BRAND PERCEPTION SUMMARY
PwC

SOURCE GLOBAL RESEARCH

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.

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Methodology

In November and December 2016 we surveyed 2,682 clients—senior end users of consulting services from around the world, all of whom had made extensive use of consultants—and asked them to tell us about three consulting firms of their choosing, giving us 8,046 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 which attributes are the most important, and how clients see the positioning of each firm in the market and why.

Four-hundred and fifty-six of the responses we received were about PwC. 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 PwC'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 PwC 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 26. 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 they also tell 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 PwC.

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

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

Advertising these findings:

Firms like to use these findings in their own marketing and KPIs. Source's marketing licence allows you to publicise your ranking in advertising, editorials, presentations to external clients, below your email signature, and on your corporate website. The licence also allows you to use the Source "badge" within these. The badge is given to those firms that have been rated number one, two, or three by clients in a given sector/region for mindshare, quality and value.

Both the licence and the badge are valid for 24 months, and for more information, please contact Ella-Sian Jolley, or click here.

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Brand perception summaries are available for the following firms:

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

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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
January				Hot topics in thought leadership
February	UK	Forecasts for 2017	GCC	Quality ratings of thought leadership for the second half of 2016
March	France GCC	Mega trend #1: Digital transformation	US UK	Analysis of recent thought leadership
April	Benelux Nordics		Energy & Resources	
May	US Canada	Mega trend #2: Cognitive computing, robotics, AI	Nordics Financial Services	Analysis of recent thought leadership
June	DACH Eastern Europe Russia		Trends in procurement	
July	Italy Spain Australia	Mega trend #3: Assets and productisation		Maximising the impact of thought leadership
August	India		Healthcare TMT Germany	
September	Africa Brazil Energy & Resources	Planning for growth in 2018	France	Quality ratings of thought leadership for the first half of 2017
October	Financial Services China Healthcare			
November	TMT	Mega trend #4: Brand and business models		

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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***.

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