

How Has Covid-19 Affected Your Federal Customer?

April 2020



Overview

Market Connections began an online survey of federal government employees starting April 8, 2020.

Four in ten are located in the DC metro area and two-thirds work for civilian agencies.

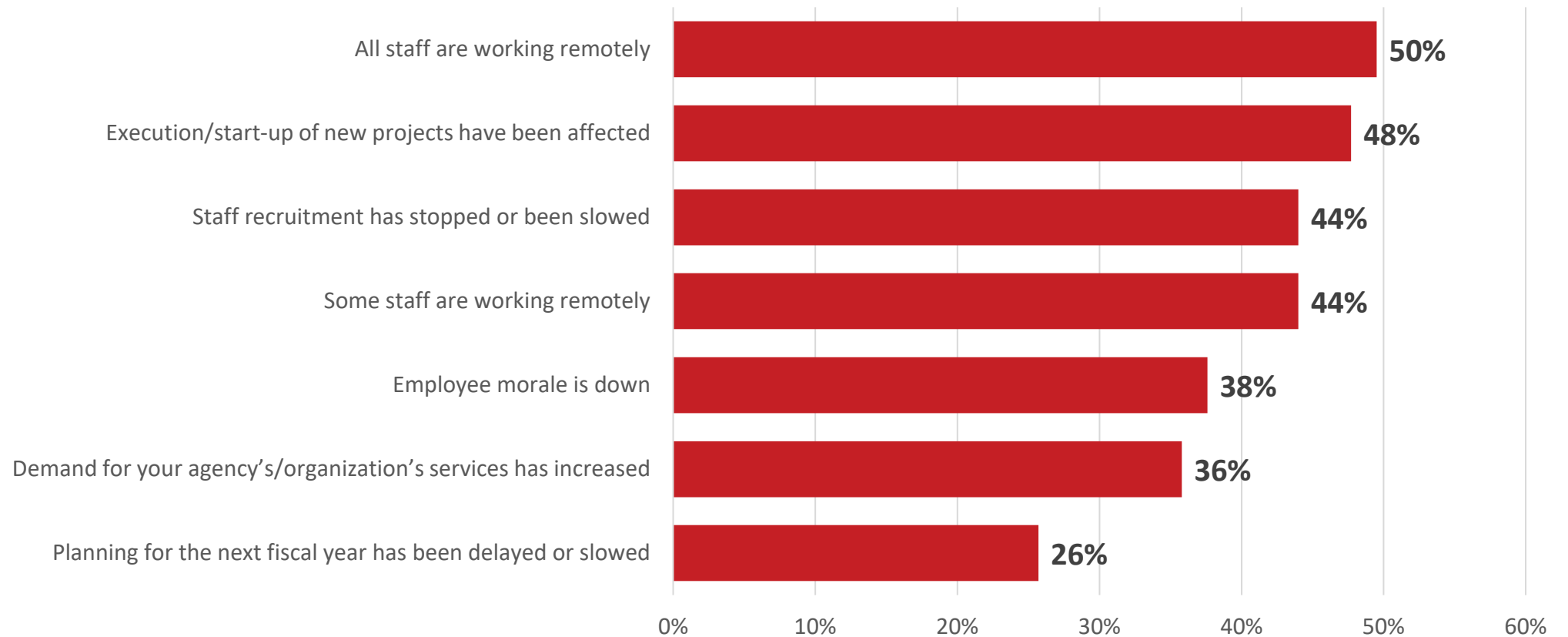


ONGOING OBJECTIVES:

- Identify changes in working behaviors related to COVID-19
- Understand challenges of conducting federal business during the pandemic
- Gauge how the federal workplace environments have been affected
- Provide guidance for marketers to adapt to the changing environment

Immediate Effects of Covid-19

Nearly half say execution of projects has been affected and one-quarter feel planning for next year has been delayed.



Q How has your agency/organization been affected by the COVID-19 pandemic?

Surge of Telework

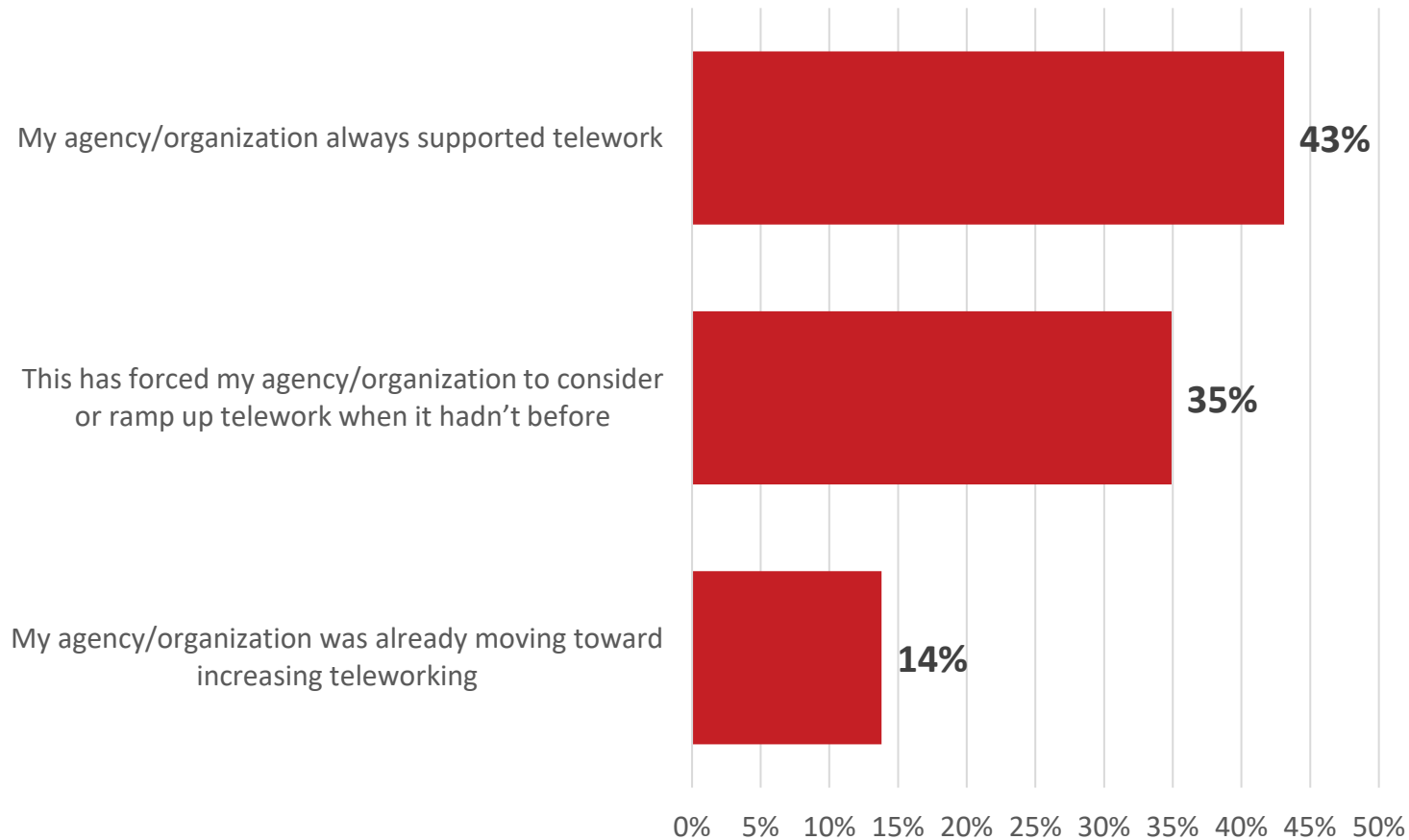
Nine out of 10 respondents are currently teleworking and 3 out of 4 respondents feel they will be able to telework at least part time after in the future



Please indicate your teleworking arrangements before the COVID-19 pandemic, currently, and how you envision teleworking in the future.

Readiness for Teleworking

Over one-third found COVID-19 has forced their agency to ramp up telework.



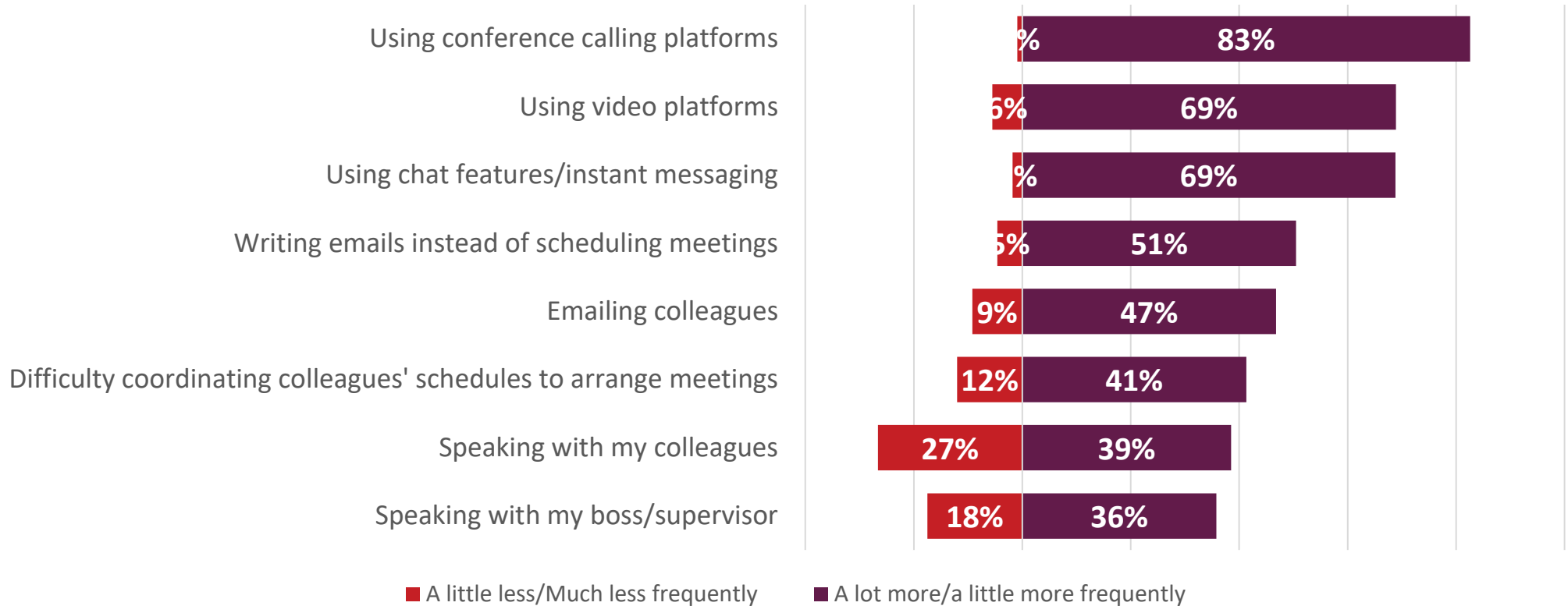
“ It has forced my agency to recognize that more work can be conducted remotely than they wished to admit to previously.

“ (My) Agency was not prepared for the growth in telework requirement.

Q How do you think the COVID-19 pandemic has affected telework for your agency/organization?

Changing Work Environments: Communication

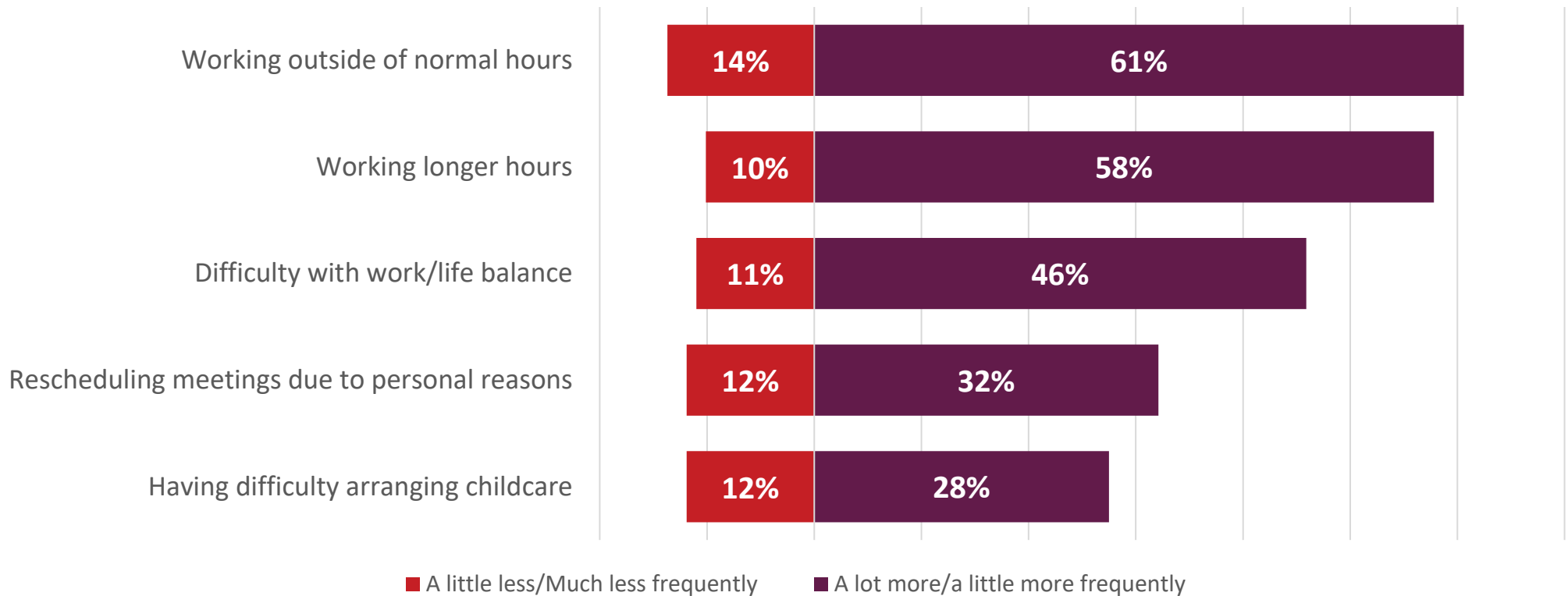
It's no surprise that respondents are using conference calling, video and IM platforms more frequently.



Q How has the COVID-19 pandemic affected your working environment?

Changing Work Environments: Lifestyle

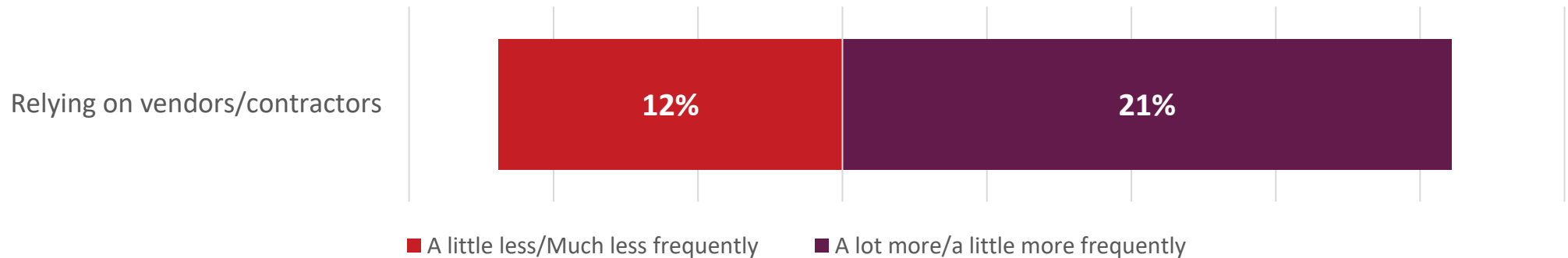
Like many of us, approximately six in ten are working outside of normal hours and longer hours.



Q How has the COVID-19 pandemic affected your working environment?

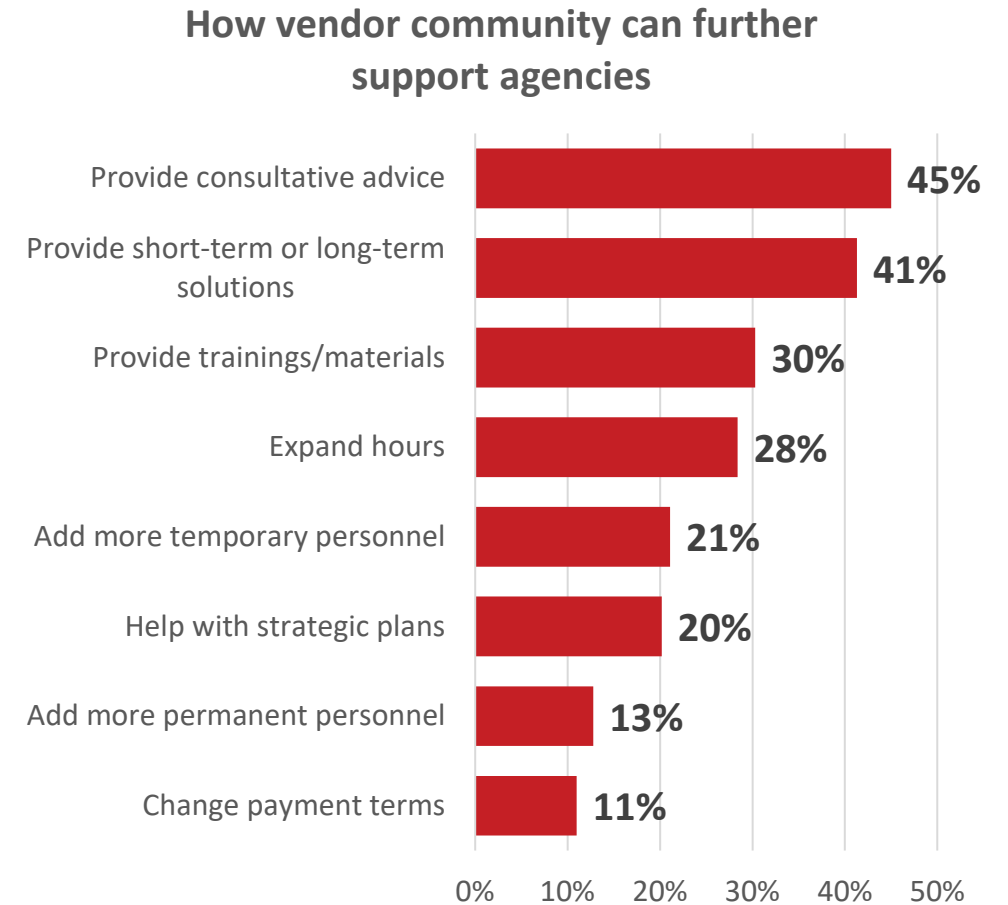
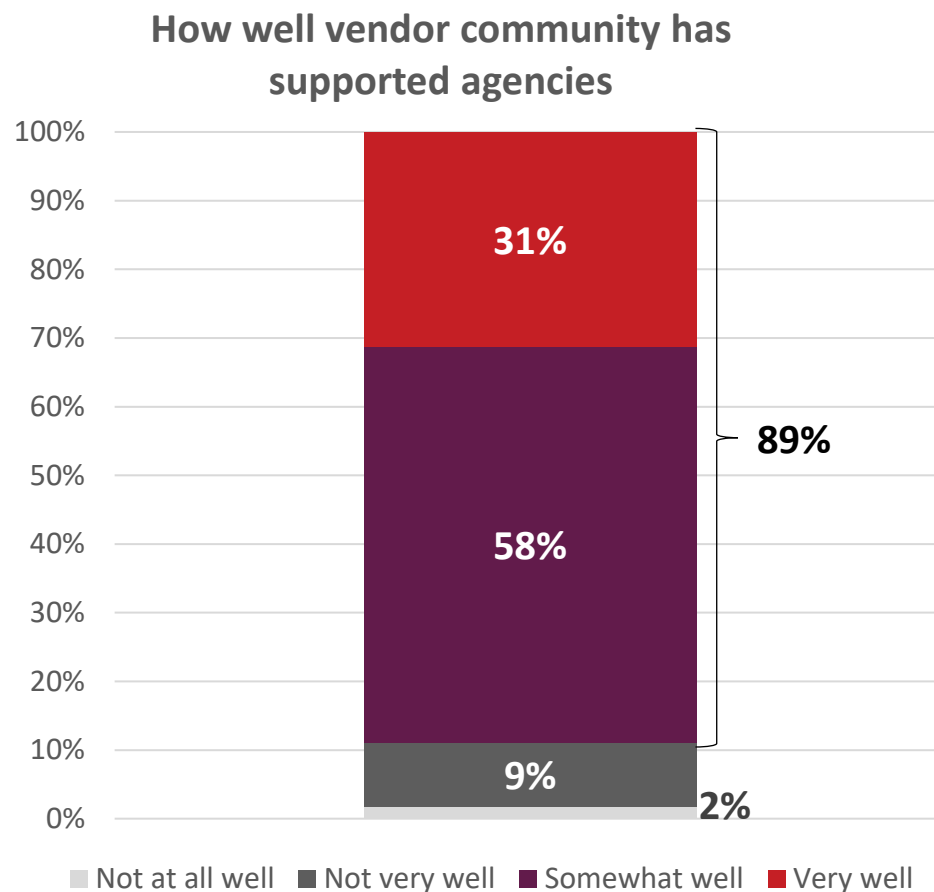
Vendor Relations

One out of five are saying they're relying on vendors/contractors more frequently.




Vendor Community Support

Respondents feel well-supported. Continue to share your expertise and advice.



Q How well has the vendor community supported your agency/organization during this time?
How can the vendor community further support your agency/organization during this time?

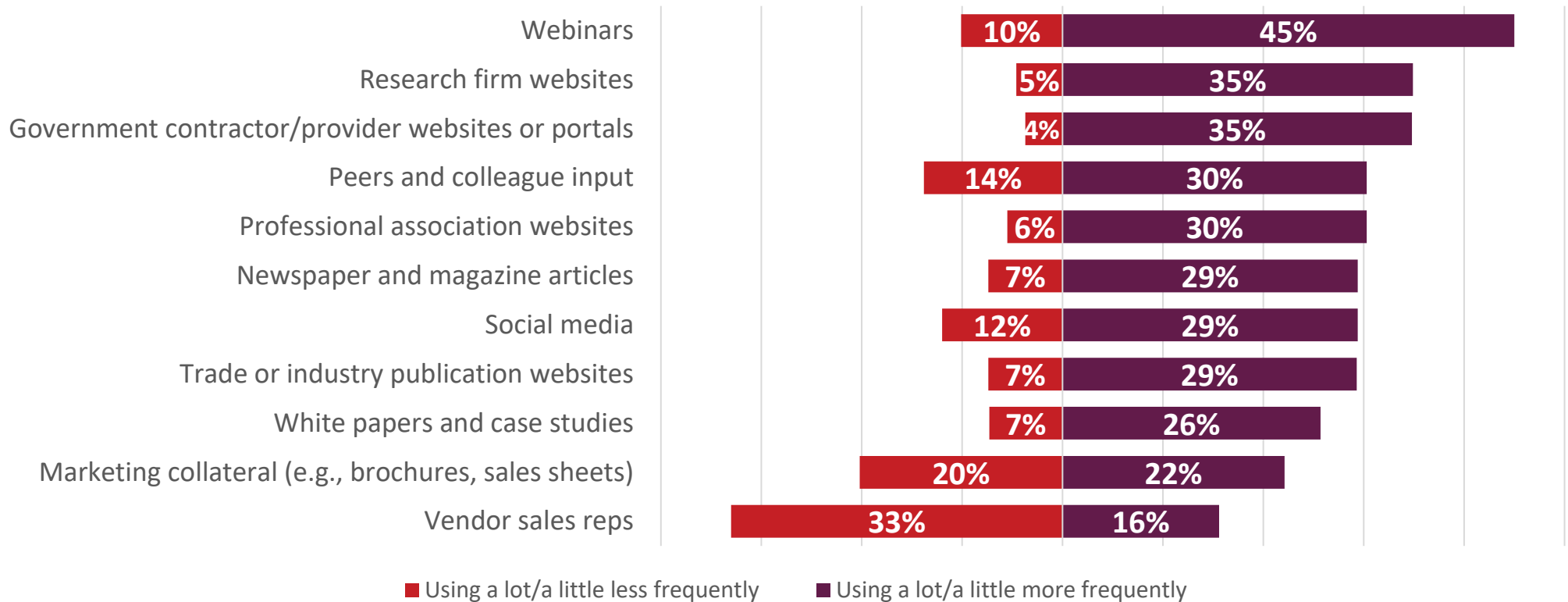


“ Our contractors/vendors have been very flexible and adapted quickly to the fluid situation around COVID/ telework arrangements/the need for different workflows to support remote employees.

CIVILIAN AGENCY RESPONDENT

How They are Learning in the Current Environment

In addition to your own website, consider research firms, professional association and trade and industry publication sites for content placement.



Since many, if not all, in-person meetings and events have been postponed or canceled due to the COVID-19 pandemic, how has your usage of each of the following to help learn about new technologies or services in your job changed?

Key Takeaways

We're all in this together,
don't screw it up.



- **April was the month of adjustment, expect May and June to be catch up months. Demand is up, expectations are as well.**
- **New work styles may lead to new opportunities for innovation. Traditional agencies are being asked to accept the non-traditional.**
- **Root your messaging in advice and support. Educational materials can provide comfort. Don't mess with the good image you have to date.**
- **Support your sales teams in DOD with educational materials, but for all agencies make sure that you are making materials available in both push and pull locations online.**
- **Continue to leverage partnerships with associations and trade publications to make connections.**

Looking into the future

We will continue to poll decision-makers as COVID-19 continues...

- Adding additional questions based on requests from clients/partners and friends
- Looking for trends as we go deeper into the new normal
- Looking towards how this will make a permanent impact on the federal market

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