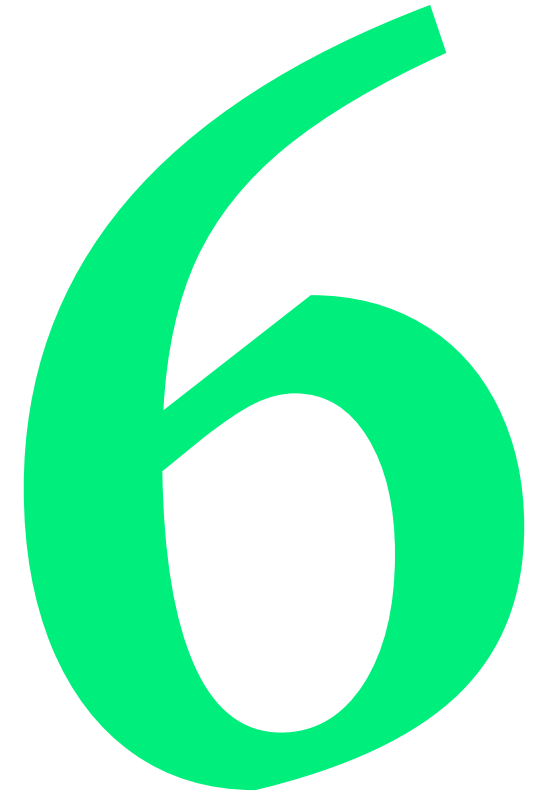


# Summary



### Methodology

The data in this report came from a variety of proprietary sources. In addition to a specially commissioned survey, detailed below, we've also incorporated data from:

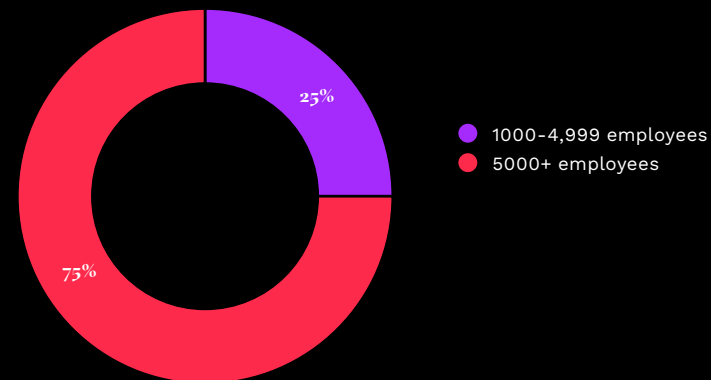
- Our annual client perceptions survey, carried out in November-December 2021 and which has around 10,000 responses about individual firms.
- Survey data gathered in June this year for our annual US market trends report.

The data in all charts has been rounded to the nearest whole number. This may result in some totals that do not equal 100%.

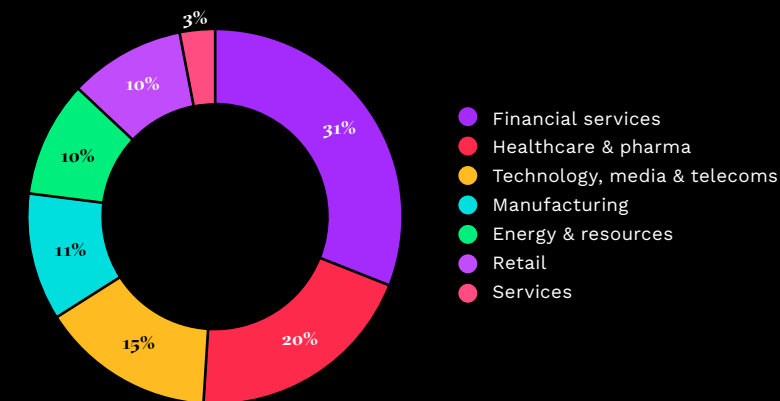
### Survey sample

The bulk of the data in this report comes from a study conducted in July 2022 of 150 senior executives, all based in the US. All of our respondents worked in private-sector organisations with 1,000 or more employees. Because managed services appeals to mid-sized organisations as well as large ones, our sample for this report is slightly different to the norm: Twenty-eight percent of respondents came from organisations with more than 5,000 employees, with the rest coming from organisations that had between 1,000 and 4,999 employees. All held a “head of department” or more senior position; and all had been directly involved in buying and managing consulting projects.

Respondents by organisation size



Respondents by sector



## Meet the **experts**

### Catherine Anderson

Catherine is a Principal Consultant at Source in our consulting practice area. Focused on bespoke project work, she turns qualitative and quantitative data into meaningful, strategic insights for professional services firms. Recent projects include identifying opportunities in new markets and analysing client sentiment and how to harness it effectively. She also oversees the Emerging Trends programme, and is often found presenting reports and research on a wide variety of topics. Prior to joining Source, Catherine managed large transformation programmes in the financial services sector.

#### Catherine Anderson

✉ [catherine.anderson@sourceglobalresearch.com](mailto:catherine.anderson@sourceglobalresearch.com)



### Fiona Czerniawska

Fiona is the founder and CEO of Source. She's one of the world's foremost commentators on the global professional services and consulting industry.

Before starting Source, she had almost 20 years' experience as a management consultant, primarily working in the areas of marketing and strategy, initially with PwC, before moving on to be head of strategy and business planning for EY in the UK.

She's the author of a dozen books including *Business Consulting: A Guide to How it Works and How to Make it Work* and *Buying Professional Services*, both of which were published by The Economist.

#### Fiona Czerniawska

✉ [fionacz@sourceglobalresearch.com](mailto:fionacz@sourceglobalresearch.com)



# About us

We help professional services firms **understand what really matters** when facing decisions of vital importance.

The best decisions are based on evidence, objectivity, and a willingness to change. That's why, at Source, we tell you what you need to hear, rather than what you want to hear.

We draw upon our deep roots within the professional services sector to provide firms with a clear picture of their clients' worlds. Through comprehensive research and meticulous analysis, we pinpoint what truly matters and deliver actionable insights that help firms map out the right way forward.

We believe in thriving individually and succeeding together. And we would love to help your firm crack its latest conundrum.

Source Information Services Ltd  
20 Little Britain | London | EC1A 7DH  
UK +44 (0)20 3478 1207  
US +1 800 767 8058  
info@sourceglobalresearch.com  
www.sourceglobalresearch.com

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# Publication schedule for 2023

Reports 2023	Market Trends Reports	Market Trends Presentations	Client Perception Studies	Emerging Trends Programme	
Q1	<p>January</p> <hr/> <p>February</p> <hr/> <p>March</p>	<p>Forecasts for 2023</p> <p>UK</p> <p>GCC</p> <p>France</p>	<p>India</p>	<p>UK</p> <p>US</p> <p>Germany</p> <p>GCC</p> <p>France</p>	<p>Offshoring Consulting Services</p>
Q2	<p>April</p> <hr/> <p>May</p> <hr/> <p>June</p>	<p>Nordics</p> <p>US</p> <p>DACH</p> <p>Sustainability</p> <p>Australia</p> <p>East Asia</p> <p>South East Asia</p>		<p>Australia</p> <p>China</p> <p>Japan</p> <p>Energy &amp; Resources</p> <p>Technology, Media &amp; Telecoms</p>	<p>Crisis Fatigue: How Much More Can Clients Take?</p>
Q3	<p>July</p> <hr/> <p>August</p> <hr/> <p>September</p>	<p>Africa</p> <p>Energy &amp; Resources</p> <p>Financial Services</p> <p>Technology, Media &amp; Telecoms</p>	<p>South America</p> <p>Healthcare &amp; Pharma</p>	<p>Risk</p> <p>Tax</p> <p>Audit</p> <p>Technology</p>	<p>Staff Augmentation: Focusing on the Opportunity</p> <p>The Rise of the Technology Challenger</p>
Q4	<p>October</p> <hr/> <p>November</p> <hr/> <p>December</p>	<p>Tax</p> <p>Risk</p> <p>Planning for Growth in 2024</p>			<p>Outcomes-Based Consulting</p>

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