

EFAMRO Moodindicator Q2 2021:

Introduction

In Q2 of 2021 EFAMRO conducted a new wave of the EFAMRO Moodindicator. Research agencies, that are members of their national trade association, were asked about the business outlook from the perspective of both their own organisation and their domestic market. In this wave, respondents from 9 European countries participated.

The sample base and response rates are relatively small in some countries and the questions differ slightly (as a result of historic benchmarking). However, the results give a good indication of the development of the European research industry, particularly when comparing the results to the results of the previous waves. The results from Finland, Ireland and Norway are included in the report, but the response rates are very low ($n = 1$). There are no results for Sweden and Bulgaria in the report. The overall base for the results is 122 . See last page of this report for the detailed response.

Table 1: Business owners views on their own

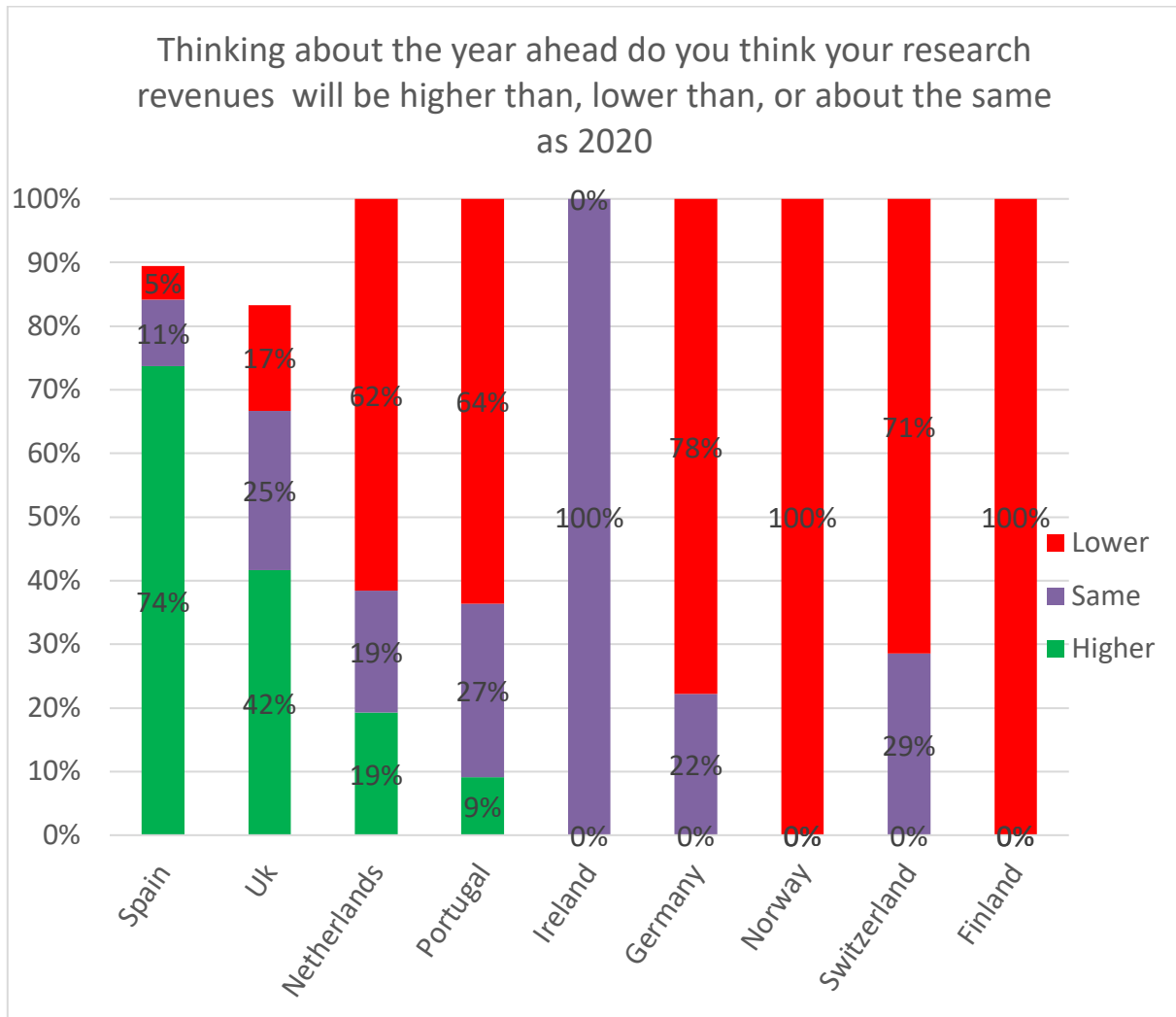
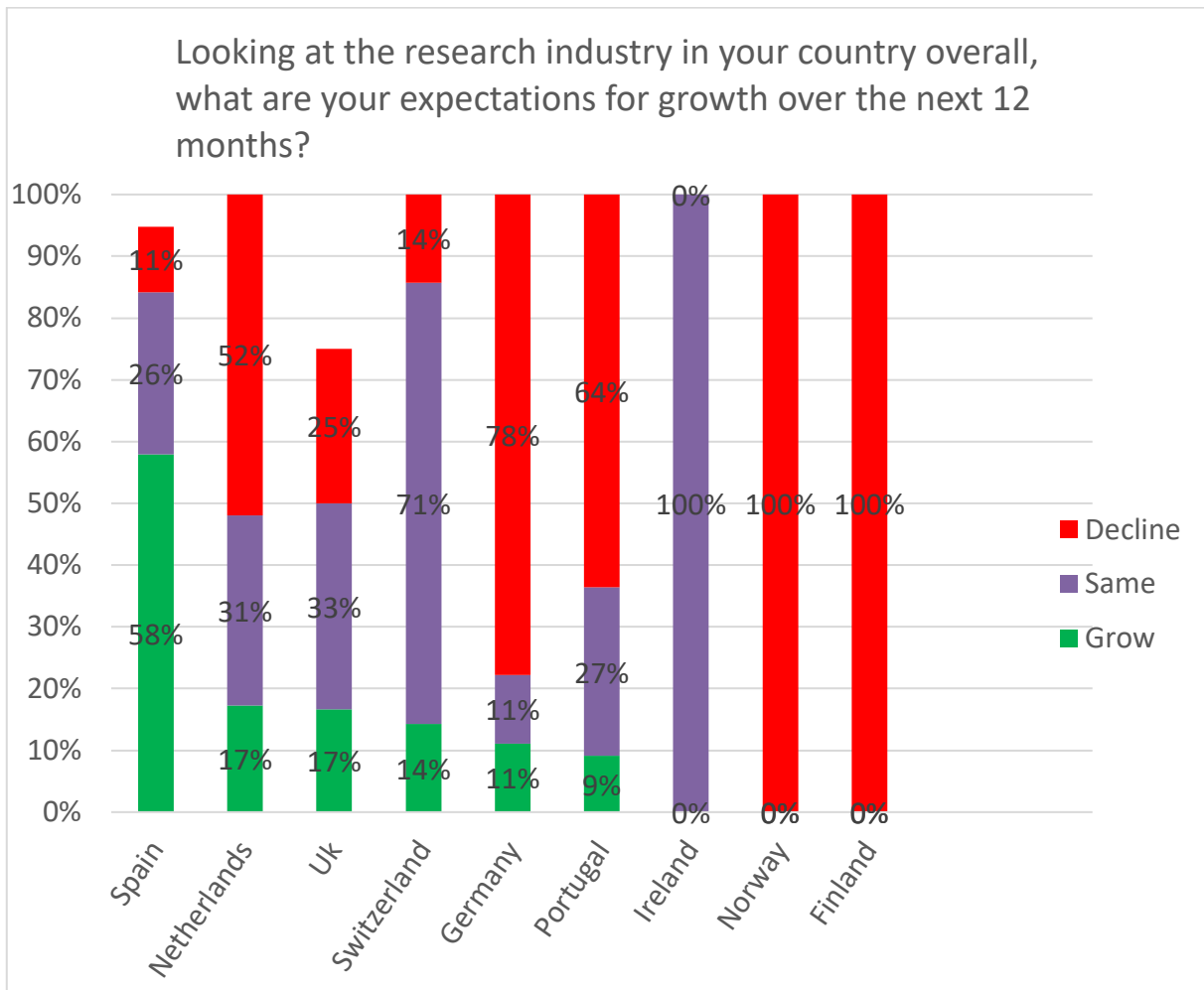


Table 2: Net positives for business owners' views on their own businesses

Column1	Q4 2018	Q2 2019	Q4 2019	Q1 2020	Q4 2020	Q1 2021	Variance
Spain	29%	67%	37%	-70%	-70%	68%	139%
Uk	29%	43%	15%	29%	-25%	25%	50%
Ireland	86%	30%	56%	-100%	9%	0%	-9%
Netherlands	65%	63%	56%	-68%	-38%	-42%	-5%
Portugal	47%	0%	17%	-90%	9%	-55%	-64%
Switzerland	14%	33%	50%	-60%	-60%	-71%	-11%
Germany	41%	7%	12%	-77%	-38%	-78%	-40%
Norway	57%	50%	25%	0%	-100%	-100%	0%
Finland	86%	60%		-100%	-100%	-100%	0%
Bulgaria				-50%	0%		
Italy	29%	8%	32%	-73%	-69%		
Sweden	100%	86%		50%			

Table 3: National research markets



Column1	Q4 2018	Q2 2019	Q4 2019	Q1 2020	Q4 2020	Q1 2021	Variance
Spain	11%	13%	-35%	-35%	-69%	47%	116%
Switzerland	-43%	-33%	18%	-60%	0%	0%	0%
Ireland	29%	0%	0%	-100%	45%	0%	-45%
Uk	-12%	-6%	-33%	-29%	-78%	-8%	69%
Netherlands	39%	26%	55%	-91%	-21%	-35%	-13%
Portugal	-13%	-14%	-14%	-100%	9%	-55%	-64%
Germany	-28%	-20%	-44%	-62%	4%	-67%	-71%
Norway	-14%	-17%	-25%	-100%	0%	-100%	-100%
Finland	-14%	20%		-100%	-100%	-100%	0%
Sweden	0%	0%		0%			
Italy	-6%	-4%	-11%	-73%	-31%		
Bulgaria				-100%	-100%		

Fieldwork and sample

Fieldwork May 2021.

	Q2 2021
Sweden	0
Spain	19
Netherlands	52
Finland	1
Norway	1
Uk	12
Switzerland	7
Ireland	1
Italy	0
Germany	18
Portugal	11

Bulgaria	0
total	122