EXTRACT

SOURCE GLOBAL RESEARCH

Perceptions of Consulting in the GCC

Client Perception Programme



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. The views about each firm expressed in this report come from senior end-users of professional services; your clients and prospects, in other words. All analysis 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 quickly.

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.

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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, provide Brand Perception Summaries 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' expectations 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 Source's view, nor is it a comment on market share or a recommendation to clients about which firms to buy from. The audience of these reports is very much the firms featured in them, and those interested in the strength of the competition in any given market.

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Methodology

Who did we talk to?

We have 825 responses from our survey of executives, directors, and senior managers in the the GCC in October and November 2019, all of whom have been responsible for buying substantial volumes of consulting services in the previous year. They represent a wide range of sectors and business functions, and 93% work in organisations that generate more than $500m in revenue.

For more information about the people we surveyed, please see the extended methodology section at the back of this report.

The difference between 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 are clients who feel qualified to share an opinion about a firm but who aren't among the firm's direct clients. They may have had exposure to the work the firm has done elsewhere in their organisation or may 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 a firm 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 they also tell us something about the differences between a firm's marketing and what it actually delivers.

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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 Quickcode 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.

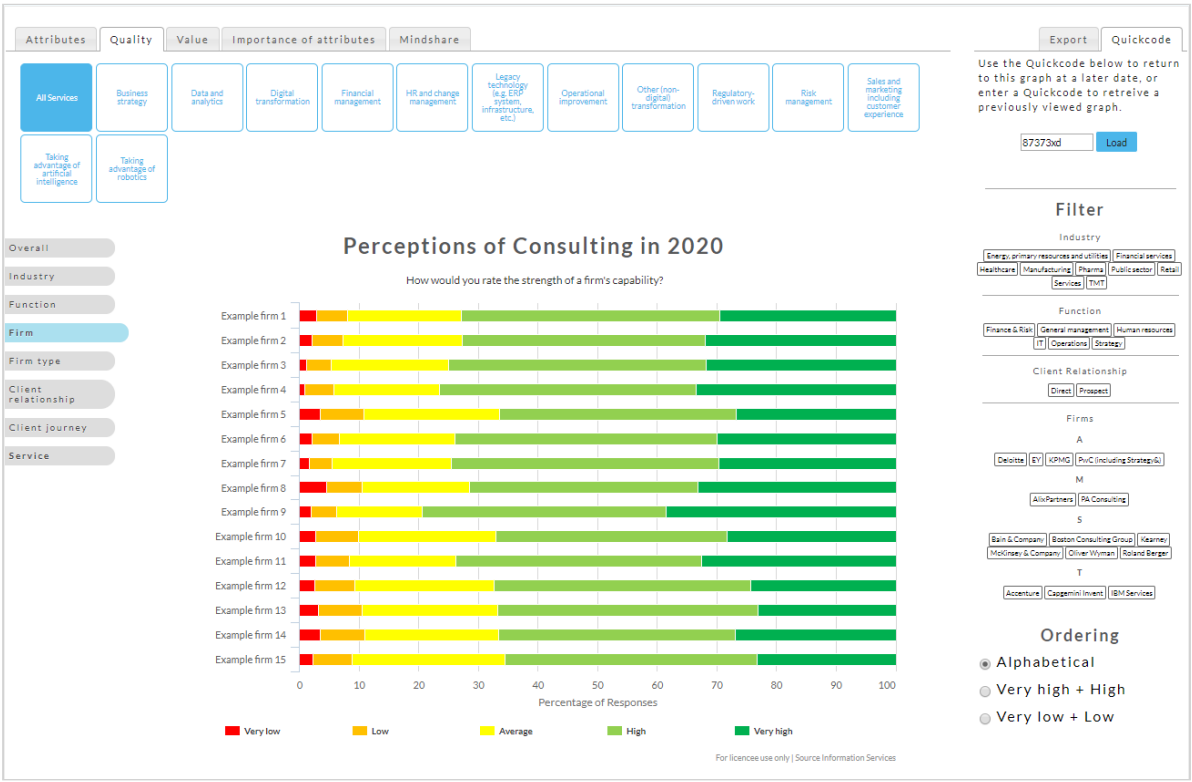
How to access the data

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.

To access the data, visit the main report page and click the blue "Explore the data" button. Alternatively, you can visit the main data portal page at reports.sourceglobalresearch.com/portal/cpp.

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, attributes, and importance of attributes.



When you log on, you'll notice that in some areas there's data that's in a faded grey colour. This is where we have data, but it's not a big enough sample to include in a ranking in this report. Nonetheless, we share it online in case you do want to see what, for example, prospect operational improvement clients in the public sector (or a similarly complex split) think of a particular firm. If you have any questions about any of the data, please contact us here.

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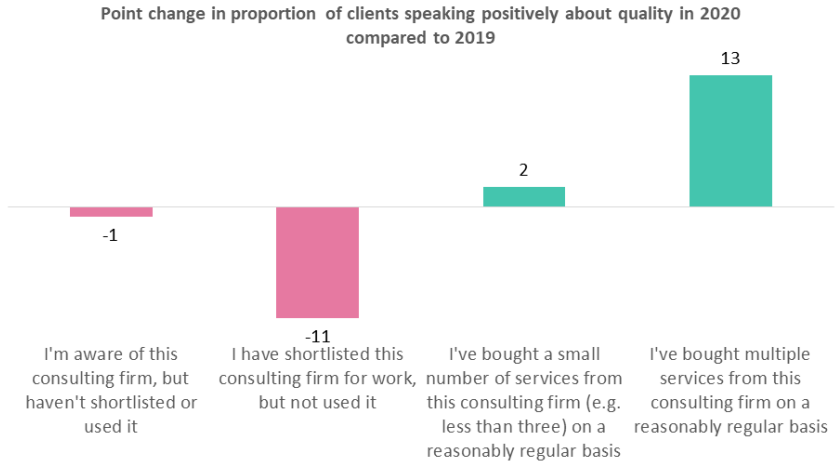
What clients are telling us

Clients are harder to impress at the pitch, but they really like their current consultants

Across the board, whether it's for the quality of work, the value added, or what it's like to work with firms, we see the same trend in how the views of clients in the GCC have changed. Heavy users of firms—those who have bought multiple services from a firm on a reasonably regular basis—are much happier about their consultants compared to last year. On the other hand, perceptions of clients who have shortlisted but not used a firm have deteriorated. What was once a mild dip and modest rise in opinion in the client journey is now much more of a hockey stick shape.

Perceptions of consulting in the GCC in 2020

Firms are increasingly failing to show their quality when pitching to new clients



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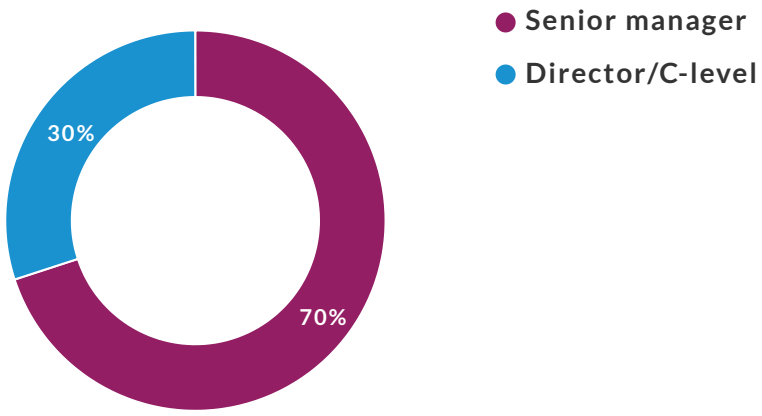
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Methodology in full

Who did we talk to?

Figure 8

Respondents by level of responsibility



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Figure 9

Respondents by sector

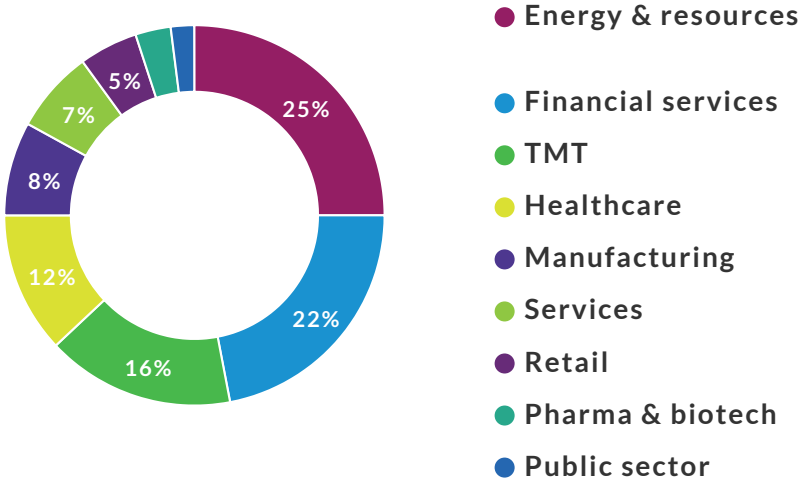
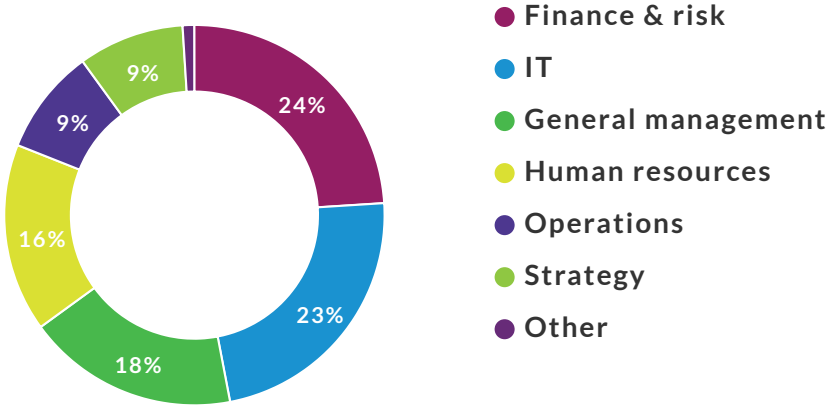


Figure 10

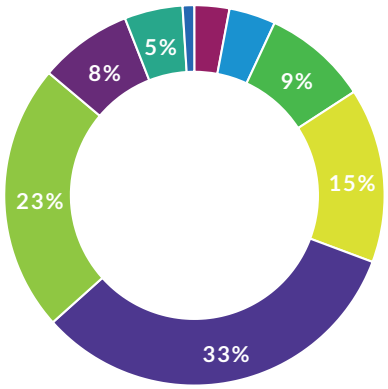
Respondents by function



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Figure 11

Respondents by organisation's revenue



- Less than $100m
- $101m - $500m
- $501m - $750m
- $751m - $1bn
- $1.1bn - $3bn
- $3.1bn - $5bn
- $5.1bn - $10bn
- $10.1bn+
- Not applicable - we're not a revenue-generating organisation

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 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 13 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.

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Which firms are included in this report?

Firm	Did we ask about this firm in this market?	Detailed profile available?
Accenture	✓	✓
AlixPartners	✓	✓
Bain & Company	✓	✓
Boston Consulting Group	✓	✓
Capgemini Invent	✗	✗
Deloitte	✓	✓
EY	✓	✓
IBM Services	✓	✓
Kearney	✓	✓
KPMG	✓	✓
McKinsey & Company	✓	✓
Oliver Wyman	✓	✓
PA Consulting	✓	✓
PwC (including Strategy&)	✓	✓
Roland Berger	✓	✓

Note that our survey asked respondents about the brand A.T. Kearney. Subsequently, the firm has rebranded as Kearney and we refer to the firm as Kearney throughout this report.

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How do we rank firms in this report?

In this report, we reveal the top-ranked firms in three areas: mindshare, quality of work, and value. 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 and by client type. We have data by sector and by function (that is, looking at how views of respondents in different sectors and different business functions vary) available online. 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, we grey out the data in question. To explore the data further, please visit 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 us here.

Mindshare: To give each firm a mindshare score, we've looked at how quickly respondents selected any particular firm. The firm that reached the quota for 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 10 times or more the amount paid in fees) to determine the order in which they are ranked.

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About the author

Martin White

Martin is a Senior Analyst at Source in our Client & Brand Insights team. He is an experienced writer and analyst, specialising in client perceptions and helping professional services firms to understand how they are perceived in the market. Prior to joining Source, Martin spent more than 11 years as an economic and financial consultant in a variety of roles at FTI Consulting and LECG.



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Our custom work

We provide advice and custom research services to the world's most successful professional services firms, helping them to identify, and develop strategic responses to, their most pressing opportunities and challenges.

Among other things, our work includes:

- Deep market and competitor analysis
- Acquisition strategy
- Proposition strategy and development
- Brand and client sentiment analysis
- Thought leadership and content strategy, development, and review

For more information about any of these, please visit our website or get in touch.

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Programme schedule for 2020

Reports 2020	Market Data & Analysis	Client & Brand Insights	Emerging Trends
January	Forecasts for 2020		
February	UK	UK	
March	GCC Benelux Nordics	GCC Nordics	The Future of Account Management
April	Southern Europe DACH France	Germany	
May	US Eastern Europe & Russia Global Tax Advisory	US France	The Consultant of Tomorrow
June	Canada South America	Financial Services Technology, Media & Telecoms	
July	Mexico Australia Global Risk Services	Energy & Resources Healthcare	
August	India China Africa	Perceptions of Audit Firms Perceptions of Tax Firms	A Climate Transformed
September	Energy & Resources Planning for Growth in 2021	Perceptions of Risk Firms	
October	Financial Services South East Asia Japan		
November	Healthcare Technology, Media & Telecoms		Is There a Reputational Timebomb?
December			

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About us

Source Global Research is a leading provider of information about the market for professional services.

Set up in 2007, Source serves the professional services industry 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.

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