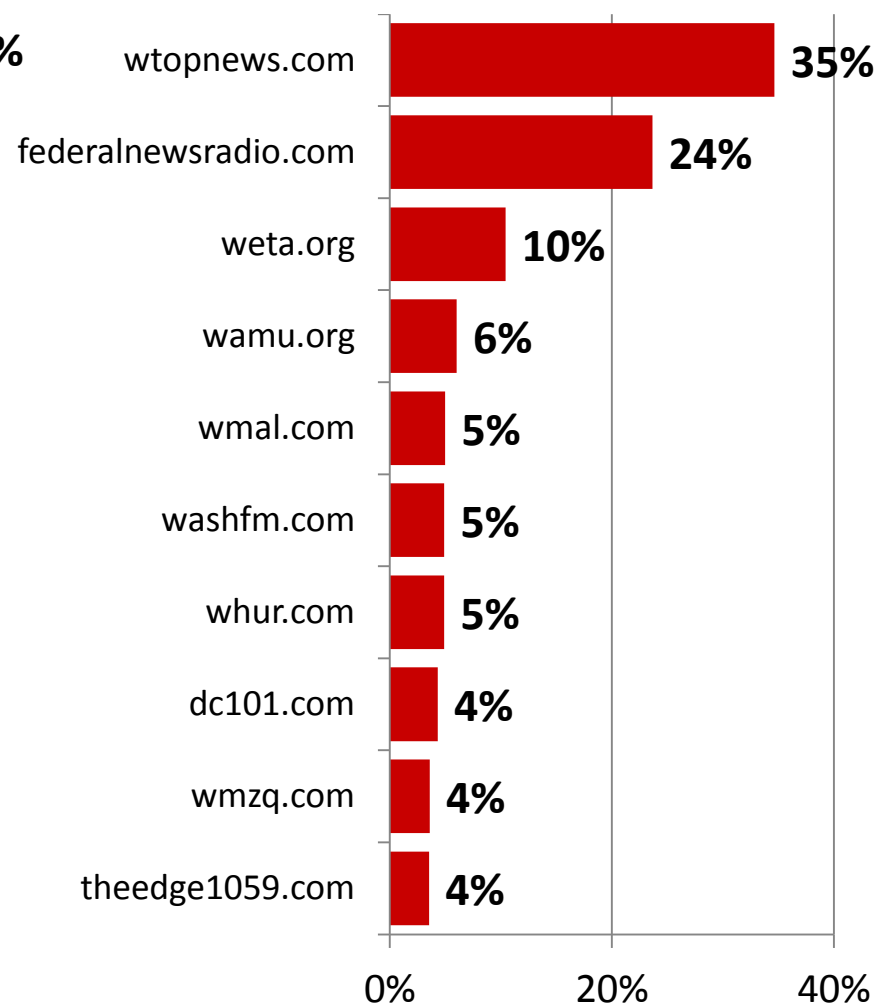


DC Metro Area: Radio

Radio Stations



Radio Websites



Online Data Tool

www.marketconnectionsinc.com/mediastudy

HOW CAN THIS STUDY HELP WITH YOUR STRATEGIC MARKETING?

- Know exactly who to target and how to reach them
- Understand how federal government decision makers acquire products and services
- Improve marketing by aligning the survey findings with your specific information needs

WHY IS THIS STUDY SO UNIQUE?

- A dynamic web-based reporting tool allows you to cross-tabulate survey results to create your own customized data views, such as job title and product purchases; or job title and web site visits or publication readership
- The study combines demographic, job function, and purchasing data with actual media usage
- The survey covers over 25 product and services areas, from weapons systems and IT to human resources and travel



Market Connections

Research you can act on.

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