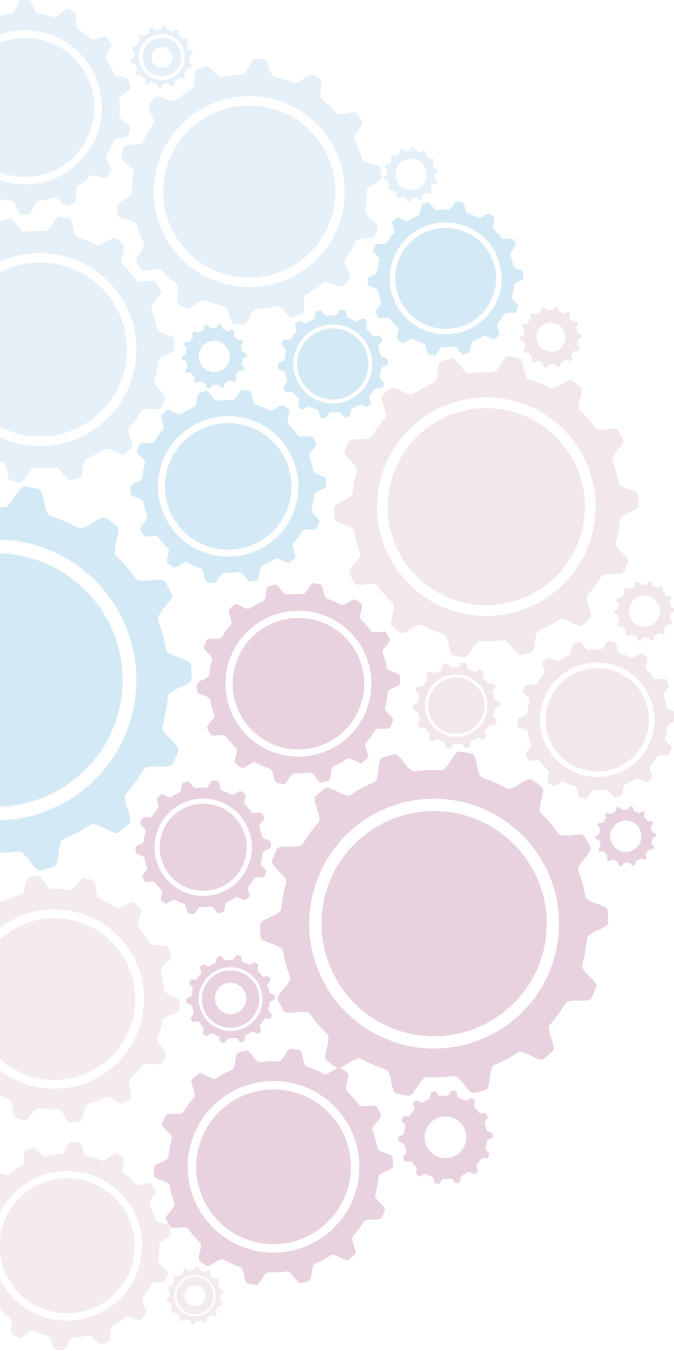




# **BRAND PERCEPTION SUMMARY**

## **McKINSEY & COMPANY**



## About this brand perception summary

---

The data contained in this summary represents the views of clients (senior end users of consulting services) as expressed to us via an online survey, more details of which you'll find in the section entitled "methodology". It does not represent the view of analysts.

The interpretation of that data, however, is ours. It's based on the unparalleled knowledge that we've acquired through years of surveying and interviewing consultants and their clients, and through the work we've done—and continue to do—advising the leaders of the world's biggest and most successful consulting firms about their businesses.

A full list of firms for which brand perception summaries are available can be found towards the back of this document.

# Methodology

In December 2015 we surveyed 2,649 clients—senior end users of consulting services from around the globe, all of whom had made extensive use of consultants—and asked them to tell us about three consulting firms of their choosing, giving us 9,278 responses in total. We asked about those firms’ capabilities, across a range of consulting services, about the extent to which they deliver value relative to the fees they charge, and about the attributes they associate with each firm. We also asked about the likelihood of using a firm, whether they have recommended a firm, and if that firm is their first choice for each service.

742 of the responses we received were about McKinsey. They came from a wide range of countries and industries but, because our sample size becomes quite small when we cut it to represent those countries and industries individually, we cannot go into great detail about how views change from one to the next. So, for example, while we can say how views about McKinsey’s overall capabilities differ between respondents in Germany and the US, we can’t talk about how views differ for individual service lines between those two countries. This summary, then, is about McKinsey as a global firm.

## *The difference between direct and indirect clients*

In this report we talk about two types of clients: direct and indirect. Direct clients are clients who either have very recent experience of working with the firm they chose to tell us about or are working with it now. Indirect clients are clients who feel qualified to share an opinion about a firm but aren’t among their direct clients. They may have had exposure to the work the firm has done elsewhere in their organisation or have simply formed an impression based on reading a firm’s thought leadership or being exposed to its marketing in some other form—we include a breakdown of these relationships on page 21. In simple terms, indirect clients are prospects.

The differences between the opinions of these two types of clients tell us a lot about the differences between expectation (indirect clients) and reality (direct clients). But it also tells us something about the differences between a firm’s marketing and what it actually delivers.

Whenever we refer to clients without specifying the relationship, we are referring to all clients—direct or indirect—that talked about McKinsey.

## Firms included in our global study and how we classify them:

|                              |            |
|------------------------------|------------|
| Accenture                    | Technology |
| Aon Hewitt                   | HR         |
| A.T. Kearney                 | Strategy   |
| Bain & Company               | Strategy   |
| Capgemini Consulting         | Technology |
| Deloitte                     | Big Four   |
| EY                           | Big Four   |
| Hay Group                    | HR         |
| IBM Global Business Services | Technology |
| KPMG                         | Big Four   |
| McKinsey & Company           | Strategy   |
| Oliver Wyman                 | Strategy   |
| PwC                          | Big Four   |
| Roland Berger                | Strategy   |
| Strategy&                    | Strategy   |
| The Boston Consulting Group  | Strategy   |
| Towers Watson                | HR         |

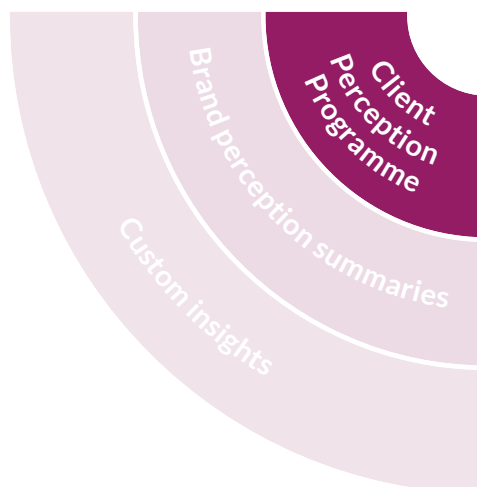
## Brand perception summaries are available for the following firms:

---

Accenture  
Aon Hewitt  
A.T. Kearney  
Bain & Company  
Capgemini Consulting  
Deloitte  
EY  
Hay Group  
IBM Global Business Services  
KPMG  
McKinsey & Company  
Oliver Wyman  
PwC  
Roland Berger  
Strategy&  
The Boston Consulting Group  
Towers Watson

For more information, please contact Sarah Burgess on +44 (0)7827 338821  
or by email: [sarah.burgess@sourceglobalresearch.com](mailto:sarah.burgess@sourceglobalresearch.com)

# CLIENT PERCEPTION PROGRAMME



## How to subscribe

You can either subscribe to the whole programme (the cheapest way of getting access to everything) or buy reports individually. All reports in the *Client Perception Programme* come with a global licence, so once you've bought them, you can use them anywhere in your firm.

For more details about how you can subscribe, please contact [Alice Noyelle](#).

The newest of our major research programmes, our *Client Perception Programme* is a suite of eleven reports that assess the reputation of consulting firms, as seen by clients.

At the heart of the programme are two important questions:

- What is the reputation of a consulting firm?
- What do clients think about the quality of service and the value added by consulting firms?

The first section of each report looks at the perceptions of clients in the market as a whole (either by geography or industry) and ranks the top three firms in each of the following areas: mindshare (how likely clients are to be thinking about a consulting firm), quality, value added, and likelihood to be recommended. The report then looks at perceptions by consulting service (and where relevant, by industry), ranking the top three firms for each. In our analysis, we draw on our extensive knowledge of the consulting market to explain why particular firms are perceived as they are and highlight interesting stories within the data along the way.

Finally, the report looks at clients' perceptions of individual firms in the relevant market. It compares each firm's mindshare, quality, and value perceptions with those of the leading firms, as well as comparing the views of direct and indirect clients to highlight the challenges that need to be addressed either during a project or by marketing.

The report also highlights which services clients are recommending each firm for and what they perceive to be each firm's strongest attributes.

## The *Client Perception Programme* can help you to:

- Understand how your consulting firm compares with competitors in the market
- Understand what clients and prospects see as your core strengths
- Where your clients think you can improve and where they want you to make improvements

## Geographies and industries covered in this Programme:

|                    |                                         |
|--------------------|-----------------------------------------|
| <b>GCC</b>         | <b>Energy &amp; resources</b>           |
| <b>US</b>          | <b>Financial services</b>               |
| <b>UK</b>          | <b>Perceptions of procurement</b>       |
| <b>The Nordics</b> | <b>Technology, media &amp; telecoms</b> |
| <b>Germany</b>     | <b>Healthcare</b>                       |
| <b>France</b>      |                                         |

For information about the products or services available from Source, please contact:

### UK, EUROPE, AND US

Alice Noyelle

+44 (0)20 3795 2662

[alice.noyelle@sourceglobalresearch.com](mailto:alice.noyelle@sourceglobalresearch.com)

### MIDDLE EAST

Jodi Davies

+971 52 989 5224

[jodi.davies@sourceglobalresearch.com](mailto:jodi.davies@sourceglobalresearch.com)

[www.sourceglobalresearch.com](http://www.sourceglobalresearch.com)

## About Source

---

Source Global Research is a leading provider of information about the market for management consulting. Set up in 2007 with offices in London and Dubai, Source serves both consulting firms and their clients with expert analysis, research, and reporting. We draw not only on our extensive in-house experience but also on the breadth of our relationships with both suppliers and buyers. All of our work is underpinned by our core values of intelligence, integrity, efficiency and transparency.

Source was founded by Fiona Czerniawska and Joy Burnford. Fiona is one of the world's leading experts on the consulting industry. She has written numerous books on the industry including: *The Intelligent Client* and The Economist books, *Business Consulting: A Guide to How it Works and How to Make it Work* and *Buying Professional Services*.

For further information please visit [www.sourceglobalresearch.com](http://www.sourceglobalresearch.com)

### UK AND EUROPE

Source Information Services Ltd

📍 20 St Dunstons Hill • London • EC3R 8HL

☎ +44 (0)20 3795 2668

### MIDDLE EAST

📍 PO Box 340505 • Dubai • United Arab Emirates

☎ +971 (0)52 989 5224

✉ [info@sourceglobalresearch.com](mailto:info@sourceglobalresearch.com)

🌐 [www.sourceglobalresearch.com](http://www.sourceglobalresearch.com)

© Source Information Services Ltd 2016

Source Information Services Ltd and its agents have used their best efforts in collecting the information published in this report. Source Information Services Ltd does not assume, and hereby disclaims, any liability for any loss or damage caused by errors or omissions in this report, whether such errors or omissions result from negligence, accident or other causes.