

Report  
March 2023

EXTRACT



# EMERGING

Where in the world:

Has hybrid working changed how  
clients think about the location of  
their consulting teams?



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# Emerging Trends: Where in the World

## Introduction

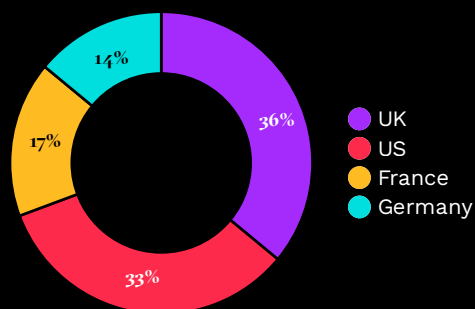
Remote and hybrid working over the last three years has made clients much more comfortable with the idea that consultants don't have to work alongside them in their offices. And the desire to keep fee rates down, particularly in the current economic climate, means that clients should be interested in all types of consulting work—not just technology services—being delivered from offshore and/or nearshore locations.

This report explores the extent to which delivery locations are changing, whether consulting firms may need to change their geographical footprint in the future to best meet the expectations of clients and their own growth prospects, and the opportunities and risks of doing so.

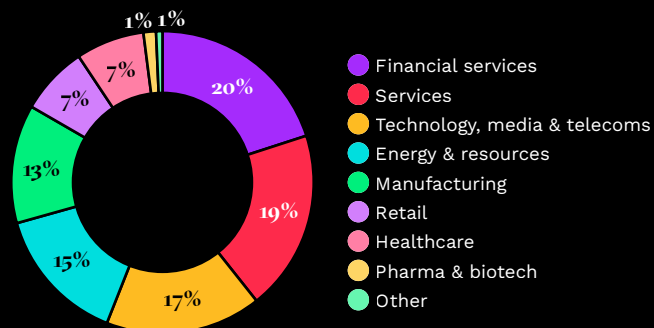
# Methodology

We surveyed 150 senior executives in the US, France, Germany, and the UK in late January/early February 2023. All of the respondents were prequalified as users of consulting services.

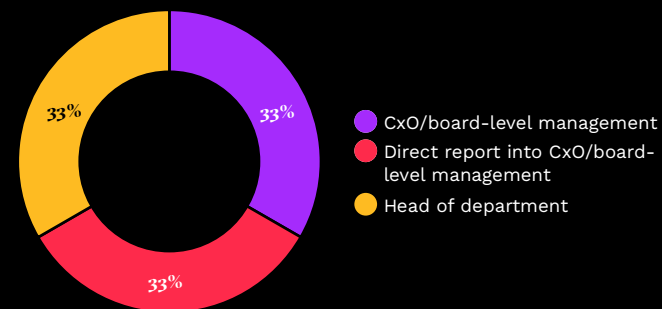
Respondents by country



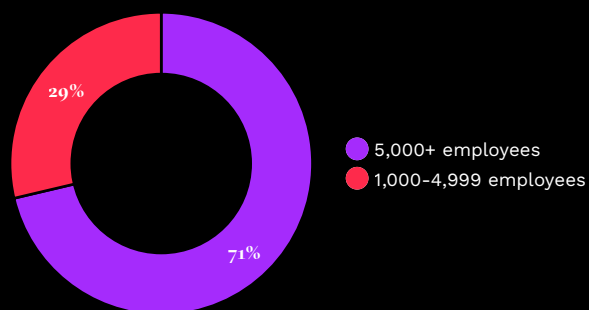
Respondents by sector



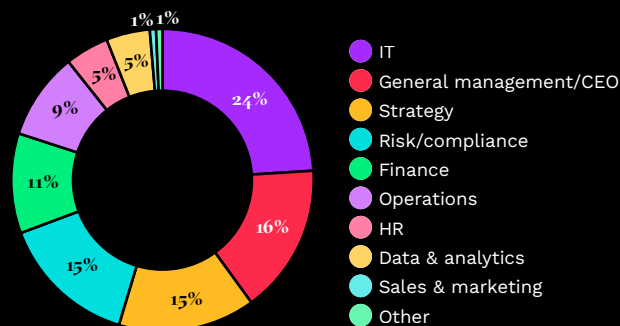
Respondents by responsibility level



Respondents by headcount



Respondents by function



# What **really** matters

# 1

A global  
world...

2

# Global consulting in theory



## Technology and management consulting are approached differently by clients

Historically, clients have considered technology and management consulting quite differently when it comes to the location that these services can be delivered from. But in recent years, technology has become part and parcel of almost all consulting work. The tools with which services can be delivered have developed to overcome many of the challenges associated with remote delivery, as well as offering clients access to expertise in different locations and often at a lower price point.

Technology consulting has for a long time been considered an area in which the expertise and consulting team do not need to be in the room for much, if not all, of the process. Clients have been completing technology consulting online for longer than they have management consulting and, therefore, feel more comfortable doing so. Many are already offshoring or nearshoring their technology consulting or look to do so in the future.

There is a bit more reticence when it comes to management consulting, though. Often considered much more personal, requiring greater face-to-face interactions between the client and the consulting team, clients are only now starting to explore the full possibilities of new locations and delivery models.

The pandemic demanded that much more management consulting be completed online, with clients and consultants both adapting to new methods of working. That being said, it is clear from our previous report [ET5 link relationships in a hybrid](#) world that clients are still keen to have significant in-person interaction.

This section of our report compares clients' views around the location of delivery for technology and management consulting services to highlight some of the important ways in which the latter in particular are changing.





# What happens in practice?



# Future change

5

# Summary

6

## 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

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### 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

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# 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.

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# Publication schedule for 2023

Reports 2023		Market Trends Reports	Market Trends Presentations	Client Perception Studies	Emerging Trends Programme	White Space
Q1	January	Forecasts for 2023 UK GCC France	India	UK US	Offshoring Consulting Services	A powerful research tool that allows subscribers to keep up to date with the latest content being produced and maximise their return on investment. A series of reports that analyse the quality and effectiveness of thought leadership are published throughout the year.
	February			Germany Financial Services		
	March			GCC France Retail		
Q2	April	Nordics US DACH Sustainability Australia East Asia South East Asia		Australia Energy & Resources Technology, Media & Telecoms	Crisis Fatigue: How Much More Can Clients Take?	
	May			China Japan		
	June					
Q3	July	Africa Energy & Resources Financial Services Technology, Media & Telecoms	South America Healthcare & Pharma		Staff Augmentation: Focusing on the Opportunity	
	August			Risk Tax		
	September			Audit Technology	The Rise of the Technology Challenger	
Q4	October	Tax Risk Planning for Growth in 2024			Outcomes-Based Consulting	
	November					
	December					