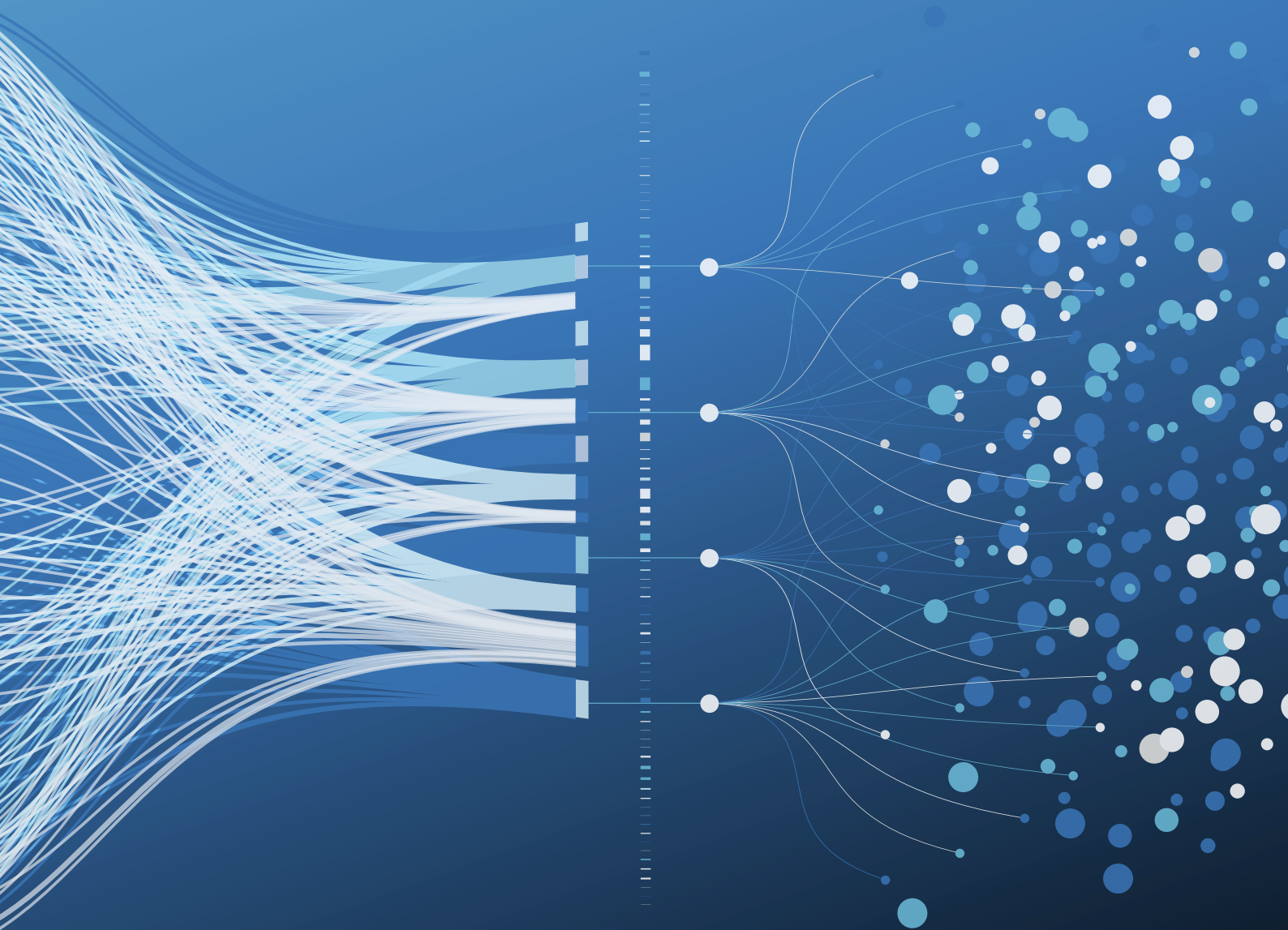


The Canada Consulting Market in 2021

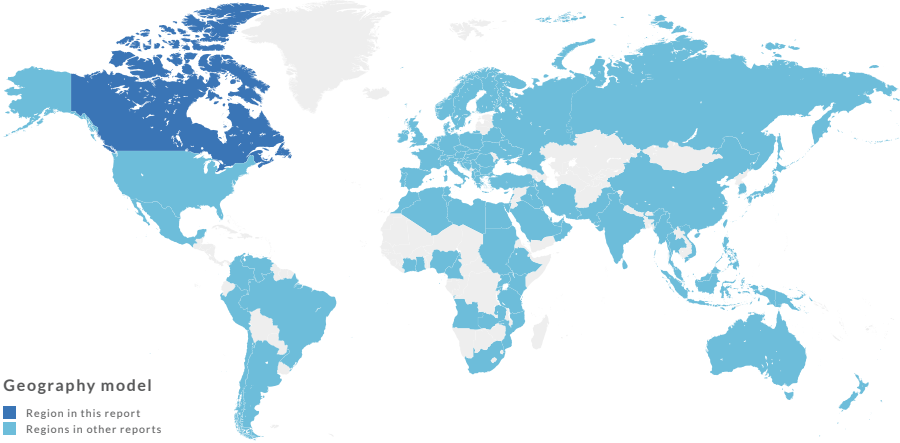
Market Trends Programme





What's included in this report

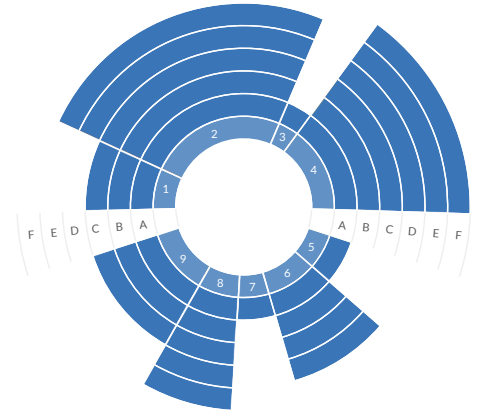
Our reports offer a wealth of market sizing, growth, and forecast data alongside engaging, in-depth analysis of the trends that matter. Using our highly flexible, multidimensional model we provide firms with robust, trusted data to make informed decisions about strategic investments and plan for the future.



Geography model

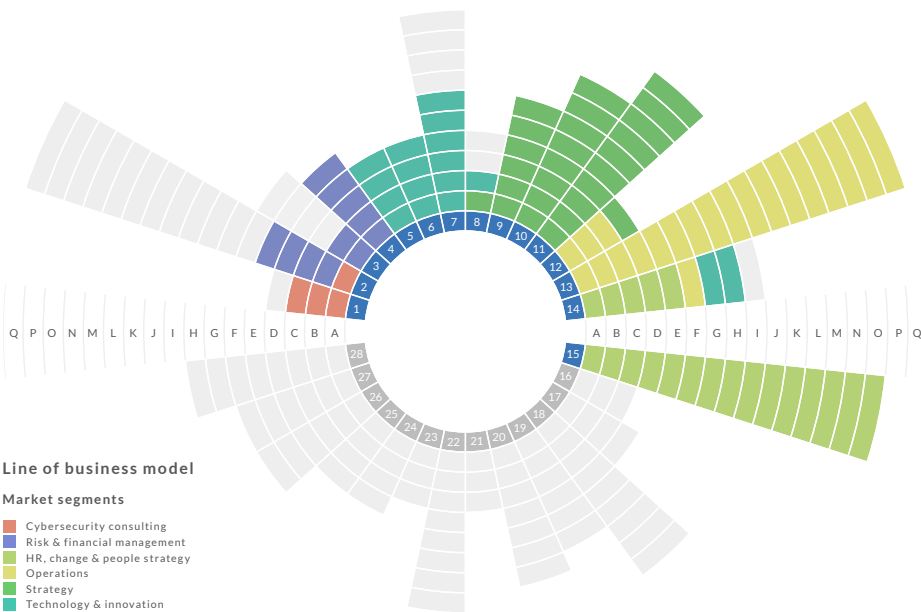
- Region in this report
- Regions in other reports

Albania	Canada	Germany	Kenya	North Macedonia	Saudi Arabia	Tanzania
Algeria	Chile	Ghana	Kuwait	Norway	Serbia	Thailand
Angola	China	Greece	Lebanon	Oman	Singapore	Tunisia
Argentina	Colombia	Hong Kong	Libya	Pakistan	Slovakia	Turkey
Australia	Côte d'Ivoire	Hungary	Luxembourg	Papua New Guinea	Slovenia	UAE
Austria	Croatia	India	Malaysia	Peru	South Africa	Uganda
Bahrain	Cyprus	Indonesia	Mexico	Philippines	South Korea	Ukraine
Belarus	Czech Republic	Iran	Morocco	Poland	Spain	United Kingdom
Belgium	Denmark	Iraq	Mozambique	Portugal	Sri Lanka	United States
Bosnia	Egypt	Ireland	Myanmar	Qatar	Sudan	Venezuela
Brazil	Ethiopia	Israel	Netherlands	Romania	Switzerland	Vietnam
Bulgaria	Finland	Italy	New Zealand	Russia	Taiwan	Zambia
Cameroun	France	Japan	Nigeria	Rwanda		



Sector model

Sectors	Sub-sectors
1 Energy & resources	1 A Energy
2 Financial services	1 B Primary resources
3 Healthcare	1 C Utilities
4 Manufacturing	2 A Banking
5 Pharma & biotech	2 B Capital markets
6 Public sector	2 C Insurance
7 Retail	2 D Investment and wealth management
8 Services	2 E Private equity
9 Technology, media & telecoms	3 A Healthcare
	4 A Aerospace
	4 B Automotive
	4 C Construction
	4 D Consumer electronics
	4 E Consumer packaged goods
	4 F Industrial products
	5 A Pharma
	6 A Defence
	6 B Education
	6 C Not-for-profit
	6 D Public sector
	7 A Retail
	8 A Business services
	8 B Leisure
	8 C Logistics
	8 D Real estate
	8 E Transportation
	9 A High-tech
	9 B Media
	9 C Telecoms



Line of business model

- Market segments
- Cybersecurity consulting
- Risk & financial management
- HR, change & people strategy
- Operations
- Strategy
- Technology & innovation

Line of business

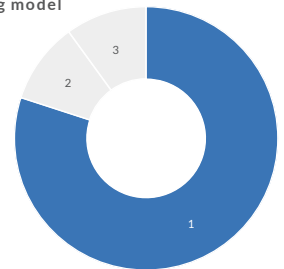
1 Cybersecurity
2 Risk
3 Forensic
4 Financial management
5 Design & UX
6 Innovation
7 Technology
8 Data & analytics
9 Research
10 Deals
11 Strategy
12 Real estate
13 Operations
14 Sustainability
15 HR & change
16 Architecture
17 Audit & assurance
18 Business process outsourcing
19 Civil engineering
20 Legal
21 Litigation
22 Marketing & creative
23 Network engineering
24 Product engineering & R&D
25 Recruitment
26 Software engineering
27 System integration
28 Tax

Capabilities

1 A Cybersecurity advice
1 B Cybersecurity incident response
1 C Penetration testing & wargaming
2 A Technology & security risk services
2 B Operational risk
2 C Programme risk
2 D Responding to regulation
2 E Risk management
3 A eDiscovery
3 B Forensic accounting
4 A Budgeting/financial planning process
4 B Debt advisory
4 C Finance function
4 D Financial advisory
4 E Financial restructuring & insolvency
5 A Corporate identity
5 B Customer journey & UX benchmarking
5 C Graphic & UI design
5 D UX & service design
6 A Ideation
6 B Innovation management
6 C Innovation strategy
6 D Strategies for growth from innovation
7 A Cloud advice
7 B ERP consulting
7 C IT strategy, planning & review
7 D IT training
7 E Programme management
7 F Vendor selection
8 A Advanced analytics
8 B Data visualisation, business intelligence & semantic layer
9 A Customer feedback
9 B Customer segmentation
9 C Employee feedback
9 D Environmental & social impact research
9 E Macro/microeconomic research
9 F Market research
10 A Capital allocation strategy
10 B Commercial due diligence & valuation
10 C Financial due diligence
10 D M&A transaction strategy
10 E Operational due diligence
10 F Portfolio & investment strategy
10 G Public-private partnerships
10 H Technology due diligence
11 A Business & financial modelling
11 B Category management
11 C Channel management
11 D Corporate recovery & turnaround
11 E Corporate restructuring
11 F Corporate strategy
11 G Market analysis & strategy
11 H Policy formulation
11 I Pricing
11 J Strategic sourcing/offshoring services
12 A Corporate, occupier services & facilities management
12 B Integrated real estate developer services
12 C Real estate deal/transaction services
12 D Real estate strategy
13 A Benchmarking
13 B Business continuity & recovery
13 C Cost cutting
13 D Customer service
13 E DevOps
13 F Distribution strategy
13 G Lean & Six Sigma
13 H Operational review
13 I Outsourcing advice
13 J Post-M&A integration
13 K Process design, re-engineering & automation
13 L Procurement/purchasing
13 M Property & estate management
13 N Sales & distribution planning
13 O Sales force effectiveness
13 P Supply chain management
13 Q Target operating model

The revenue-earning model

- 1 Consulting
- 2 Managed service
- 3 Other (contingent fees, software licensing, associate networks)





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Explores the key trends that were front of mind for consulting firms in this market in 2020.

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The Canada consulting market in 2021

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About this report

Our report draws on three main sources:

- Our Global Data Model covering the professional services market
- Our interviews with senior management consultants from a range of consulting firms
- Our in-depth desk research on the market

A detailed view of our methodology and more information about Source can be found below:

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4



The Canada consulting market in 2020



An array of digitisation, transformation, and operational improvement opportunities across the market meant Canada's consultants started 2020 on a positive footing. However, the arrival of COVID-19 pulled the rug out from under them, as it did consultants around the world. And as if a pandemic weren't enough to contend with, the collapse in oil prices in Q2 last year only added to their woes. After all, one in every 10 dollars spent on consulting in 2019 came from energy & resources companies, and many fossil fuel-related opportunities spilled over into other markets, including the public sector. Together, these factors resulted in a contraction in the consulting market, with revenues falling 9.5% to total US\$4,073m last year.

The nadir of that contraction was in the second quarter as the pandemic and plummeting oil prices forced companies to idle some existing work and put new projects on hold while they scrambled to shift to remote working and shore up their finances. As the immediate crisis subsided, however, companies started to tentatively return to the market over the summer, and firms saw an uptick in demand as the year drew to a close.

While the consulting market's substantial contraction weighed heavily on many firms in Canada, their market actually fared slightly better than those in other leading economies, such as the US and UK, both of which suffered contractions of around 12%. To some extent, the less severe contraction in Canada can be attributed to the size of the public sector, which accounts for 15% of consulting revenues—more than in many other major markets—and the need for provincial and national governments to lean on consultants to help with rapid responses to the pandemic. And with Canada's digital transformation efforts having lagged behind those of most other major markets in recent years, clients had a lot of catching up to do as they transitioned to remote working and the heightened digital demands of pandemic lockdowns. The rush to get it right created a solid stream of work for consultants with the necessary skills.

In terms of the types of consulting in highest demand, cybersecurity consultants—who were already busy before the pandemic—saw revenues rise 14.7% last year as clients sought to extend protections from their core systems to their newly remote workforces. Firms also saw increased demand for wargames and penetration testing as clients who already had protections in place stress-tested their set-ups, identifying weaknesses and plugging gaps before they could be exploited.

While all other market segments contracted, some fared better than others. The technology & innovation market segment performed best

In terms of the types of consulting in highest demand, cybersecurity consultants—who were already busy before the pandemic—saw revenues rise 14.7% last year as clients sought to extend protections from their core systems to their newly remote workforces.



among the shrinking markets, with revenues falling 7% last year. This market segment's relatively modest fall can be credited to clients who were ill-prepared for the transition to remote working calling on consultants to help them rapidly source and roll out the necessary hardware and software solutions. And once the immediate challenges of lockdown subsided, firms saw clients reach out for additional support to upgrade their remote working solutions and explore what else might be implemented to enhance their operations and improve interconnectivity within their value chains.



— Insights from consultants

Interviews with consulting leaders



At Source, we have always believed that the only way to truly understand a consulting market is to have real conversations with the consultants who are on the ground working in that market, serving their clients day in and day out. Below, you'll find condensed versions of our most recent discussions with Canada's consultants, as they reflect on 2020, tell us how the previously unimaginable events of 2020 are reshaping the market, and in the case of a few brave souls, venture a guess as to what comes next.



Jason Boggs, National Consulting Leader, PwC

How was 2020 for you?

2020 was quite a turbulent year. At the start of the year, we were already in an uncertain time for the Canadian economy, and we were anticipating an economic downturn later in 2020. Obviously, that economic downturn happened but certainly not in the way we anticipated. From a Canadian perspective, we really started to experience the impact of COVID from mid-March when we had the first in a series of lockdowns, which triggered an economic crisis. It has been very different to economic crises of the past, largely due to the level of government assistance in keeping companies afloat. The dramatic reduction in direct interaction has meant a reduction in commercial activities. For most sectors, that means lost business, though a few sectors are struggling to keep up with an increase in demand.

How has this been reflected in the performance of the consulting market?

In March, April, and May, businesses were trying to figure out how they would manage the crisis, with many being forced to undertake dramatic changes. From a consulting perspective, change frequently means opportunities to help our clients, and this was indeed the case. However, some of our longer-term transformation work was put on pause or scoped down, because our clients needed time to focus on themselves and figure out how they were going to interact with customers going forward. In some industries, they were even worried about their financial viability.

By the time we got into summer 2020, the focus was shifting to what the pandemic would mean for the back half of the year, so some of those delayed programmes started up again as organisations moved out of crisis mode into thinking more about the medium and long term. As we entered the autumn, we saw a significant increase in organisations wanting to return to, and in some cases accelerate, their digital transformation efforts. As organisations moved on from crisis response, many of them wanted to ensure that their digital channels were working properly and that new capabilities instituted during the crisis were fit to be used permanently. This meant the second half of 2020 was actually very busy, as we continued to help clients achieve their front-to-back digital transformation.

Were there any particular sectors in which demand was strongest?

It actually came from across sectors. Unsurprisingly, there has been a lot of demand from the government

and public sector side in dealing with the health crisis—whether that was focusing on how to help citizens deal with COVID or the supply chain issues and logistics behind rolling out the vaccine—as well as returning to a number of technology-led programmes.

From a private sector perspective, there were of course some sectors that weren't spending, such as travel and non-food retail organisations, as they were simply focused on their survival. Outside of that, anyone who continued to operate and was able to sell their goods and services to customers was focused on how they could interact with their customers in a digital way. For most organisations, that requires a transformation of processes and skillsets. Our clients are very much focused on how they can move their technology to the cloud to support that transformation.

Clients have identified digital transformation as the area that's most relevant to serving their customers going forward. We have seen people's behaviours and preferences for interacting with businesses change, and we expect those changes will last beyond the pandemic. The degree to which we return to in-person activities, such as travelling and brick-and-mortar shopping, is yet to be determined, but organisations need to be ready to continue interacting with their customers in a digital way.

How has the crisis changed your delivery model?

During the move to virtual, we—both as an industry and as an organisation specifically—proved to be very resilient in terms of being able to interact with our clients and provide a similar level of service as before. Quite early on in the pandemic, we were still able to deliver on cloud migration projects in a largely virtual environment, which is allowing our clients to continue on that digital transformation journey despite not having as many people on site. As the vaccine is rolled out and restrictions start to be lifted, the interesting question will be figuring out how we engage with clients when we know we can deliver fully virtually. We have to figure out the right—and necessary—moments for that in-person interaction to assist change.

Having consultants on site has, of course, become slightly less relevant. Being able to work remotely with clients around the world has been really powerful in terms of bringing the best resources to each client opportunity. Being able to bring a broader, global perspective from the PwC network has really helped create a compelling value proposition.



How has this impacted pricing and fee models?

Our clients were looking to cut costs, so many of them were reluctant to take on the large, upfront costs of diagnostic work or implementing change, and that reluctance has driven a move toward risk-reward sharing engagements. That is something we had experience with pre-pandemic, but interest has definitely increased. Hopefully, as the pandemic fades, we'll be able to enjoy the reward side of risk-reward pricing, especially with regard to new digital channels that are helping our clients increase their relevance to their customers.

about how we can assist our clients in addressing these issues in their organisations. We feel we have a critical role to play in terms of encouraging that dialogue and in developing solutions.

Looking forward to 2021, how do you think the services or capabilities clients will be looking for will change?

I think clients will still be interested in the same topics as they are now. What will be interesting is the level of interaction we start to see. Will we see a boomerang back in terms of business travel and time spent together in person? We are just going to have to wait and see what clients want and react to the opportunities and challenges that presents, and PwC will be ready to help.

I'm glad you didn't ask me what the end of 2021 will look like: I have no idea! My opinion on that changes on a weekly basis. As a society, we're all hopeful that the vaccine and the current lockdowns do actually have the impact we're hoping they will have. A lot of people continue to think about a 'return to normal', and I'm not sure that's ever going to happen. I think we just have to continue thinking about how we're going to adapt. One of the key things we're going to have to consider is how the economy can recover from the levels of debt that both governments and private sector companies have taken on. It's going to be a really interesting year as we see how different organisations respond to economic recovery.

Is sustainability still on clients' agendas? Are you still seeing work related to green initiatives and climate change?

Yes, absolutely. This is a key focus area, not only for organisations themselves, but also from an investment perspective. It's something that many organisations see as a potential differentiator, and it's an opportunity to be seen as addressing some of the social challenges that came to the forefront during the crisis.

The crisis gave us time to reflect on some of the issues we face in society as a whole, and we have been working to address these internally—looking at our own practices and who we interact with, as well as thinking



4

About this report

Methodology

Sources

MegaModel: our Global Data Model

The quantitative market data in this report comes from our unique model of the global professional services market.

Rather than making high-level assumptions, this model has been built from the bottom up, sizing the market capability by capability—assessing how much work a firm earns delivering each professional capability within each sector and country. This results in a robust view of the size of the supply-side market, which can then be broken down to view the size of the market by country, sector, line of business, capabilities, and market segments.

This year’s model has been expanded, with a new capability taxonomy and a much broader range of professional services firms included—all of which reflects convergence and other changes we see in the industry. For the purposes of this report we’ve focused on types of firm and market segments that broadly equate to traditional definitions of consulting. As a result of these changes to our methodology, there are changes to our market sizing data, which take into account that conventional consulting firms now compete in many non-consulting markets—in essence that their addressable market is larger. Historic data has been restated to match our new definitions, but the inclusion of new types of firm and additional services may also have an impact on growth rates.

Alongside this market segmentation, we also limit our market sizing and analysis to what we at Source call “big consulting”—work done by mid- and large-sized firms (those with more than 50 people). Please note that we don’t track the long, thin tail of work done by contractors and very small firms, as most readers of this report would

not seek or be able to compete in this part of the market.

All of the data in the model is calibrated through extensive interviews with, and surveys of, professional services firms and their clients, allowing us to discuss broader trends in the market alongside detailed dimensions such as headcount. These interviews and surveys are supplemented with desk research, which allows us to assess the impact of wider macroeconomic trends on professional services. This, combined with our detailed modelling, results in a long-term view of the market that is able to support both historic and forecast data.

All figures given in this report are in US dollars. For reference, Source is using the following exchange rates in its reports this year:

US dollar to British pound	US\$1 = £0.78
US dollar to euro	US\$1 = €0.87



Interviews with senior consultants

In addition to our quantitative research, we interviewed 10 very senior consultants in Canada, representing most of the leading consulting firms in the geography and many smaller local specialists to understand more about how the consulting market is performing and the major trends, changes, and challenges consultants and their clients face. Throughout the year, Source analysts remain plugged into the global consulting market through our bespoke research and consulting projects, adding further depth to our understanding of the consulting industry.

In-depth desk research

We also conducted a thorough PEST analysis of Canada that drills down into finer macroeconomic details on a holistic and sector-by-sector basis and allows us to fit our research into a wider macroeconomic picture.

Definitions of sectors and market segments

Our definition of management consulting includes a broad range of business advisory services, but excludes:

- tax advisory
- audit
- the implementation of IT systems
- the delivery of outsourced/offshored services
- HR compensation/benefits administration and technology

Where mergers and acquisitions work is concerned, consulting on deals is included (under strategy), but corporate finance fees on deals themselves are generally not included, although it is not always straightforward to separate the two.

For more information about how we classify consulting services and sectors, please see “Definitions of sectors and market segments”.



Definitions of sectors and market segments

Sectors



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, and 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.



Market segments

We've taken the lines of business and capabilities from our taxonomy that broadly align with traditional definitions of consulting and divided them into market segments that include the following. Please note that for some lines of business, for example, forensics, we've taken a subset of the relevant capabilities and excluded others.



Technology & innovation

Ideation, Innovation management, Innovation strategy, Strategies for growth from innovation, Cloud advice, ERP consulting, IT strategy, planning & review, IT training, Programme management, Vendor selection, Clean technology, Green IT, Corporate identity, Graphic & UI design, UX & service design, Customer journey & UX benchmarking, Data visualisation, business intelligence & semantic layer.



HR, change & people strategy

Benefits, compensation & pensions, excluding actuarial & investment advice, Change management, Diversity & inclusion, Employee engagement, Governance & board effectiveness, HR strategy & effectiveness, Leadership, Organisational design & culture, Organisational training & development, Outplacement, Pension fund evaluation & advice, Performance management, Stakeholder management, Talent management, Team effectiveness & collaboration, Resource-efficiency strategy, Purpose-led strategy & change, Resource-efficiency implementation, Social impact & trust.



Strategy

Capital allocation strategy, Commercial due diligence & valuation, Financial due diligence, M&A transaction strategy, Operational due diligence, Portfolio & investment strategy, Public-private partnerships, Technology due diligence, Business & financial modelling, Category management, Channel management, Corporate recovery & turnaround, Corporate restructuring, Corporate strategy, Market analysis & strategy, Policy formulation, Pricing, Strategic sourcing/offshoring services, Real estate strategy, Environmental & social impact research, Macro/microeconomic research, Market research, Customer feedback, Customer segmentation, Employee feedback, Advanced analytics, Sustainable investment.



Operations

Benchmarking, Business continuity & recovery, Cost cutting, Customer service, DevOps, Distribution strategy, Lean & Six Sigma, Operational review, Outsourcing advice, Post-M&A integration, Process design, re-engineering & automation, Procurement/purchasing, Property & estate management, Sales & distribution planning, Sales force effectiveness, Supply chain management, Target operating model, Sustainable supply chain, Corporate, occupier services & facilities management, Integrated real estate developer services, Real estate deal/transaction services.



Cybersecurity consulting

Cybersecurity advice, Cybersecurity incident response, Penetration testing & wargaming, Technology & security risk services.



Risk & financial management

Operational risk, Programme risk, Responding to regulation, Risk management, Budgeting/financial planning process, Debt advisory, Finance function, Financial advisory, Financial restructuring & insolvency, eDiscovery, Forensic accounting.



Contributors

We are extremely grateful to all the people we spoke to for making this report possible. Below is a list of individuals who have contributed (excluding those consultants who wished to remain anonymous).

Name	Job title	Organisation
Jason Boggs	National Consulting Leader	PwC
David Dawson	Managing Director, Canada	Protiviti
Patrick Lortie	Partner and Canada Market Leader	Oliver Wyman
Tim MacLeod	Managing Director	Bridgeable
Petar Nikolic	Partner	EY
Ben Saffron	Managing Consultant	Advisian
Stephanie Terrill	National Leader of Management Consulting – Canada	KPMG
Linda Williams	Canadian Advisory Performance Improvement Leader	EY
Charles Woodhatch	Regional Lead – Canada Advisory	Avanade
Jon Wylie	President, Natural Resources	Proudfoot



About the author

Ashok Patel

Ashok is a writer and editor at Source in our Market Trends team. He is an experienced writer, editor, and analyst, providing insights into the latest trends and developments across the professional services market. He has been quoted by a variety of trade publications and has previous experience in Source's Client Perception Programme. Prior to joining Source, Ashok was an editor and consultant in the commodities market, as well as working in the UK automotive industry.

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Programme schedule for 2021

Reports 2021		Market Trends Programme	Client Perception Studies	Emerging Trends Programme
Q1	January	Forecasts for 2021 US GCC UK Nordics Canada	UK US	
	February		Germany Financial Services	
	March		Healthcare & Pharma GCC France	Buying and Selling
Q2	April	France DACH Australia China Southern Europe South America Benelux South East Asia India Japan Eastern Europe & Russia	Nordics Energy & Resources Technology, Media & Telecoms	
	May		China Japan	Beyond Digital
	June			
Q3	July	Africa Energy & Resources Financial Services		
	August		Perceptions of Risk Firms Perceptions of Tax Firms	Investing for Growth
	September		Perceptions of Audit Firms	
Q4	October	The Global Tax Advisory Market The Global Risk & Cybersecurity Services Market Healthcare & Pharma Technology, Media & Telecoms Consumer Products & Retail Planning for Growth in 2022		Building a Trusted Brand
	November			
	December			

Please note that with the purchase of all Market Trends reports in 2021, you will also gain access to a monthly video summary on the global market, presented by Fiona Czerniawska.

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About us

Source analyses the way in which economic, business, behavioural, and technology change drives how organisations use professional services, and the implications that has for professional services firms.

Since its inception in 2007, Source has invested in sophisticated, proprietary research techniques that not only provide unique insights on current and future trends in the market, but also provide a better and faster solution than you would be able to reach yourself.

Our analysis and recommendations are derived from data and experience, and we use our team's extensive knowledge of the industry to provide actionable and clear conclusions on the best course of action for you and your firm. Our insights have underpinned some of the biggest strategic investment decisions made by professional services firms around the world.

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In addition to our report programmes, we also provide custom advice and research-led consulting services to the world's biggest and most successful professional services firms, helping them identify the best areas for investment and plan their strategic responses.

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.