

Report
September '22

EXTRACT



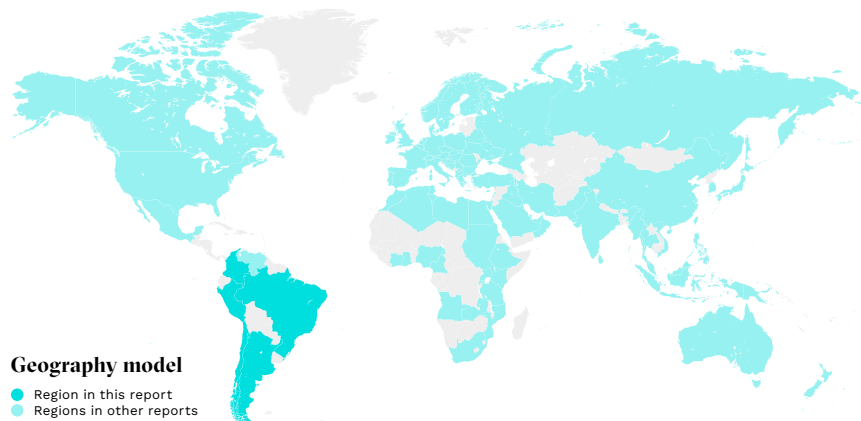
MARKET

The South America
Consulting Market
in 2022



What's included in this report

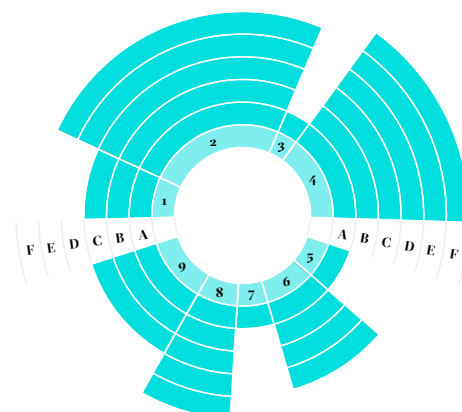
Our reports offer a wealth of market sizing, growth, and forecast data alongside engaging, in-depth analysis of the trends that matter. Using our highly flexible, multidimensional model we provide firms with robust, trusted data to make informed decisions about strategic investments and plan for the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



Geography model

- Region in this report
- Regions in other reports

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



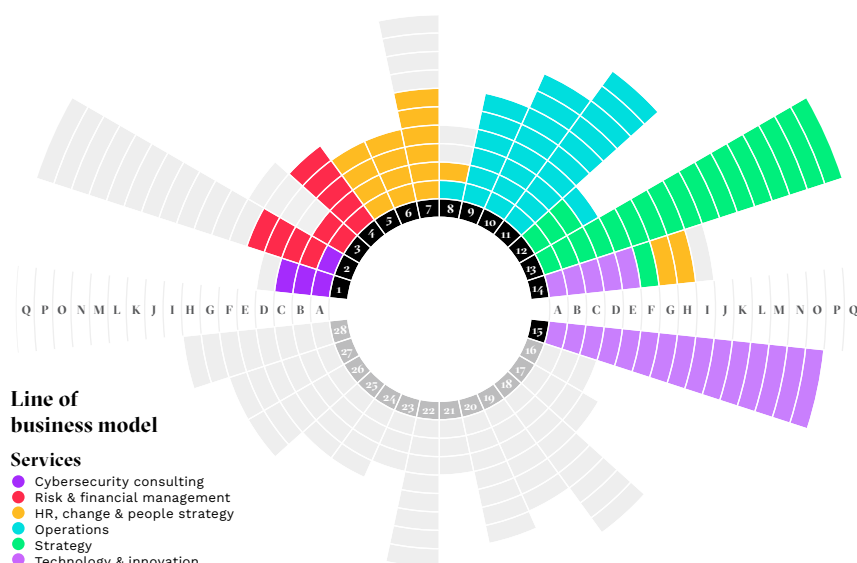
Sector model

Sectors

- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & biotech
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms

Sub-sectors

- 1 A Energy
- 1 B Primary resources
- 1 C Utilities
- 2 A Banking
- 2 B Capital markets
- 2 C Insurance
- 2 D Investment and wealth management
- 2 E Private equity
- 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

Services

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

Line of business

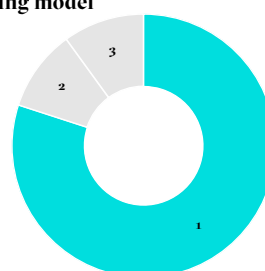
- 1 Cybersecurity
- 2 Risk
- 3 Forensic
- 4 Financial management
- 5 Design & UX
- 6 Innovation
- 7 Technology
- 8 Data & analytics
- 9 Research
- 10 Deals
- 11 Strategy
- 12 Real estate
- 13 Operations
- 14 Sustainability
- 15 HR & change
- 16 Architecture
- 17 Audit & assurance
- 18 Business process 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

The revenue-earning model

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



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About this report

Our report draws on four main sources:

- Our Global Data Model covering the professional services market
- Our annual global client perception survey of senior end-users of consulting firms
- 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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The South America consulting market in 2021

Although 2021 was a challenging year in South America, as public health crises and political turbulence continued to afflict several countries in the region, the consulting market rebounded strongly from the previous year. As in many other emerging markets in 2021, clients turned to technology to implement their pandemic-recovery plans and address many of the most important challenges they faced—from facilitating remote working to expanding health coverage and improving productivity.

Although South America has traditionally lagged behind more mature markets when it comes to ESG, 2021 marked a shift in approach as clients sought to get ahead of global investor expectations and the growing possibility of new regulation around key issues such as deforestation. The South America market also benefited from a high degree of public investment in infrastructure, transport, and 5G. These drivers combined to result in 11.9% growth across the region.

The consulting market in Brazil, by far the largest in South America, grew 11.8% as it rebounded from the previous year. In the first half of 2021, the country was rocked by deadly waves of COVID-19 infection, the impact of which was compounded by political turbulence and an uneven governmental response. This led many clients to speed up digitisation plans to facilitate hybrid and remote working in the midst of the uncertainty. These factors drove Brazil's large technology & innovation consulting market to grow 16% over the course of 2021.

As in many other emerging markets in 2021, clients turned to technology to implement their pandemic-recovery plans and address many of the most important challenges they faced

From a sector point of view in Brazil, pharma recorded the fastest growth (18%), as clients sought to rapidly scale up their production of drugs and PPE to meet growing demand after new strains of COVID-19 hit the country. Retail also stood out, with consulting revenues growing 14.8% over the course of the year. Clients sought technology solutions to provide omni-channel and e-commerce offerings to their customers, in direct response to the drop in footfall during the pandemic. Meanwhile, consultants in the services sector had a much better year, with revenues rising 15% after a contraction of 26.5% in 2020. Firms benefited from clients' efforts to implement infrastructure investments more efficiently, and to plan for an expected rebound in tourism.

Argentina, the region's second-largest consulting market, grew 12% in 2021. The country was rocked by political in-fighting and popular unrest as a result of a combination of factors—from controversial plans to restructure its large public debt, to corruption scandals around uneven access to vaccines. In response to the uncertain climate, clients invested in digital and cloud solutions as a safeguard, leading to 15.7% growth in technology & innovation consulting, already the largest service line in the country. This uptick in digitisation encouraged clients to revisit their data and system security, leading to 17.3% growth in cybersecurity consulting, which became the second-largest service line in the market, overtaking risk & financial management.

From a sector point of view, consultants had plenty of work to do in Argentina's TMT sector, which grew 15.1% amid increasing investment in the country's network infrastructure. Pharma consultants benefited from investments to boost production capacity and efficiency for drugs, vaccines, and PPE. Meanwhile, revenues in healthcare consulting rose 15.2% as providers invested in digital solutions aimed at improving the coverage and quality of care.

In Chile, the consulting market grew 12.1%, this was faster than any other country in the region. With a more stable economic base than other countries, strategy consultants saw an uptick in deals activity as clients sought support in growing their businesses at home and abroad. Firms also benefited from clients' efforts to digitise their businesses, with 17.8% growth in the large technology & innovation service line and 17.4% growth in cybersecurity consulting. From a sector point of view, the shift to online shopping drove high growth in the retail consulting market (16.3%), as clients sought solutions to better serve consumers remotely. Meanwhile, in pharma,

The client perspective



Getting back to normal—certainly for those at the top

Last year, clients in South America were overwhelmingly negative about the impact of the crisis on their businesses: Sixty five percent said the pandemic had either a somewhat or a very negative effect on them, while just 26% said it had a positive impact. This was a much more negative picture than elsewhere, which was likely influenced by just how hard the pandemic hit this part of the world.

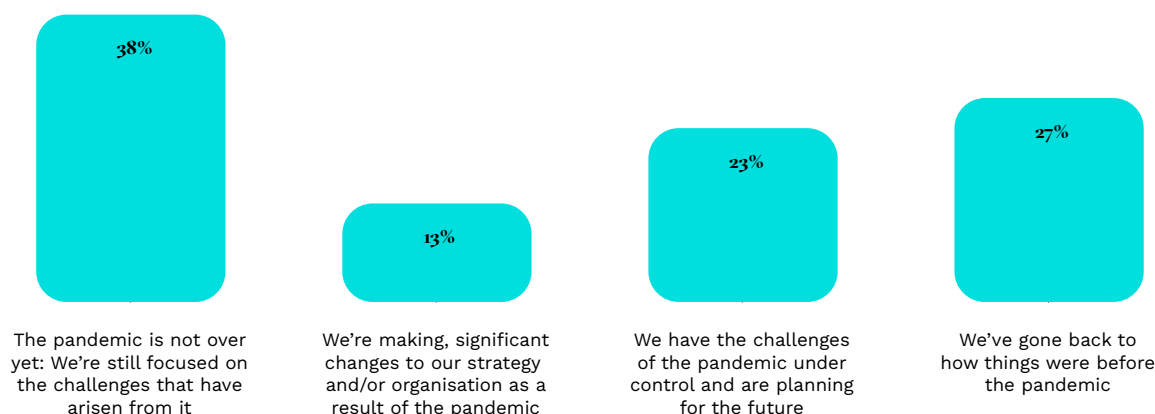
However, it seems that clients in South America are now recovering at a pace broadly similar to their peers elsewhere. When asked about their attitude to the pandemic at the start of this year, 38% said they were still in crisis mode. This is a slightly higher proportion than in other markets—aside from China and Japan—but perhaps lower than might have been expected, given the grim reports from the previous year. A slightly smaller proportion (36%) are in some sort of recovery mode—either making significant changes or planning for the future. The smallest group are those who describe being back to normal, but, again, this is in line with global trends: 27% in South America versus 25% in all other markets.

But responses do depend on who you speak to. CxOs are much more likely than less senior colleagues to say things are back to normal (40% compared with 21% of all other respondents). This could simply reflect the decision-making processes: From a CxO's perspective, strategies have been articulated, plans formulated, and decisions made—they are already thinking about what is around the corner. On the other hand, their direct reports and other senior management are potentially still working through the practical implications of such major change initiatives, and are consequently more likely to describe their organisations as still recovering.

Sixty five percent said the pandemic had either a somewhat or a very negative effect on them, while just 26% said it had a positive impact.

Figure 4

How would you best describe the attitude of your organisation to the pandemic at the start of 2022?





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 it that market, serving their clients day in and day out. Below, you'll find condensed versions of our most recent discussions with South America's consultants, as they reflect on 2021, and in the case of a few brave souls, venture a guess as to what comes next.

Pedro Guimaraes, Senior Partner, Roland Berger

How did the consulting market perform over the past year?

The past year has been positive for our consulting market as in many other parts of the world. As Latin Americans, we could collaborate more globally with people who were working remotely in more mature markets. That helped advance some of the discussions we were having. Also, different sectors were searching for different types of services.

Which consulting services have been in high demand?

Digitisation and tech-disruption have been prevalent here. Digital disruption started in the B2C consumer-facing sectors, such as banking and telecoms, and then moved towards more B2B- or B2B2C-related sectors. Today, there are three other topics that are frequently on our agenda: rising inflation, sustainability and supply chain shortages.

Is the pandemic still having a large impact on how the consulting market is performing?

I think the pandemic is becoming endemic now, and it's more under control. Brazil has a very high vaccination rate. It's mostly business as usual; the planes I take to commute to work every week are full. I returned from Europe yesterday and the local airport was packed with tourists. It's less about the pandemic now and more about the political elections that are taking place in October in Brazil.

Will the election have an ongoing impact on activity in Brazil?

Absolutely, especially in the short term, because consulting sectors suffer during uncertainty—when there is uncertainty, people hold back investments. If there is a clear recession or political agenda, clients know what they need to do, whether that's growth, cost-cutting or accelerating digital transformation. Ahead of the election there is lots of uncertainty, but the political campaign is one thing and the reality of being in command is another. From 2023 onwards, and regardless of who wins, I think both the left- and right-wing parties would become more centred. That's because you must govern to achieve democracy, and I don't see any big revolution taking place in Brazil.

I think, important restructuring reforms, involving privatisation of infrastructure-related sectors, or support for more sustainable, regenerative agriculture, will happen regardless of who wins. These topics will be at the centre of activity in Brazil over the next couple of years.

This region has comparative advantages in multiple sectors. For example, copper mining in Chile, agribusiness in Brazil or Argentina, forest-based products from Colombia, and the emerging middle class of Peru that's been accelerating growth. These advantages will remain relevant regardless of the political cycle. I am confident in the region in the mid to long term, but it will be a volatile short term with the uncertainties of the election. This will probably continue for the first half of 2023 as the new government get in place. However, business leaders in Brazil and Latin America have learned to win regardless of who is in command.

To what extent are ongoing geopolitical tensions, such as the war in Ukraine, affecting the consulting market?

There is less of an impact here than in Europe or the US. However, we have China as an important trade partner here in Brazil, and if sanctions affected that relationship, then we would probably feel the effect. The war is increasing input costs, such as the price of fertilisers, but farmers have not stopped buying them, because commodity prices are also high, so, in a way, the whole value chain is profiting. That's why I do not foresee any major disruption in agribusiness supply chains, which are so important here.

How else have rising commodity prices affected the work you are doing?

There is the pressure on oil prices, which impacts local inflation. That also affects soy, corn, sugar and ethanol, which are important exports, as well as anything related to iron or copper mining. However, in less-advanced, commodity-related industries, the impact is more positive than negative. Rising oil prices also benefit green energy in Brazil. With much of our electricity coming from renewable resources, and the push to accelerate fossil alternatives such as green hydrogen, this agenda will flourish.

How has digital progressed over the past year and where do you see it heading?

I think most people in developed markets would be impressed by how digitised some of our sectors already are. In the retail and consumer goods, perhaps we're still a little behind developed markets, but if you take banking, telecoms and even public sector, we are well advanced. Brazilian banks have always been known for being very efficient and they have been working on digitisation of banking services over the past 10 years. What we have here is world-class.

In terms of public-sector services, examples include drivers' licenses, which are now digitised, and income tax which can now be done very efficiently online. There are so many basic public services which have been digitised end-to-end over the last four or five years. Of course, we are far from being like China when thinking about consumption. However, if you take the top electronics retailers, they have 60-80% of their sales online. This shift accelerated through COVID, especially in consumer-facing sectors including banking, telecoms and retail.

To what extent is remote working adapting your own internal model and the way you connect with and deliver to customers?

There are two things here. The positive is that it's easier to pull resources from different parts of the globe and put the right experts in front of our clients quickly. The flipside is that it takes longer to develop trust-based relationships with someone that you didn't have a relationship with before. For clients you already had a personal relationship with it accelerates things, but with new clients it takes a bit longer to build trust.

To what extent are talent shortages a problem, either for clients or within your own organisation?

It is a problem, as it is in most parts of the world. That's because consultants are no longer just competing amongst themselves for talent, but also with tech companies—who are hiring a lot from consulting—and with start-ups. The new generation of talent is seeking something more entrepreneurial and flexible. They are willing to earn less on a fixed basis, as long as there is a considerable upside if the company goes big and becomes the next global unicorn. We're trying to use a more flexible work style where people go to the office two or three days a week and then work from home for the rest—this has become the new normal. Yet we still believe it's important to have our monthly meeting with everybody. It's usually on a Thursday, at the end of the day, and followed by happy hour. It's a more relaxed day, because it's largely about networking. My concern is that the flexible, remote lifestyle makes people less loyal to the place in which they work, because it doesn't feel like home. I wouldn't be surprised if, in a year or two, studies show that attrition rates have increased everywhere because people are moving more—they want to be more mobile and try out new things. I think this is a risk that we need to face, and we should assume we will be working with higher attrition rates.

Is brand important when it comes to retaining talent?

I think branding is going to be important. If you're one of the big brands in your sector, people want to put that brand on their CV and benefit from it. Brands are important and we cannot neglect that. However, people who are more entrepreneurial might care less about the brand and more about the positive impact they can have on an institution.

How are you seeing sustainability impact businesses as we transition out of the pandemic?

In Europe there is a strong regulatory push that is accelerating the agenda, such as with carbon taxes. Society and consumers are also deeply concerned, which is supporting planet-positive products. Here in Brazil, and in most Latin American countries, this topic is a C-level priority and high up in government discussions, but I do not see much regulatory pressure. Consumers must have their basic needs met before they start shifting consumption behaviours. We see some initiatives, but nothing compared to the level of change in Europe.

Brazil and countries in Latin America such as Colombia and Peru have a large portion of their territory covered by the Amazon Rainforest. They have an amazing potential to benefit from the development of carbon markets, whether that's being paid to protect forests or large-scale reforestation projects in areas which have been devastated over the last few decades. I'm a strong supporter of the approach towards more-regulated carbon markets on a sub-national level in large countries such as Brazil, and I'm positive that can remove some of the scepticism around carbon offsets and removals. I think there is strong potential for those countries to generate additional revenue streams, which can be used to reduce poverty in those forest regions. On top of that, there is also the opportunity to better-develop some forest-based value chains for sustainable foods. When you think about Brazilian nuts, cocoa, or acai, these products come from the forest. There are amazing agroforestry techniques to further develop those value chains, because there is demand for these products in more developed markets such as Europe or

the US. I think this region could be a great supplier of sustainable foods to the world.

What is the competitive landscape in consulting looking like going into the next six months to a year?

In most markets in Latin America, the consulting firms that have been most successful are Accenture and McKinsey, in terms of the size of their offices and their presence in different markets. We, Roland Berger, are more about depth than breadth. We are perceived as a strategy-focused boutique that does a lot of work for private equity and for C-level leaders in our sectors. I think we would need to expand our services to become more of a transformational partner and we have the aspiration to grow fast in our region. In Brazil, for instance, we aspire to triple our size in the next four years.

Do your growth plans create any challenges?

I think talent is the challenge. We, as a consulting firm, are as good as the people that we have. I always say that an organisation should follow strategy, but in the case of management consulting, I think it's the opposite. Strategy will follow the organisation, because if you have a strategy, but you do not have the people, then it won't be executed. You need to provide individuals with the freedom to shape your strategy. That's the model that I'm trying to implement here for the region. Therefore, talent is critical, and spending time talking to people and understanding their needs is a very important part of my job as a regional leader.

What are some of the trends or challenges you expect your clients to face and need help with over the next year or two?

I think clients now want more than a strategic thinker. They want a firm that can work with their organisation, help build the required capabilities and deliver impact. They also want a firm that collaborates globally, goes deep, and complements their capabilities. For example, the generic framework that applies for Coca Cola won't work; it needs to be sector and client specific. I think empathy is also important, and is one of our main values, so creating trust-based relationships with human beings matters and will remain relevant in this part of the world.



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 service.

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 = £0.73

US dollar to euro US\$1 = €0.84

Client perspective

We carry out a client survey to help us build a rich picture of how different trends in South America are affecting clients’ organisations and their use of consulting. One survey focuses on trends in South America, providing detailed insights into the nuances of the market. For this, we surveyed 101 senior clients of consulting firms from across South America, all of whom work in organisations with more than 500 employees. This survey focuses on the following areas:

- How they expect to use consultants during 2022 and the first half of 2023
- Factors that affect the way clients work with consulting firms
- The ways consulting firms market themselves to clients and the impact this has on client decision making.

Figure 29

Respondents by sector

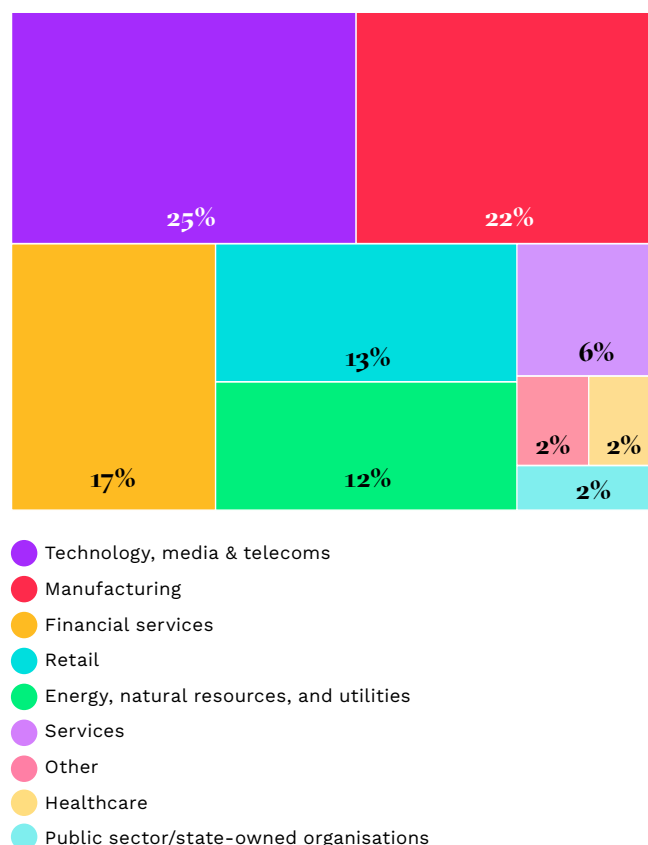


Figure 30

Respondents by organisation size

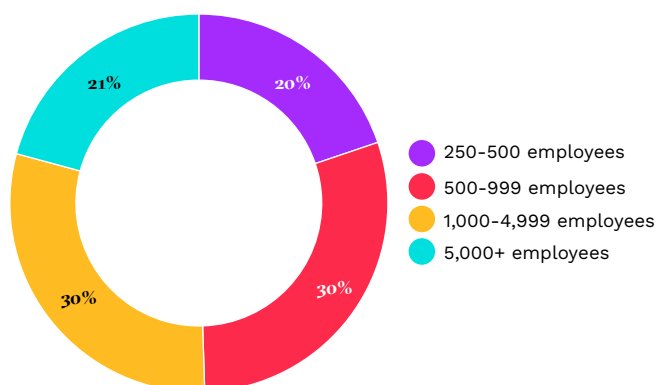
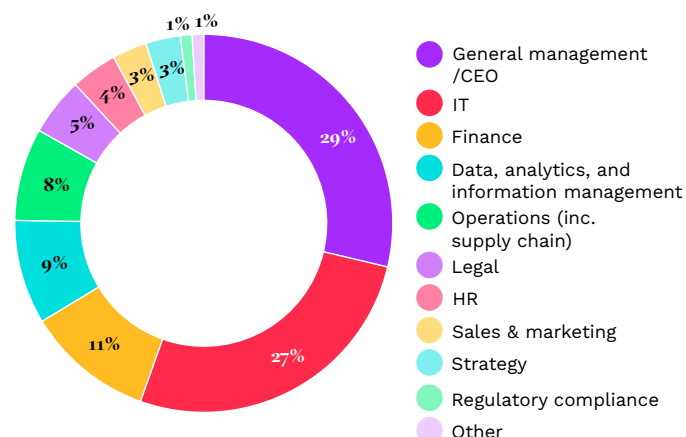


Figure 31

Respondents by function



Interviews with senior consultants

In addition to our quantitative research, we interviewed four very senior consultants in South America, 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 in to 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 in the South America 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 services

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 & 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 services”.

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
Pedro Guimaraes	Senior Partner	Roland Berger
Hercules Maimone	Brazil Advisory Leader	PwC
Dustin Pozzetti	Head of Consulting KPMG Brazil & South America	KPMG
Paolo Re	Managing Director	Business Integration Partners

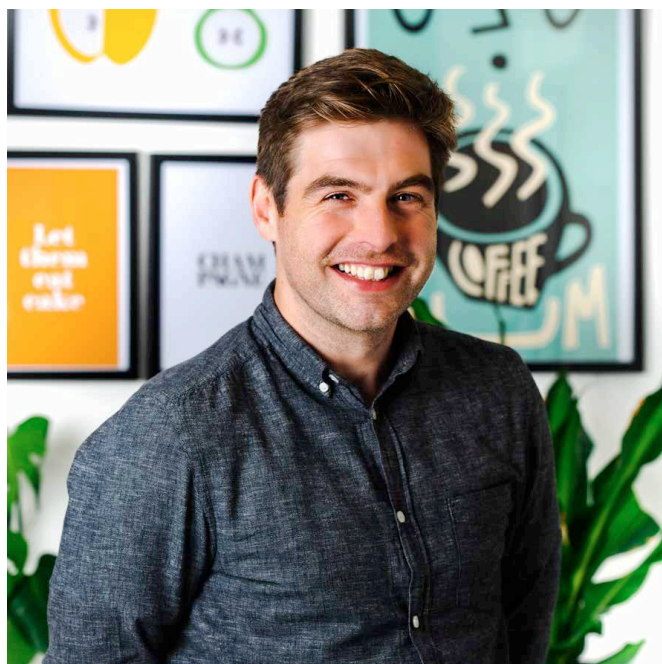
Meet the experts

James Beeby

James is our Research Manager at Source and works across the business to provide clients with research and analysis into firms, countries, sectors, and markets to understand the key trends impacting the professional services industry. James also plays a leading role in our internal research programme, tracking macroeconomic, political, and social changes to understand the risks and opportunities for client firms across a range of sectors and markets. He also evaluates research processes to unearth new and insightful ways of delivering original and impactful research and analysis. Prior to joining Source in 2019, James worked in the Singapore Ministry of Foreign Affairs in London as a political researcher.

James Beeby

✉ james.beeby@sourceglobalresearch.com



Alison Huntington

Alison is Director of Client & Brand Insights, overseeing all of the research and custom work we do in the area. She's worked with many of the world's leading consulting firms on brand benchmarking, proposition testing, and client feedback projects, as well as authoring reports and white papers on the industry's most pressing issues and topics. Alison regularly presents her insights at Source events, writes blogs for our website, and appears on The Future of the Firm, Source's podcast. Prior to joining Source, Alison worked at Deloitte and Moorhouse as a consultant for five years, working in a variety of industries.

Alison Huntington

✉ alison.huntington@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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For more information contact Caitriona Lowry
caitriona.lowry@sourceglobalresearch.com

UK +44 (0)20 3478 1207
sourceglobalresearch.com

