

EXTRACT

MEGA TREND #1: DIGITAL TRANSFORMATION

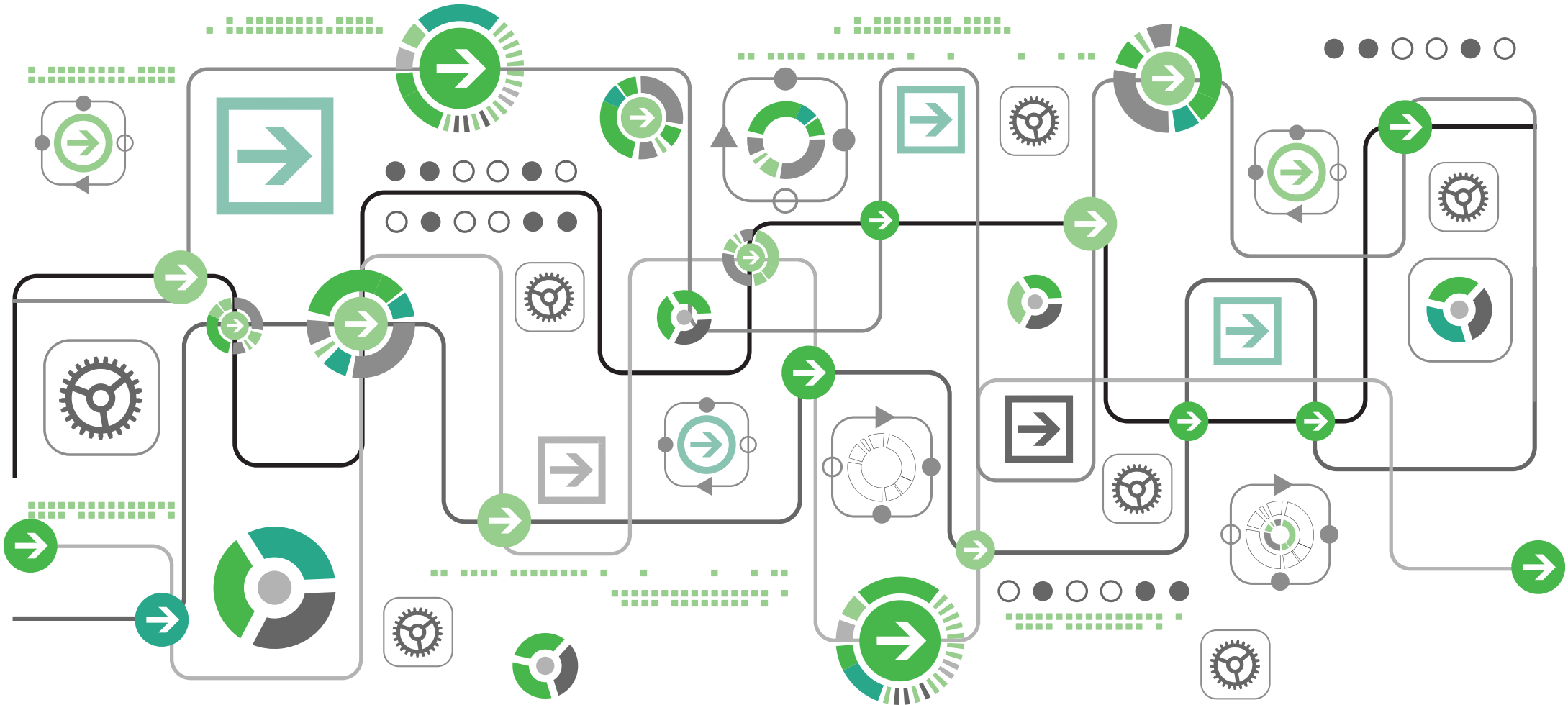
*A global perspective on the size, shape,
and evolution of the consulting market
for digital transformation*



There's never been a better time to be a creator and a maker, especially if you think about the canvas of technology and the things businesses have to create, as well as their desire to know more about their customers and their behaviours, interests, and desires. On the flipside, there's never been a tougher time to be in business, with organisations being constantly disrupted and established value chains being ripped up. We occupy the space between the boundless opportunity and the pervasive threat.

Matthew Candy, IBM iX

MEGA TREND #1: DIGITAL TRANSFORMATION



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OUR STARTING POINT

Everything that's happened with digital transformation so far has been the warm-up act, in which clients have used digital technology to facilitate and accelerate existing priorities, like cutting costs or creating a better customer experience. That's all about to change. We stand at the threshold of a new phase in the evolution of the digital transformation story—a phase that will be characterised by clients using digital to change not only how they do things, but what they do, and even who they are. According to clients, what will matter most in this phase is not a consulting firm's technological capabilities but its relationships with their board. Which leads us to the question at the heart of this report: Will strategy firms inherit the digital earth?

ABOUT THIS REPORT

Our report draws on data from three main sources:

1. Our global consulting data model. A bottom-up model of the consulting industry covering 84 countries, 29 sectors, and six major service lines and containing about 9.7m data points.
2. A survey of 150 clients in the US about digital transformation.
3. Our annual global client perception survey, the latest version of which had 8,046 responses.

It's important to note that at the time of writing this report our data about the consulting market in 2016—the year we refer to in talking about the size of the market—is provisional. What you have here is a good guide to the size of the digital transformation market globally, in specific geographies, and in terms of how it interfaces with traditional consulting services lines. But as it pre-dates the publication of our 2017 reports on most geographies around the world, some of the detail is subject to minor changes.

Unless indicated otherwise, survey data is taken from our digital transformation survey (No. 2, above).

*The question of “why” is behind us;
we're now facing the question of “how.”*

Patrick Rouvillois, The Boston Consulting Group

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SOURCE REPORT PROGRAMMES

CONSULTING MARKET PROGRAMME

- A series of detailed reports that contain the most accurate view available about the consulting market in an extensive list of countries and regions. These explore key themes, provide market sizing data, growth forecasts, and deep analysis, all backed up by extensive quantitative and qualitative research amongst consulting firms and clients.
- As well as our country reports, we also produce a global view of four different industries. These reports contain industry analysis, market sizing data, and growth forecasts at a global level, as well as breakdowns by sub-sector, service, and geography.

STRATEGIC PLANNING PROGRAMME

- A series of reports that take a detailed look at the big trends in the global consulting industry, interpreting them in terms of what they mean for consulting firms and who is best placed to exploit them.

CLIENT PERCEPTION PROGRAMME

- A series of reports based on our huge client survey, that reveal what clients think about the leading consulting firms in a number of regions and industries. We rank the leading consulting firms in terms of clients' perceptions of things like quality and value.
- As part of this programme, we also publish brand perception summaries. These give an in-depth and unique view of the world's leading consulting firms. Available on request.

WHITE SPACE

- A series of reports that analyse the quality and effectiveness of thought leadership. These are included in all White Space subscriptions.

| 2017 | CONSULTING MARKET PROGRAMME | STRATEGIC PLANNING PROGRAMME | CLIENT PERCEPTION PROGRAMME | WHITE SPACE |
|-----------|---|--|-------------------------------|---|
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| March | France GCC | Mega trend #1: Digital transformation | US UK | Analysis of recent thought leadership |
| April | Benelux Nordics | | Energy & Resources | |
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About Source

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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](#).

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