

The Continued Effects of COVID-19 on the Federal Contracting Industry and Your Customer

July 2020

In Partnership With:



Overview

Market Connections began ongoing surveys of federal government employees starting April 8, 2020.

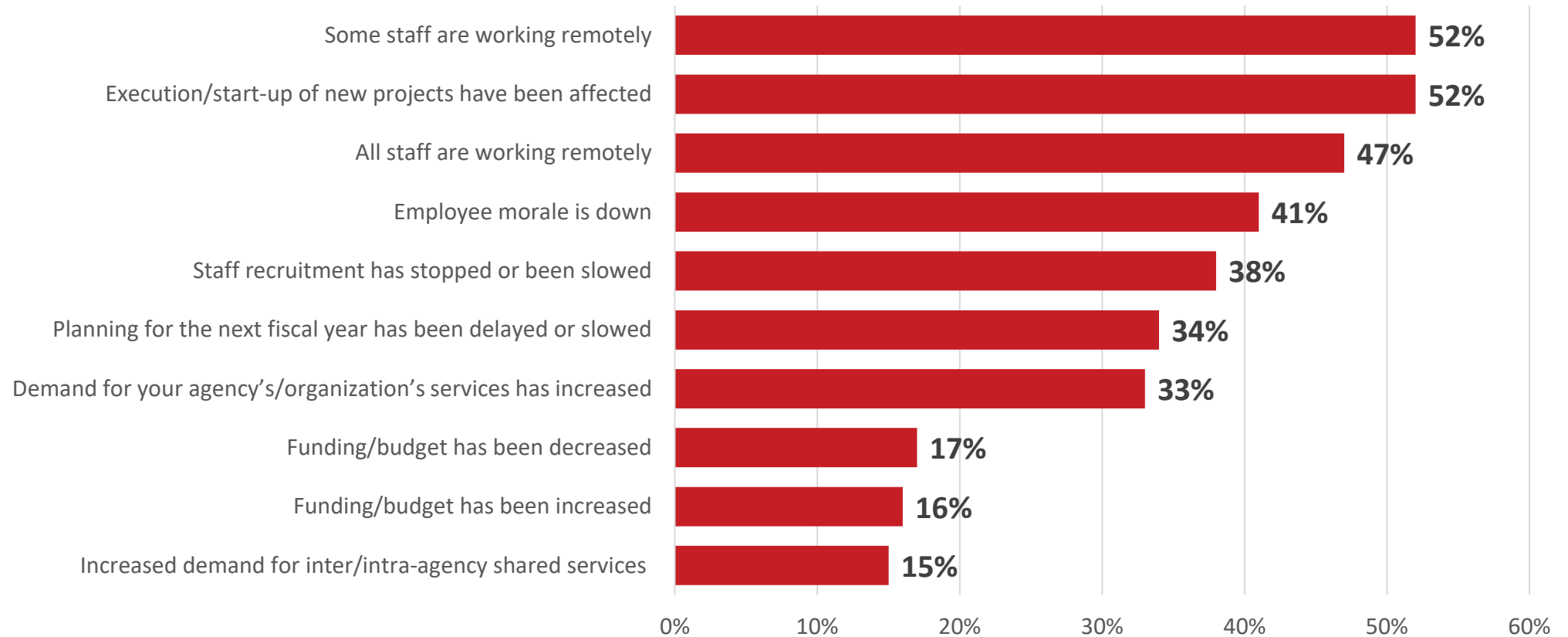


ONGOING OBJECTIVES:

- Identify and monitor 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 and how federal employees are adapting
- Provide guidance for marketers to adapt to the changing environment

Immediate Effects of Covid-19

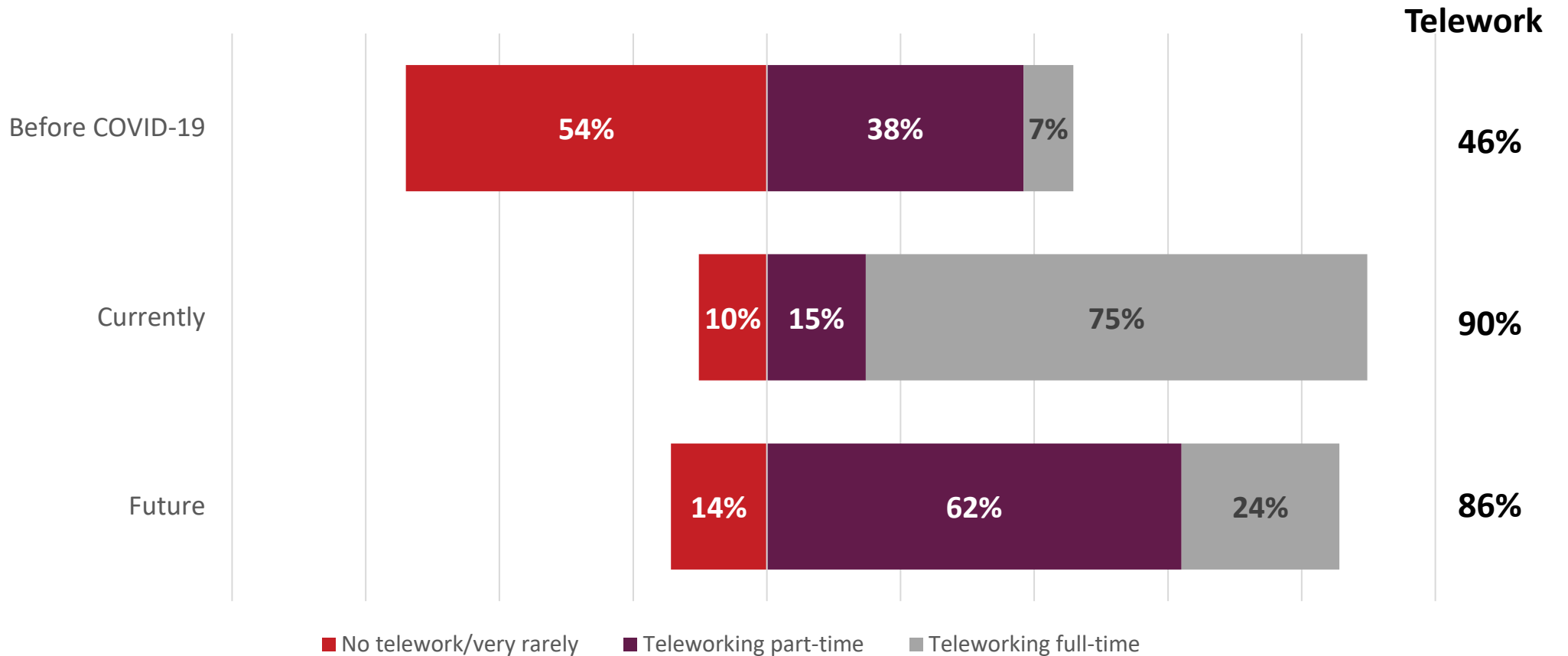
Agencies are starting to move forward but planning for 2021 is still behind.



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

Surge of Telework

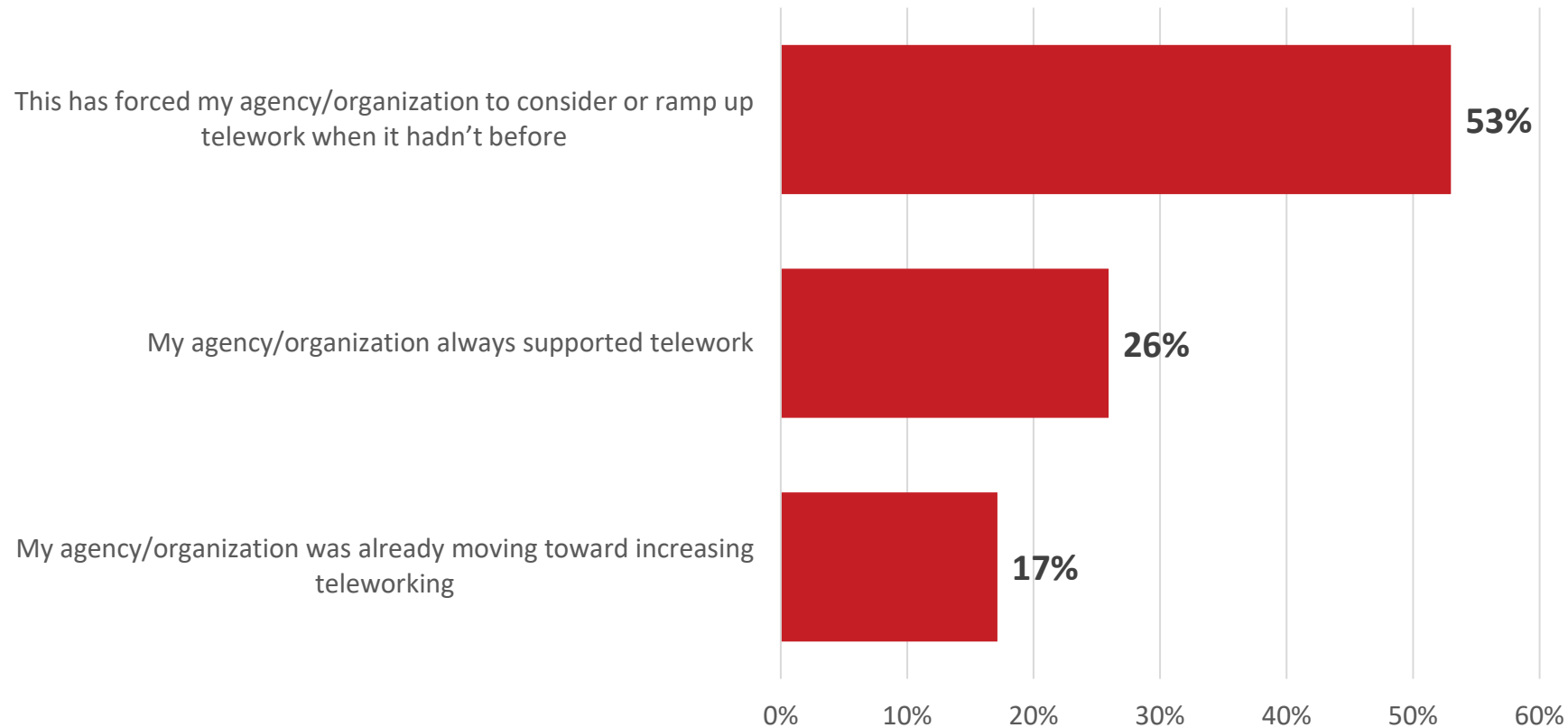
Teleworking is still the norm and increasingly going to be the future, regardless of pandemic.



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

Readiness for Teleworking

More agencies are starting their planning to include teleworking as an option in the future, whether they like it or not.



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

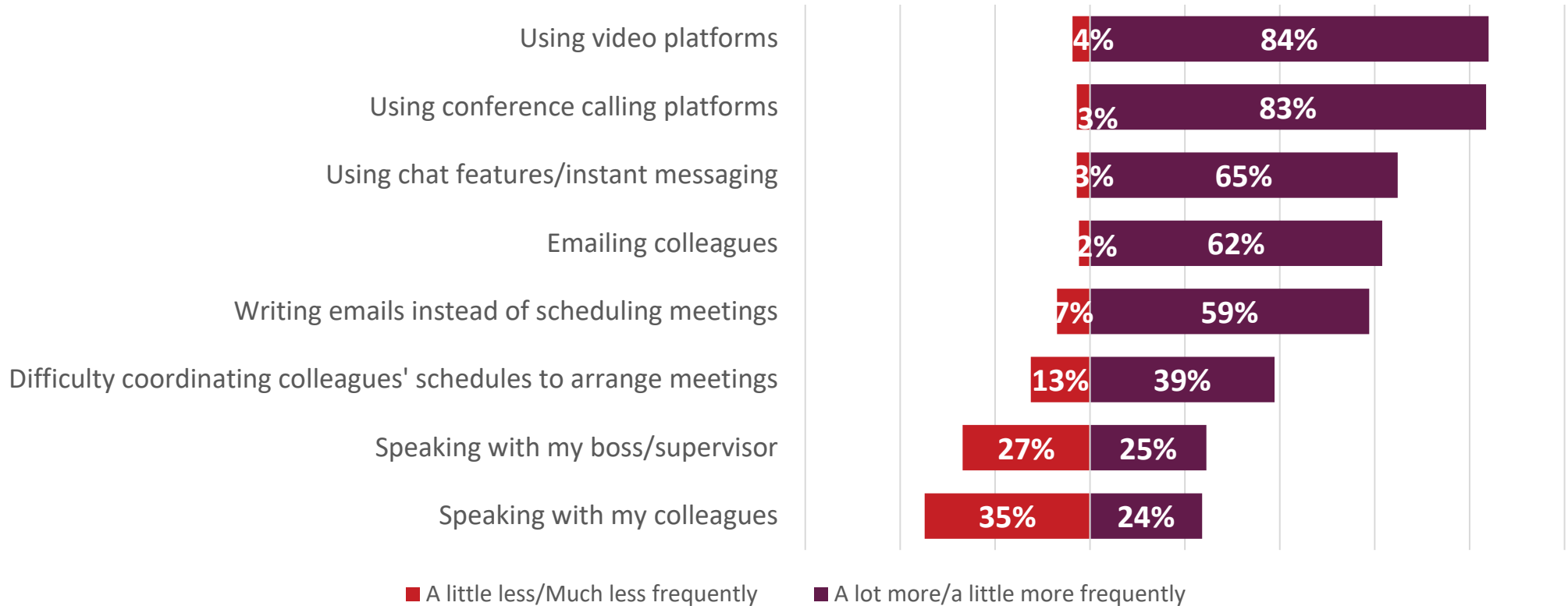
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Business operations are going very much as normal, and the maximum telework at my agency has made it more productive versus being physically at the office. More work is getting done while teleworking.

CIVILIAN AGENCY RESPONDENT

Changing Work Environments: Communication

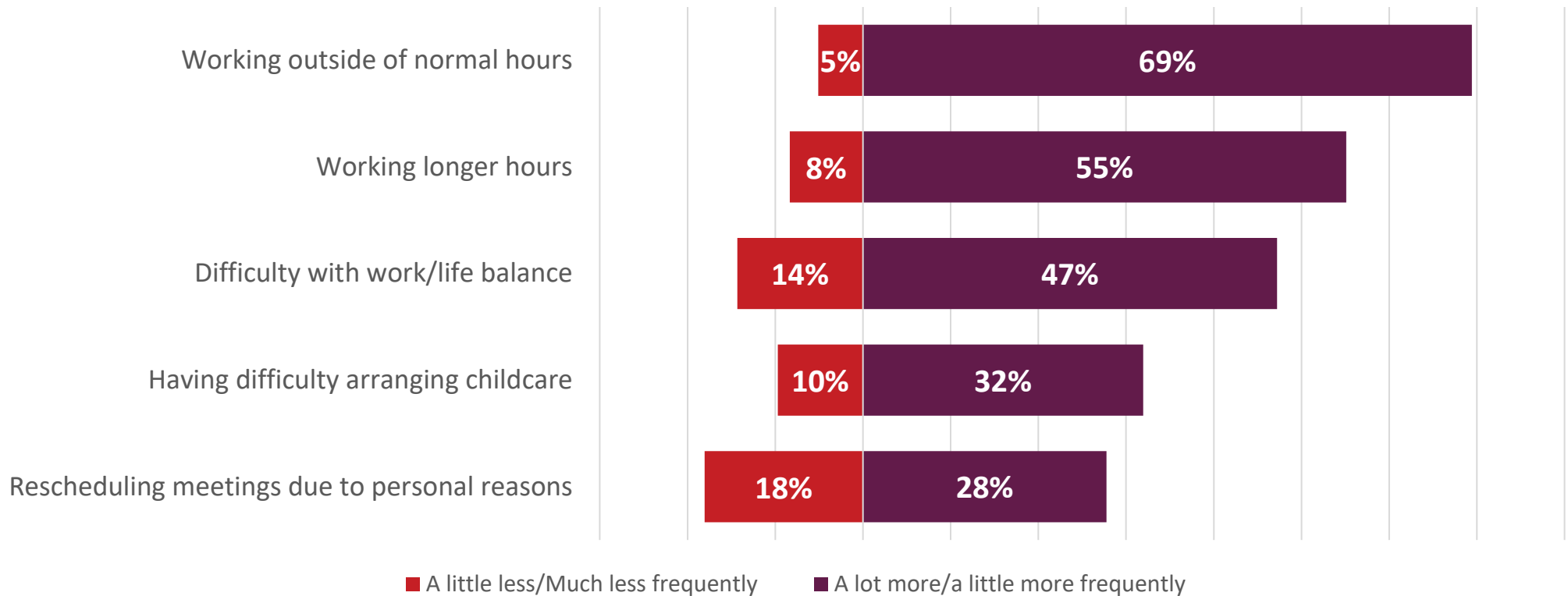
Continued increase in video platforms highlights recent security changes many platforms have made to accommodate government needs.



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

Changing Work Environments: Lifestyle

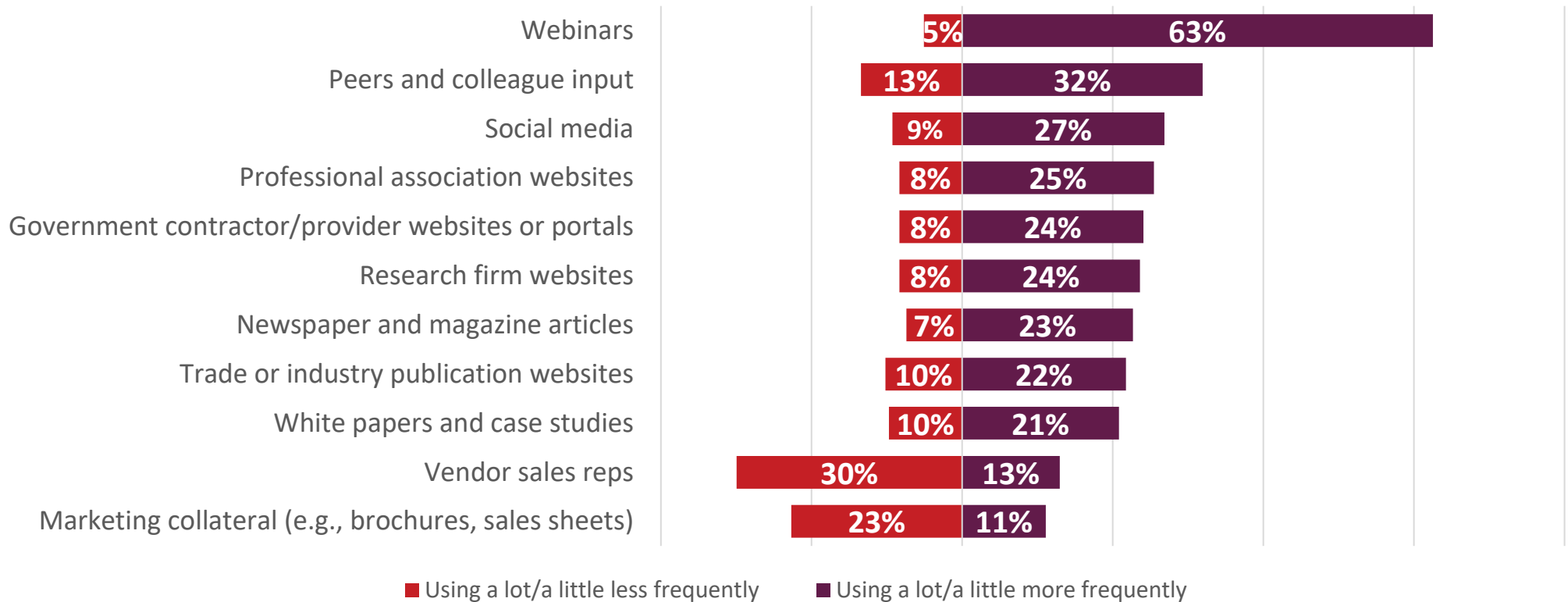
Workers are adapting their lifestyles to balance life and job responsibilities.



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

How They are Learning in the Current Environment

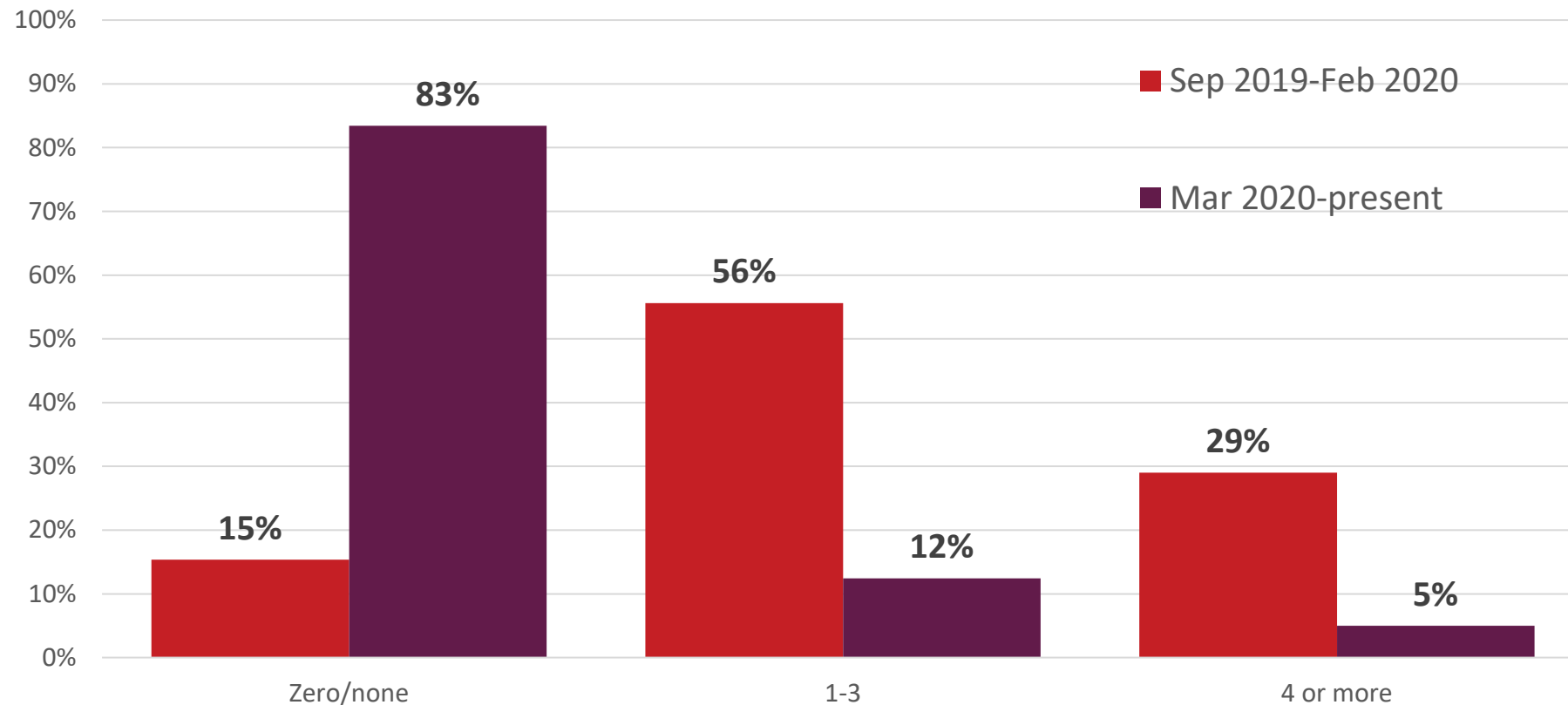
Webinars are booming and becoming a go-to source for new information. Initial grasping to all sources has tempered and coalesced around more efficient, one-to-many tools.



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?

Participation in In-person Events: Pre/Post COVID-19

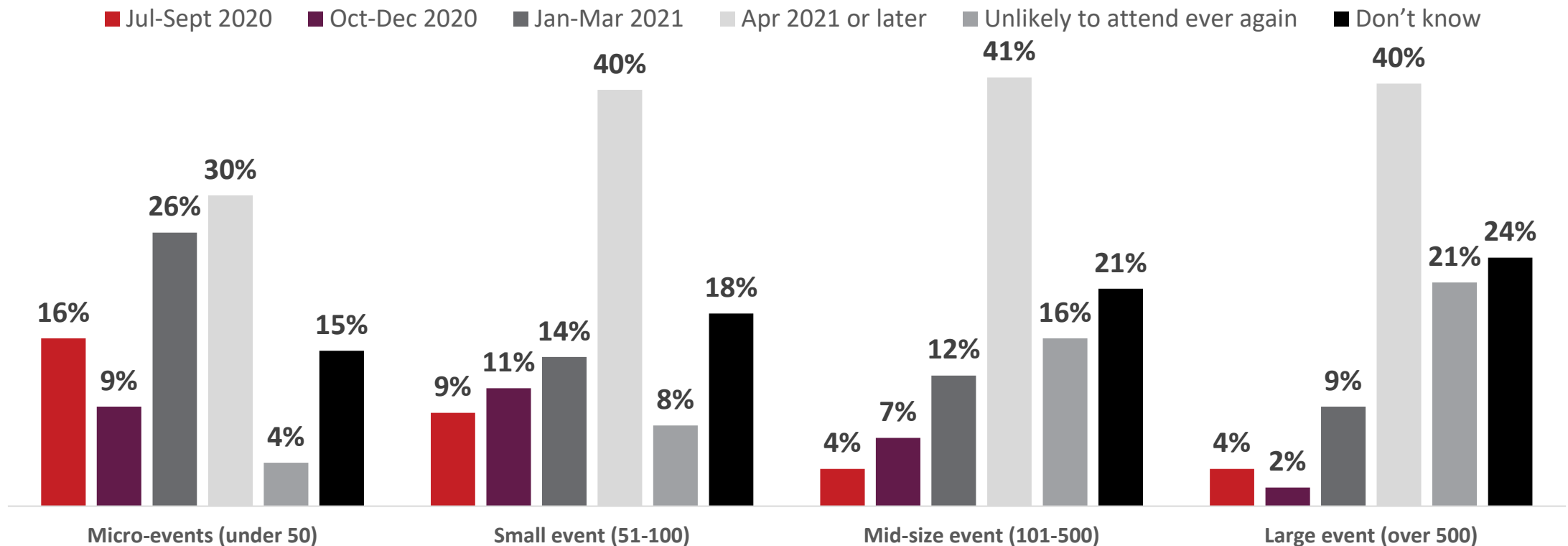
Event attendance disappeared after March. The real question is: when will it return?



Q Approximately how many work-related in-person events (i.e., trade shows, conferences, seminars) have you attended during the following timeframes?

Comfort Level for In-Person Event Participation By Size

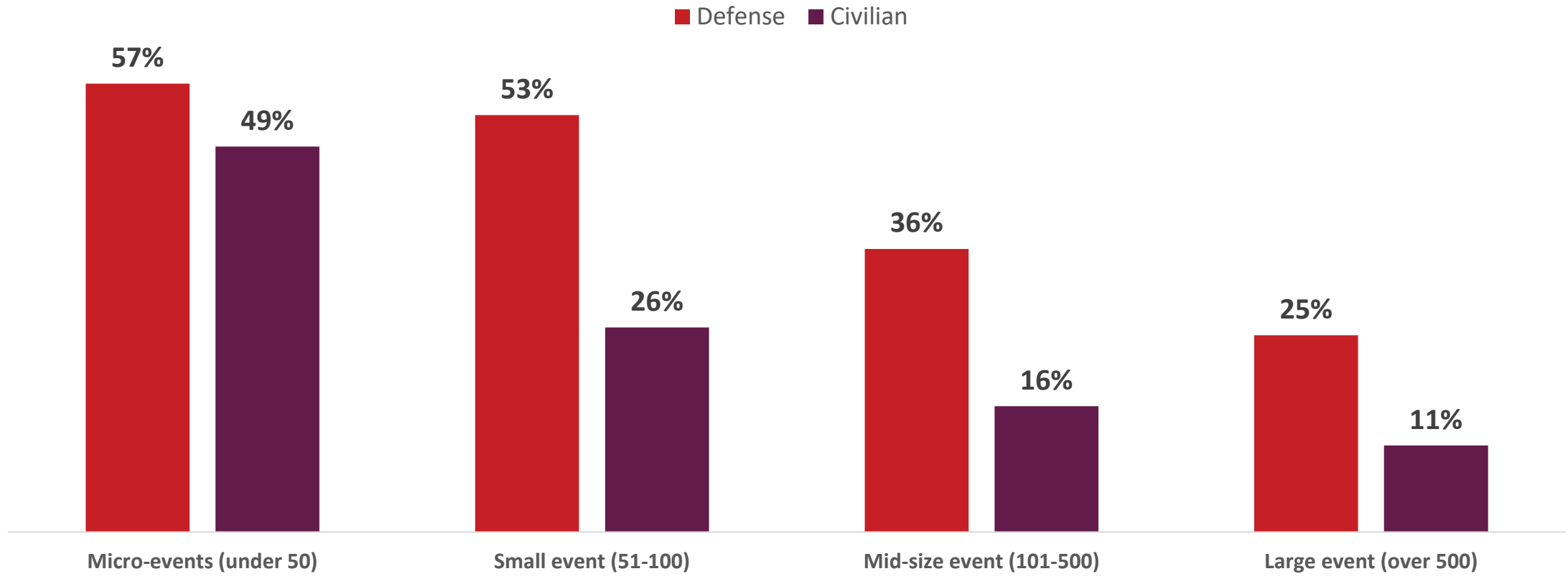
Micro to small events have the greatest chance of attendance before Q1 2021. There is still tremendous uncertainty and little to no interest in attending large events until late 2021.



Q Regardless of local restrictions, how soon do you think you would feel comfortable going to a work-related in-person event?

Comfort Level for In-Person Event Participation Prior to April 2021

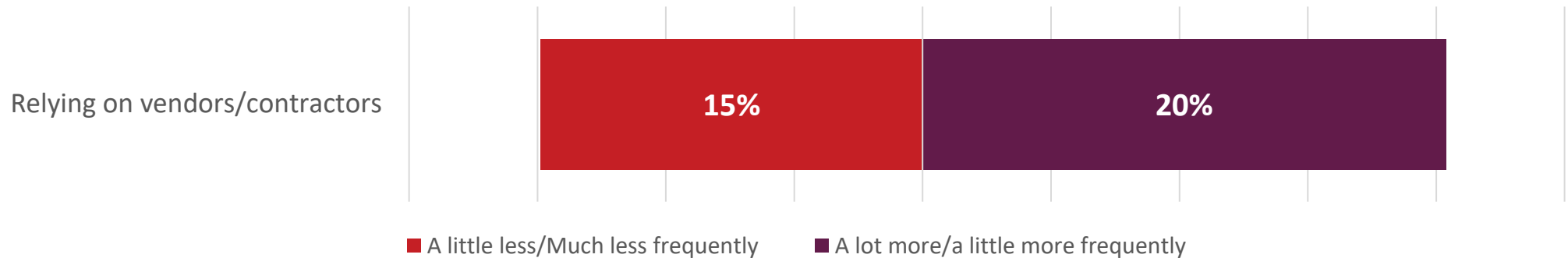
DOD respondents are more willing to participate in events before next year. Civilian-oriented events may need to wait until mid 2021 or later.



Regardless of local restrictions, how soon do you think you would feel comfortable going to a work-related in-person event?

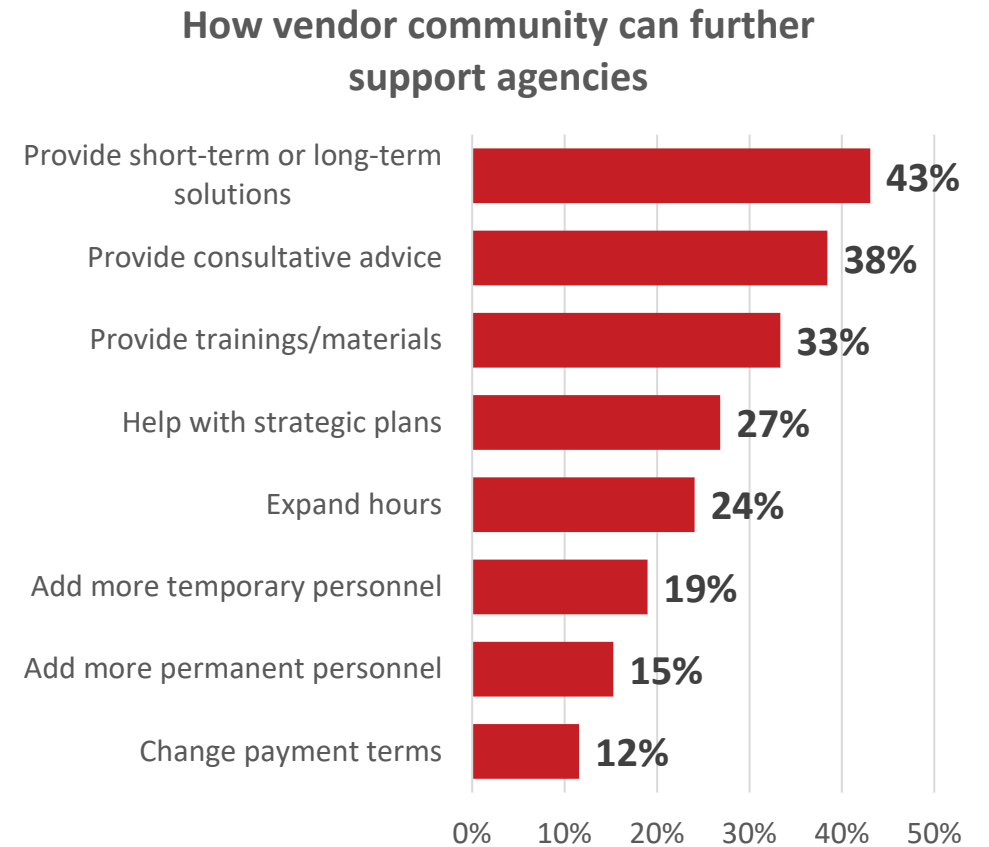
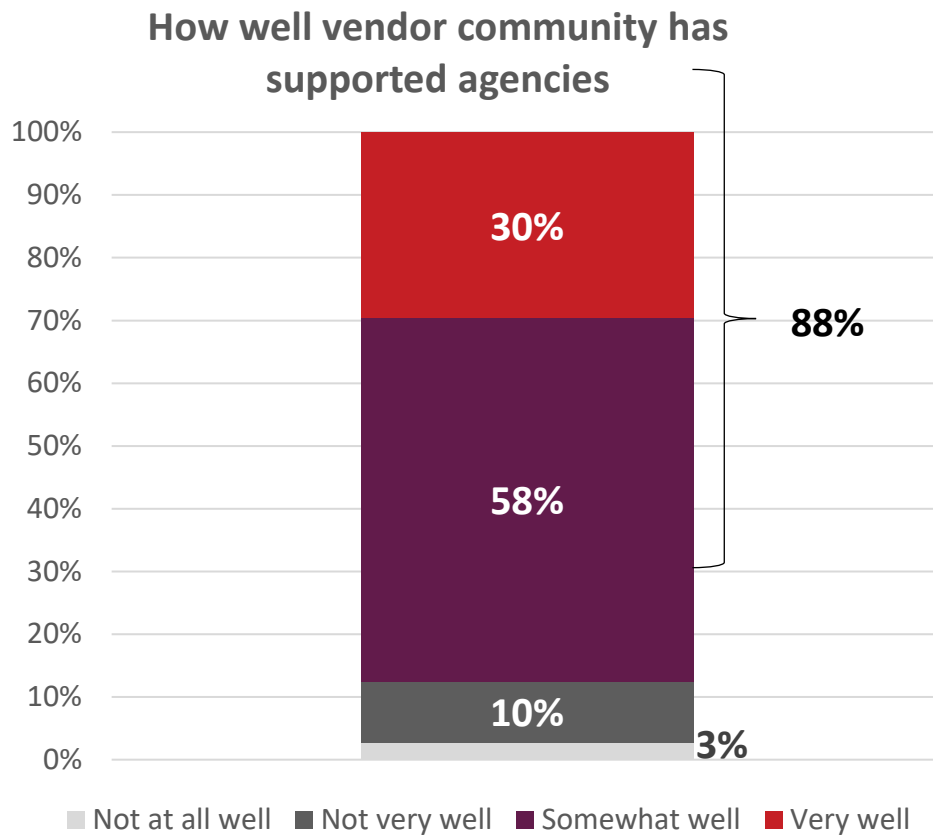
Vendor Relations

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



Vendor Community Support

Congratulations to the contractor community. 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?



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The vendor community has been very helpful in reaching out to our organization to ensure we have as much access to our required tools/infrastructure/training - and helping to address the change in telework climate.

DEFENSE AGENCY RESPONDENT

Key Takeaways

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



- Some agencies and employees are “returning to work,” but most are “reworking their return” with changing work/home lifestyles and virtual connections.
- Biggest opportunities lie ahead for those vendors who build and support teleworking ecosystems.
- The scramble for information has begun to coalesce around webinars as an effective one-to-many, low risk platform.
- Events will have to re-sell themselves. Planning for 2021 should include micro-events to provide for reassurance and safe execution. Large trade shows may be gone until 2022.
- Federal partners/vendors have been effectively supporting their government counterparts. It's not time to pull back.

Looking into the future

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

- Release of the **2020 Federal Media and Marketing Study (FMMS)** will take place on October 29th. New questions will address a definitive new environment.
- We will continue to look for trends as we go deeper into the new normal.
- We will look towards how this will make a permanent impact on the federal market.

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