



PERCEPTIONS OF CONSULTING IN THE THE GCC

*Assesses the reputation of consulting firms,
as seen by clients*



OUR VALUES AND INTEGRITY

Our purpose is to help you grow your business. We aim to provide you with the best data and analysis to help you make the right decisions for your firm.

To that end, Source Global Research is completely independent of any professional services firm we work with or comment on. Moreover, the quantitative data and rankings shown in this report are based on the views of senior end users of professional services (your clients and prospects), not on our view. The analysis, on the other hand, is our own—as experts in interpreting client data, our aim is to help you make sense of it and bring the important messages to your attention.

It is not possible to influence our rankings either by subscribing to our research or by paying us money—it never has been and it never will be.

EXECUTIVE SUMMARY

- Clients in the GCC are most likely to talk about strategy firms: four of the five top-rated firms for mindshare are strategy brands. McKinsey is the most talked about, followed by Bain & Company. The Boston Consulting Group and Oliver Wyman also feature in the top five, and are joined by IBM Global Business Services.
- EY tops the ranking as the firm with the highest proportion of clients speaking positively about the quality of its work, followed by Accenture and KPMG. It's a tight race, however: just 11 points separate the top-rated firm from the bottom.
- The Boston Consulting Group is the firm most likely to deliver more in value than it charges in fees, according to clients. Accenture and Deloitte sit just behind, and all three are the only firms for which more than 50% of clients talk about a positive return on their investment.
- There appears to be a relationship between the price of oil and clients' perceptions of the value consulting firms add. When oil prices fall, positive perceptions of value tend to rise. When prices rise, clients' opinions about value become less positive. The challenge for firms is to break that association, so that they're seen to be delivering value at all times.
- Clients in the GCC say that account management is the most important attribute in a consulting firm, but it's among the attributes with which they're least satisfied.
- Clients are less positive this year than last about the quality of work delivered by consulting firms. The proportion of clients describing quality as "high" or "very high" has dropped from 64% last year to 57% this year, with business strategy services falling the most.

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PA Consulting

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Roland Berger

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HOW TO USE THIS CLIENT PERCEPTION STUDY

It's very important to be clear about what our Client Perception Studies are, and are not:

What they're not are exhaustive studies of clients' opinions about specific firms that remain statistically robust when filtered to provide detailed data about views at a very granular level of the market. So if, for instance, you want statistically robust data about what clients in the pharma sector in Germany think about McKinsey's operational improvement capabilities, you won't find it in these reports. We do profile individual firms in our reports to the extent we can—indeed this remains one of the most popular parts of the reports with readers—and we do, separately, offer in depth analysis of the world's leading consulting firms, but our Client Perception Studies are not designed to replace the sort of in-depth client research that many firms carry out (and often ask us to carry out for them).

What they are designed to do is provide a snapshot of views within a particular consulting market at a point in time. What they lack in detail about individual firms they make up for in three important ways:

- A multi-firm view. Our reports enable consulting firms to see how they stack up against their competitors in the minds of clients.
- A view from prospects, not just existing clients. We include the views of people who aren't current active clients of the firm they're telling us about, enabling us to understand what we tend to think of as a firm's brand pipeline, and to compare the views of prospective and active clients. In doing this last, we're able to assess the extent to which clients' expectation of a firm are met in reality, and how well a firm's marketing and delivery capabilities are aligned.
- Independence and expertise. The trouble with conducting your own client research is that clients are often reluctant to express negative views about firms (and people) with whom they've worked closely. They have no such concerns when they're telling us. Added to which, we're able to bring the expertise we've gained over years of analysing the consulting market to bear, helping to interpret the results within the context of the wider market and the strategic priorities of consulting firms.

It's important to remember that this is a study of client perceptions; a summarised view of what we're hearing from the market. It's not our view, nor is it a comment on market share or a recommendation to clients about which firms to buy from. The audience for these reports is the firms featured in them, and those interested in the strength of the competition in any given market

METHODOLOGY

Who did we talk to?

We have 891 responses from our survey of executives, directors, and senior managers in the GCC in November and December 2017, all of whom have been responsible for buying substantial volumes of consulting services in the previous year. They represent a wide range of industries and business functions, and 68% work in organisations that generate more than \$500m in revenue.

This report also includes qualitative research from interviews carried out in 2017 and 2018 with senior buyers of consulting in the GCC to bring aspects of our findings to life.

For more information about the people we surveyed, please see the **extended methodology section** towards the end of this report.

The two types of client in this report: direct clients and prospects

We talk about two types of clients in this report: direct clients and prospects.

Direct clients are clients who have bought services from a firm on a reasonably regular basis. They're current clients, or ones with an ongoing relationship with a firm.

Prospects (and what we have sometimes referred to as "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. In this research, we segment this group into those that are simply aware of a firm, and those that have shortlisted firms but decided not to proceed with that firm.

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

Discover more online

The data contained and referred to within this report is also available online, where it can be sorted and filtered according to your preferences. In fact, some of the charts contained in the report link directly through to the online database. Note that wherever you see a quick code next to the title of a chart, that code can be entered into the search function of the database to reproduce exactly the same chart.

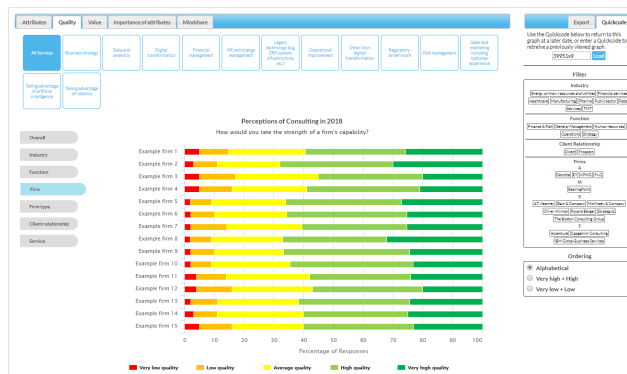
How to access the data

To access the data, you can either go to the page where you downloaded this report and click on the 'Explore the underlying data' button. Alternatively, you can visit our website here and log in using the same credentials you use to download the report.

2018 > Home			
Welcome to the online version of our Client Perception Programme, the most detailed survey of its kind about the management consulting market. This is where you'll find information about what clients (senior end users of consulting services) think about the price, value and quality of the services delivered by many of the world's leading consulting firms.			
Please use the data within it as much as you like internally, but refer to our marketing licence policy if you want to use it externally, or contact Ella-Sian Jolley ESJ .			
	Included in your licence	Published	
Client Perceptions Programme 2018			
Germany CPS	✔	April 2018	Load
US CPS	✔	April 2018	Load
UK CPS	✔	June 2018	Load
Energy & Resources CPS	✔	August 2018	Load
Financial Services CPS	✔	June 2018	Load
Healthcare CPS	✔	September 2018	Load
TMT CPS	✔	September 2018	Load
France CPS	✔	July 2018	Load

What can I do with the data?

From here, you will be able to filter all the data in this report on each of the key areas: Mindshare, quality, value, recommendations, attributes, and important attributes.



METHODOLOGY IN FULL

Who did we talk to?

Figure 10

Respondents' level of responsibility

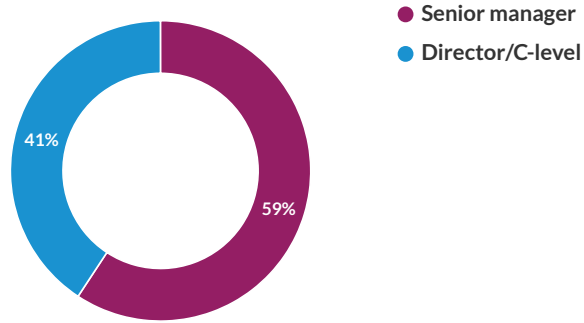


Figure 11

Respondents by industry

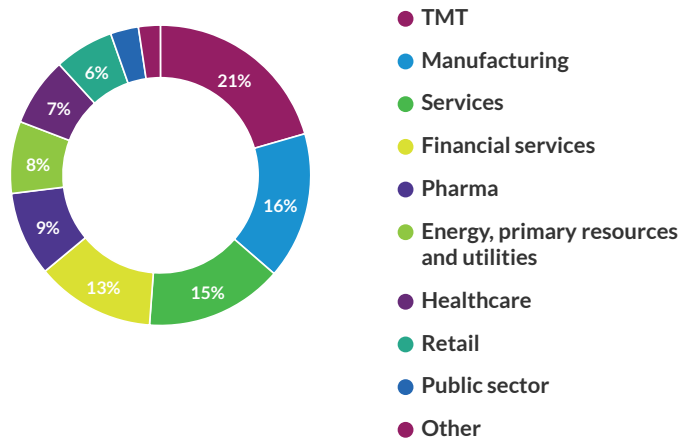


Figure 12

Respondents by function

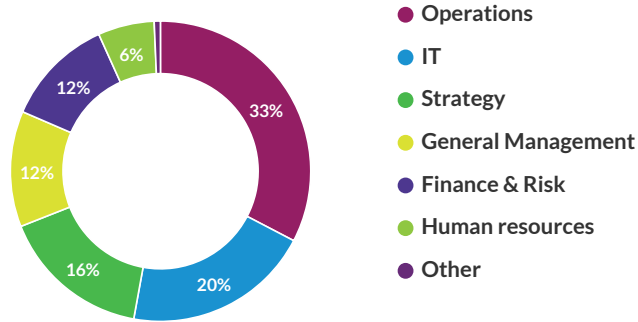
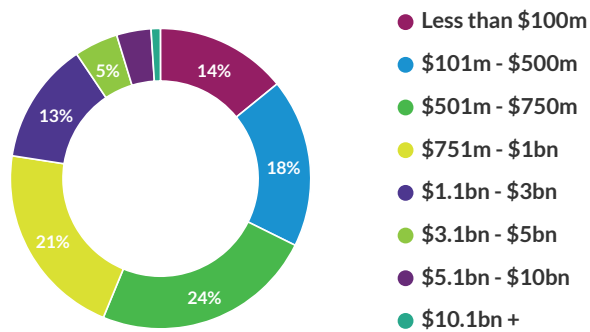


Figure 13

Respondents organisation's revenue



What did we ask them?

Each respondent was asked to tell us about three consulting firms and was presented with a list of 14 leading consulting firms in the GCC. We focus respondents on the world's leading consulting firms to ensure we have sufficient responses to carry out a detailed analysis.

We asked each respondent to share their views on each of the three firms selected, focusing on the following areas:

- Quality: Their perception of the quality of service provided by each firm in ten different consulting services
- Value: Their view of how much value each firm added in relation to the fees paid for its services
- Attributes: How they rate each firm and the individuals from it across a range of attributes, and what they think the most important attributes of each firm are.

Which firms are included in this report?

Firm	Did we ask about this firm in this market?	Detailed profile available?
Accenture	✓	✓
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	✓	✓
PwC	✓	✓
Roland Berger	✓	✓
Strategy&	✓	✓

How do we rank firms in this report?

In this report, we reveal the top-ranked firms in four areas: mindshare, quality, value, and most recommended firm. We look at the top-ranked firms overall, but where we can, we also split the data to look at perceptions in each consulting service, by client type, by industry, and by function (that is, looking at how views of respondents in different industries and different business functions vary). In breaking down the data to this level our sample sizes can become quite small, so where it isn't big enough for us to be confident making a ranking, we've declined to do so. That means that in this report we are unable to provide a ranking for clients in the finance & risk, general management, or HR functions, nor for clients working in the energy, primary resources & utilities industry, financial services, retail, pharma, healthcare, public sector, or other. If you have questions about the industries we've omitted from this report, try visiting our [online portal](#), where you'll be able to see all the data we have in one place. If you have further questions, please contact info@sourceglobalresearch.com.

Mindshare: To give each firm a mindshare score, we've looked at how quickly respondents selected any particular firm. The firm that reached 50 responses fastest gains the top score (which is 100). All other firms are scored in comparison to the time it takes to fill that quota. Think of it as firms racing each other to a finish line.

Quality: We base our rating on the sum of the proportion of people who describe quality as either "high" or "very high". Where that produces an equal result between two firms, we take into account the share who have described quality as "very high" to determine the order in which they are ranked.

Value: We base our rating on the sum of the proportion of people who say that the value a firm delivers is greater (to any extent) than the fees it charges. Where that produces an equal result between two firms, we take into account the extent to which value is seen to be greater than fees (respondents had the choice of saying it was twice, five times, or ten times greater than fees) to determine the order in which they are ranked.

DEFINITIONS OF INDUSTRIES

Industries



Energy & resources

Energy

Includes the exploration and production of energy, including oil, gas, coal, and renewables.

Utilities

Includes the delivery of electricity, gas, water, sanitation, and other related services.

Primary resources

Includes agriculture, chemicals and chemical products, commodities, forestry, fishing, metals, mining, and plastics.



Financial services

Banking

Includes retail banking, commercial banking, and lending.

Insurance

Includes general insurance (e.g., motor, home, pets, health—anything on an annual contract), life insurance, pension products, retirement planning.

Private equity

Includes both consulting work for private equity firms and consulting work with private equity portfolio businesses.

Capital markets

Includes investment banking, trading of stocks and financial products, corporate finance, and broking.

Investment and wealth management

Includes private banking, high net-worth banking, investment management, trust funds, the management of pension funds, and asset management.



Manufacturing

Aerospace

Includes space research and technology, the manufacture of aircraft, aircraft parts, rockets and other space equipment, and tanks and ammunition.

Automotive

Includes the manufacture of motor vehicles, industrial vehicles, and vehicle supplies and parts.

Construction

Includes surveying, architectural, and engineering services, heavy construction, house building, and the building of infrastructure.

Consumer packaged goods

Includes the manufacture of clothes, foods, alcohol, tobacco, furniture, home furnishings, cleaning products, small arms, children's toys, and sports equipment.

Consumer and industrial electronics

Includes electrical components, household and industrial appliances, commercial and professional equipment.

Industrial products

Includes industrial machinery, steel and metal products, and plastic products.



Pharma & biotech

Includes research into and the production of drugs, biological products, medicinal chemicals, and life sciences.



Healthcare

Includes private and publicly-funded healthcare, hospitals, laboratories, and medical equipment.



Public sector

Government

Includes federal/national, state/regional, local government, emergency services, justice, social services, public transport, and conservation.

Education

Includes public and private schools, universities, and libraries.

Defence

Includes national security and consulting around defence issues.

Not for profit

Includes non-commercial research organisations, religious, political and professional membership organisations, trusts, labour unions, and business associations.



Retail

Includes the selling of clothes, food, consumer goods, and automobiles.



Services

Logistics

Includes warehousing, storage, packing and crating, and distribution including cargo, freight, and haulage.

Business services

Includes services relating to law, accountancy, IT maintenance, security systems, advertising, employment agencies, and vehicle leasing.

Leisure

Includes museums, art galleries, theatre, golf courses, hotels, hospitality, travel agencies, restaurants, and bars.

Real estate

Includes estate agencies and operators of residential and commercial buildings.

Transportation

Includes private and people-related transportation, including airlines, airport management, train operators, rail infrastructure management, water transportation, courier services, and private bus services.



Technology, media & telecoms

Telecoms

Includes telephone, mobile, digital, and other communication services.

High-tech

Includes IT related devices, computer and computer related devices, audio and video equipment, broadcasting and communication equipment.

Media

Includes radio, television, and digital broadcasting stations and services as well as printing and publishing of newspapers, periodicals, and books.

ABOUT THE AUTHOR

Alison Huntington

Alison is the Head of Client & Brand Insights at Source. She is responsible for all the reports we write on this subject, and leads many of the bespoke projects we deliver in this area. She's an experienced writer, analyst, and interviewer, and has worked on bespoke projects around brand benchmarking, helping consulting firms to understand how they are perceived in the market, and what they can do to improve perceptions. Alison earned her stripes as a consultant at Deloitte, working on a wide range of projects across many industries.



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SOURCE REPORT PROGRAMMES

● MARKET TRENDS 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.

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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.

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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 global perception summaries. These give an in-depth and unique view of the world's leading consulting firms. Available on request.

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2018	MARKET TRENDS PROGRAMME	STRATEGIC PLANNING PROGRAMME	CLIENT PERCEPTION PROGRAMME	WHITE SPACE
JANUARY				Hot topics in thought leadership
FEBRUARY	Forecasts for 2018 UK		Germany GCC	Quality ratings of thought leadership for the second half of 2017
MARCH	GCC DACH Benelux	Mega trend #1: Data & analytics	US	
APRIL	Spain France Nordics		UK Energy & Resources	Analysis of recent thought leadership
MAY	Eastern Europe US Russia	Mega trend #2: Discover	Nordics Financial Services	Analysis of recent thought leadership
JUNE	Italy Canada	Mega trend #3: Strategy		
JULY	LATAM Australia	Mega trend #4: Run		Analysis of recent thought leadership
AUGUST	Africa		Healthcare TMT	
SEPTEMBER	Planning for growth in 2019 India Energy & Resources		France	Quality ratings of thought leadership for the first half of 2018
OCTOBER	South East Asia Financial Services China			
NOVEMBER	TMT Healthcare	Mega trend #5: Robotics		
DECEMBER		Mega trend #6: Digital transformation		

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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