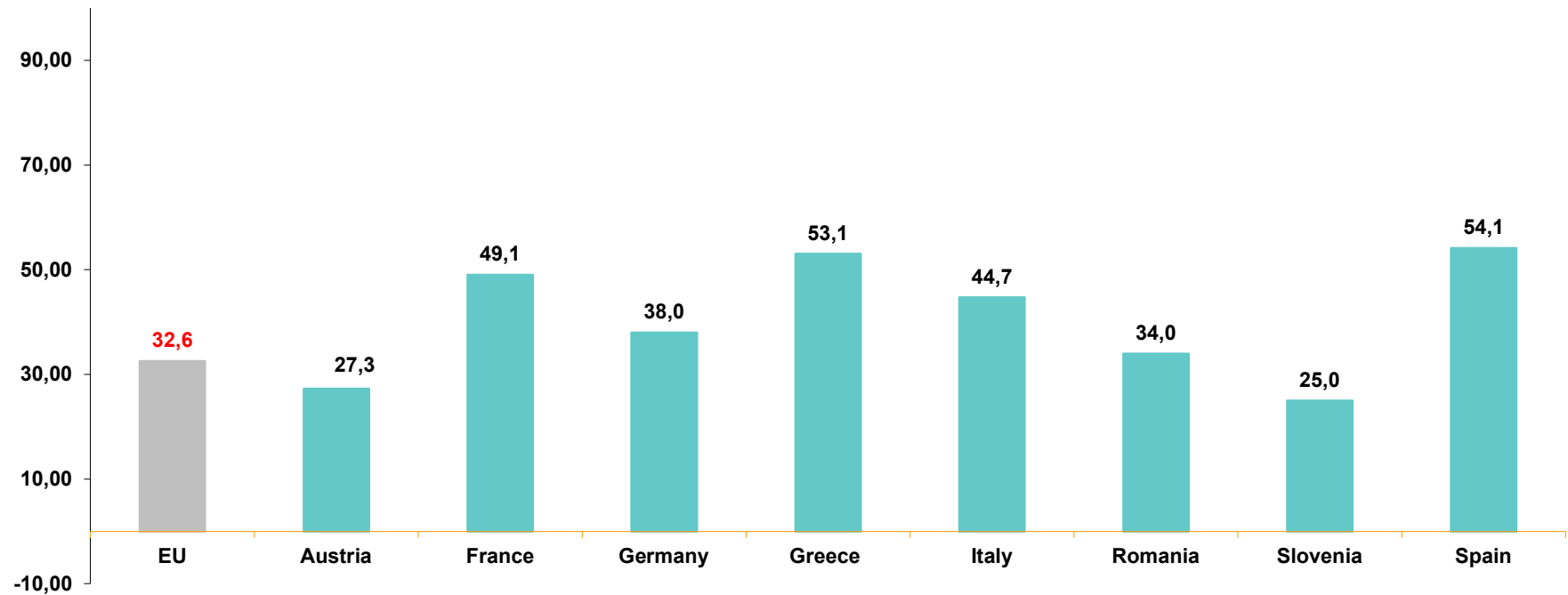


feaco barometer

- Management Summary Q2 2021 -

State of Business Index

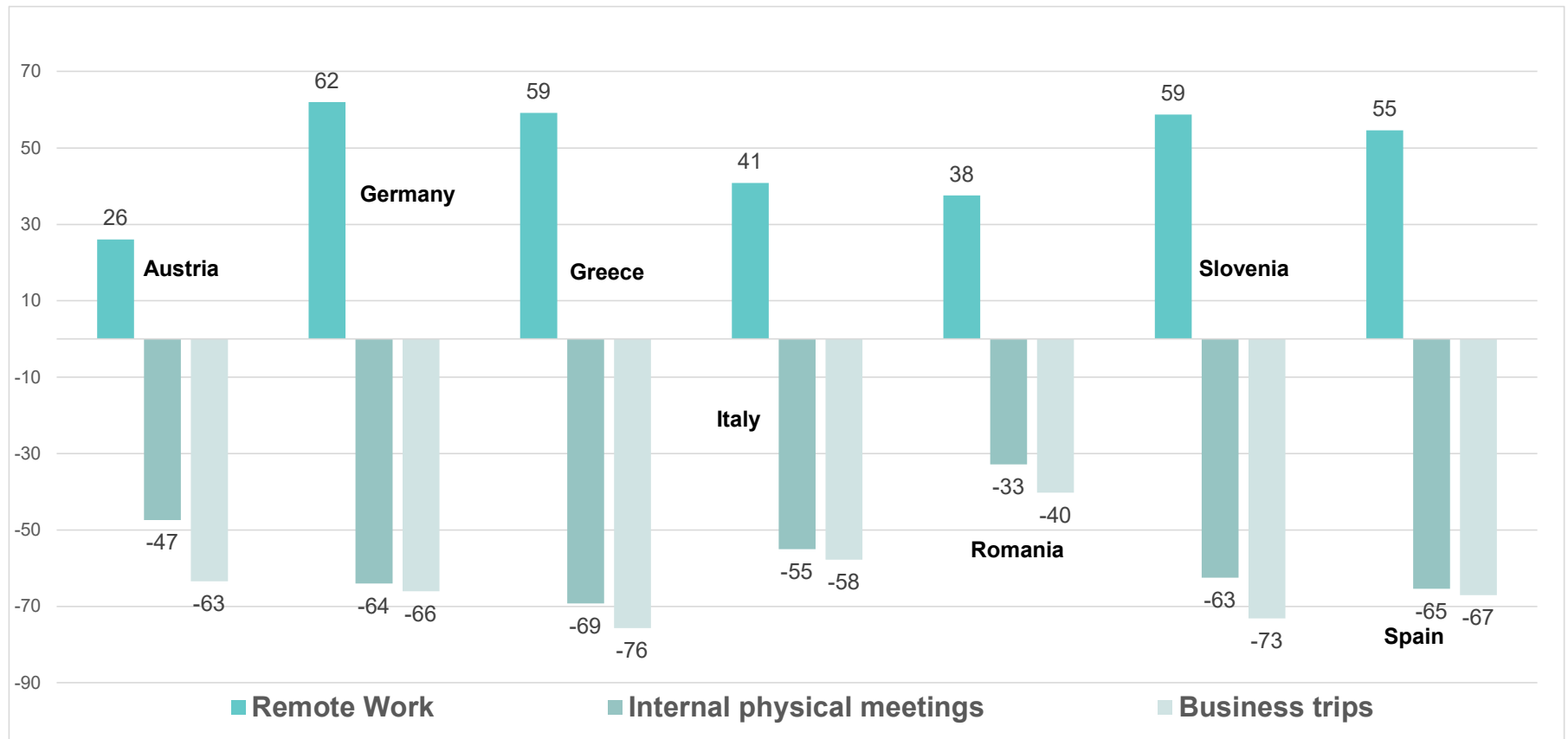
Q2 2021
(Range -100 to +100)



State of Business Index

	Europe	Austria	France	Germany	Greece	Italy	Romania	Slovenia	Spain
Retrospect: Turnover development within the last three months									
Increase	60%	45%	82%	44%	no data	53%	20%	25%	67%
Stable	32%	32%	17%	40%	no data	42%	68%	50%	25%
Decrease	8%	23%	1%	16%	no data	5%	12%	25%	8%
Present state of business...?									
Good (above budget)	40%	36%	40%	48%	46%	37%	36%	38%	33%
Satisfying	43%	41%	39%	40%	42%	58%	52%	38%	58%
Dissatisfying (below budget)	17%	23%	21%	12%	11%	5%	12%	25%	8%
Current number of assignments...?									
Large	26%	9%	32%	40%	21%	26%	12%	13%	25%
Satisfying	52%	59%	39%	44%	68%	68%	72%	63%	67%
Dissatisfying	22%	32%	29%	16%	11%	5%	16%	25%	8%
Outlook: Business expectations for the coming six months compared with the previous six months									
Better	68%	45%	84%	48%	71%	58%	56%	38%	83%
Stable	27%	50%	10%	44%	29%	42%	32%	63%	17%
Worse	5%	5%	5%	8%	0%	0%	12%	0%	0%
State of the Industry Index Q1 2021	32,6	27,3	49,1	38,0	53,1	44,7	34,0	25,0	54,1

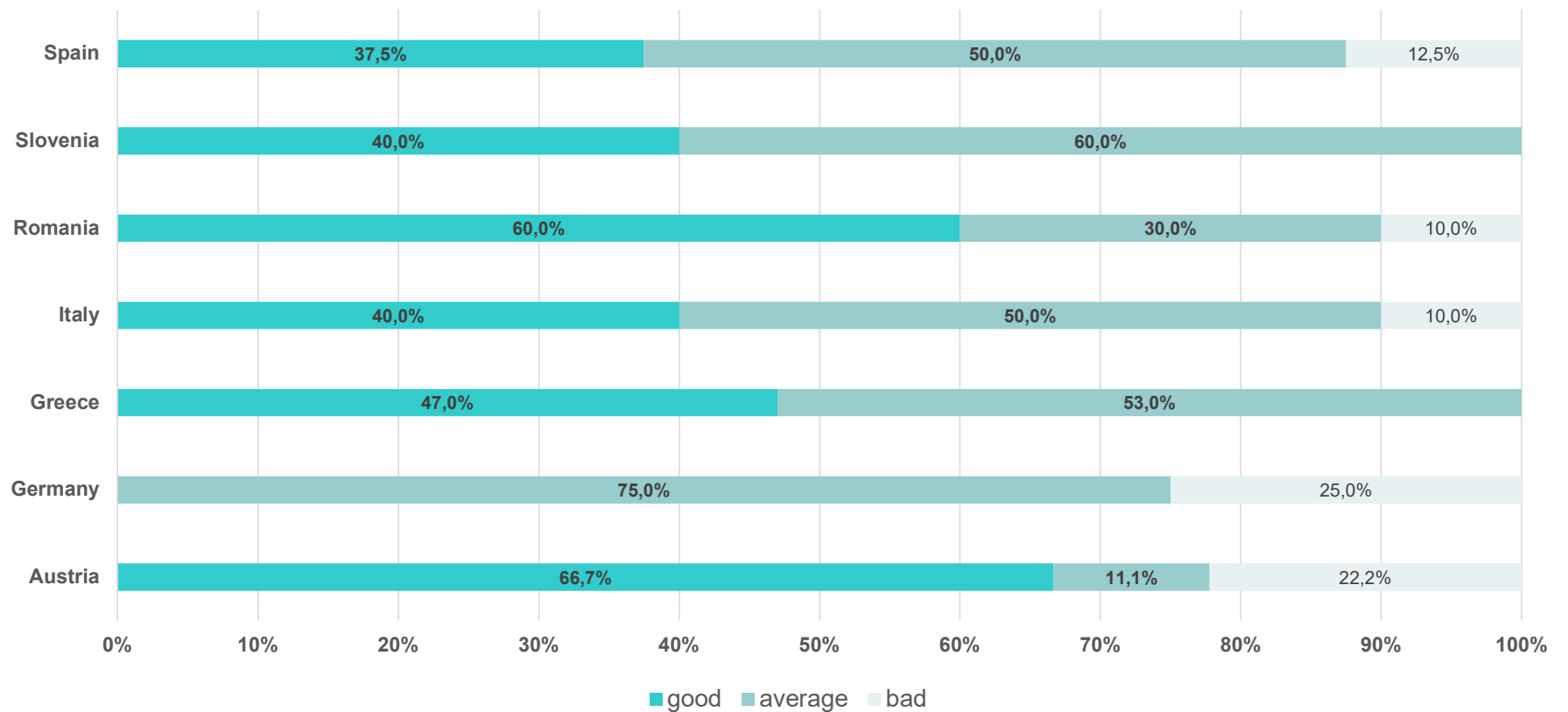
„New Work“ in Consulting Companies in 2020



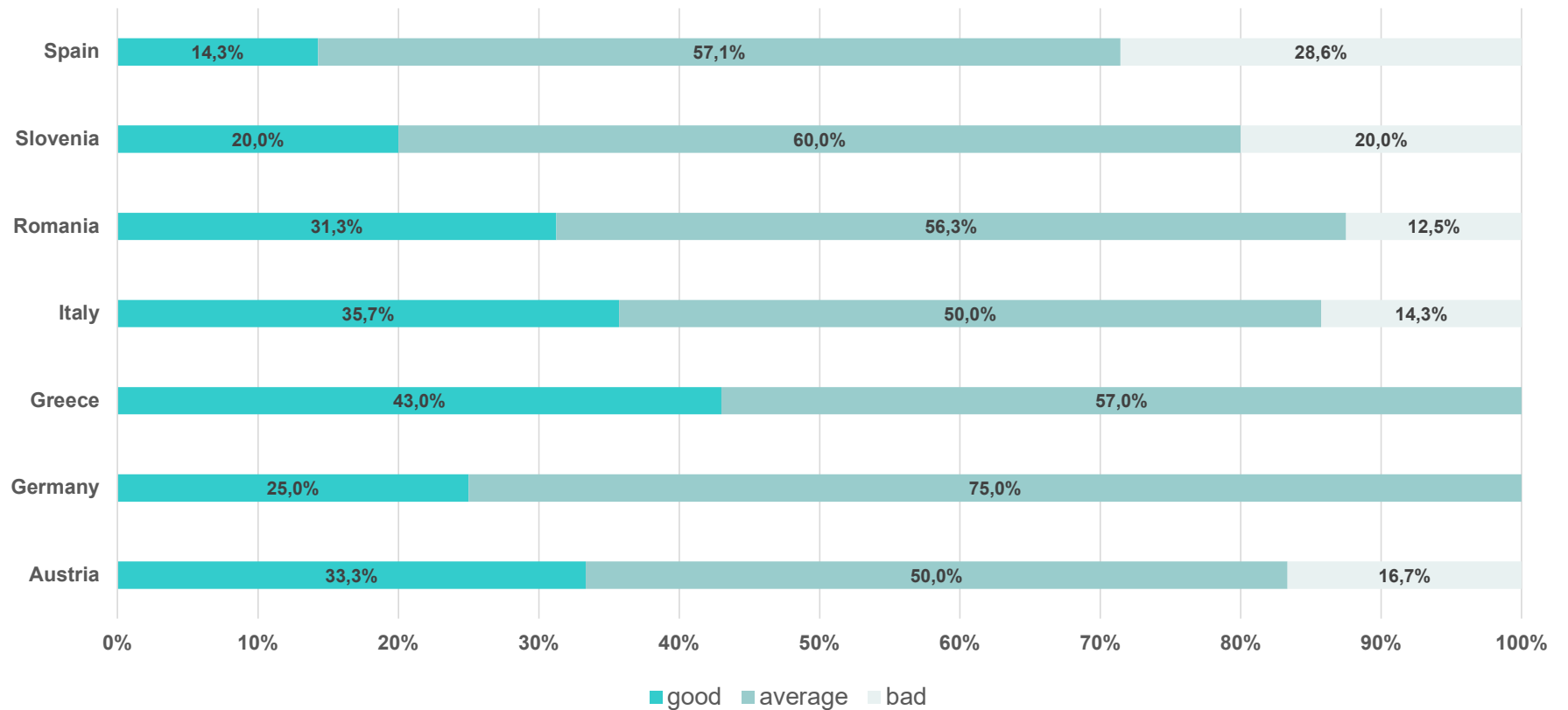
% increase or decrease („-“)

Current Demand from selected Client Industries

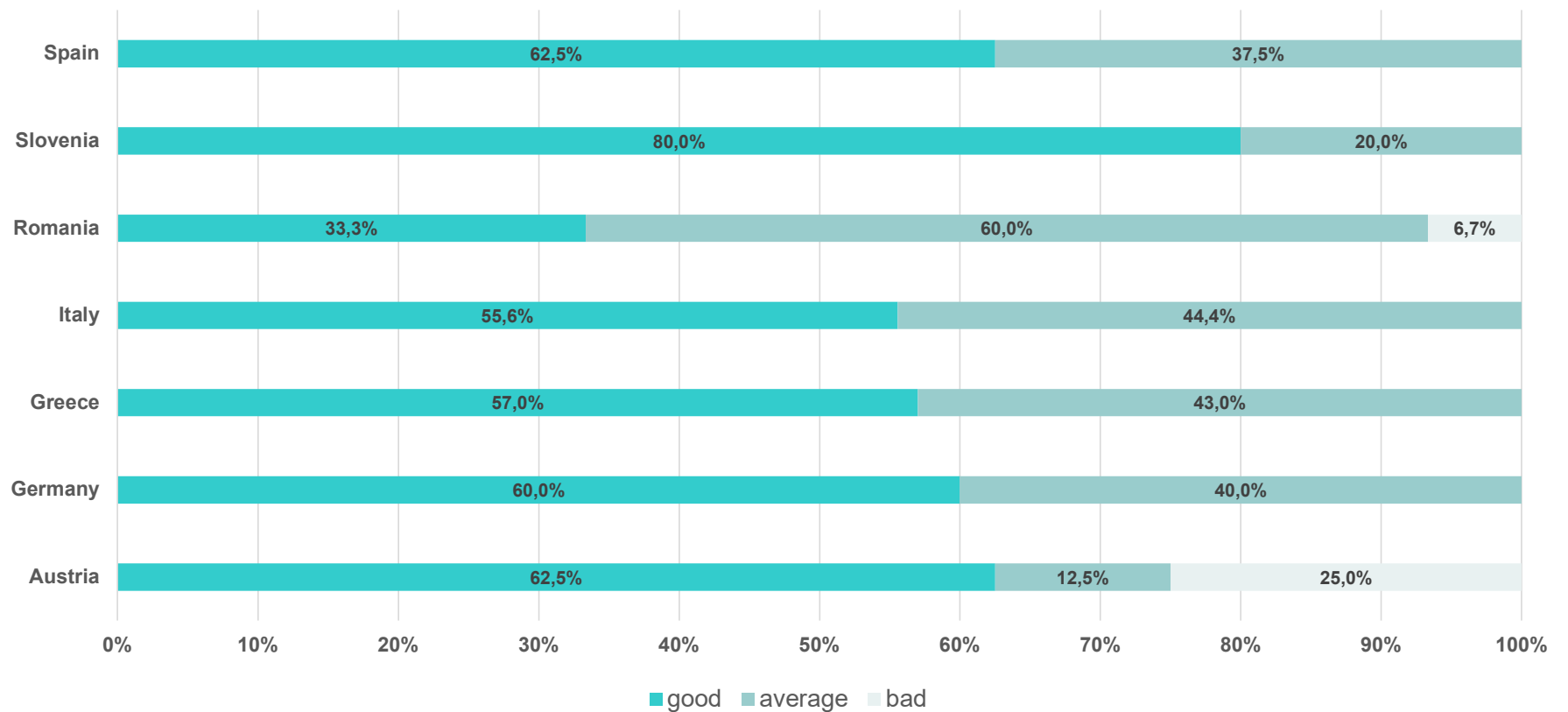
Demand: Consumer Goods



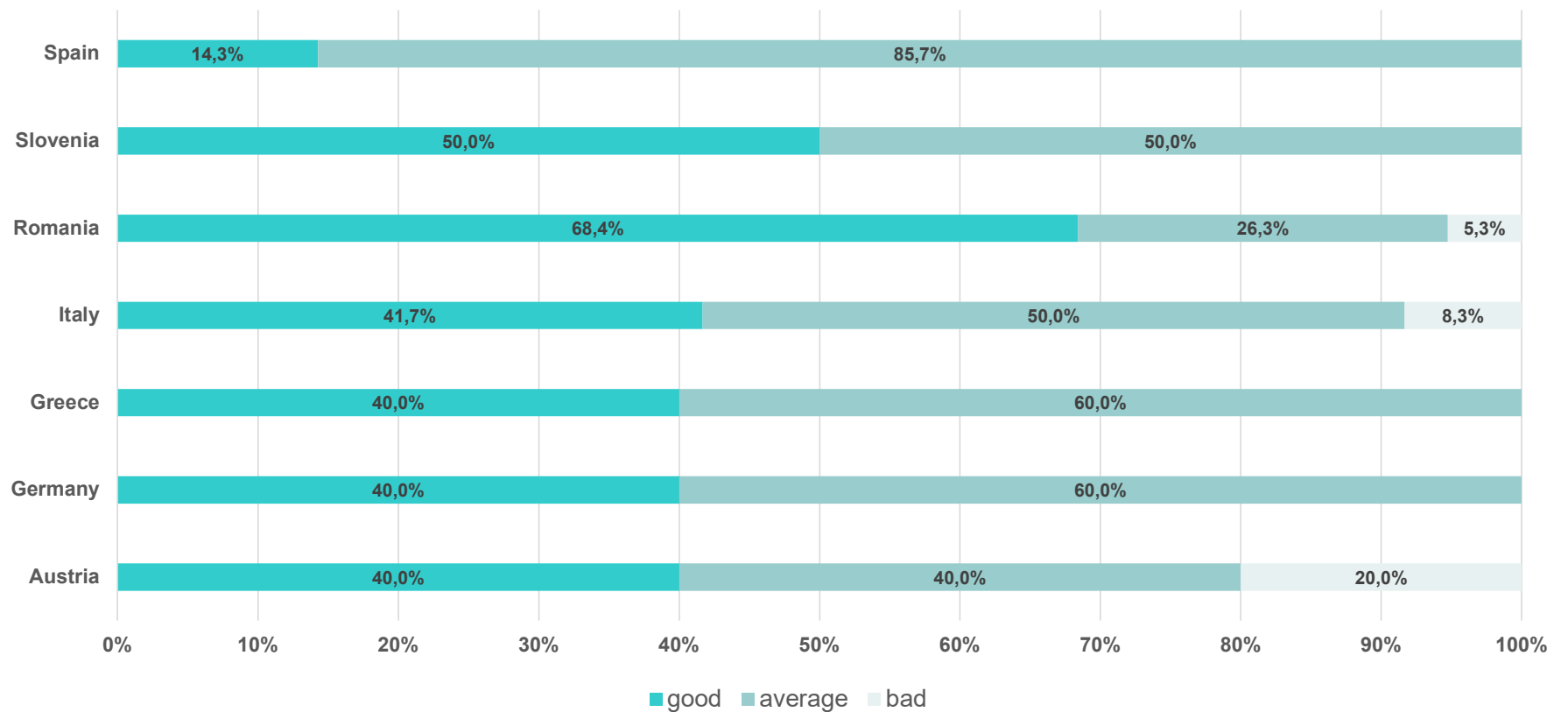
Demand: Vehicle manufacturing



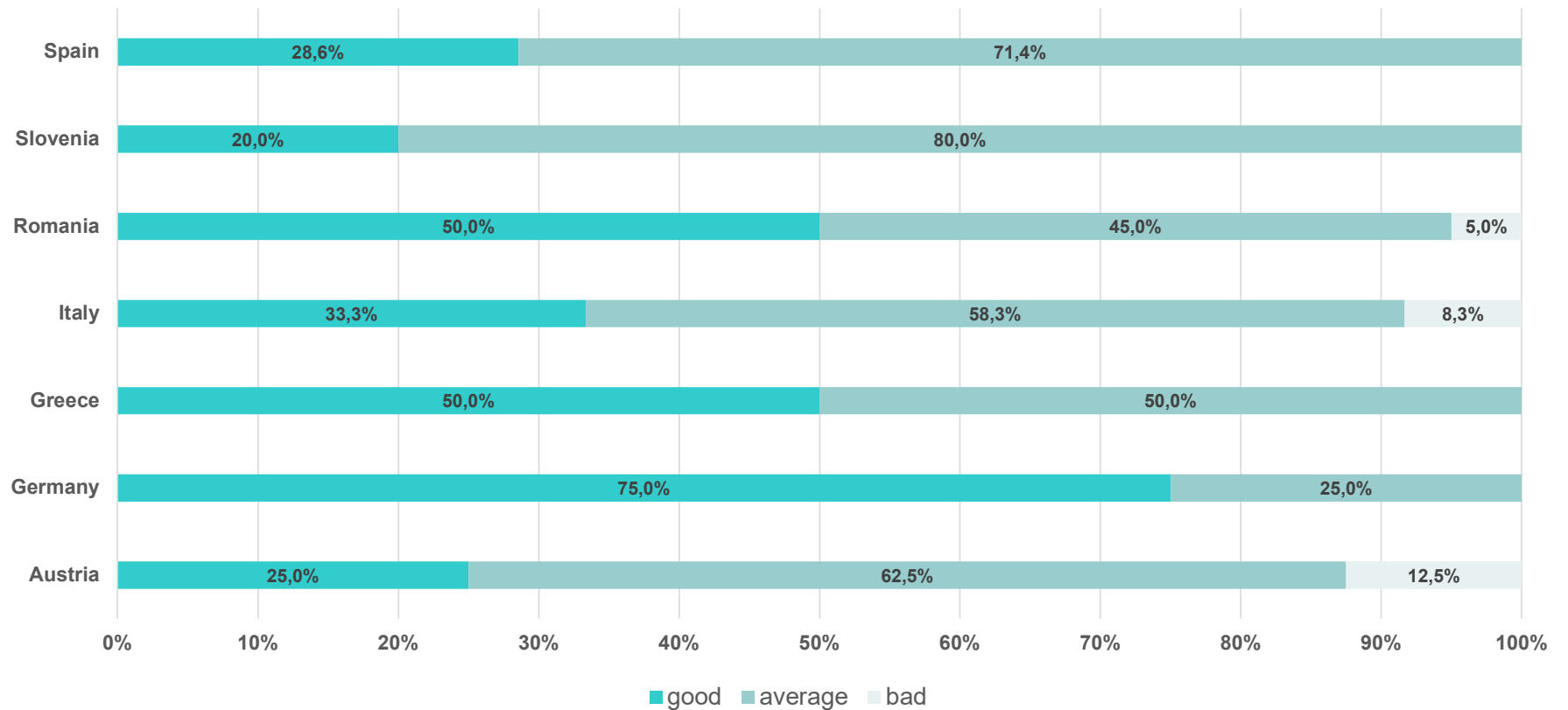
Demand: Chemistry / Pharmaceutical



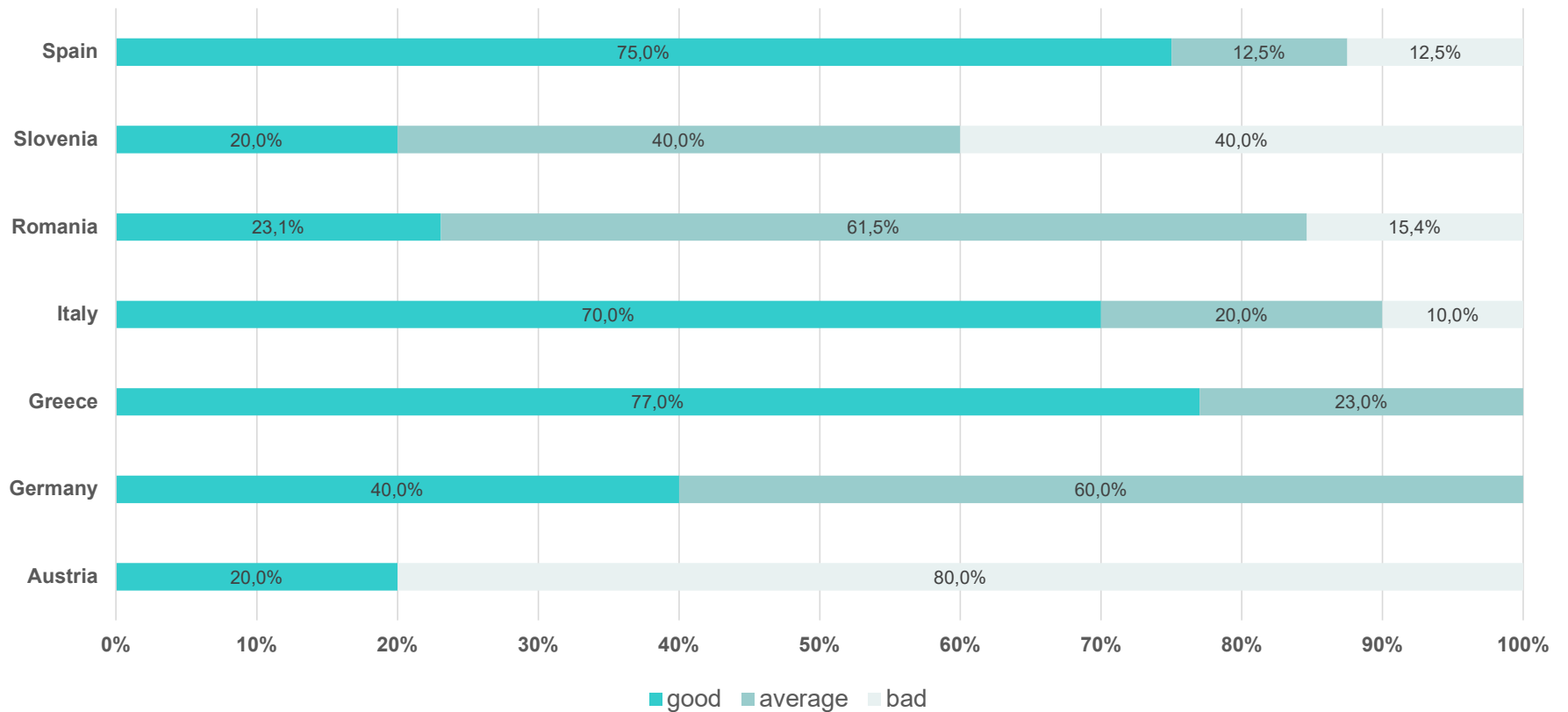
Demand: Mechanical Engineering



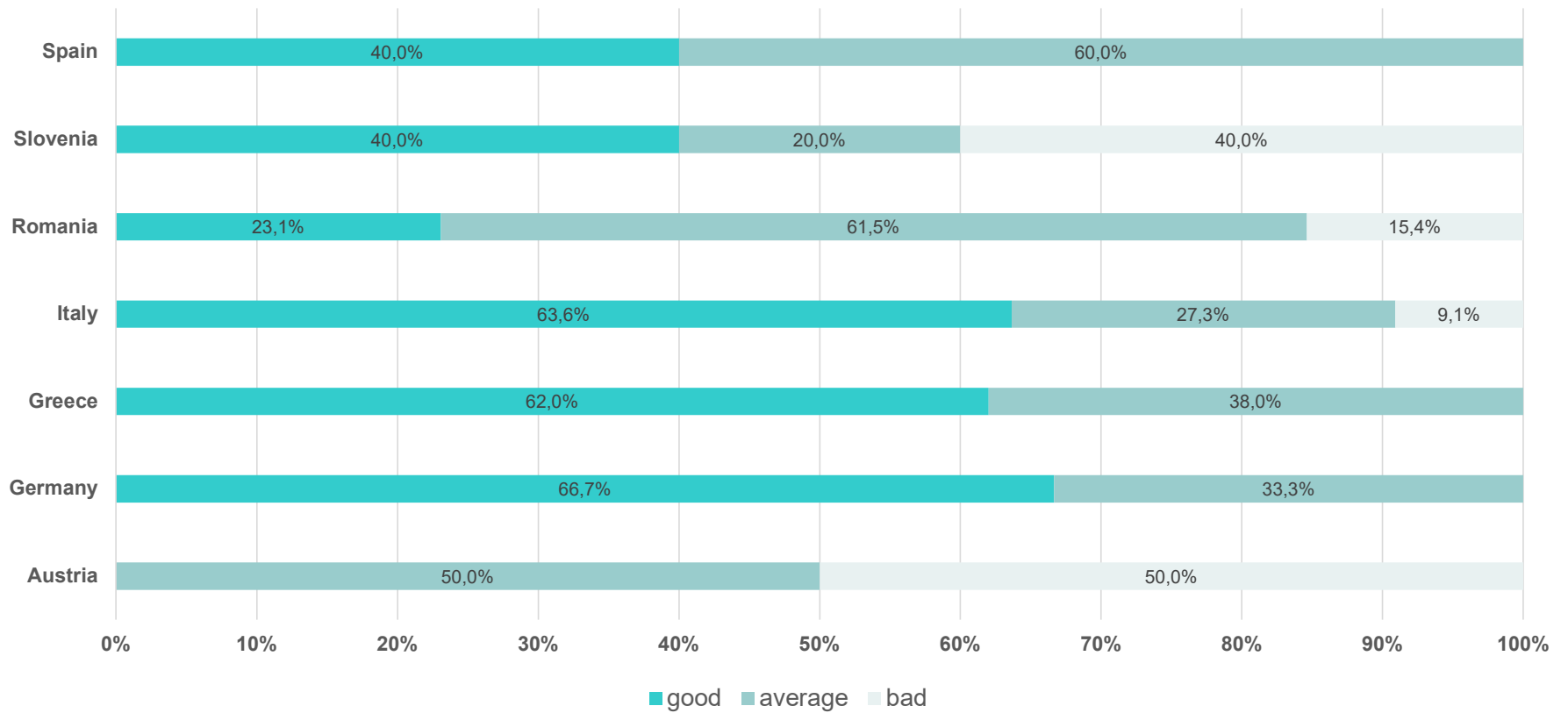
Demand: Other manufacturing



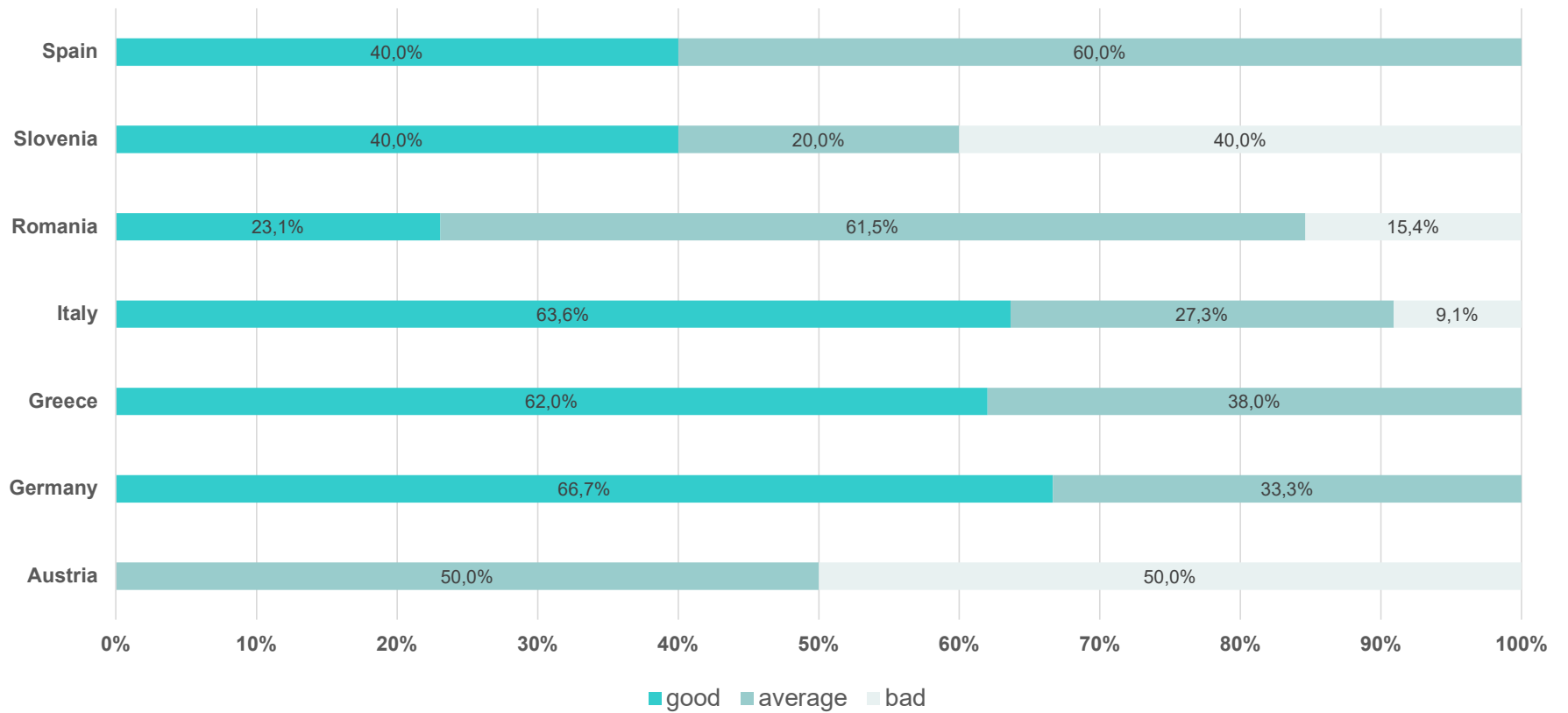
Demand: Credit institutions



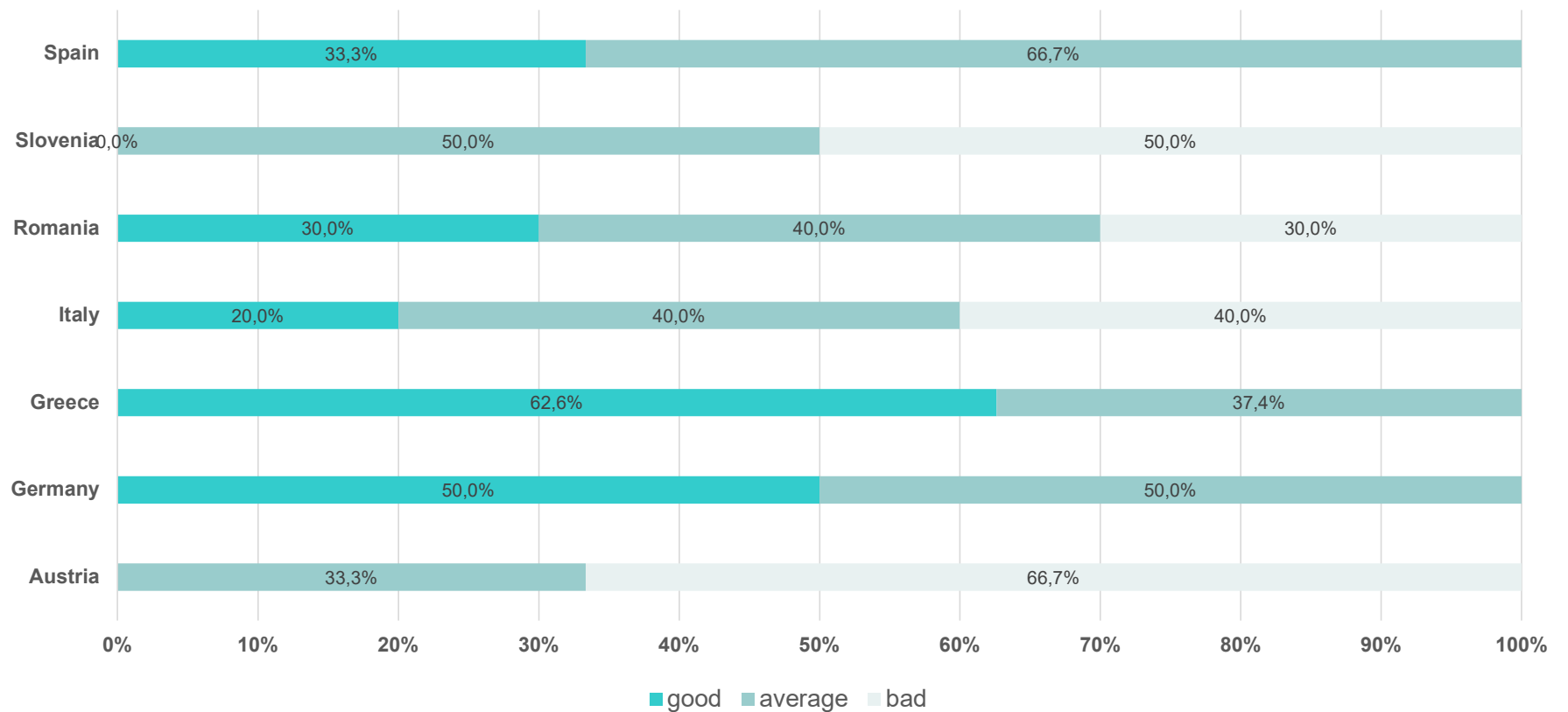
Demand: Insurance



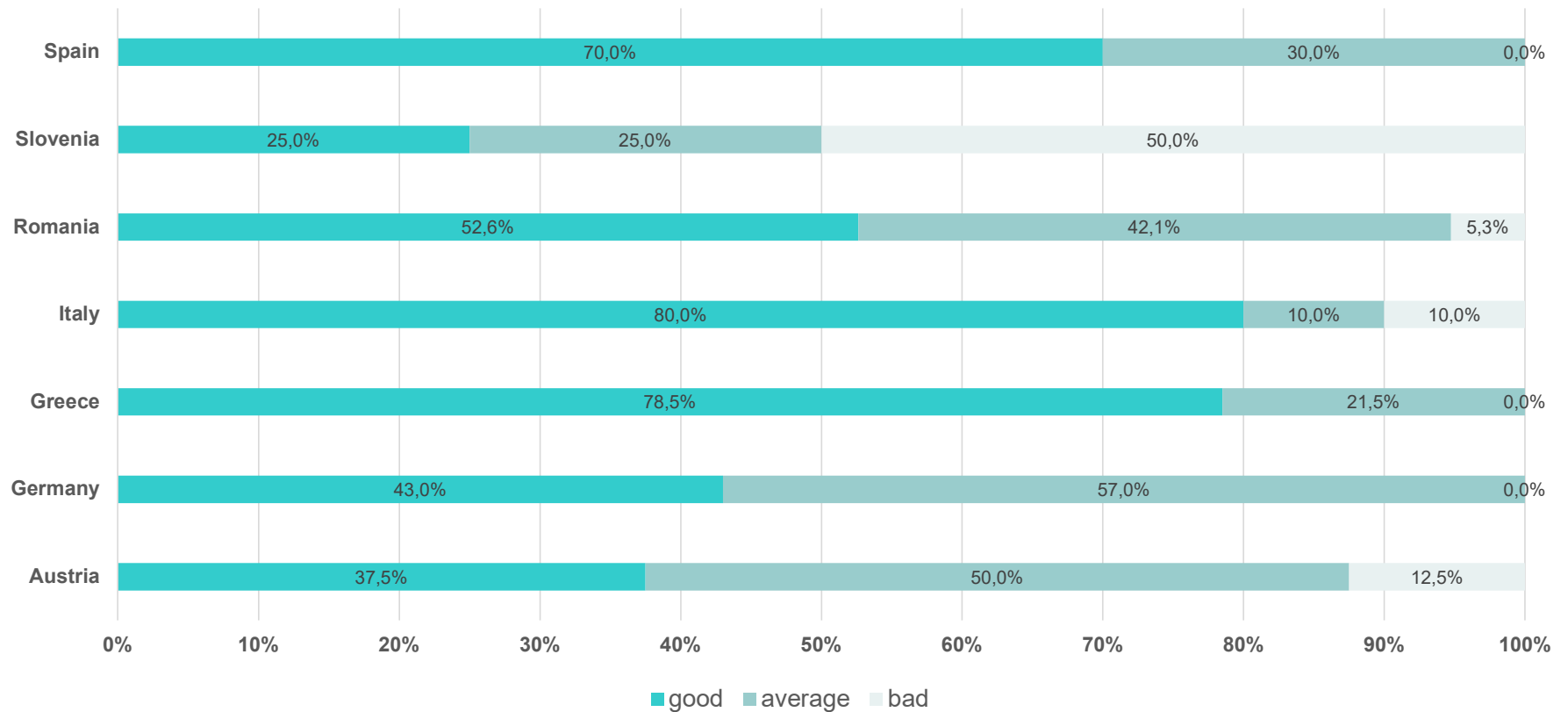
Demand: Insurance



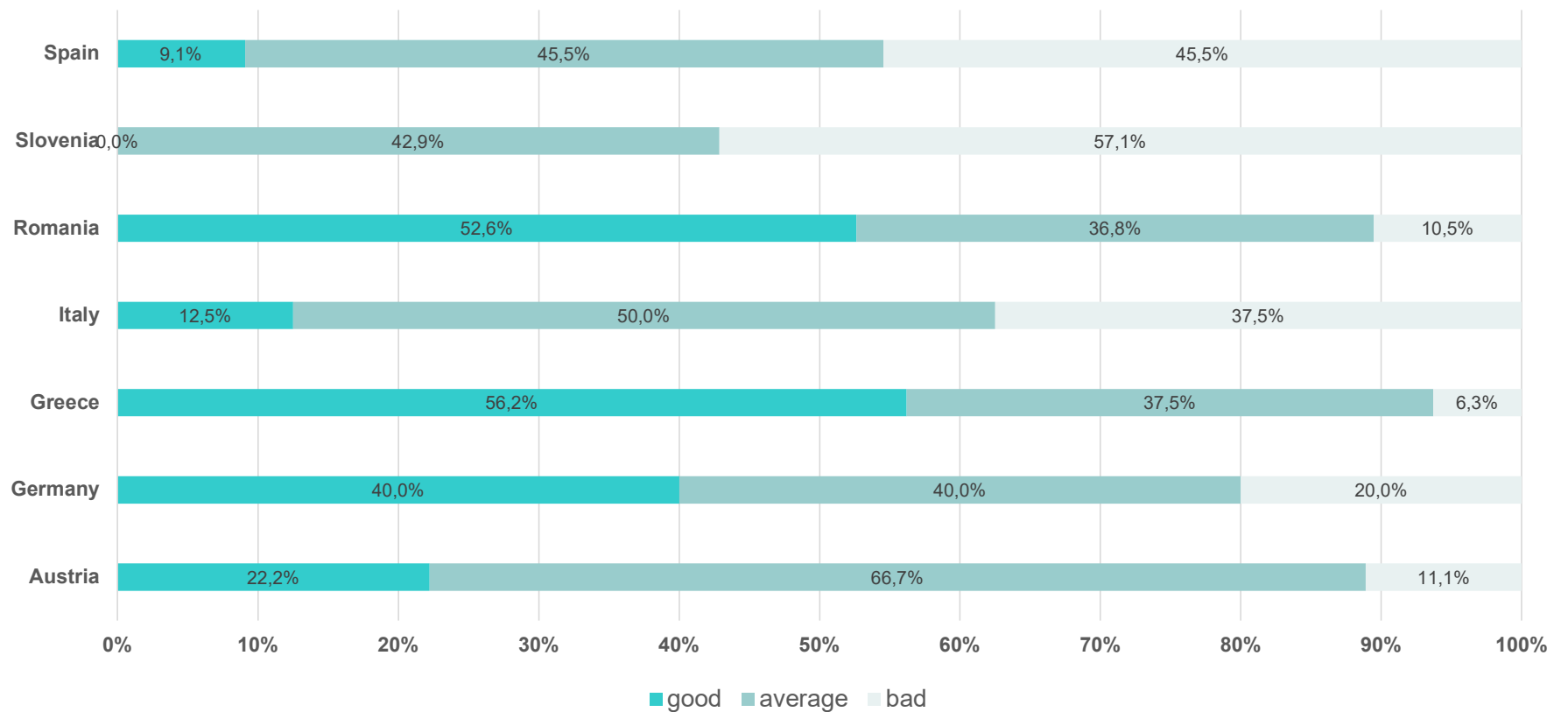
Demand: TIMES



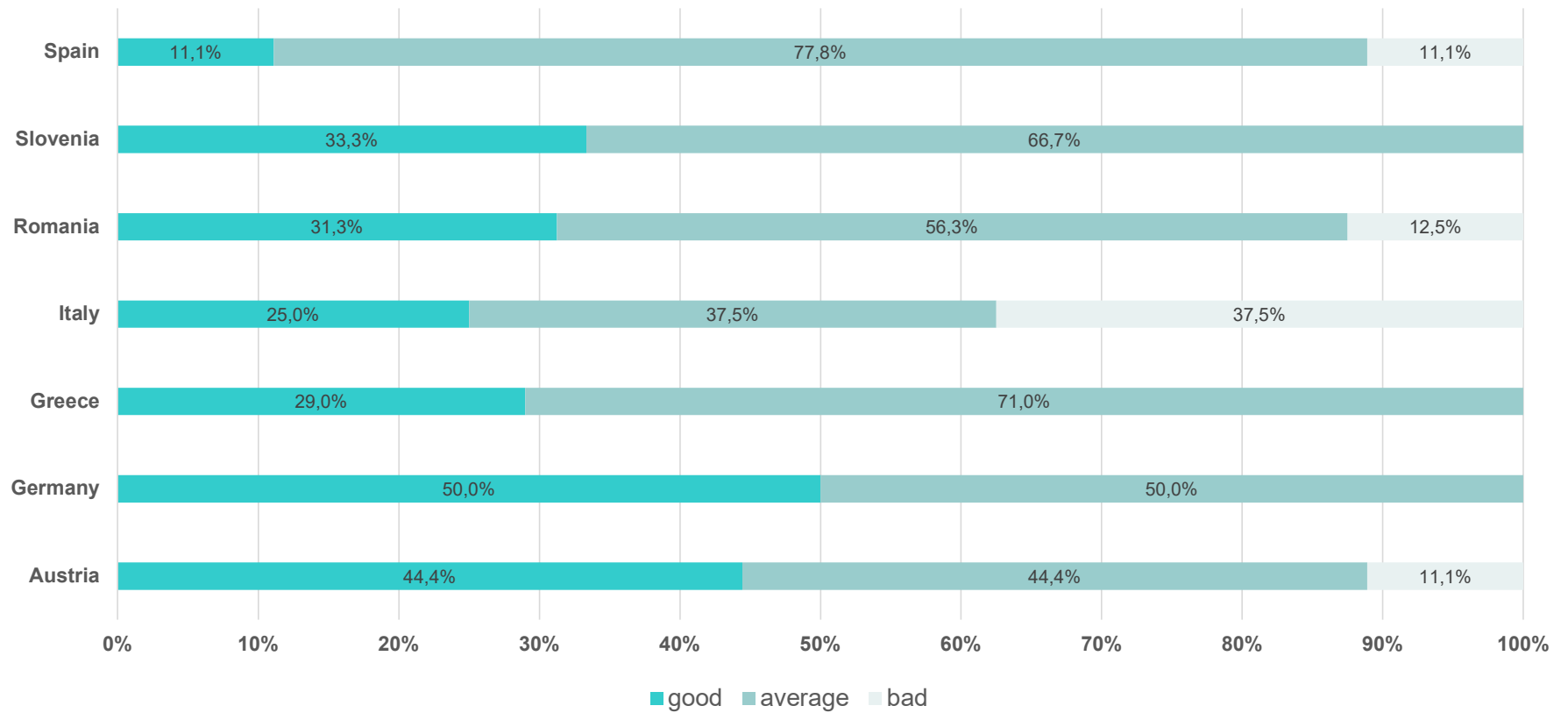
Demand: Energy and water suppliers



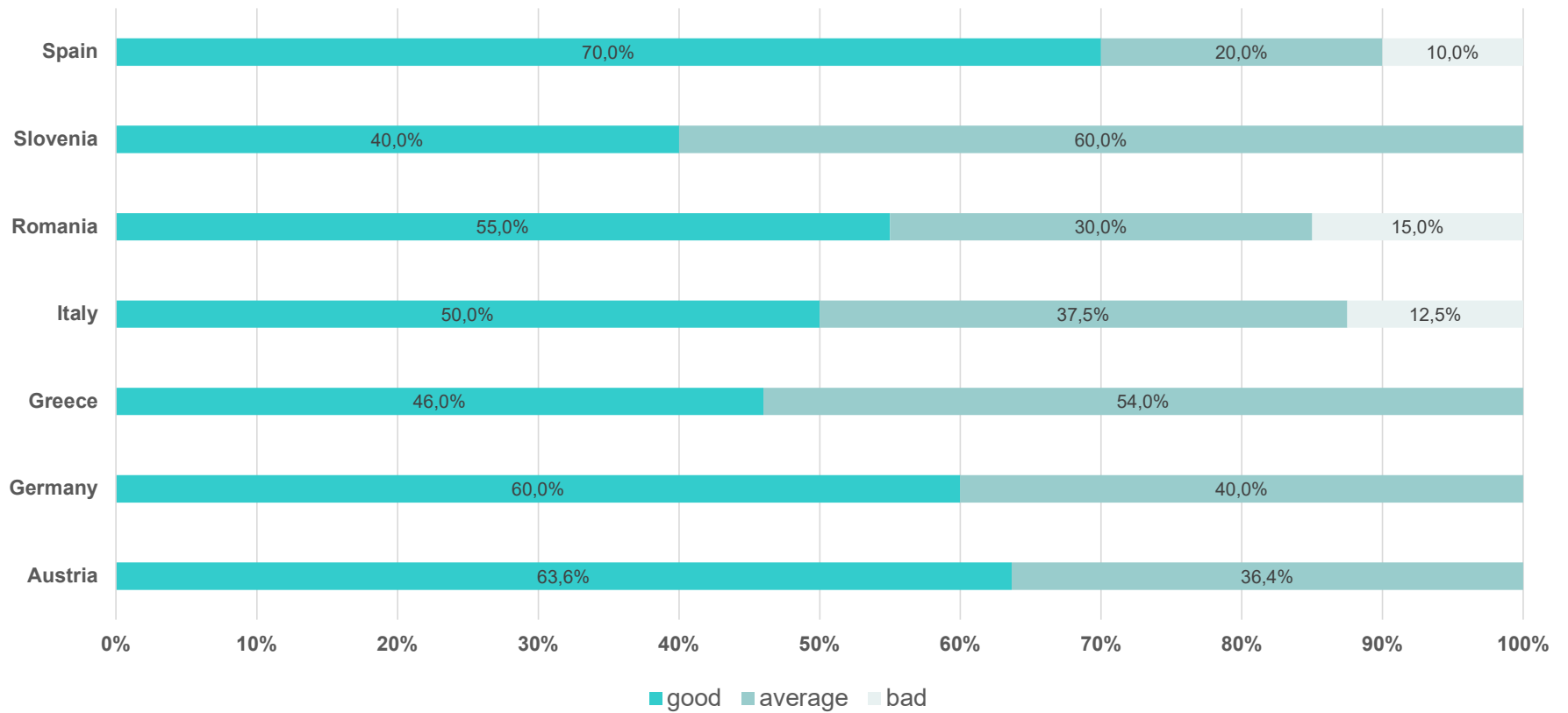
Demand: Transport and hospitality



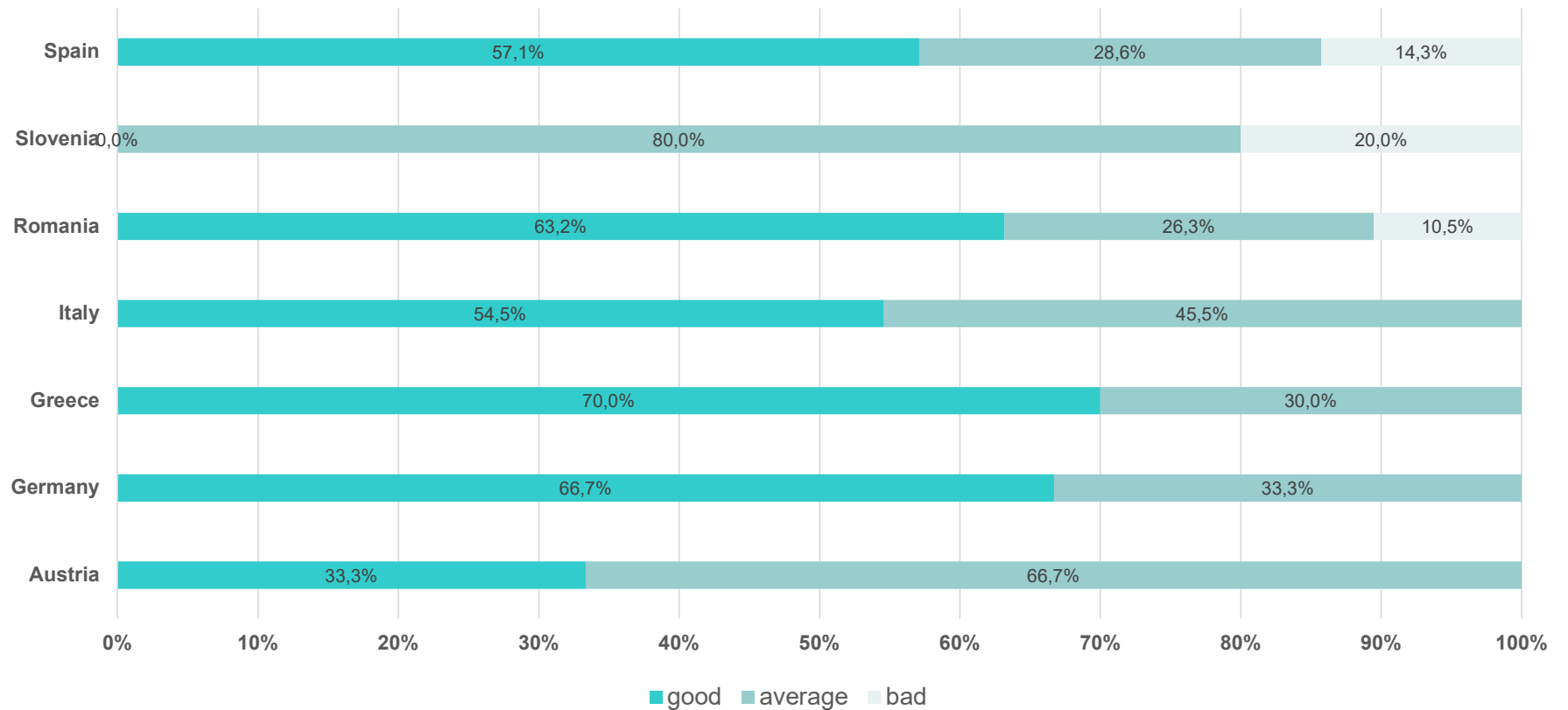
Demand: Wholesale and retail trade



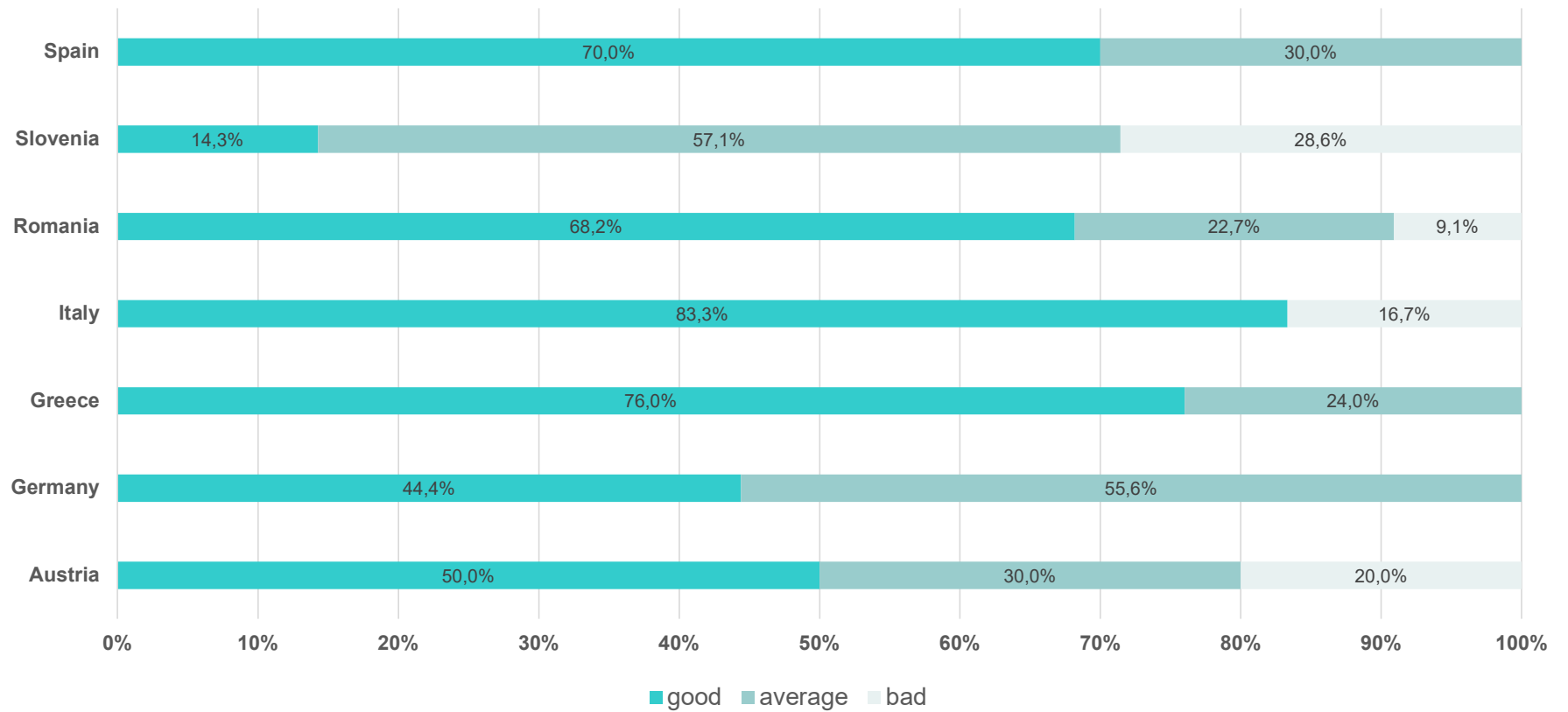
Demand: Healthcare



Demand: Other service providers / Professional services



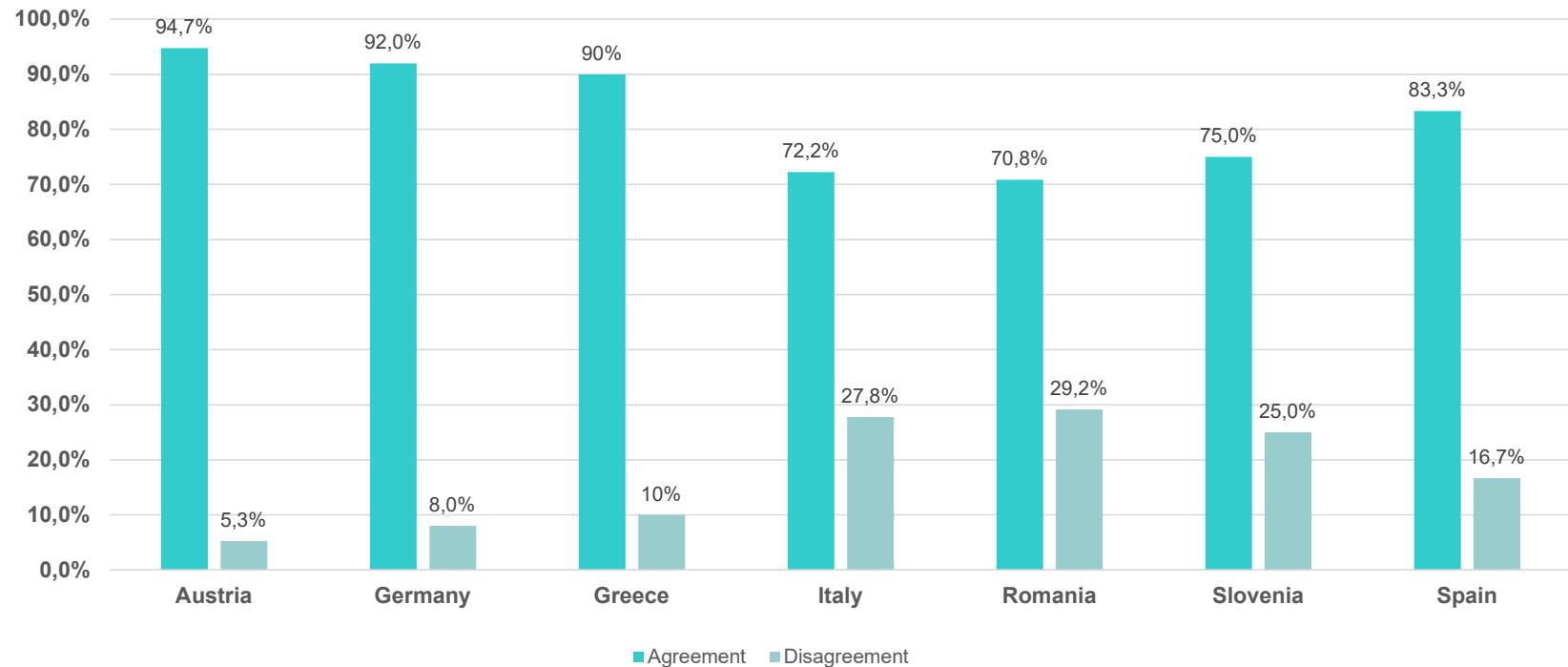
Demand: Public Sector



Current Trends in the Management Consulting Industry

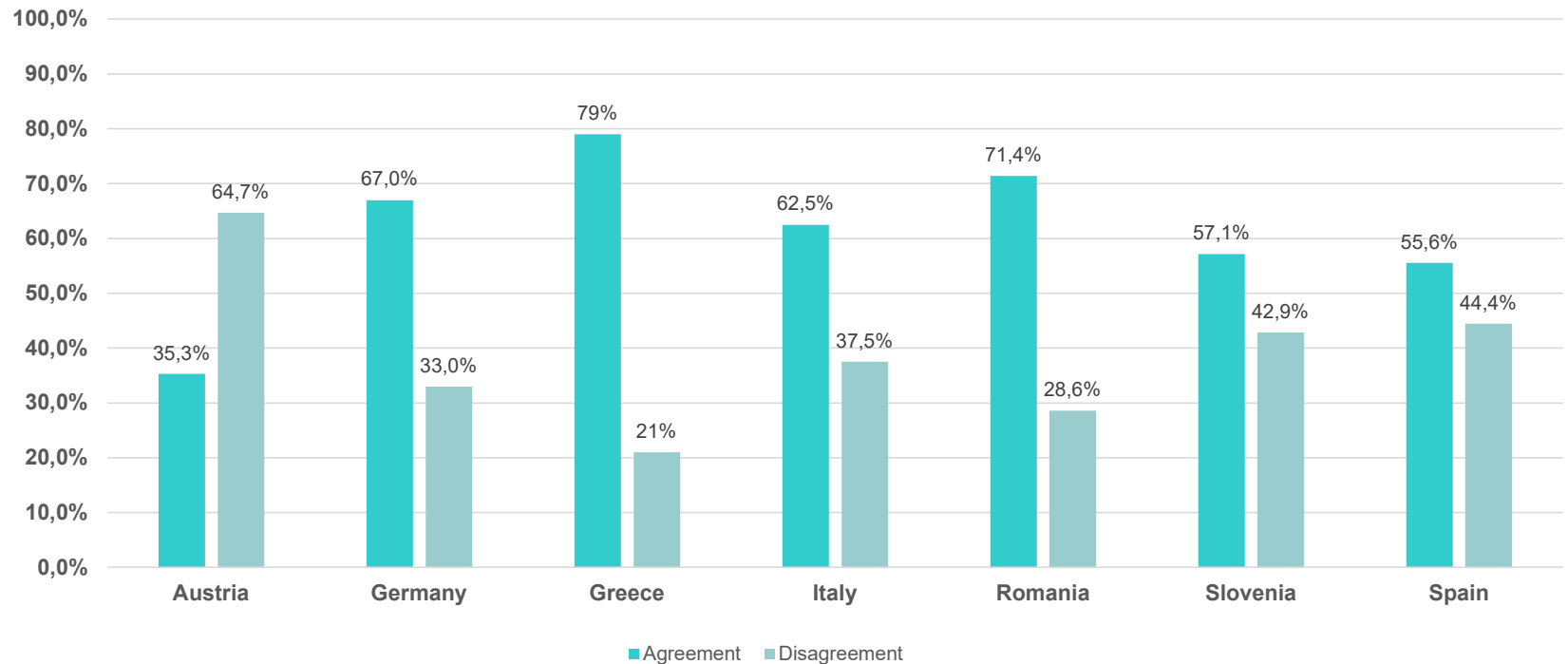
Current Trends in Management Consulting

“Remote work will continue to establish itself and remain at a high level after the pandemic.”



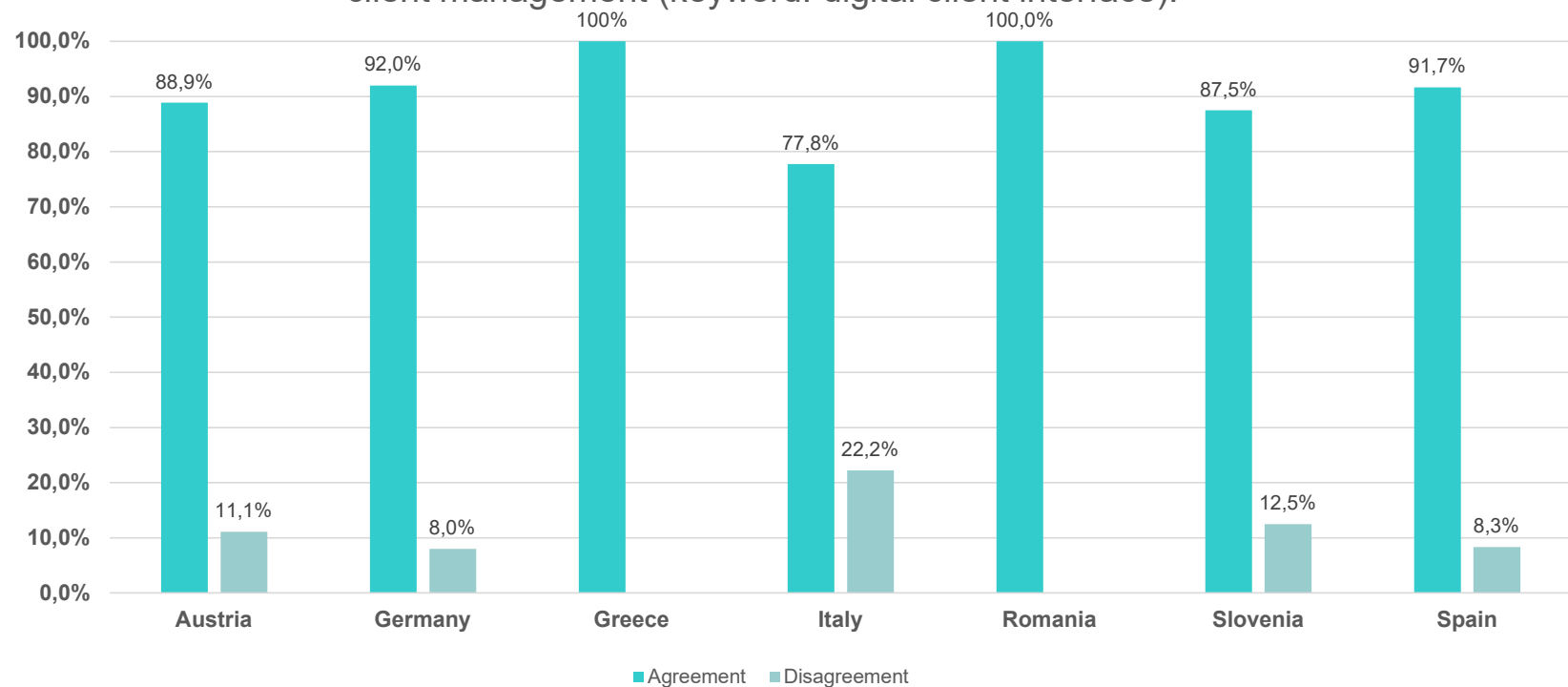
Current Trends in Management Consulting

“The promotion of gender diversity will climb steeply up the priority list of management consultancies in the next three years.”



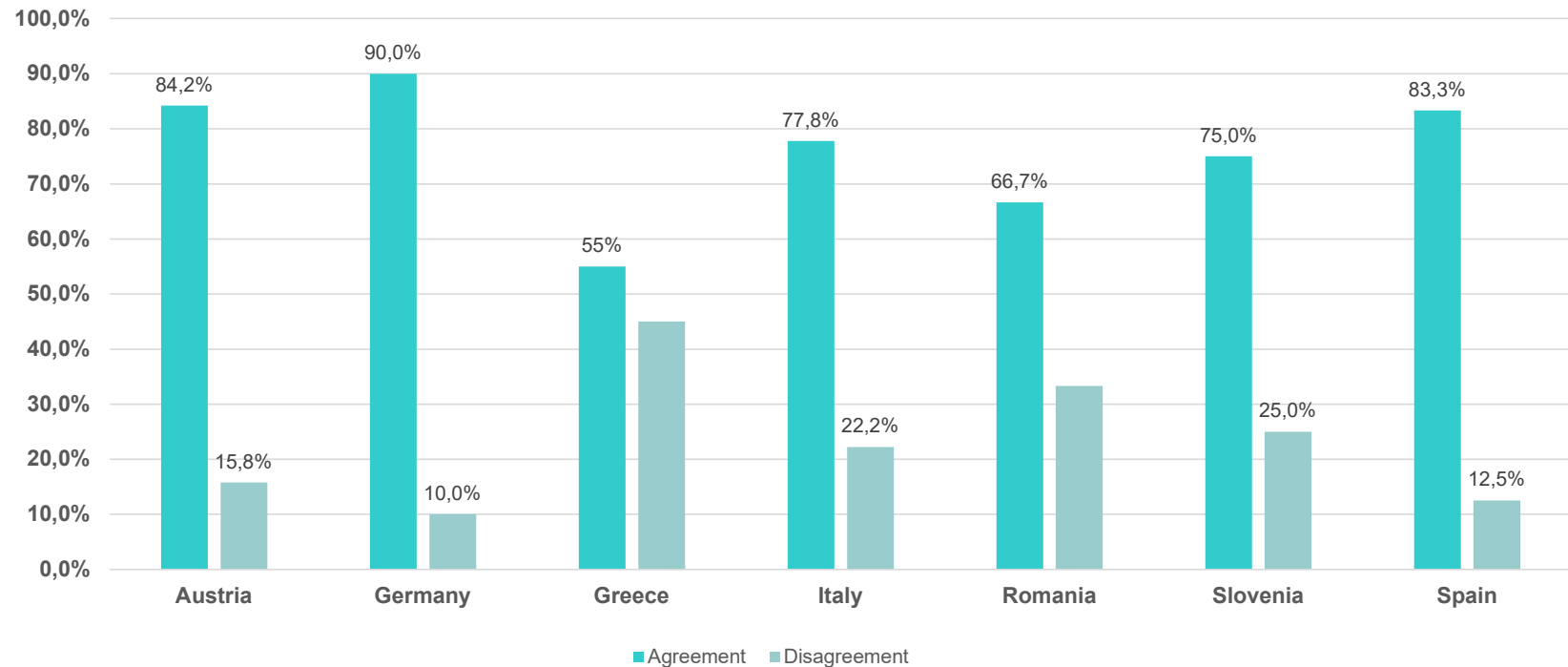
Current Trends in Management Consulting

“Consultancy firms must significantly increase the level of digitalisation of their own company (infrastructure, processes, management, etc.), their service portfolio and client management (keyword: digital client interface).”



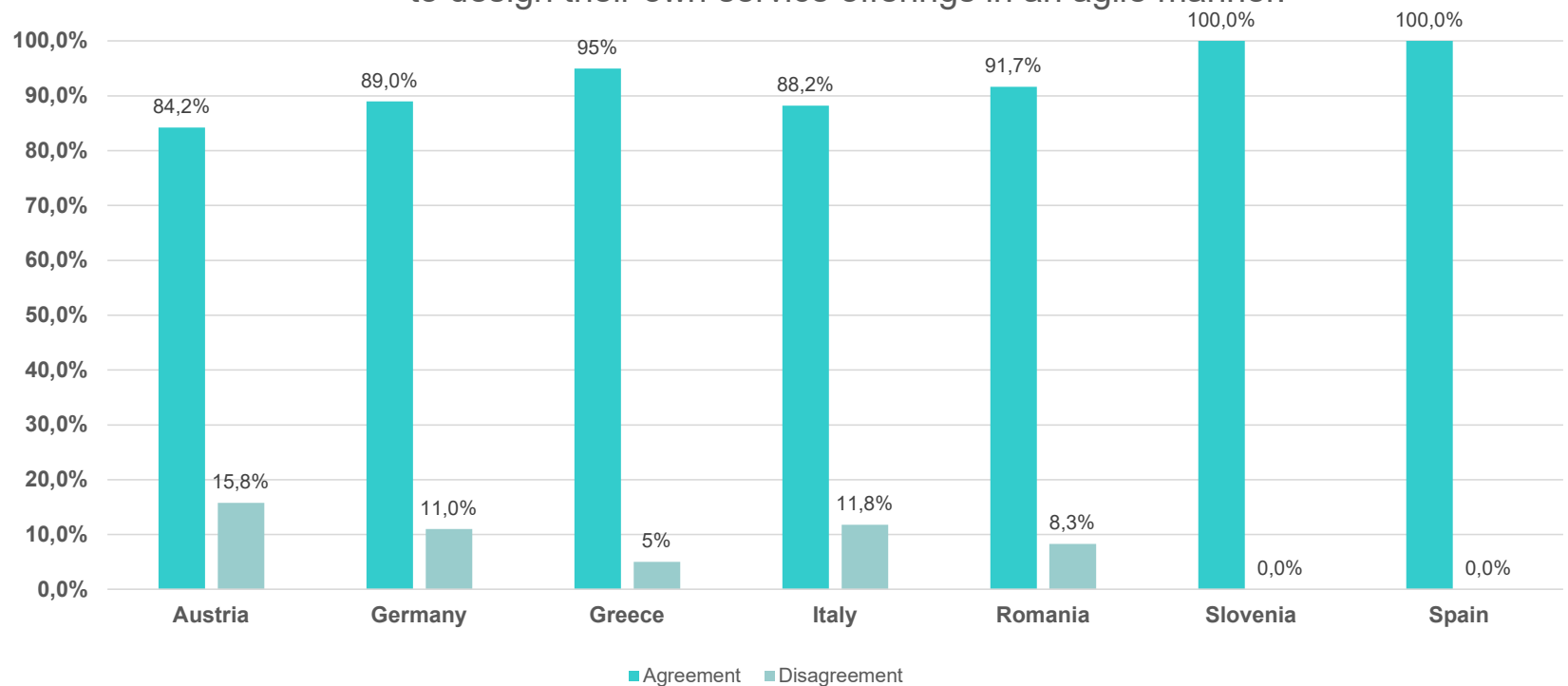
Current Trends in Management Consulting

“A.I. will not be able to replace face-to-face consulting in the foreseeable future.”



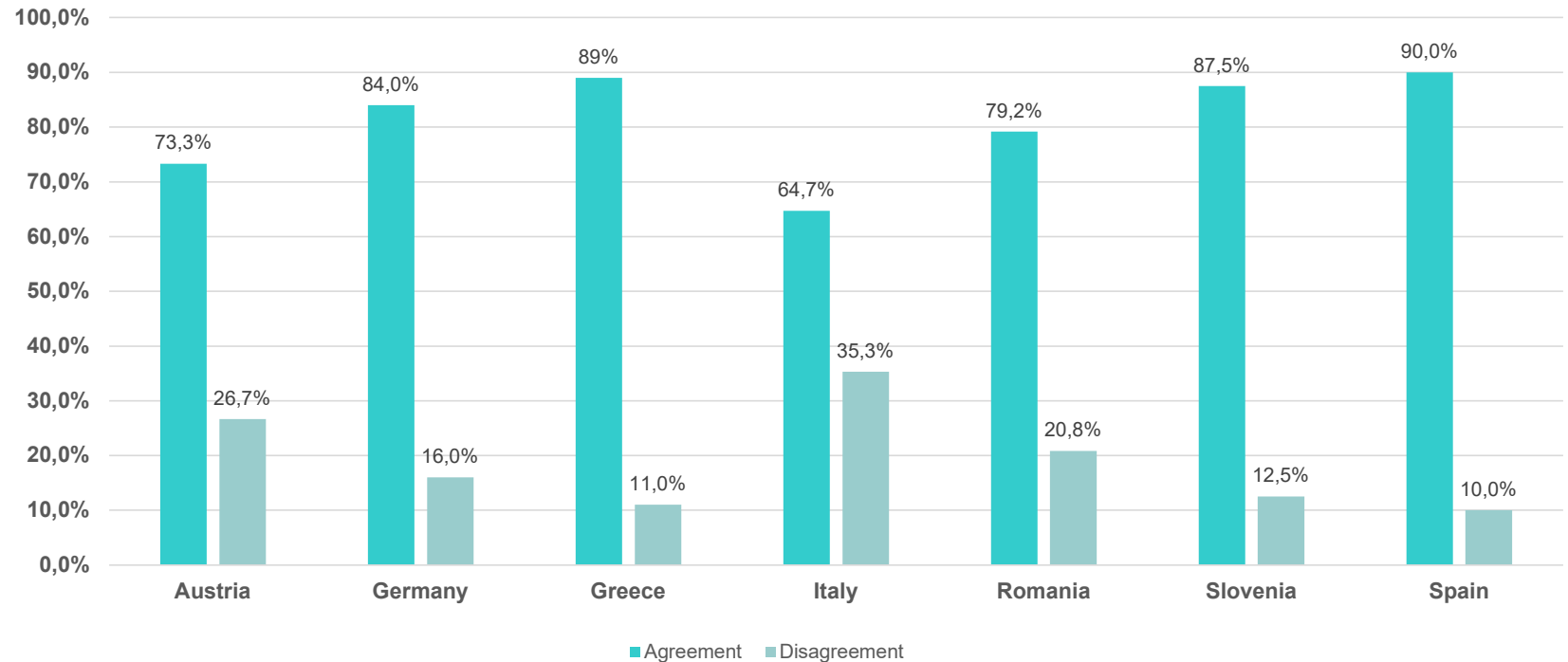
Current Trends in Management Consulting

“Clients increasingly expect the consultant to be familiar with agile methods and also to design their own service offerings in an agile manner.”



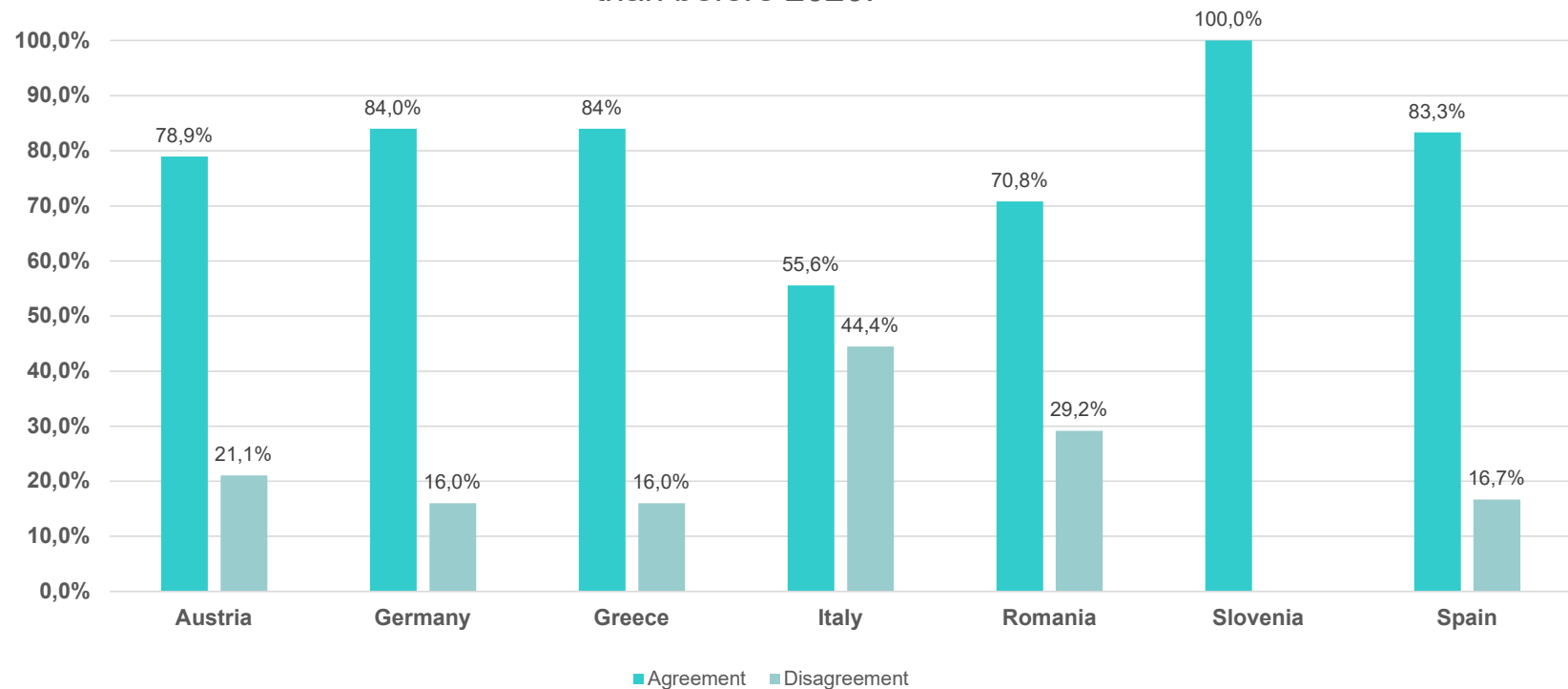
Current Trends in Management Consulting

“Junior consultants increasingly expect their employers to assume social and ecological responsibility in the sense of a holistic CSR concept.”



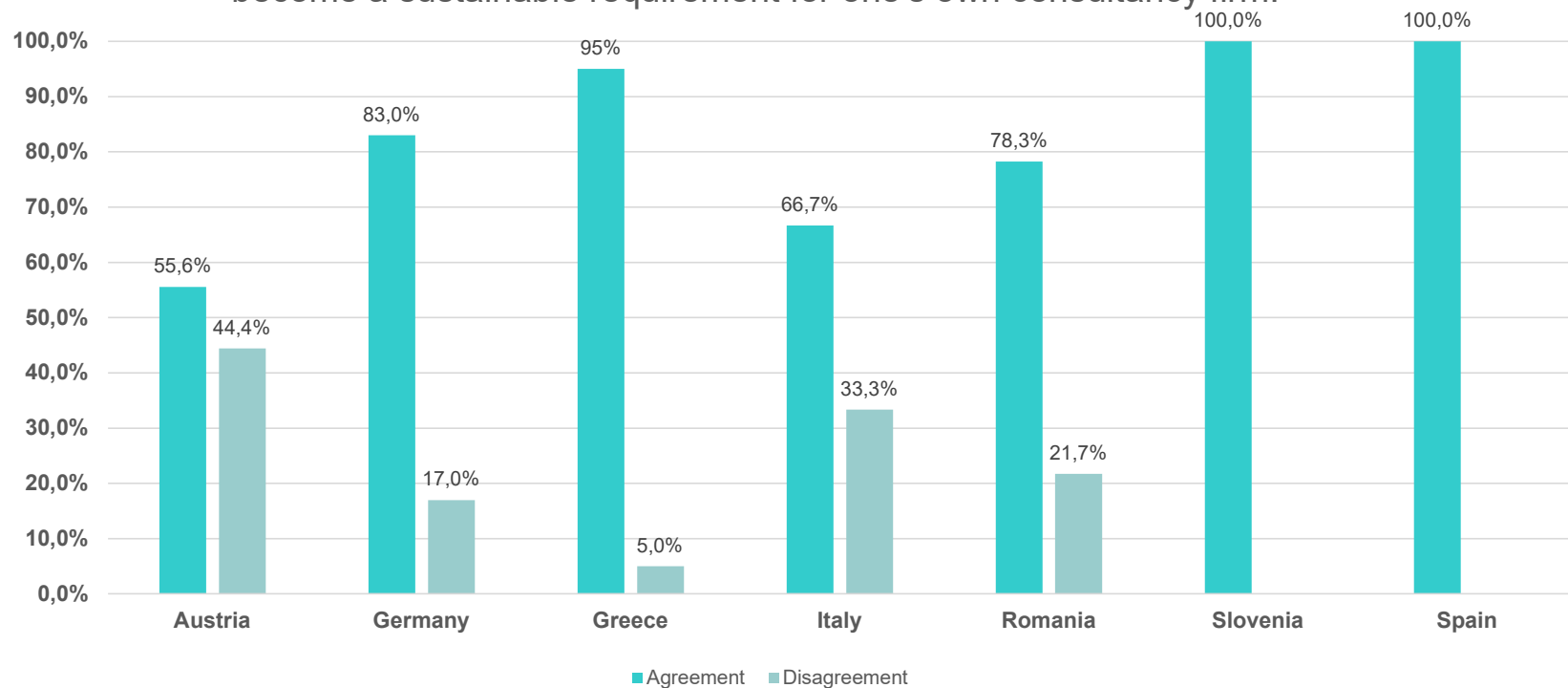
Current Trends in Management Consulting

“Consultants' travel will be significantly less in the post-Corona period than before 2020.”



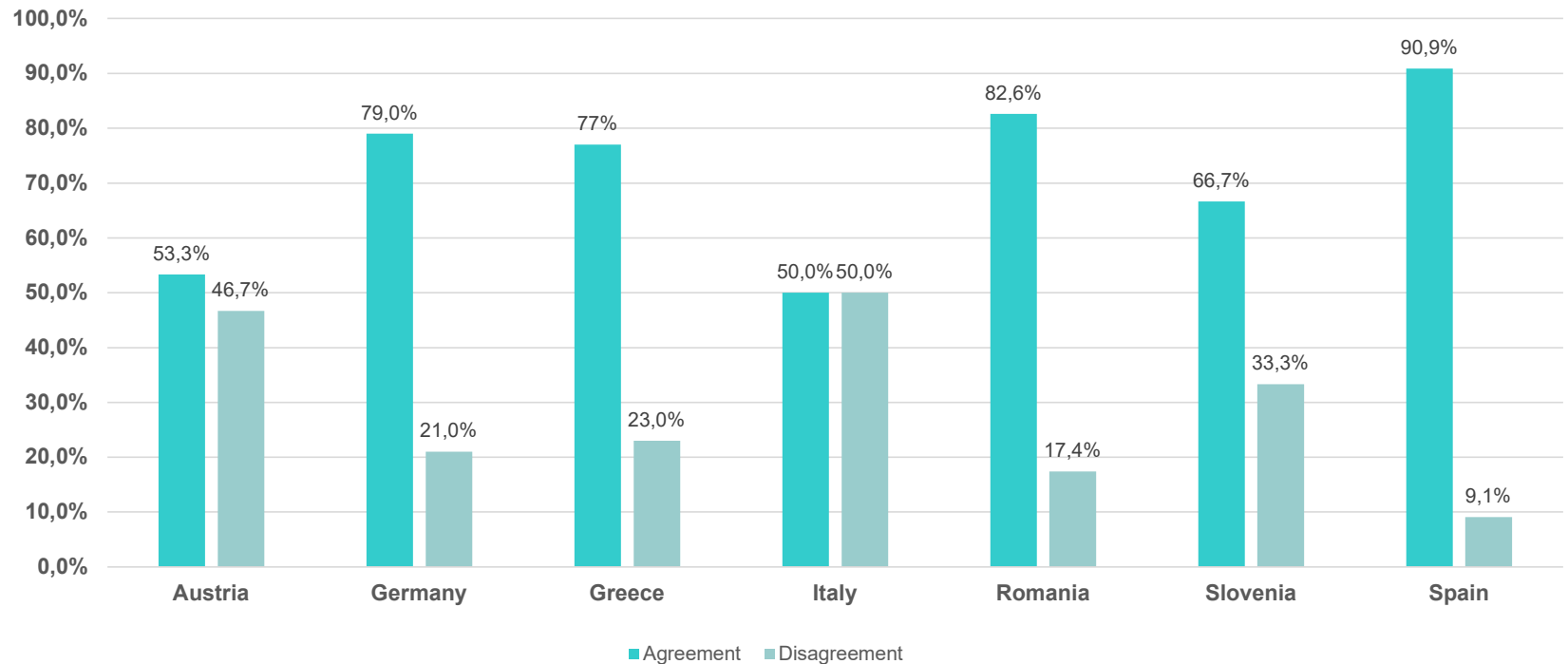
Current Trends in Management Consulting

“ESG (Environmental Social Governance, i.e. consideration of environmental and climate protection, working conditions and corporate governance) will increasingly become a sustainable requirement for one's own consultancy firm.”



Current Trends in Management Consulting

“For consulting firms that are open to "real" diversity, an interesting personnel market is opening up both qualitatively and quantitatively.”



Current Trends in Management Consulting

“As on-site consulting decreases, the consulting profession will become much more attractive for women.”

