

2011 Federal Media and Marketing Study Overview

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Third Annual Release

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Research You Can Act On

2011 Federal Media and Marketing Study:

Contents

- Study background and goals
- Methodology and survey topic areas
- Study highlights

2011 Federal Media and Marketing Study:

Goals

- Provide an independent single 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.
- Expanded topics included in the survey: social media, mobile usage, DC metro radio station websites and local TV news stations.
- Provide instant access to all data with an easy to use online analytic tool.

2011 Federal Media and Marketing Study: *Background*

- What are the tools we currently have to measure and compare media options?
 - Print:**
 - ▶ BPA/ABC statements qualify “receivership”
 - ▶ Subscriber studies
 - Web sites:**
 - ▶ Third party ad servers and measuring companies
- Traditionally, the media community has to evaluate *all* of these information sources *separately* for the federal market.

2011 Federal Media and Marketing Study: *Methodology*

- Comprehensive respondent base
 - ▶ 14 publications
 - ▶ Third party databases
 - ▶ Associations and other websites
- Over 120,000 unique names and email addresses
- Online survey fielded in November 2010 – January 2011
- Sample size: Over 3,000
- Data weighted to ensure publications were not over or under represented in sample

2011 Federal Media and Marketing Study: *Respondent Base*

- Air Force Times
- Armed Forces Journal
- Army Times
- Aviation Week & Space Tech
- Defense News
- Defense Systems
- FCW
- Federal Times
- GCN
- Government Executive
- Government Security News
- HSToday
- Marine Corps Times
- Military.com
- Navy Times
- NCMA
- Carrolls' Directories
- Market Connections' Federal Panel

2011 Federal Media and Marketing Study:

Topics Covered

- Demographics:
 - ▶ Agency
 - ▶ Location
 - ▶ Age
 - ▶ Gender
 - ▶ Education
 - ▶ Grade/rank
- Job function
- Purchase responsibility
- Trade show/webinar attendance
- Media usage including:
 - ▶ Print
 - ▶ Web sites
 - ▶ Blogs
 - ▶ Social media
 - ▶ Mobile
 - ▶ DC Metro newspapers
 - ▶ DC Metro radio
 - ▶ DC Metro radio websites
 - ▶ DC Metro TV news stations

2011 Federal Media and Marketing Study:

Job Function

- Accounting, budget and finance
- Administration and office services
- Aviation services/operations
- Field combat
- Emergency response/safety
- Energy and environmental
- Engineering and architecture
- Executive and command
- Facilities, real estate
- Forestry, wildlife and environment
- Human resources
- Information technology, computers, systems
- Intel/ security
- Law enforcement/ public safety
- Legal, law, patent, copyright
- Logistics
- Maintenance and repair
- Medical, health
- Project/program management
- Purchasing, contracting
- Scientific, mathematics, R&D
- Social sciences, welfare
- Training, education
- Telecomm/communications

2011 Federal Media and Marketing Study:

Product and Service Purchase Categories

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

2011 Federal Media and Marketing Study:

Media Usage Details

- 37 Publications
- 44 Web sites
- 16 Social media sites
- Access and participation in blogs
- Media preferences (online, print, mobile)
- Mobile use
- 16 DC Metro radio stations and websites
- 10 TV news stations

2011 Federal Media and Marketing Study:

Federal Publications

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

2011 Federal Media and Marketing Study: *Business & News Media Publications*

- *Bloomberg Business Week*
- *Newsweek*
- *Time*
- *US News and World Report*
- *USA Today*
- *Washington Post*
- *Wall Street Journal*

2011 Federal Media and Marketing Study:

Federal Web Sites

- AFCEA.org
- AirForceTimes.com
- Armed ForcesJournal.com
- ArmyTimes.com
- AUSA.org
- AviationWeek.com
- C4ISRJournal.com
- DefenseNews.com
- DefenseSystems.com
- FCW.com
- FederalTimes.com
- GCN.com
- GovExec.com
- GovPro.com
- GSNMagazine.com
- HSToday.us
- Janes.com
- KMImediagroup.com
- MarineCorpsTimes.com
- MILITARY.com
- NavyLeague.org
- NavyTimes.com
- NCMAHQ.org
- Nextgov.com
- NGAUS.org
- ROA.org
- SAME.org
- SecurityMagazine.com
- SecurityManagement.com
- USNI.org

2011 Federal Media and Marketing Study:

Business & News Media Web Sites

- Accuweather.com
- BusinessWeek.com
- CNBC.com
- CNN.com
- C-Span.org
- FoxNews.com
- MSNBC.com
- NewsWeek.com
- Time.com
- USAToday.com
- USNews.com
- WashingtonPost.com
- Weather.com
- WSJ.com

2011 Federal Media and Marketing Study:

Social Media

- Bebo
- BlipTV
- Facebook
- Flickr
- foursquare
- GovLoop
- GovTwit
- LinkedIn
- MeriTalk
- MySpace
- Paper.li
- Reddit
- Scribd
- StumbleUpon
- Twitter
- Vimeo
- YouTube

2011 Federal Media and Marketing Study: *DC Metro Area*

Newspapers/Publications:

- ▶ *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
- ▶ Channel 8 TBD
- ▶ CNN
- ▶ CNBC
- ▶ HLN Headline News
- ▶ Fox News
- ▶ MSNBC

2011 Federal Media and Marketing Study: *DC Metro Area Radio Stations & Web Sites*

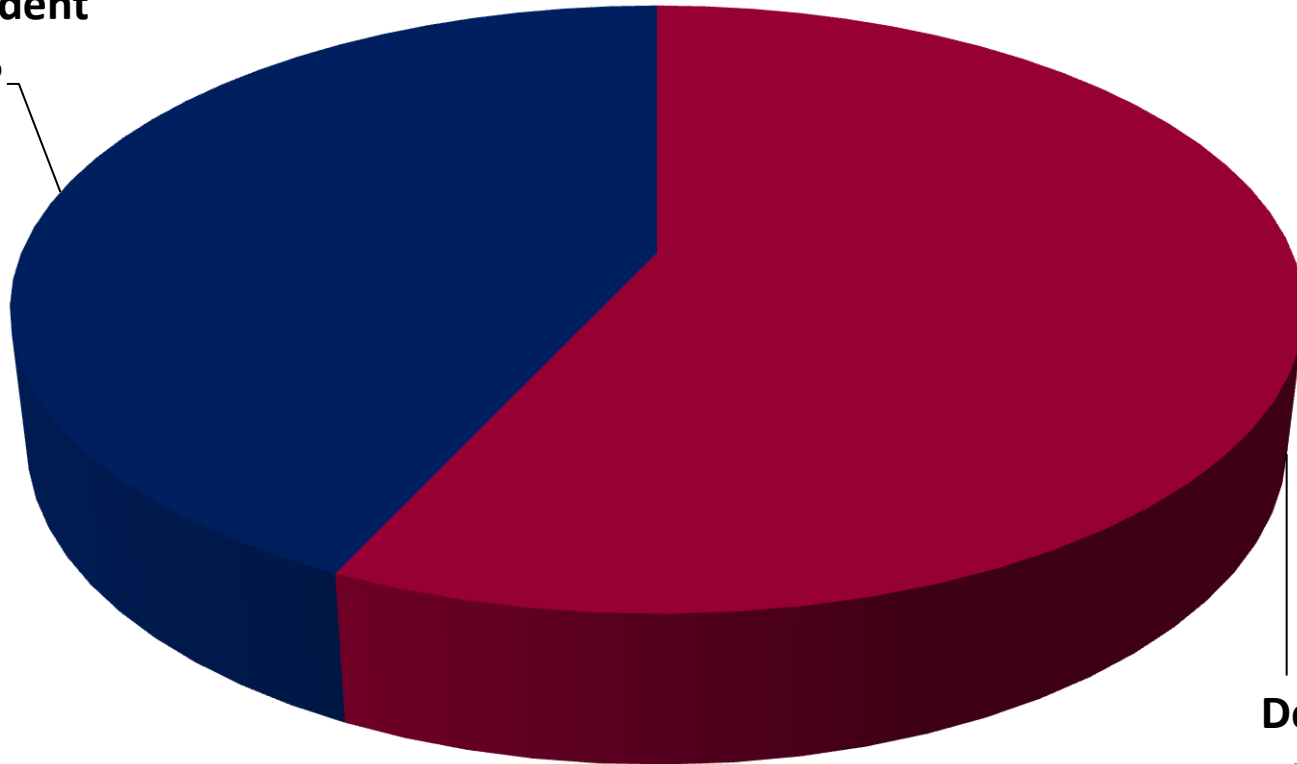
- WAMU 88.5 FM
- WETA 90.9 FM
- WPGC 95.5 FM
- WHUR 96.3 FM
- WASH 97.1 FM
- WMZQ 98.7 FM
- WIHT 99.5 FM
- WBIG 100.3 FM
- WWDC 101.1 FM
- WTOP 103.5 FM
- WJZW 105.9 FM
- WJFK 106.7 FM
- WRQX 107.3 FM
- WMAL 630 AM
- WTEM 980 AM
- WFED 1500 AM

2011 Federal Media and Marketing Study

Highlights

Demographics: Agency Type

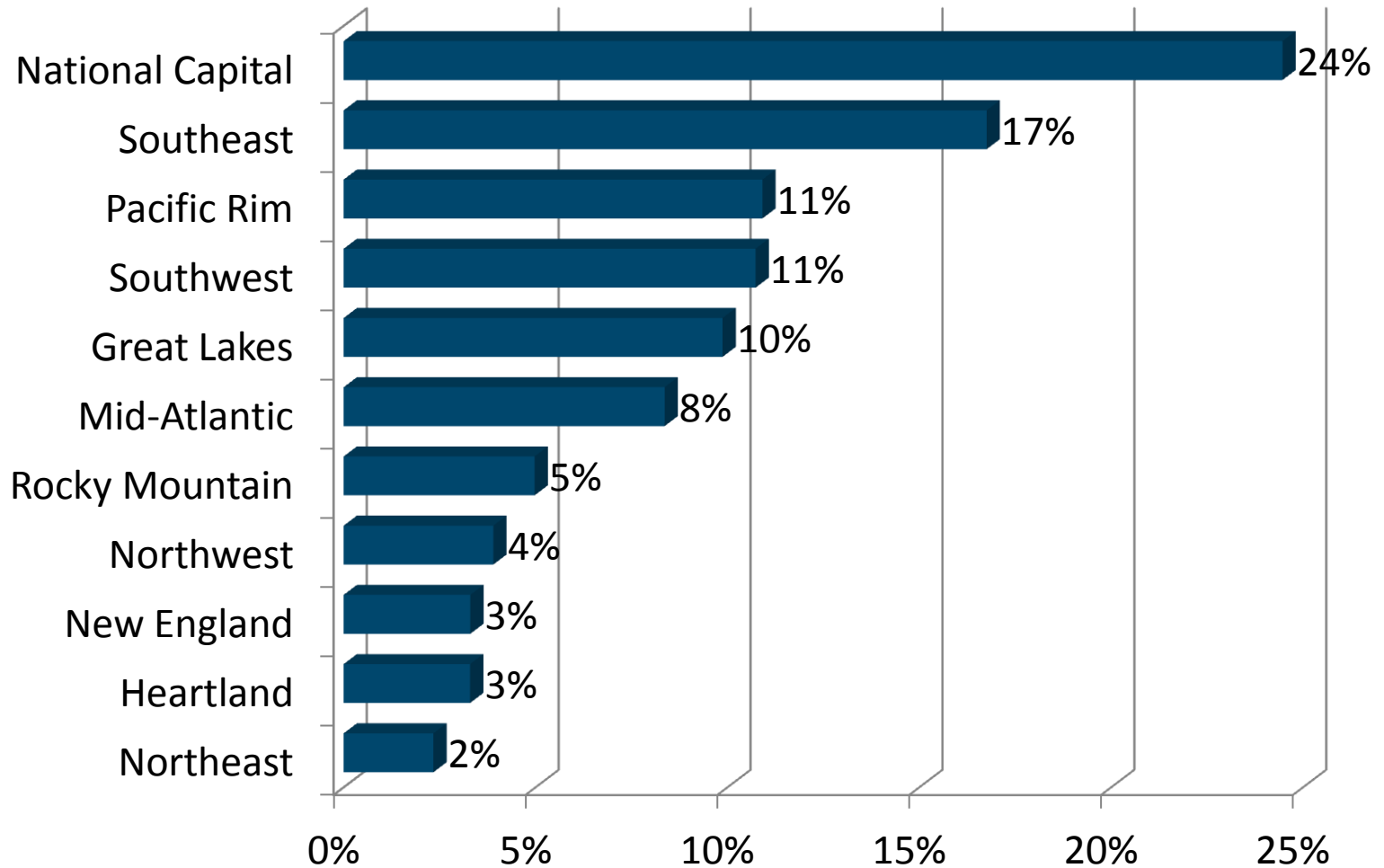
Civilian or
Independent
43%



Defense or
military
57%

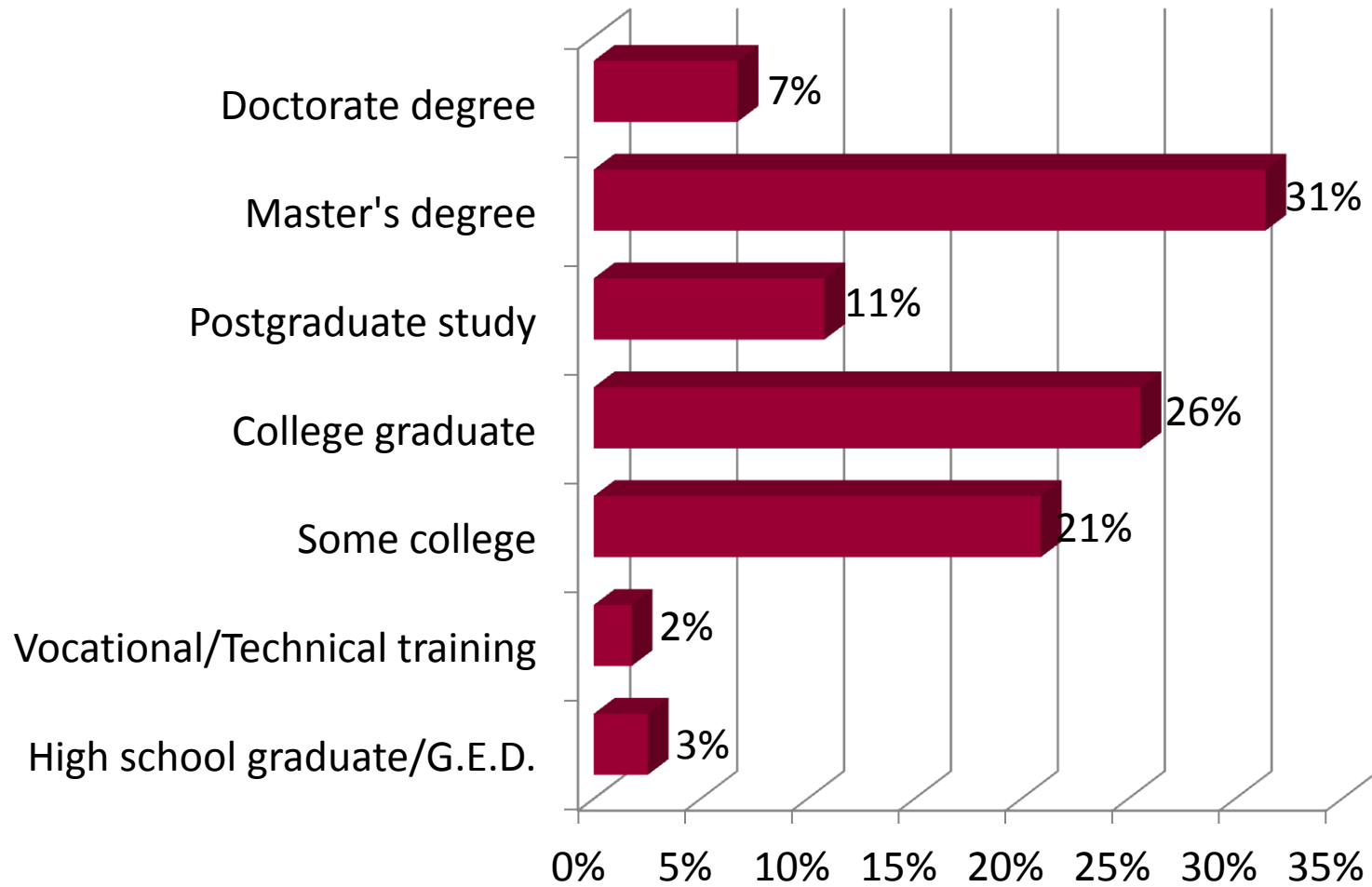
Source: 2011 Federal Media & Marketing Study

Demographics: **GSA Region**



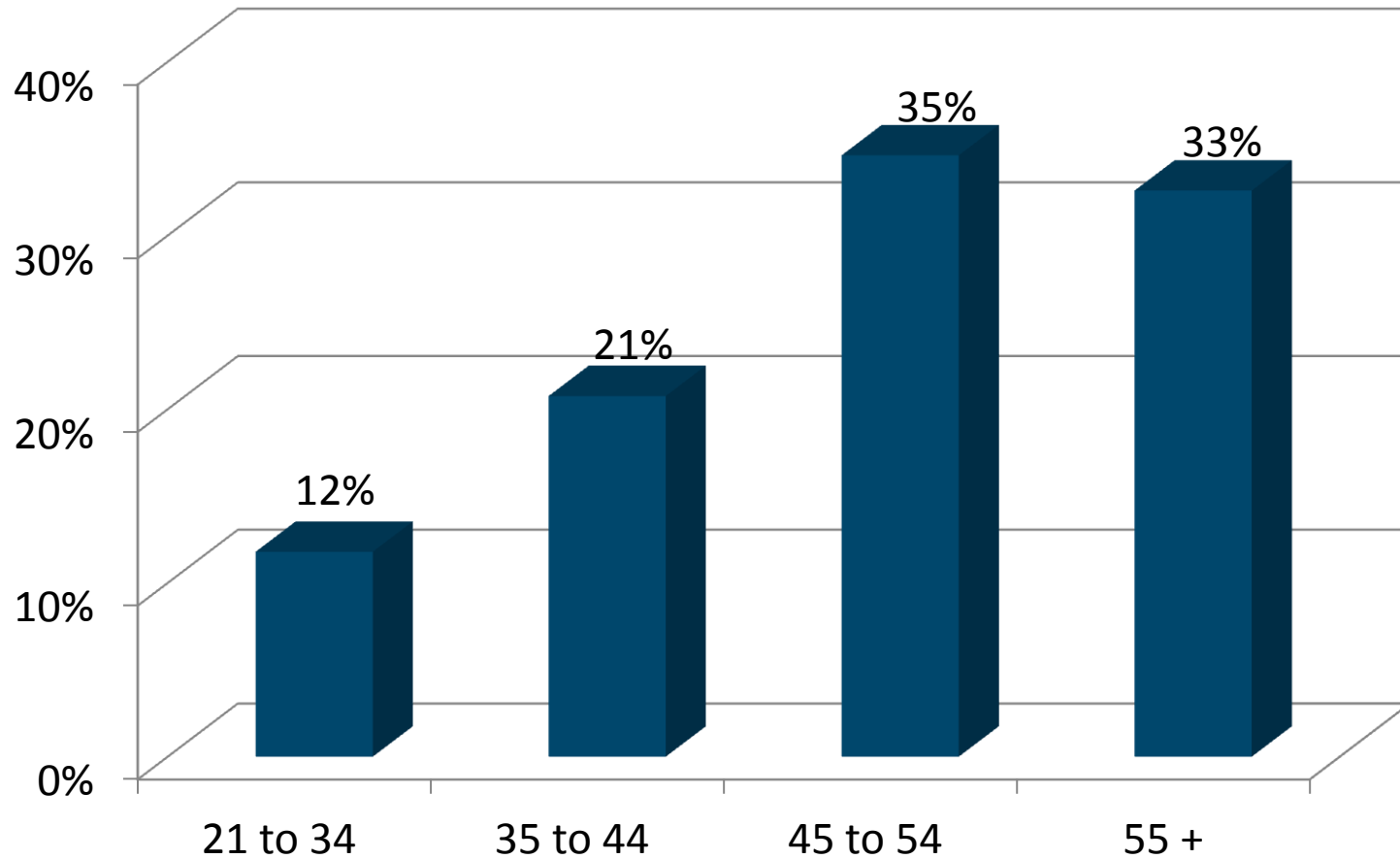
Source: 2011 Federal Media & Marketing Study

Demographics: Education



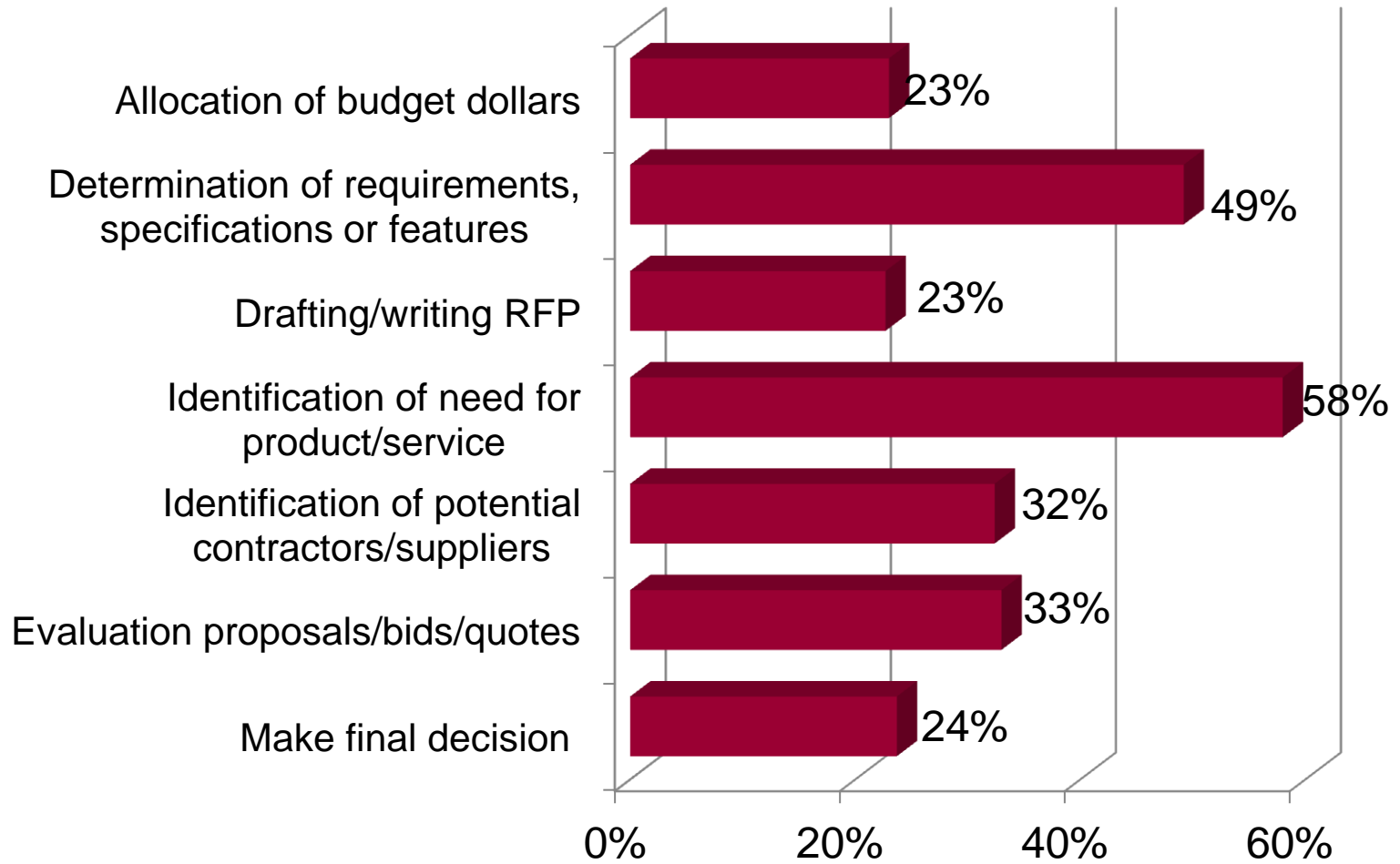
Source: 2011 Federal Media & Marketing Study

Demographics: Age



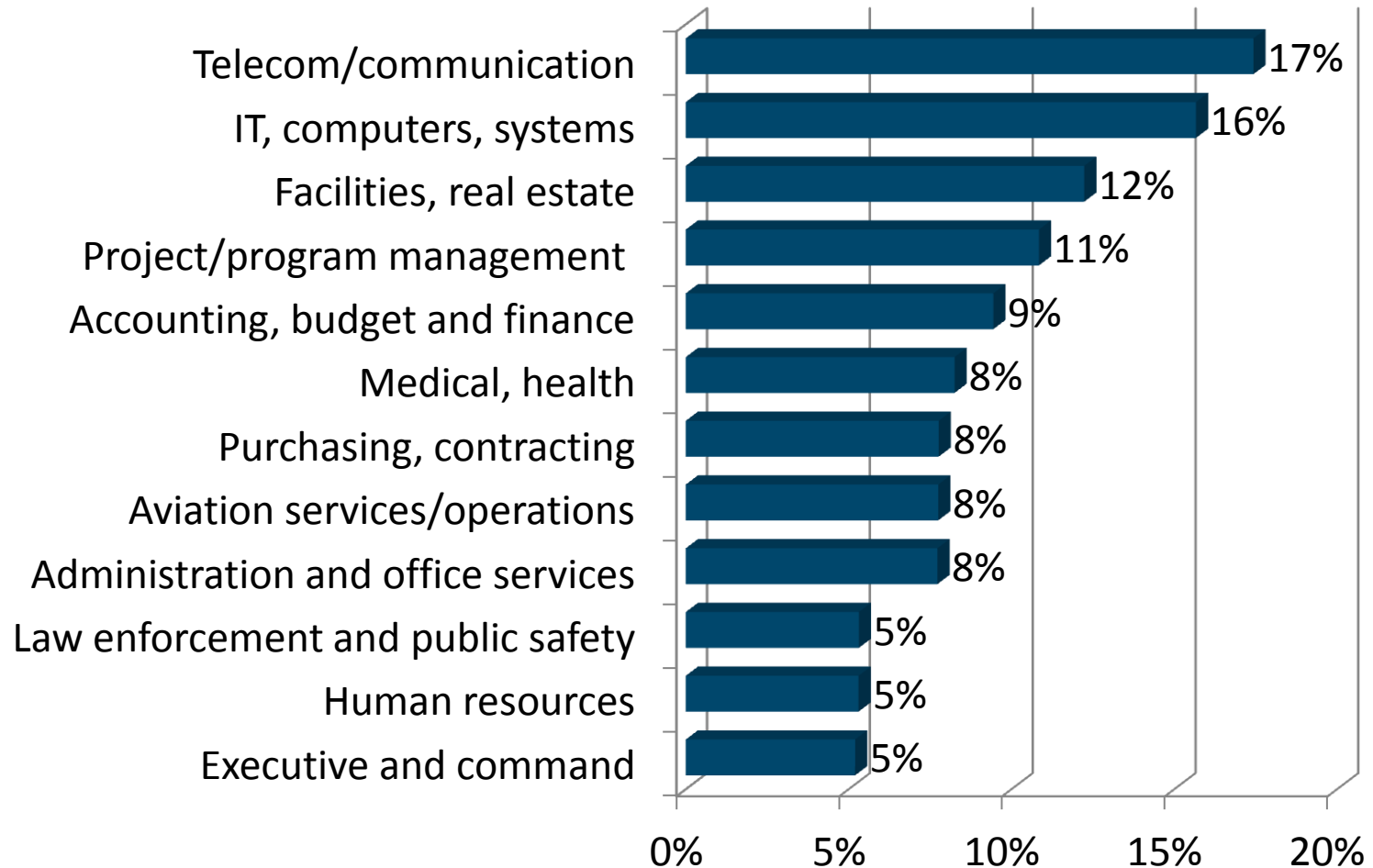
Source: 2011 Federal Media & Marketing Study

Involvement in Purchase Process



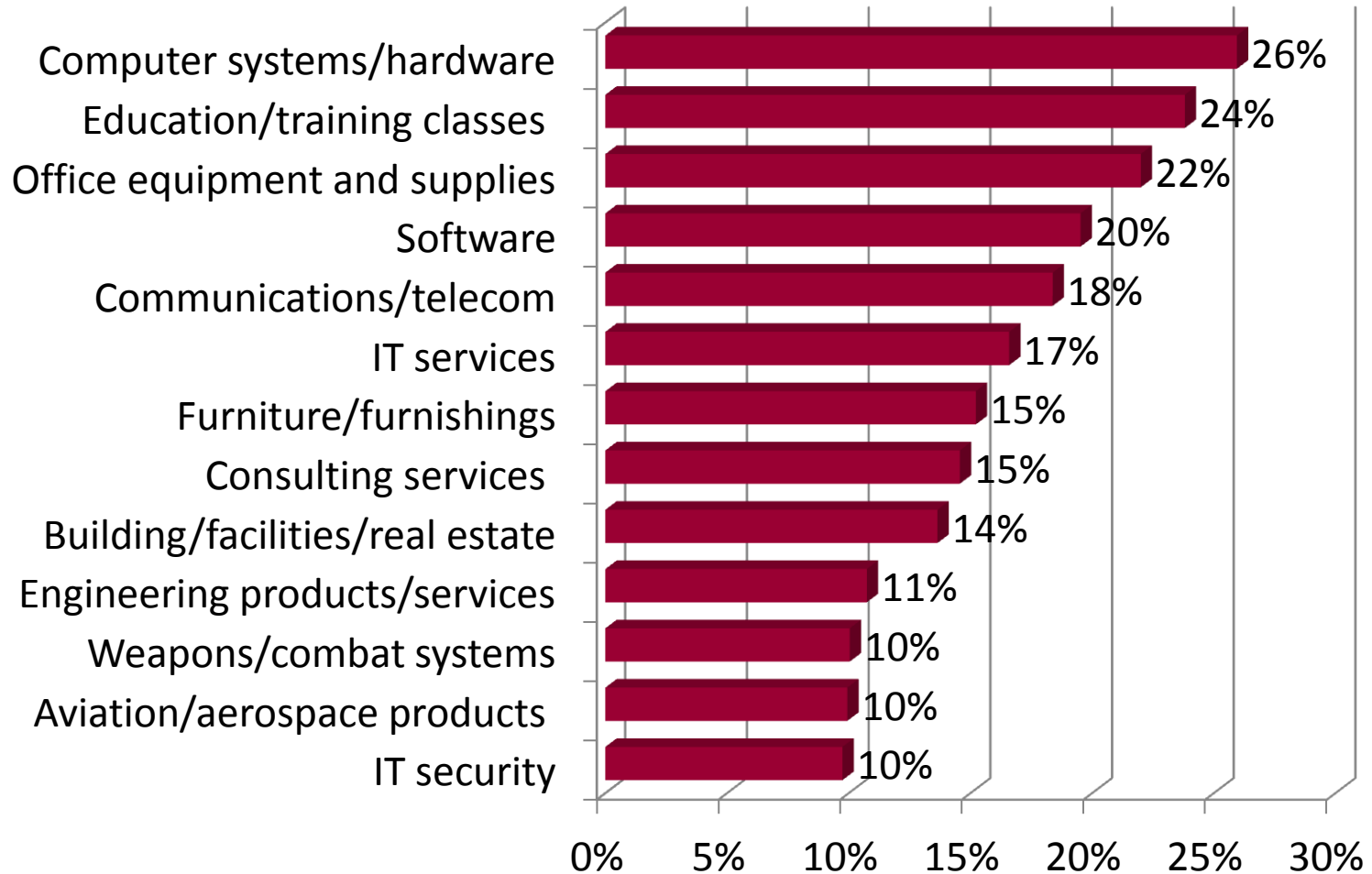
Source: 2011 Federal Media & Marketing Study

Top Job Functions



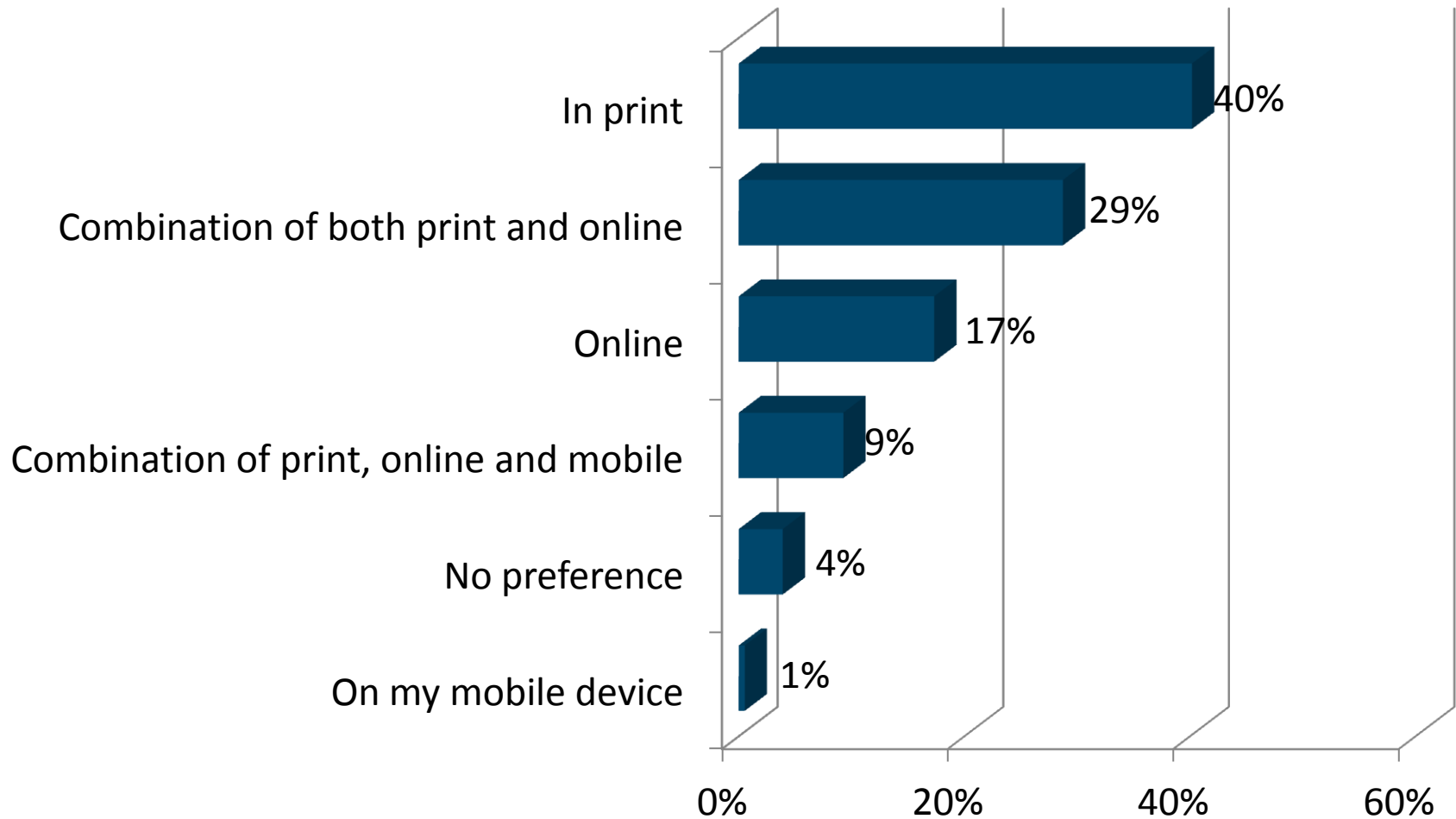
Source: 2011 Federal Media & Marketing Study

Top Product and Service Categories



Source: 2011 Federal Media & Marketing Study

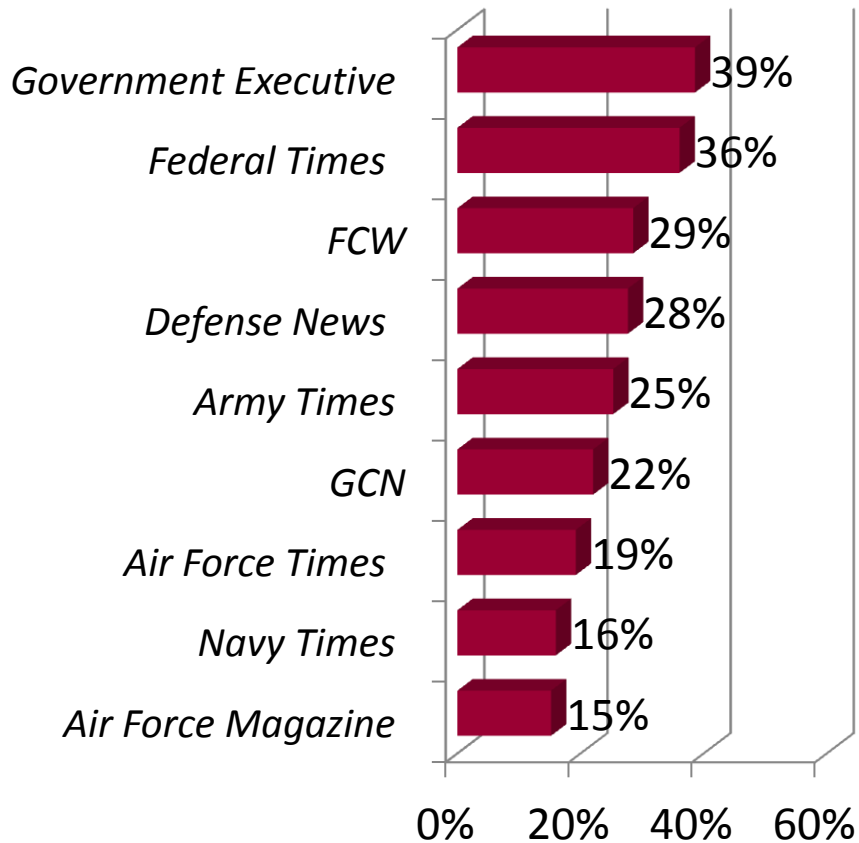
Preferences to Read Trade Publications



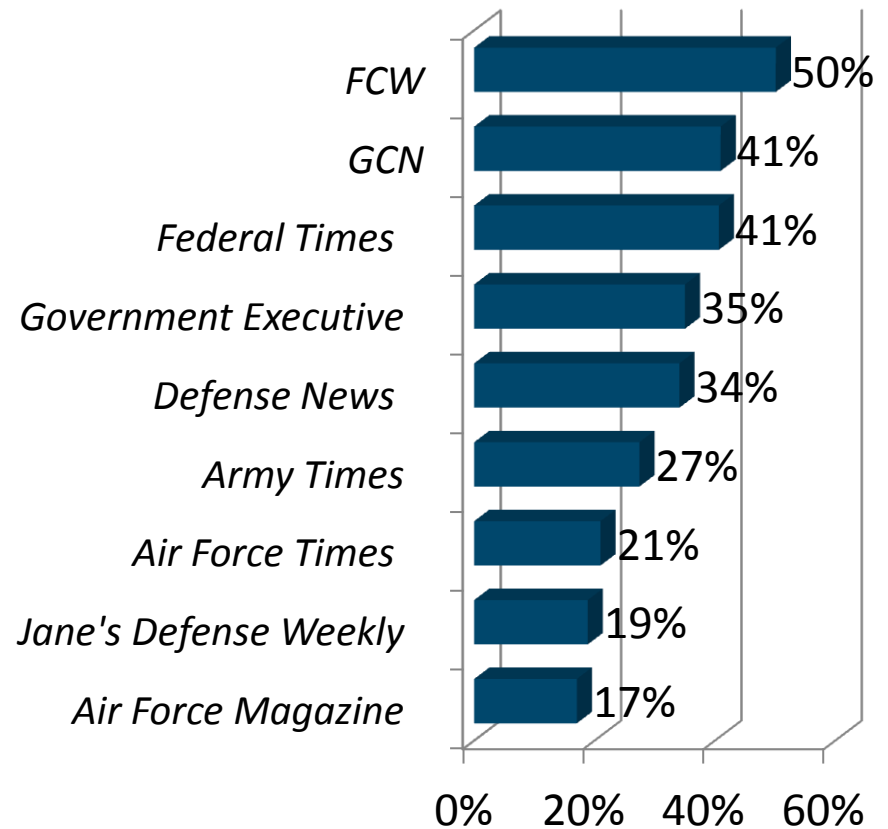
Source: 2011 Federal Media & Marketing Study

Top Federal Publications Read

Total Sample

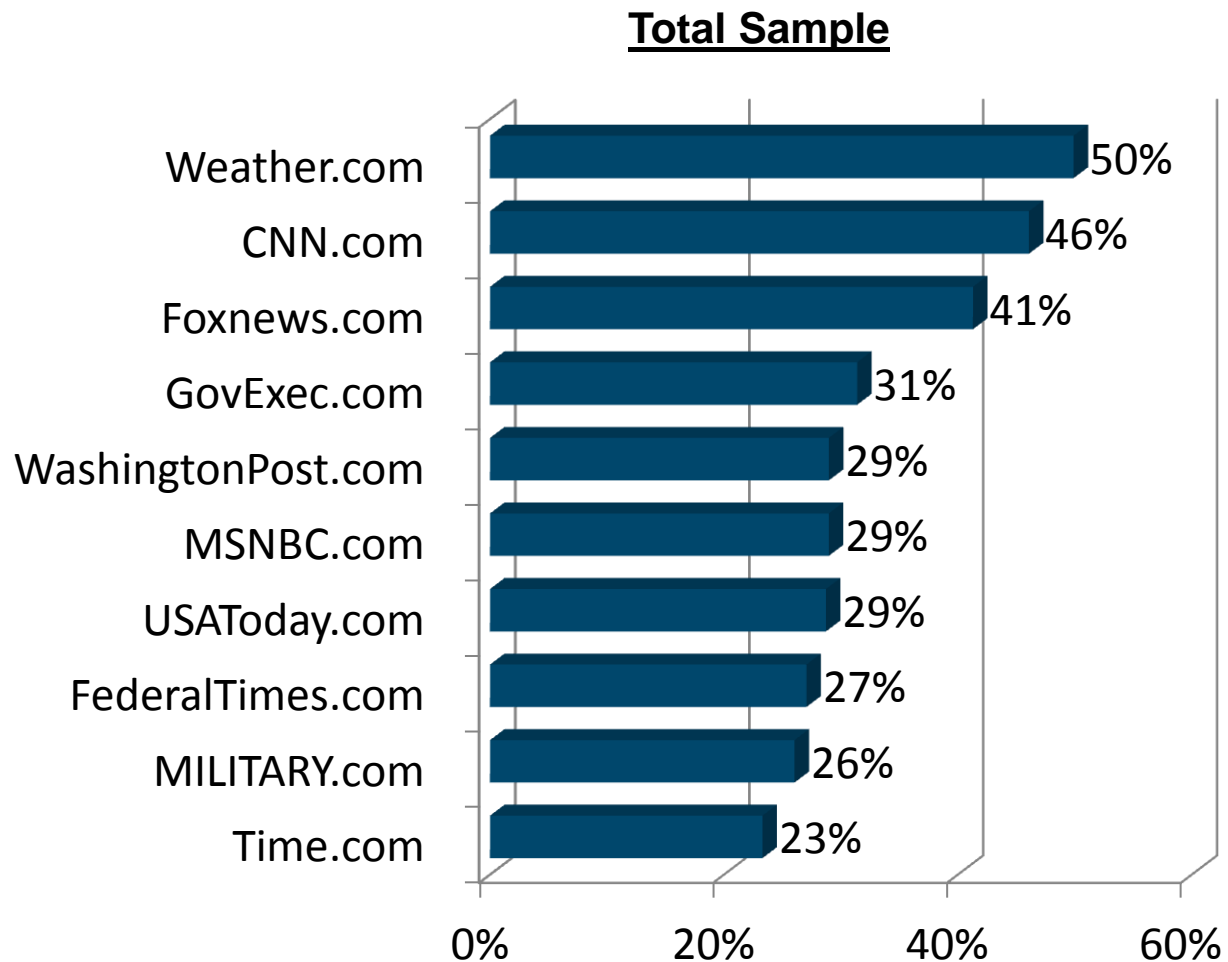


IT Job Function



Source: 2011 Federal Media & Marketing Study

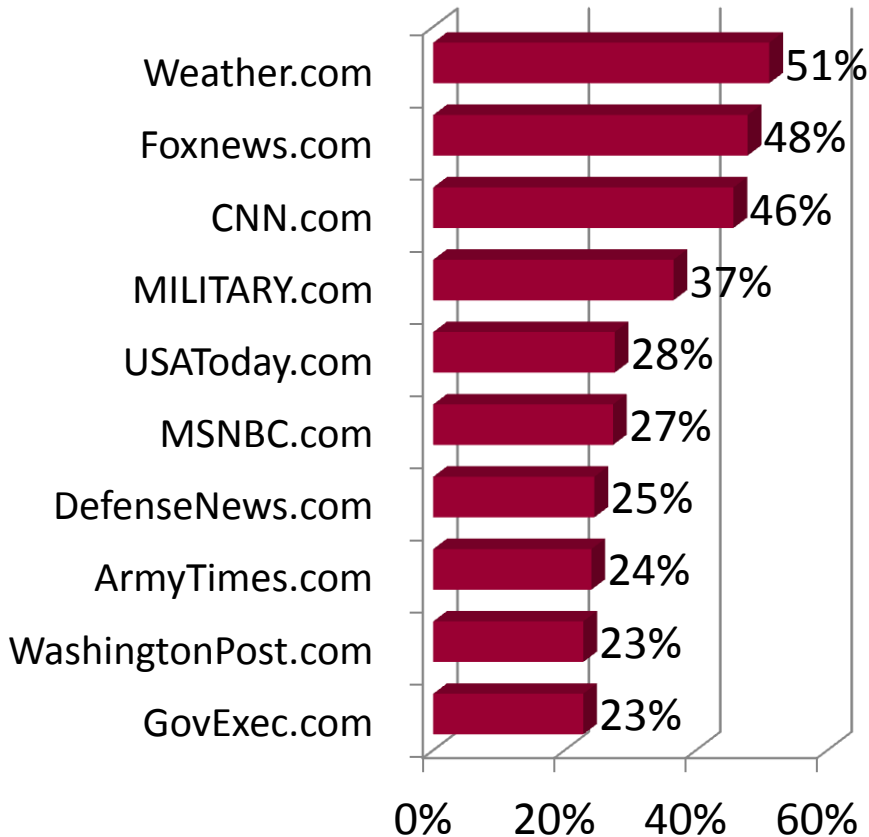
Top Web Sites Visited



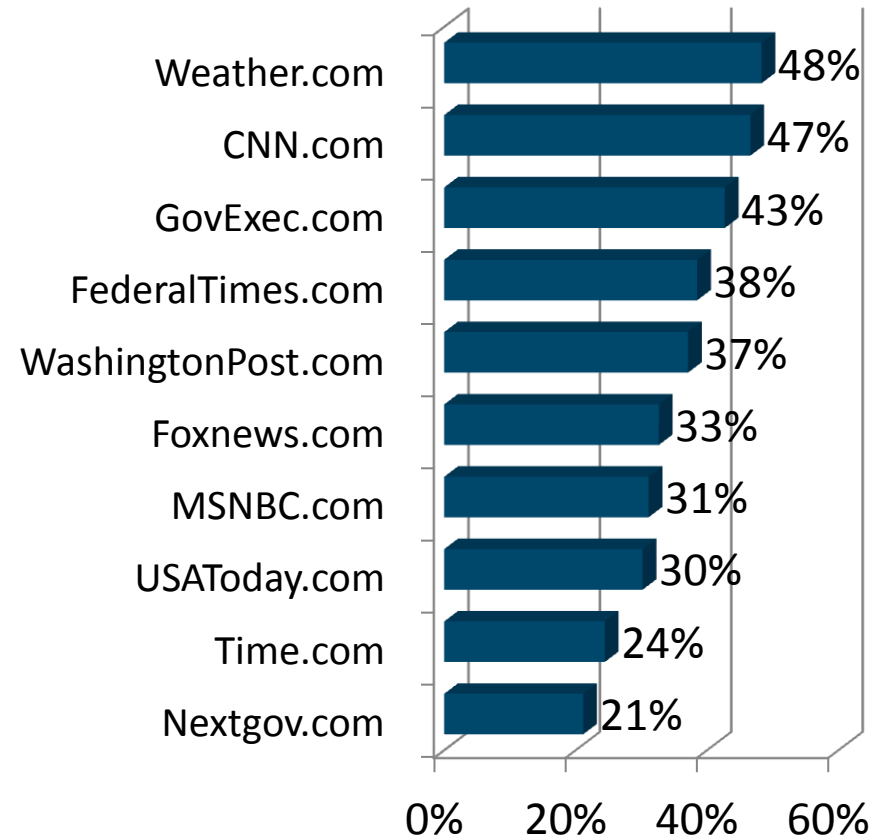
Source: 2011 Federal Media & Marketing Study

Top Websites Visited

Defense Respondents



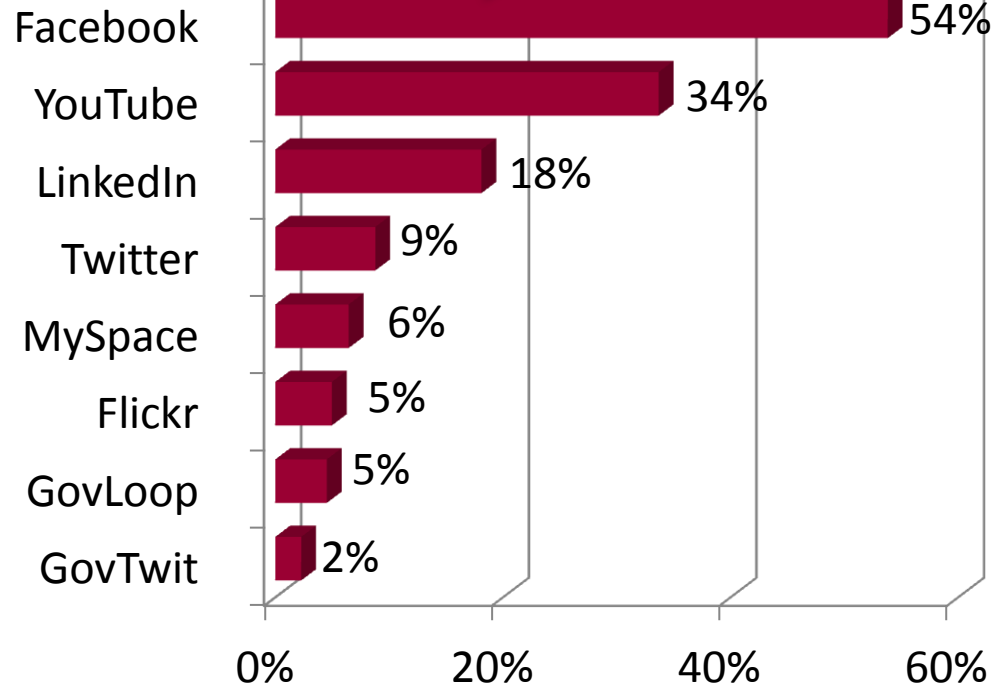
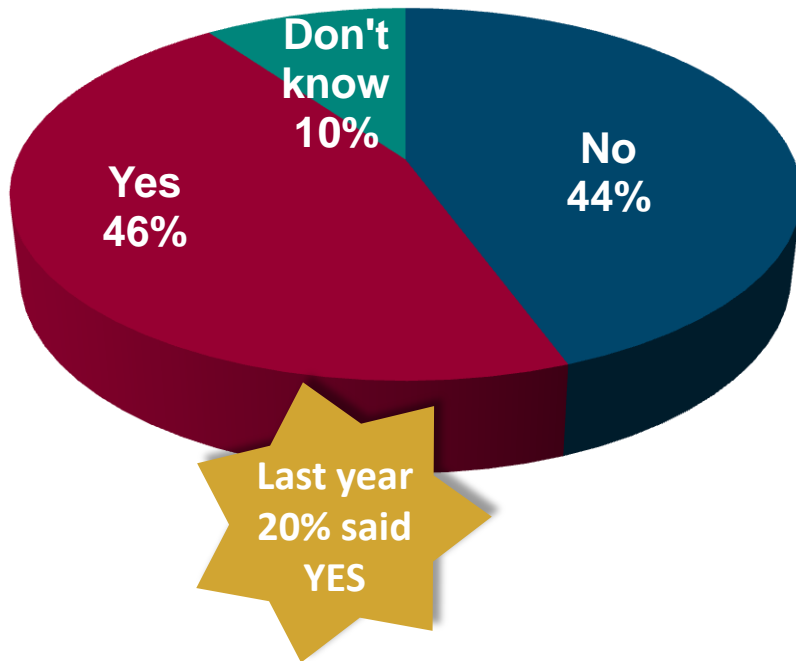
Civilian Agency Respondents



Source: 2011 Federal Media & Marketing Study

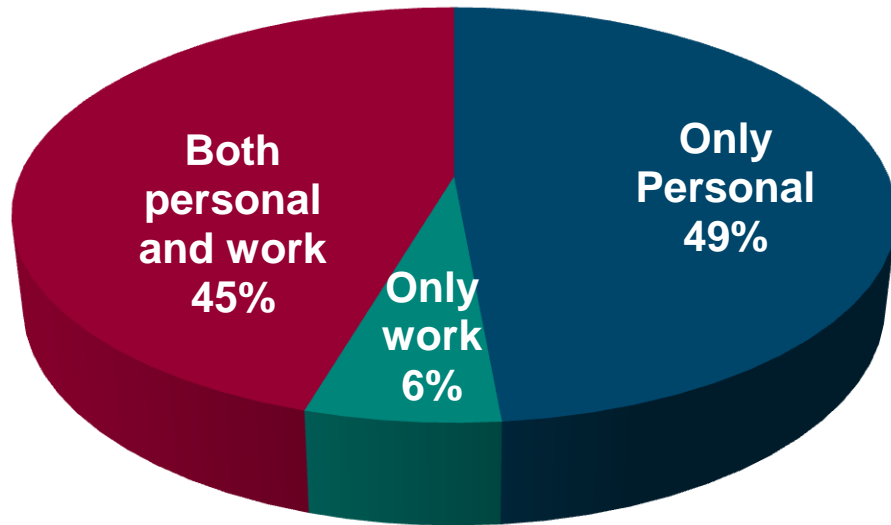
Online Social Sites

Are you allowed to access social networking sites at work?

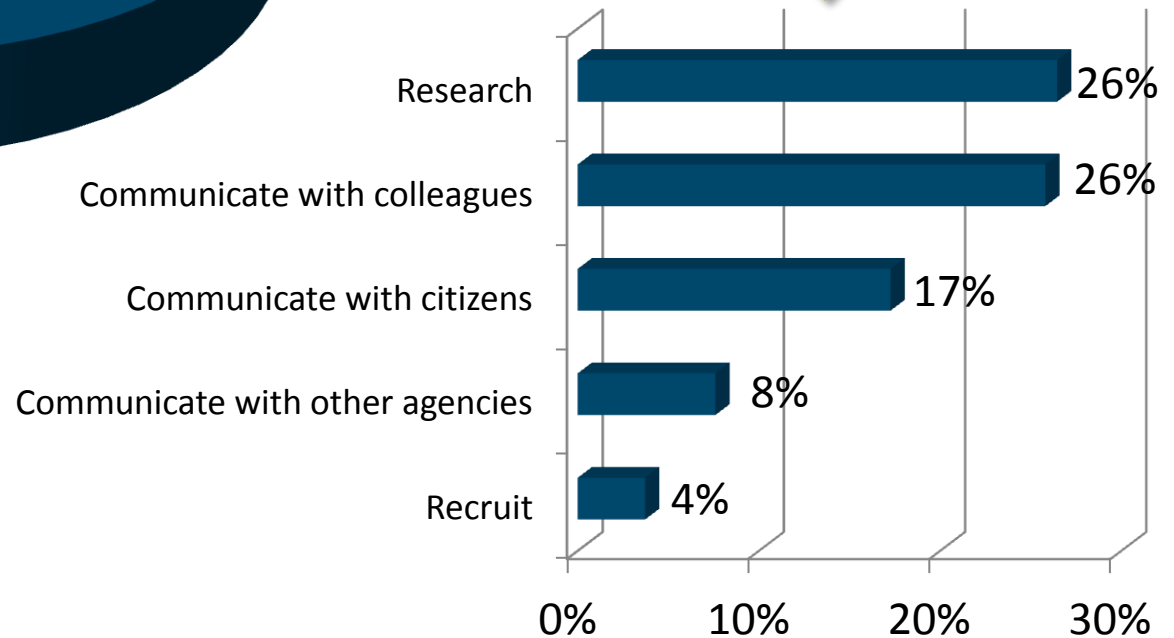


Source: 2011 Federal Media & Marketing Study

Federal Facebook Users



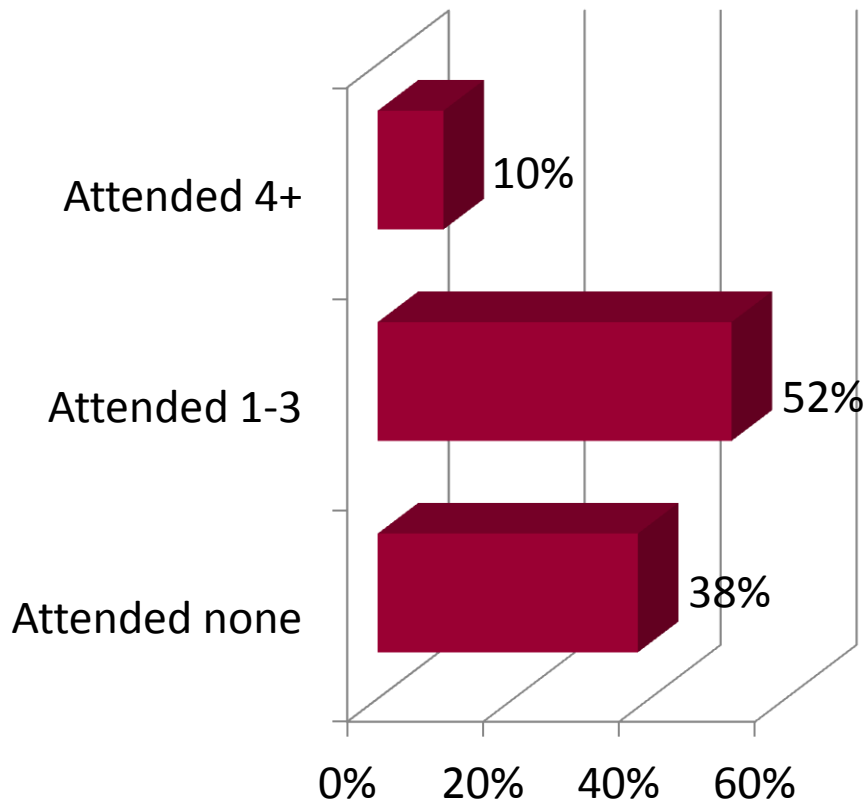
Work activities using Facebook



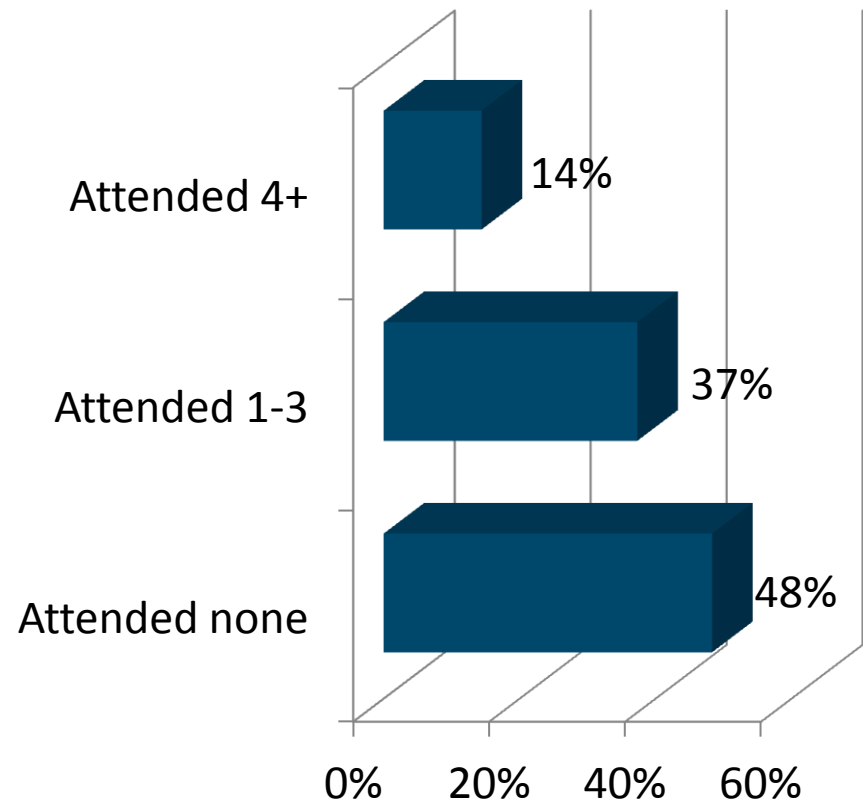
Source: 2011 Federal Media & Marketing Study

Event Attendance in Past 12 Months

Trade Show, Conferences,
Industry Events



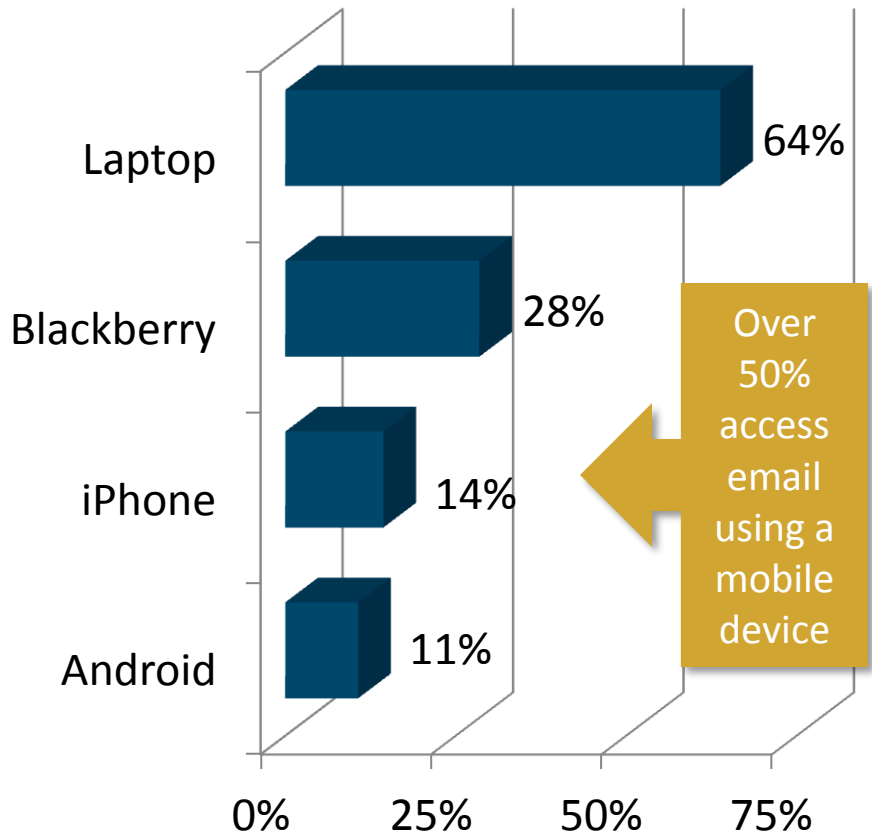
Webinars



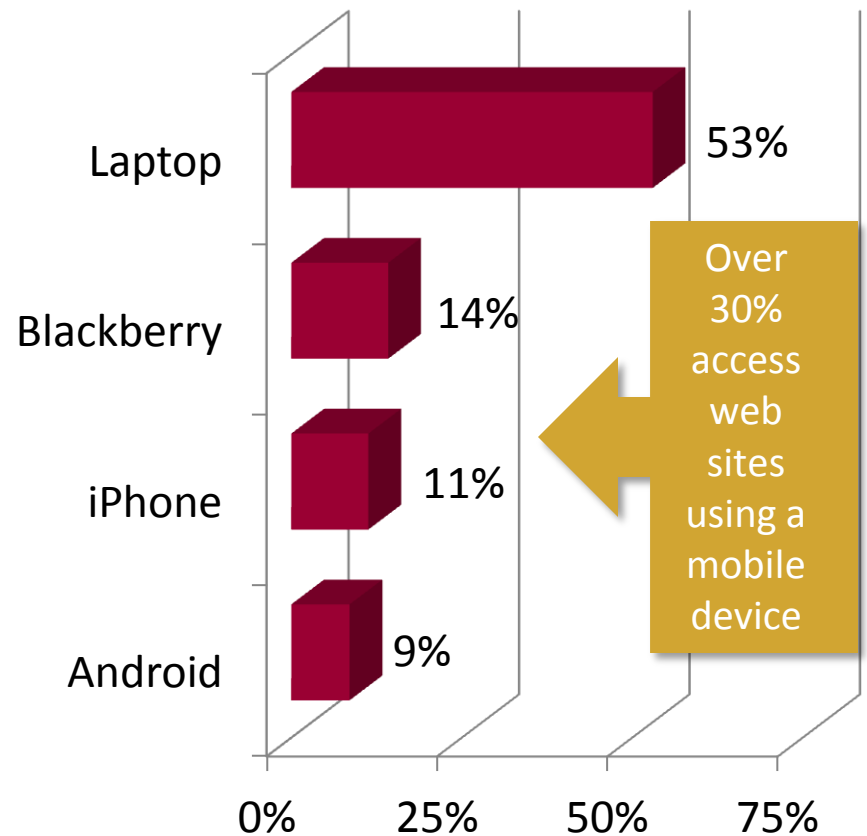
Source: 2011 Federal Media & Marketing Study

Mobile Communication Devices

Access Email



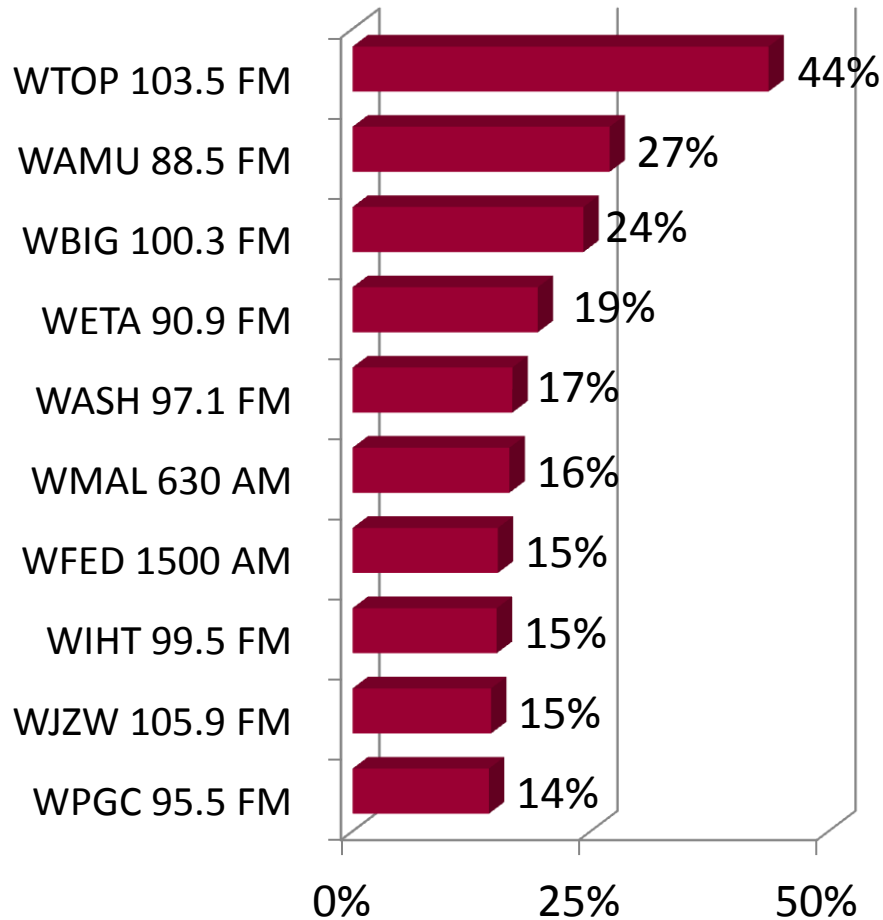
Access News Websites



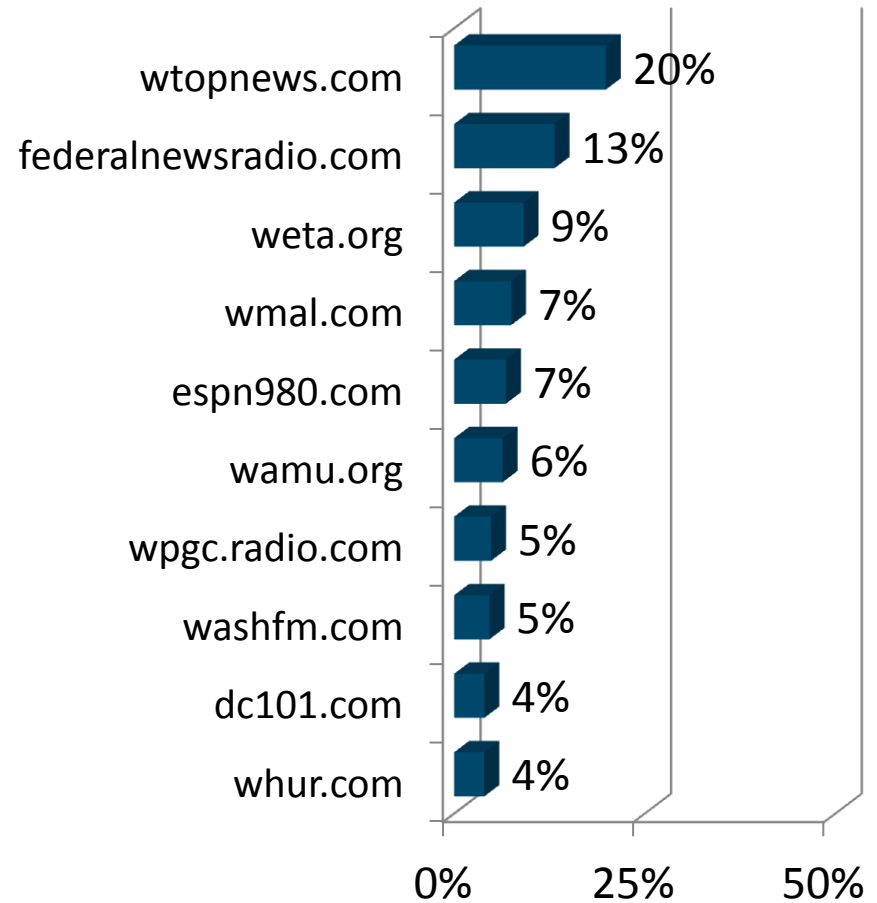
Source: 2011 Federal Media & Marketing Study

DC Metro Area: Radio

Radio Stations

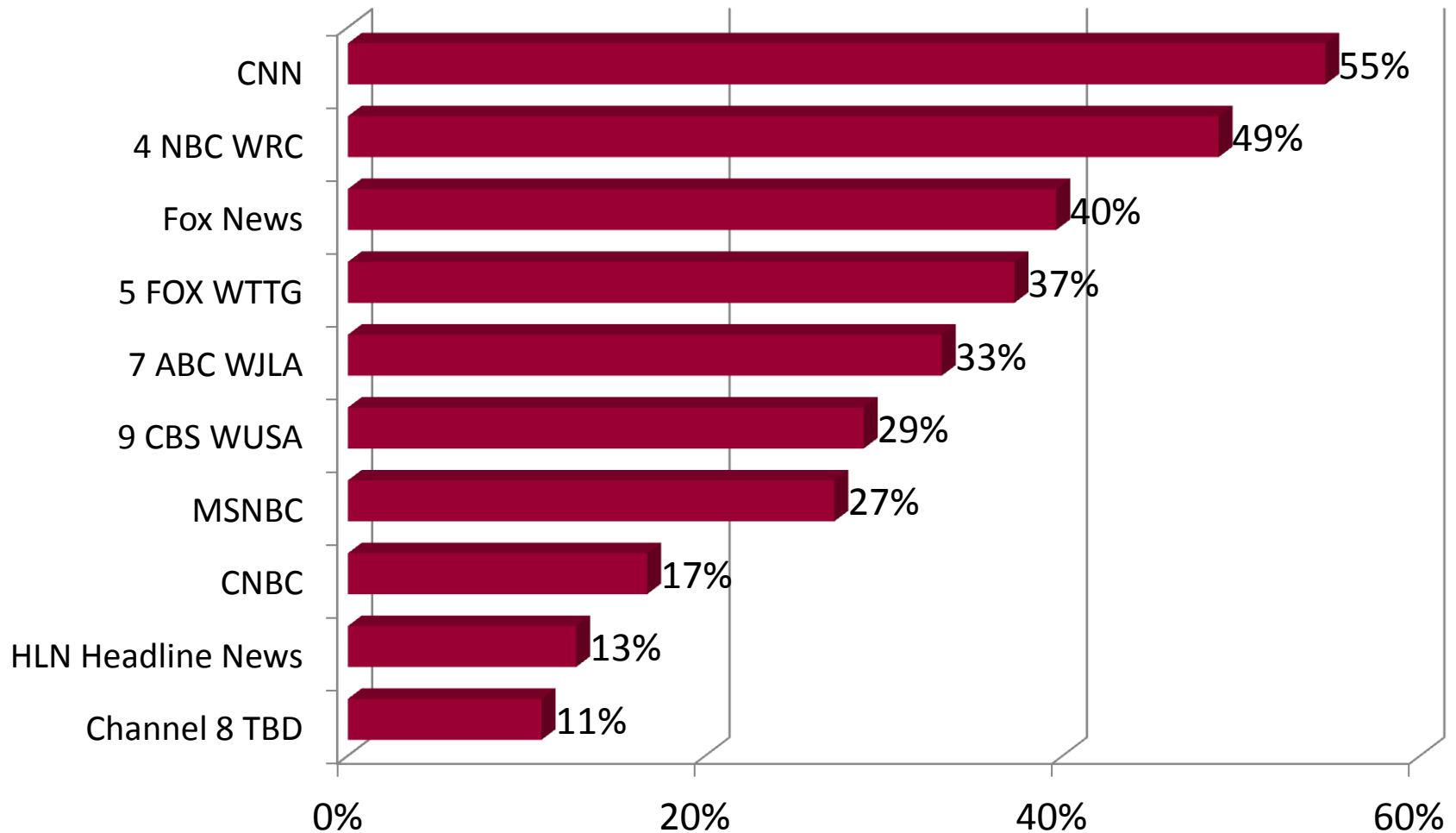


Radio Websites



Source: 2011 Federal Media & Marketing Study

DC Metro Area: TV for News



Source: 2011 Federal Media & Marketing Study

2011 Federal Media and Marketing Study

The *only* resource offering comprehensive data on the media consumption and purchasing habits of senior-level federal decision-makers.

Order access to the online data and web-based reporting tool at:


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