



**EFAMRO Moodindicator  
2022 Q2**

## EFAMRO Moodindicator 2022 Q2:

### Introduction

In Q2 of 2022 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 11 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 overall base for the results is 249.

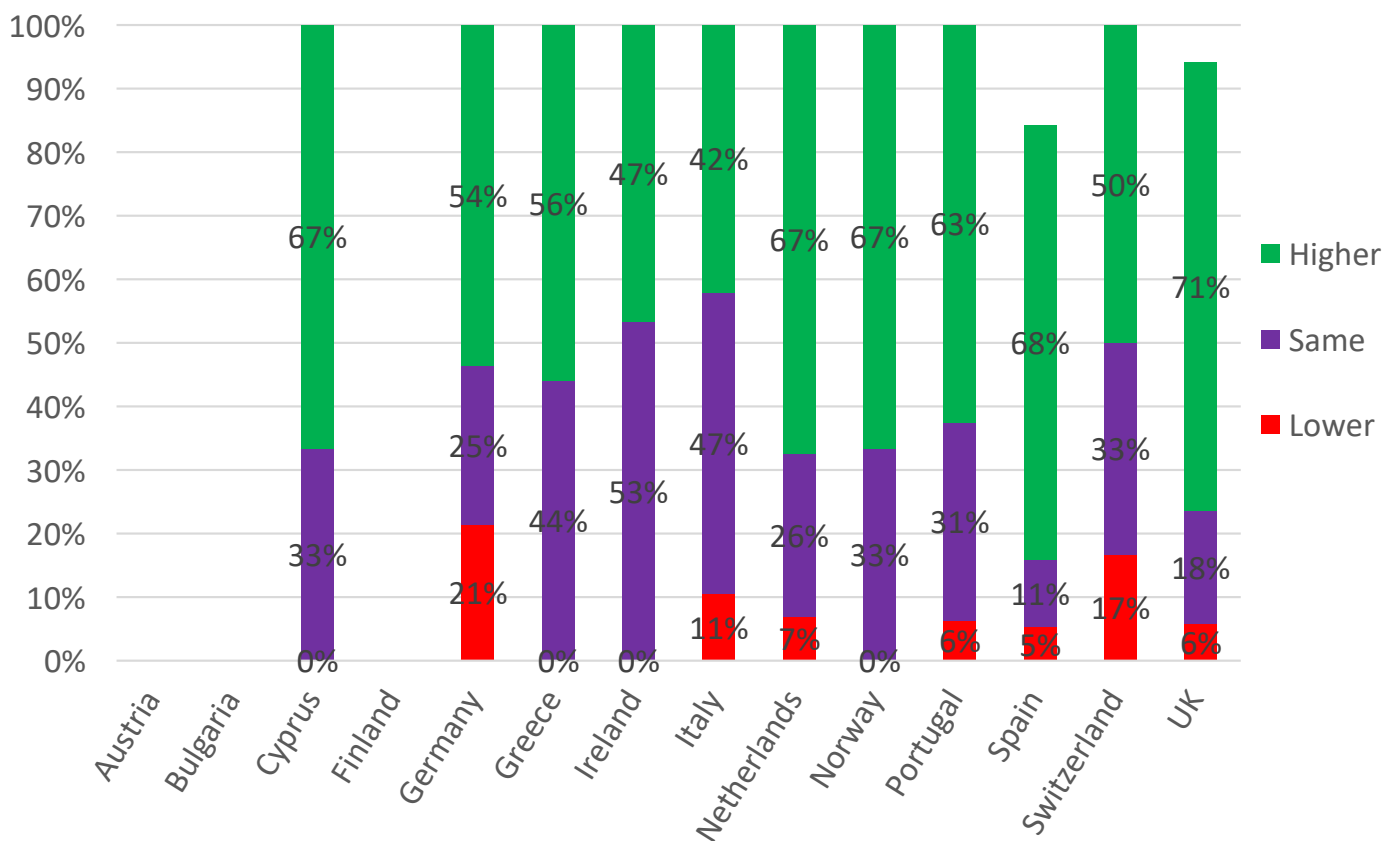
See table below for a detailed response overview.

	2022 Q2	2021 Q4	2021 Q1	2020 Q4	2020 Q1	2019 Q4
Austria	-	-	-	-	-	-
Bulgaria	-	2	-	2	4	-
Cyprus	3	-	-	-	-	-
Finland	-	-	1	1	1	2
Germany	28	17	18	24	13	17
Greece	25	-	-	-	-	-
Ireland	15	7	1	11	8	9
Italy	19	-	-	16	11	19
Netherlands	43	97	52	61	68	123
Norway	12	1	1	1	5	4
Portugal	16	13	11	11	10	12
Spain	19	18	19	16	17	11
Switzerland	18	28	7	5	5	12
UK	51	11	12	12	14	14
Total						

\* Minimal response, results are indicative

**Table 1: Business owners views on their own**

Thinking about the year ahead do you think your research revenues will be higher than, lower than, or about the same as last year

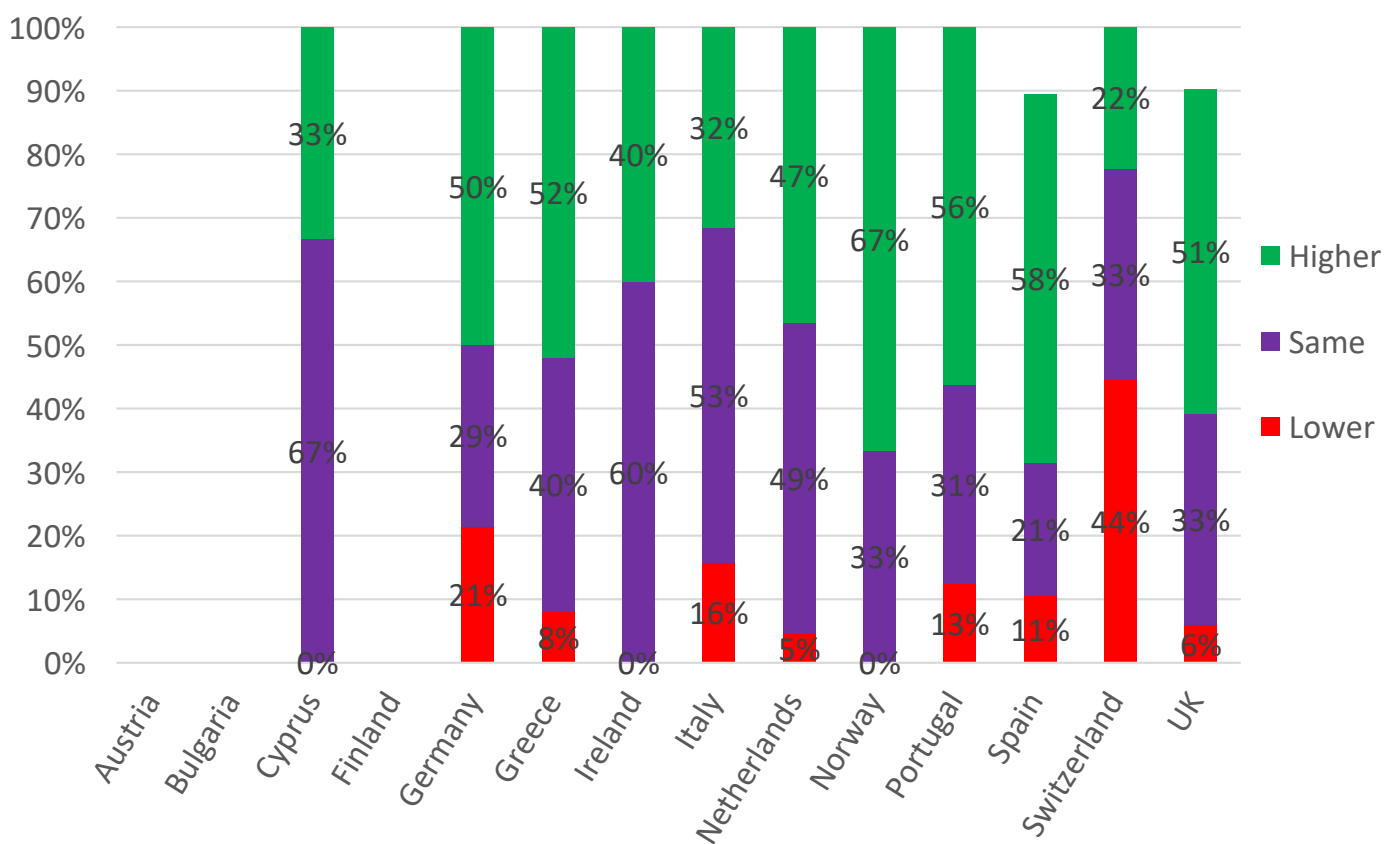


**Table 2: Net positives for business owners' views on their own businesses**

	2019 Q4	2020 Q1	2020 Q4	2021 Q1	2021 Q4	2022 Q2	Variance
Austria	-	-	-	-	-	-	-
Bulgaria	-	50	0	-	0	-	-
Cyprus	-	-	-	-	-	67	-
Finland	0	-100	-100	-100	-	-	-
Germany	12	-23	-38	-78	35	32	-3
Greece	-	-	-	-	-	56	-
Ireland	56	-100	9	0	57	47	-10
Italy	32	-73	-69	-	-	32	-
Netherlands	54	-68	-38	-42	66	60	-6
Norway	25	0	-100	-100	100	67	-33
Portugal	17	-90	9	-55	100	56	-44
Spain	36	-76	-88	74	72	63	-9
Switzerland	50	-60	-60	-71	50	33	-17
UK	14	21	-25	33	-45	65	110

**Table 3: National research markets**

Looking at the research industry in your country overall, what are your expectations for growth over the next 12 months?



**Table 4: Net positives for national research markets**

	2019 Q4	2020 Q1	2020 Q4	2021 Q1	2021 Q4	2022 Q2	Variance
Austria	-	-	-	-	-	-	-
Bulgaria	-	-100	-100	-	-100	-	-
Cyprus	-	-	-	-	-	33	-
Finland	-	-100	-100	-100	-	-	-
Germany	-35	-62	4	-67	47	29	-18
Greece	-	-	-	-	-	44	-
Ireland	-44	-100	9	0	71	40	-31
Italy	-11	-45	-31	-	-	16	-
Netherlands	54	-91	-21	-35	53	42	-11
Norway	-25	-100	0	-100	0	67	67
Portugal	0	-100	9	-55	100	44	-56
Spain	18	-44	-81	47	78	47	-31
Switzerland	-33	-60	0	0	14	-22	-36
UK	-21	-29	-75	-17	-67	45	112

**Table 5: Thinking about the year ahead do you think your research revenues will be higher than, lower than, or about the same as last year (Market total weighted)**

	<b>2022 Q2</b>	<b>2021 Q4</b>	<b>2021 Q1</b>	<b>2020 Q4</b>	<b>2020 Q1</b>	<b>2019 Q4</b>
Lower	10%	38%	37%	57%	31%	15%
Same	23%	37%	30%	18%	42%	54%
Higher	64%	25%	34%	25%	27%	32%
Unknown	4%	0%	0%	0%	0%	0%

**Table 6: Looking at the research industry in your country overall, what are your expectations for growth over the next 12 months? (Market total weighted)**

	2022 Q2	2021 Q4	2021 Q1	2020 Q4	2020 Q1	2019 Q4
Lower	11%	47%	46%	61%	50%	32%
Same	34%	36%	39%	28%	45%	57%
Higher	49%	18%	15%	12%	6%	11%
Unknown	6%	0%	0%	0%	0%	0%