

A Spotlight on Growth

As another fiscal year comes to a close, GrowthLab is proud to present our annual list of marketing communications leaders in the federal space. These rankings include the top 100 marketing communications firms based on FY2022 data for prime, unclassified contracts awarded across all U.S. federal agencies.

In addition to our industry-wide rankings, we highlight the firms making the biggest moves over the past year in terms of new contract value captured. We also take an in-depth look at some of the small business leaders primed for continued growth in the public sector.

We look forward to sharing even more data and analysis in future iterations of this annual report. However, you don't have to wait a year to get insights from GrowthLab that are relevant to your business. Visit www.growthlab.us/insights to view our latest thinking on issues that matter to marketing communications firms in the federal space. And, if you're not already, subscribe to our regular email newsletter with tips, recent contract awards, and upcoming opportunities.



Government spending on marketing communications services remains stable, with some notable variation at the agency level.

Among all federal agencies, those comprising the Department of Health and Human Services spent the most on marketing communications solutions in FY2022, accounting for nearly 45% of total spend (largely attributable to the massive COVID-19 contract held by Fors Marsh Group). Other big spenders include agencies in the DOD—particularly those with large, ongoing military recruitment contracts—and NHTSA, through its contract for integrated communications support (held by Stratacomm). Not surprisingly, firms working on those contracts are heavily represented on our list.

What might come as a surprise, however, is the shrinking number of marketing communications firms capturing federal awards. In FY2019, more than 1,600 companies held prime contracts. Now, that number has dwindled to just 582 companies, and roughly half of them are making less than \$100,000 in annual revenue from prime contracts.

The top ten companies on this year's GL100 captured a whopping 75% of total revenues from prime contracts, underscoring the government's continued preference for streamlined acquisition. Today, there are more vehicles and multi-award IDIQs/BPAs and fewer one-off contracts, which ultimately results in far fewer companies receiving work.

Similarly, FY2022 was a year of significant consolidation in the industry as M&A activity remained relatively robust. Highlights include Westat acquiring Insight Policy Research and Marcom Group acquiring LMD Agency, among other notable deals, and it's likely that this trend continues in the near future.

As usual, the companies in the top 100 represent a mix of industry bellwethers and young firms on the rise, and GrowthLab is proud to call a number of them clients and partners. Our hope is that this list will inform and inspire you as you develop your own strategies for competing in the federal space moving forward.

If you're looking to break into the world of government contracting for the first time, or you're hoping to see your firm move up this list in the coming years, let's chat.

Otherwise, we hope you enjoy the annual GL100 report, and we look forward to seeing what next year brings.

Here's to your success in 2023 and beyond.

Sincerely,

Mike Kapetanovic

GrowthLab Principal

Tommy Benz GrowthLab Principal



A SPOTLIGHT ON GROWTH

Methodology

Our analysis is focused on contractors performing work under the following marketing communications-related NAICS codes: 511199, 541430, 541613, 541810, 541820, 541830, and 541910. While other NAICS codes may have marketing communications contract awards, e.g. 541611, we have limited this to the regularly used NAICS codes. Not every company on this list operates exclusively in the marketing communications sector. Several consultancies, professional services firms, and 8(a) ANCs made our rankings, since they do offer capabilities supporting marketing communications and had at least one prime award under one of the above NAICS codes in FY2022.

For each company included, we reviewed all current contracts to determine eligibility. That said, we've removed companies that are not primarily focused on marketing communications services, even if they contracted work under one of these codes (e.g., General Dynamics). In total, 62 companies that would have made this list based on FY2022 spend were left out of our rankings.

The industry saw a number of mergers and acquisitions in FY2022. For the purposes of our analysis, we used the combined revenue of companies involved in a merger to determine the new company's ranking on this list (e.g., revenue for The Hatcher Group is equivalent to combined revenue of The Hatcher Group and HORNE Creative Group). Additionally, we consolidated several of the companies under their parent company. For example, Porter Novelli is folded in with the other Omnicom Group agencies.

In addition to presenting the top 100 firms based on overall FY2022 government contracting revenue, we also identify the top three firms based on size, and the top three carrying special SBA certifications, including 8(a), Historically Underutilized Business Zone (HUBZone), Woman-Owned Small Business (WOSB), and Service-Disabled Veteran-Owned Small Business (SDVOSB). To determine a company's size, we used open-market, non-GSA classifications found in the Federal Procurement Data System (FPDS).

This report accounts for prime contracts only. All references to contractor "revenue" reflect contract awards reported by the government for FY2022; not actual contract revenue reported by companies to the Securities and Exchange Commission. These numbers are different for a variety of reasons. Our rankings are based on agencies' net contract obligations, as reported by federal procurement officials when contracts are signed. The prime spend is a total sum inclusive of de-obligated contracts.

Our data is accurate as of November 10, 2022. If you notice discrepancies between our report and your own data, please let us know.

Movers & Shakers

A number of firms made huge strides in the federal space between 2021 and 2022, while even more experienced dramatic declines in public sector revenue. This trend is evidence of both an increasingly competitive landscape, continued preference of streamlined acquisitions, and the challenges associated with meeting government performance requirements.

As the government continues to modify the rules for securing large contract awards, more opportunities will be available to small businesses and firms that have the specialized capabilities federal agencies are seeking.



MOVERS & SHAKERS

Top 25 Companies

In total, 81 companies had \$1 million or more in prime contracts in FY2022. Of those that eclipsed that mark in FY2022, four didn't have any federal spend (in the used NAICS codes for this report) in FY21. Congrats to AWL Strategies, Deloitte, JPA Health and LMO Advertising for joining the list!

And, we saw a handful of companies watch their public sector portfolios soar above the \$1 million mark in FY2022, specifically: Sage Communications, Metro Communications, Novak Birch, Brennsys Technology, Dynamic Integrated Services, Paskill & Stapleton Graphic, and Montage Marketing.

Leading the way with the top movers are three strong small businesses: **ECU Communications**, **Montage Marketing Group** and **Sage Communications**. ECU Communications soared over 1,900% from their significant win at the SBA for the Community Navigator's Pilot Program. On that win, they beat out 13 other bidders! Right behind ECU Communications, Montage Marketing Group grew 1,885%. And, while **Fors Marsh Group** rounds out the top 10 with a growth rate of 98.6%, they saw the largest dollar growth, nearly \$210M.

Top 25 Companies (IN % CHANGE)

Rk. NAME	2021 (\$Ks)	2022 (\$Ks)	% CHANGE
7 ECU COMMUNICATIONS	\$1,695	\$35,321	1,983.3%
2 MONTAGE MARKETING GROUP	\$60	\$1,191	1,885.8%
3 SAGE COMMUNICATIONS	\$675	\$4,253	530.1%
4 ABT ASSOCIATES	\$217	\$1,076	396.4%
5 DYNAMIC INTEGRATED SERVICES	\$325	\$1,452	346.7%
6 PASKILL & STAPLETON GRAPHIC	\$291	\$1,081	271.2%
7 DAVIS MANAGEMENT GROUP	\$1,006	\$2,377	136.4%
8 CATMEDIA	\$3,213	\$6,964	116.8%
9 BRENNSYS TECHNOLOGY	\$603	\$1,223	102.8%
70 FORS MARSH GROUP	\$212,248	\$421,473	98.6%



MOVERS & SHAKERS

Top 25 Companies (CONTID)

2021 (\$Ks)	2022 (\$Ks)	% CHANGE
\$713	\$1,365	91.5%
\$34,558	\$62,316	80.3%
\$37,916	\$66,233	74.7%
\$1,427	\$2,486	74.2%
\$4,323	\$7,383	70.8%
\$7,814	\$12,668	62.1%
\$4,467	\$6,662	49.1%
\$1,599	\$2,356	47.3%
\$6,107	\$8,813	44.3%
\$5,973	\$8,274	38.5%
\$2,621	\$3,527	34.6%
\$1,155	\$1,518	31.4%
\$816	\$1,064	30.4%
\$29,313	\$37,989	29.6%
\$1,996	\$2,585	29.5%
	\$713 \$34,558 \$37,916 \$1,427 \$4,323 \$7,814 \$4,467 \$1,599 \$6,107 \$5,973 \$2,621 \$1,155 \$816 \$29,313	\$713 \$1,365 \$34,558 \$62,316 \$37,916 \$66,233 \$1,427 \$2,486 \$4,323 \$7,383 \$7,814 \$12,668 \$4,467 \$6,662 \$1,599 \$2,356 \$6,107 \$8,813 \$5,973 \$8,274 \$2,621 \$3,527 \$1,155 \$1,518 \$816 \$1,064 \$29,313 \$37,989

FEDERAL MARKETING COMMUNICATIONS LEADERS FY22

The rankings below include some of the biggest names in media and advertising, as well as a number of global consultancies that have continued to build marketing capabilities around their data expertise.

However, plenty of small businesses and relative newcomers to the public sector also made their presence felt in FY2022, and they're well represented here.

Without further ado, we present the GL100 for FY2022.



Rk. NAME	SPEND AWARDED (\$Ks)
7 FORS MARSH GROUP	\$421,473
2 OMNICOM GROUP	\$418,706
3 INTERPUBLIC GROUP	\$383,888
4 WPP GROUP USA	\$179,750
5 CROSBY MARKETING COMMUNICATIONS	\$66,233
6 PLOWSHARE GROUP	\$64,737
7 STRATACOMM	\$59,559
8 LMD AGENCY	\$37,989
9 ECU COMMUNICATIONS	\$35,321
70 APTIVE RESOURCES	\$33,425
77 ELEVATION	\$33,326
12 ALTARUM INSTITUTE	\$32,803
73 YES& FEDERAL	\$32,046
14 DISTRICT COMMUNICATIONS GROUP	\$32,006
15 IQ SOLUTIONS	\$23,219
76 RTI INTERNATIONAL	\$19,702
77 WESTAT	\$17,865
78 BETAH ASSOCIATES	\$16,133
79 BIXAL SOLUTIONS	\$15,418
20 SCIENTIFIC CONSULTING GROUP	\$12,847



Rk. NAME	SPEND AWARDED (\$Ks)
27 ICF INTERNATIONAL	\$12,668
22 FHI 360	\$12,157
23 SCHATZ PUBLISHING GROUP	\$10,854
24 IPSOS	\$9,733
25 EDELMAN	\$9,614
26 HAGER SHARP	\$9,413
27 LUMINARY LABS	\$8,813
28 CW-LTS	\$8,274
29 BRUNET GARCIA ADVERTISING	\$8,018
30 MCNEELY PIGOTT & FOX PUBLIC RELATIONS	\$7,840
37 COMMUNICATEHEALTH	\$7,825
32 L & M POLICY RESEARCH	\$7,572
33 RED CARROT	\$7,383
34 BANYAN COMMUNICATIONS	\$7,379
35 CATMEDIA	\$6,964
36 CONCEPTS	\$6,662
37 CREATIVE MARKETING RESOURCES	\$6,603
38 SENSIS	\$6,279
39 ROCK CREEK STRATEGIC MARKETING	\$6,064
40 JPA HEALTH	\$5,969



Rk. NAME	SPEND AWARDED (\$Ks)
47 AMERICAN INSTITUTES FOR RESEARCH	\$5,883
42 IGNITED MINDS	\$5,805
43 VISTRA COMMUNICATIONS	\$5,432
44 HORNE CREATIVE GROUP	\$4,319
45 SAGE COMMUNICATIONS	\$4,253
46 INTREPID	\$4,184
47 NOVA RESEARCH COMPANY	\$3,527
48 BARBARICUM	\$3,495
49 AKOYA	\$2,839
50 TACTIS	\$2,807
57 SALTERMITCHELL	\$2,714
52 NCN TECHNOLOGY	\$2,585
53 TMGL	\$2,509
54 720 STRATEGIES	\$2,486
55 DAVIS MANAGEMENT GROUP	\$2,377
56 EFK GROUP	\$2,356
57 ALAN S NEWMAN ASSOCIATES	\$2,352
58 A. BRIGHT IDEA	\$2,279
59 LMO ADVERTISING	\$2,113
60 PCI PRODUCTIONS	\$2,091



Rk. NAME	SPEND AWARDED (\$Ks)
67 LEONARD RESOURCE GROUP	\$2,072
62 SYNERGY ENTERPRISES	\$1,910
63 FINN PARTNERS	\$1,638
64 MEDIA FUSION	\$1,571
65 REINGOLD	\$1,565
66 KGB MEDIA	\$1,518
67 DYNAMIC INTEGRATED SERVICES	\$1,452
68 BRIDGE GROUP	\$1,448
69 NOVAK BIRCH	\$1,365
70 GRAFIK INDUSTRIES	\$1,288
77 METRO COMMUNICATIONS	\$1,230
72 BRENNSYS TECHNOLOGY	\$1,223
73 POWELL STRATEGIES	\$1,216
74 MONTAGE MARKETING GROUP	\$1,191
75 DELOITTE	\$1,176
76 LINKS MEDIA	\$1,095
77 VOX OPTIMA	\$1,094
78 PASKILL & STAPLETON GRAPHIC	\$1,081
79 ABT ASSOCIATES	\$1,076
80 BOOZ ALLEN HAMILTON	\$1,064



Rk.	NAME	SPEND AWARDED (\$Ks)
81	VANGUARD COMMUNICATIONS OF FALLS CHURCH	\$968
82	TMP WORLDWIDE	\$940
83	BIDAYA CORPORATE COMMUNICATIONS	\$911
84	AWL STRATEGIES	\$856
85	GOLDBELT	\$854
86	JBS INTERNATIONAL	\$810
87	HOME FRONT COMMUNICATIONS	\$797
88	MEDIAFORCE	\$785
89	TETRA TECH	\$782
90	OCTANE	\$739
91	LISTA DESIGN STUDIO	\$730
92	ADZ ETC	\$720
93	RED	\$699
94	THREESPOT MEDIA	\$605
95	AQUENT	\$583
96	MODAVATE	\$574
97	BLN	\$567
98	ART-Z GRAPHICS	\$556
99	ANTELOPE FLATS	\$537
100	GRAFIK MARKETING COMMUNICATIONS	\$537

Deep Dive: Recognizing Category Leaders



DEEP DIVE

Category Leaders

Over the course of our analysis, we segmented companies based on a number of attributes including size and small business certifications. Those didn't factor into a firm's eligibility for the GL100 rankings, and companies from each segment can be found on that list.

However, for those interested in a more nuanced view of the industry landscape, we reveal the top three leaders by category below.

Large Companies PG.15

- Fors Marsh Group
- Omnicom Group
- Interpublic Group

Small Business PG.16

- LMD Agency
- ECU Communications
- Aptive Resources

WOSB PG.17

- LMD Agency
- ECU Communications
- Aptive Resources

SDVOSB PG.18

- Aptive Resources
- ▼ Vistra Communications
- Dynamic Integrated Services

8a pg.19

- Red Carrot
- ▼ Vistra Communications
- Nadvanced Business Software Consulting

HUBZone PG.20

- Schatz Publishing Group
- Tactis
- EFK Group



Large Companies



Fors Marsh Group

#1 LARGE, #1 OVERALL | FORSMARSH.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$212,248**

2022 PRIME CONTRACTS:

\$421,473

% GROWTH: +98.59%

Largest Contracts:

\$422,847 Health and Human Services

National Institutes of

\$300,023 \$188,303 Health and Human Health and Human

Services
National Institutes of

Services
of National Institutes of

onal Institutes of National Institutes th Health

Important 2022 Win:

\$422,847 Health and Human Services

ational Institutes of Health

ND

Omnicon Group

#2 LARGE, #2 OVERALL | OMNICOMGROUP.COM

OmnicomGroup

At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$507,590**

2022 PRIME CONTRACTS:

\$418,706 % GROWTH:

-17.51%

Largest Contracts:

\$4,000,000 Defense

US Army (DDB Chicago) \$903,550 Defense

US Air Force (GSD&M)

\$122,608 Health and Human Services

Centers for Medicare and Medicaid Services (Porter Novelli)

Important 2022 Win:

\$44,985

Health and Human Services

Centers for Medicare and Medicaid Services Healthcare Fraud Prevention Outreach & Education Campaign (Porter Novelli)



Interpublic Group

#3 LARGE, #3 OVERALL | INTERPUBLIC.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$436,972**

2022 PRIME CONTRACTS:

\$383,888

% GROWTH:

-12.15%

Largest Contracts:

\$736,999
Health and Human
Services

Centers for Medicare and Medicaid Services (Weber Shandwick) \$709,028 Health and Human Services

Food and Drug Administration (True North \$282,513 Health and Human Services

Centers for Medicare and Medicaid Services (Weber Shandwick)

Important 2022 Win:

\$736,999

Health and Human Services

Centers for Medicare and Medicaid Services Health Insurance Exchange Public Education and Outreach (Weber Shandwick)



Small Businesses



LMD Agency

#1 SMALL, #8 OVERALL | LMDAGENCY.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$29,313**

2022 PRIME CONTRACTS: **\$37,989**

% GROWTH:

* GROWTH:

Largest Contracts:

\$72,164 Defense

US Army National

\$55,653 Homeland Security

US Coast Guard

\$22,696 Homeland Security

Cybersecurity and Infrastructure Security Agency

2 ND

ECU Communications

#2 SMALL, #9 OVERALL | ECUCOMM.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$1.695**

2022 PRIME CONTRACTS:

\$35,231

% GROWTH: +1.983.25%

Largest Contracts:

\$34,411 Small Business Administration \$4,054 State Department \$3,333 Homeland Security

Citizen and Immigration Services

Important 2022 Win:

• \$34,411

Small Business Administration

Community Navigator's Pilot Program



Aptive Resources

#3 SMALL, #10 OVERALL | APTIVERESOURCES.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$33,956**

2022 PRIME CONTRACTS:

\$33,425

% GROWTH:

-1.56%

Largest Contracts:

\$63,362 Office of Personnel Management

\$60,761 Veterans Affairs \$41,979 Office of Personnel Management

Important 2022 Win:

Veterans Affairs

Communications, Marketing and Outreach Services for Veterans Benefits Administration



WOSB



LMD Agency

#1 WOSB, #8 OVERALL | LMDAGENCY.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: \$29,313

2022 PRIME CONTRACTS: \$37,989

% GROWTH:

+29.60%

Largest **Contracts:**

\$72,164 Defense

US Army National

Homeland Security

US Coast Guard

\$55,653

\$22,696 Homeland Security

Cybersecurity and Infrastructure Security Agency

ND

ECU Communications

#2 WOSB, #9 OVERALL | ECUCOMM.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: \$1,695

2022 PRIME CONTRACTS:

\$35,231

% GROWTH: +1.983.25% Largest **Contracts:**

\$34,411 **Small Business** Administration

\$4,054 State Department

\$3,333 Homeland Security

> Citizen and Immigration Services

Important 2022 Win:

Small Business Administration



Aptive Resources

#3 WOSB, #10 OVERALL | APTIVERESOURCES.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: \$33,956

2022 PRIME CONTRACTS:

\$33,425

% GROWTH:

-1.56%

Largest **Contracts:**

\$63,362 Office of Personnel Management

\$60,761 Veterans Affairs \$41,979 Office of Personnel Management

Important 2022 Win:

Veterans Affairs



SDVOSB



Aptive Resources

#1 SDVOSB, #10 OVERALL | APTIVERESOURCES.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$33,956**

2022 PRIME CONTRACTS:

\$33,425

% GROWTH:

-1.56%

Largest Contracts:

\$63,362 Office of Personnel Management \$60,761 Veterans Affairs \$41,979 Office of Personnel Management

Important 2022 Win:

\$6,997 Veterans Affairs

Communications, Marketing and Outreach Services for Veterans Benefit:

ND

Vistra Communications

#2 SDVOSB, #43 OVERALL | CONSULTVISTRA.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$4,764**

2022 PRIME CONTRACTS:

\$5,432

% GROWTH:

+14.00%

Largest Contracts:

\$3,452 Health and Human Services

Centers for Disease Control \$2,735 Defense

Human Resources Activity \$1,999 Defense Media Activity

RD ' #3

Dynamic Integrated Services

#3 SDVOSB, #67 OVERALL | DISCONSULTING.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$5,973**

2022 PRIME CONTRACTS:

\$8,274

% GROWTH:

+38.52%

Largest Contracts:

\$9,992 • Veterans Affairs \$6,981 Veterans Affairs \$5,820 Veterans Affairs

Important 2022 Win:

\$9,992 Veterans Affairs

Communication Support Services for the Million Veteran Progran



8a



Red Carrot

#1 8A, #33 OVERALL | THEREDCARROT.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$4,323**

2022 PRIME CONTRACTS:

\$7,383

% GROWTH:

+70.81%

Largest Contracts:

\$21,000 Homeland Security

Immigration and Customs Enforcement \$9,529 S Housing I

Development

National Science

Important 2022 Win:

\$9,529

Housing and Urban Development

roadcasting Webcasting and Satellite Services



Vistra Communications

#2 8A, #43 OVERALL | CONSULTVISTRA.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$4,764**

2022 PRIME CONTRACTS:

\$5,432

% GROWTH:

+14.00%

Largest Contracts:

\$3,452 Health and Human Services

Centers for Disease Control \$2,735 Defense

Human Resources Activity \$1,999 Defense

Media Activity

NCN Technology

#3 8A, #52 OVERALL | NCNTECHNOLOGY.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS:

\$1,996

2022 PRIME CONTRACTS:

\$2,585

% GROWTH:

+29.52%

Largest Contracts:

\$11,385 Homeland Security

Secret Service

\$245 Homeland Security

Customs and Border Protection



HUBZone



Schatz Publishing Group

#1 HUBZONE, #23 OVERALL | SCHATZPUBLISHING.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$9,194**

2022 PRIME CONTRACTS:

\$10,854

% GROWTH:

+18.05%

Largest Contracts:

\$18,000 Transportation

Federal Highway

\$6,944 Health and Human Services

Housing and Urbai

\$4,515 Health and Human

Services

Housing and Urban Development

Important 2022 Win:

\$6,944 Housing and Urban Development

NMA Strategic Communication Services StratComm

2 ND

Tactis

#2 HUBZONE, #50 OVERALL | TACTIS.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS:

\$2,485

2022 PRIME CONTRACTS:

\$2,807

% GROWTH:

+12.98%

Largest Contracts:

\$1,786 General Services Administration \$442 General Services Administration \$305 General Services Administration

Important 2022 Win:

\$1,786

General Services Administration

ate, Local, Tribal Territory SLTT Media Plan Implementatior



EFK Group

#3 HUBZONE, #56 OVERALL | EFKGROUP.COM



At a Glance (in 000's)

2021 PRIME CONTRACTS: **\$1.599**

φ1,399

2022 PRIME CONTRACTS:

\$2,356

% GROWTH:

Largest Contracts:

\$12,264 National Science Foundation

+47.31%

growthlab

About Us

We are a team of former marketing communications agency executives who help marketing communications firms, consultancies, and holding companies win more business in the public sector. Founded in 2018 and headquartered in Washington, D.C., GrowthLab exists to support large and small organizations at every stage of the government contracting lifecycle, from breaking into the federal space to expanding an existing portfolio. We rely on our extensive network of partners as well as decades of combined experience leading new and established government contractors, to provide services that include: growth and/or public sector strategy, pipeline development, market intelligence, capture and teaming.

Not only have we helped secure billions of dollars in federal agency spend, but we've also helped companies build the teams, networks, and internal processes that allow them to operate more efficiently, improve market positioning, and win more contracts—year after year.

To introduce yourself, learn more about our services, or explore a potential engagement, get in touch with us at **www.growthlab.us**. We'd love to talk!