

EXTRACT



Market Trends

MARKET

**The Nordics Consulting
Market in 2024**

Report

May 2024

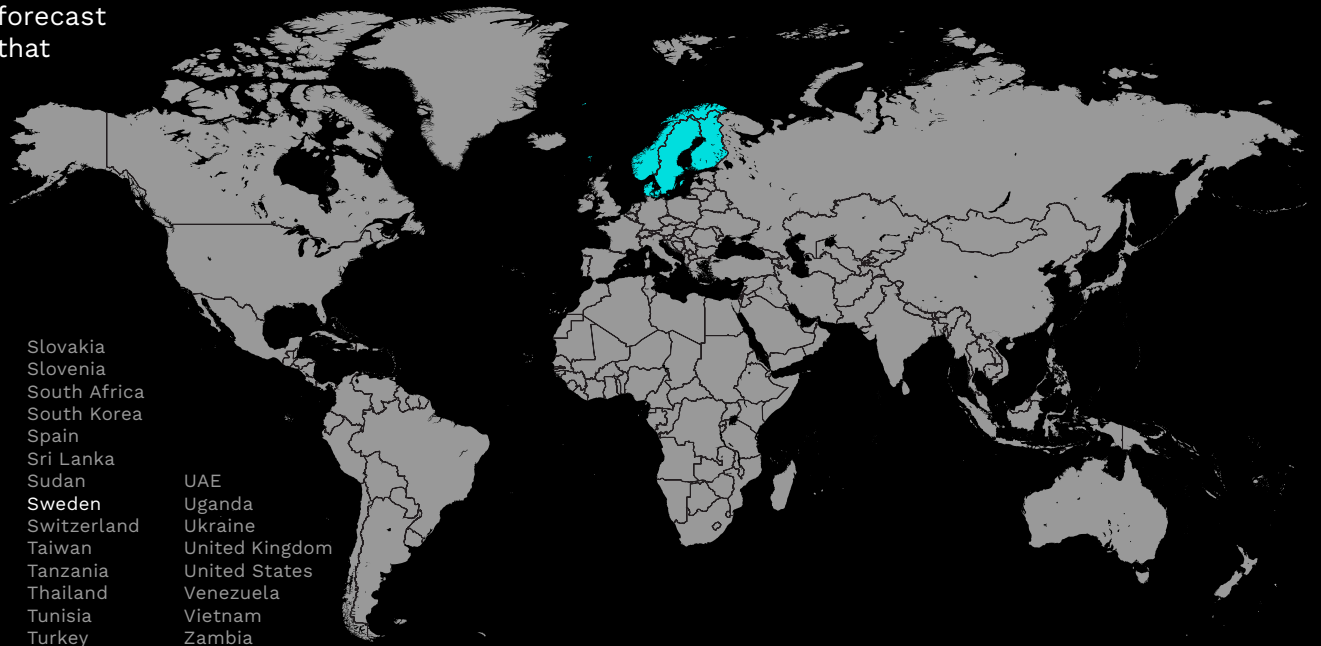
What's included in this report

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

Countries covered

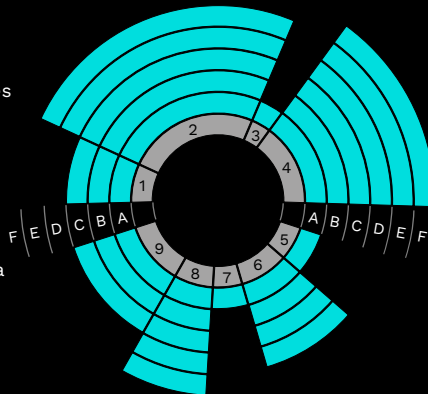
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal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



Sector model

Sectors

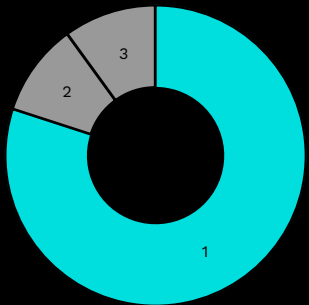
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & biotech
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



Sub-sectors

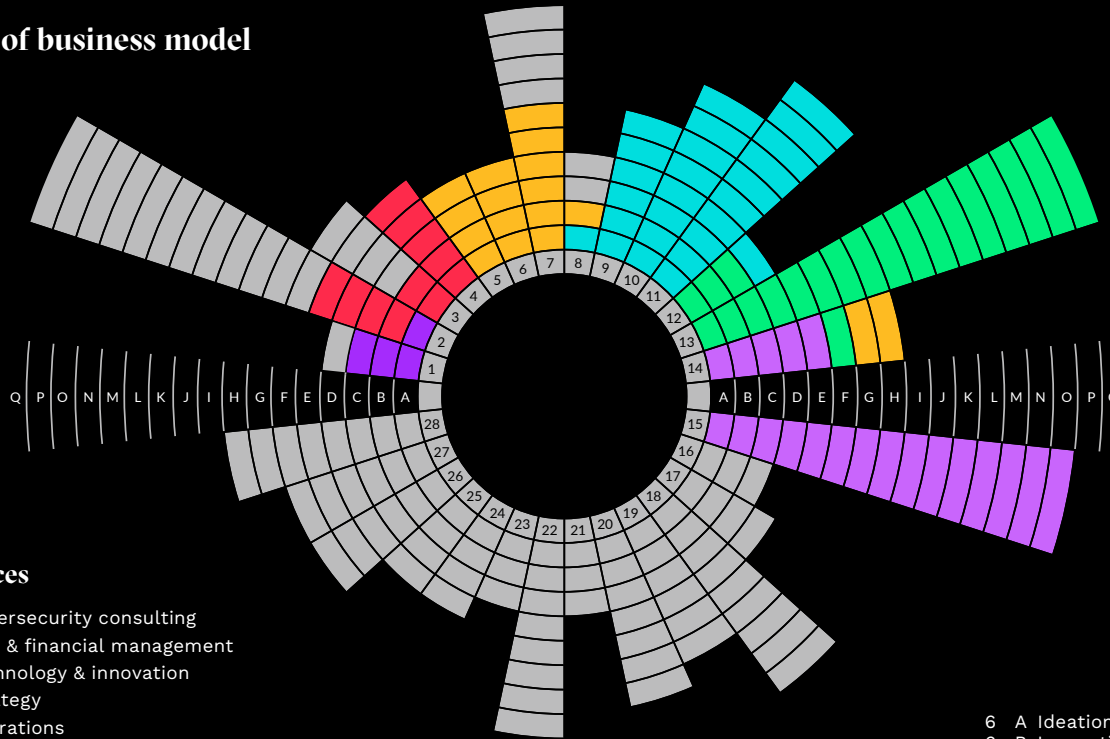
- | | | |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy | 4 A Aerospace | 8 A Business services |
| 1 B Primary resources | 4 B Automotive | 8 B Leisure |
| 1 C Utilities | 4 C Construction | 8 C Logistics |
| 2 A Banking | 4 D Consumer electronics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

The revenue-earning model



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

Line of business model



Services

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

Line of business

- | | |
|---------------------------------|------------------------------|
| 1 Cybersecurity | 20 Legal |
| 2 Risk | 21 Litigation |
| 3 Forensic | 22 Marketing & creative |
| 4 Financial management | 23 Network engineering |
| 5 Design & UX | 24 Product engineering & R&D |
| 6 Innovation | 25 Recruitment |
| 7 Technology | 26 Software engineering |
| 8 Data & analytics | 27 System integration |
| 9 Research | 28 Tax |
| 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 | |

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 |
| 14 A Purpose-led strategy & change |
| 14 B Resource-efficiency implementation |
| 14 C Resource-efficiency strategy |
| 14 D Social impact & trust |
| 14 E Sustainable investment |
| 14 F Sustainable supply chain |
| 14 G Clean technology |
| 14 H Green IT |
| 15 A Benefits, compensation & pensions, excluding actuarial & investment advice |
| 15 B Change management |
| 15 C Diversity & inclusion |
| 15 D Employee engagement |
| 15 E Governance & board effectiveness |
| 15 F HR strategy & effectiveness |
| 15 G Leadership |
| 15 H Organisational design & culture |
| 15 I Organisational training & development |
| 15 J Outplacement |
| 15 K Pension fund evaluation & advice |
| 15 L Performance management |
| 15 M Stakeholder management |
| 15 N Talent management |
| 15 O Team effectiveness & collaboration |

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Underpinned by our MegaModel, our reports deliver an independent and objective understanding of the markets that matter most; including everything from key trends and growth opportunities to the latest views of consulting leaders and a detailed analysis of the buyer's voice.

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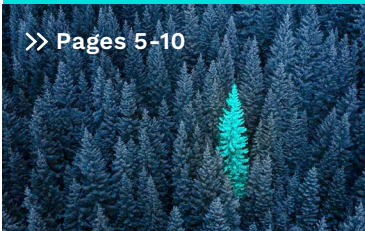
What really matters

We identify the things that really matter to firms—a snapshot of the most important dynamics in the market.

The big answers

We ask Source's experts what they think are the big opportunities and risks in today's market.

>> Pages 5-10



2

Market overview

Bringing together our market data, forecasts, and analysis, we provide a comprehensive picture of the state of play from a geographical, sector, and line-of-business perspective.

>> Pages 11-18



3

Client priorities

Using data from our survey of senior buyers of consulting, we explore the most important priorities, opportunities, and challenges for clients.

>> Pages 19-30

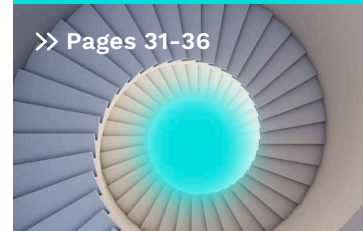


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Implications for firms

We take a look at the factors influencing clients' buying behaviours, and what this means for the services firms provide.

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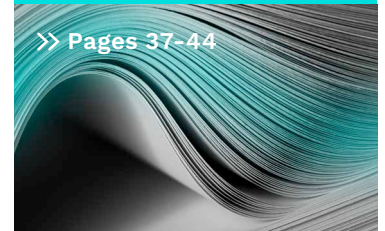


5

Insights from consultants

In this series of interviews, senior leaders from professional services firms offer their perspectives on what really matters in the market today.

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1



“Large corporations in Sweden have been less active, focusing on cost cutting due to rising interest rates and geopolitical uncertainty.”

Johan Engdahl, KPMG Sweden

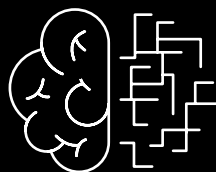
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3

AI has captured the imagination but hasn't yet become a crucial driver of consulting work.



Using emerging technologies (e.g., AI) is currently the most relevant and important issue being discussed at senior levels in organisations as a whole

2023 saw global excitement about the business potential of generative AI and other key emerging technologies.

Even though the Nordics region has a strong high-tech presence, firms must keep in mind that this technology is in its early stages of being introduced into business ecosystems. So while clients identified data & analytics and the adoption of emerging technologies as their key investment priorities for 2024, the projects are more around scoping out potential uses rather than commissioning large-scale transformation projects.

Consulting firms should see client excitement as a call to action to start building their own capabilities in what will become an increasingly profitable area. Although it may not dominate over all other projects this year, firms must still ramp up their expertise, look into developing business use cases and, if the option arises, look to partner with key emerging technology providers. The lack of internal expertise in this area among clients means that there will still be demand for consulting work in this space.

Professional services firms should also note that clients are not solely interested in AI, and it should not be the only emerging technology that they explore. There are ample opportunities to develop expertise and capability in connectivity, automation, and blockchain, all of which both appeal to clients and have the ability to offer real value.

Although these emerging technologies have not yet taken off in full force, it is an exciting time for consulting firms: Clients will be looking to their expertise to inform their next moves in the technology space.

2



“We’ve seen growth in utilities and pharmaceuticals, whereas industrials saw larger areas of decline, and retail was challenging.”

Thomas Nellemose Rosenlund, Valcon

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3



“There was more focus on projects where the payback time is shorter and where the potential benefits could be realised in the short to medium term.”

Petter Vold, PwC Norway

Client priorities

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Client confidence has been severely undermined by a combination of rising costs and falling revenues

Client confidence in the Nordics has been rocked by the last year. In 2023, clients were still cautious, but most did not feel that the future of their business had been significantly affected. As another year of unfriendly market conditions took its toll in 2023 twice the number of clients reported that their confidence was significantly reduced.

Clients in Denmark and Sweden have felt the effects most keenly, with 60% or more in each country feeling that their expectations were significantly lowered. However, even clients in Norway and Finland, two comparatively optimistic countries, were significantly less confident than last year.

The causes of this depression in confidence are primarily economic: As their own end customers try to keep costs low, many consulting clients in the Nordics are seeing revenues drop. As this hit to sales is combining with rising energy costs and inflation, clients are increasingly feeling the strain.

The polycrisis has also left clients feeling that they don't have access to the right information. They will be looking to improve internal functions around data collection and risk prevention to prepare themselves for future shocks that may emerge.

Figure 10

To what extent have macroeconomics and political tensions impacted your confidence when thinking about the future of your organisation?

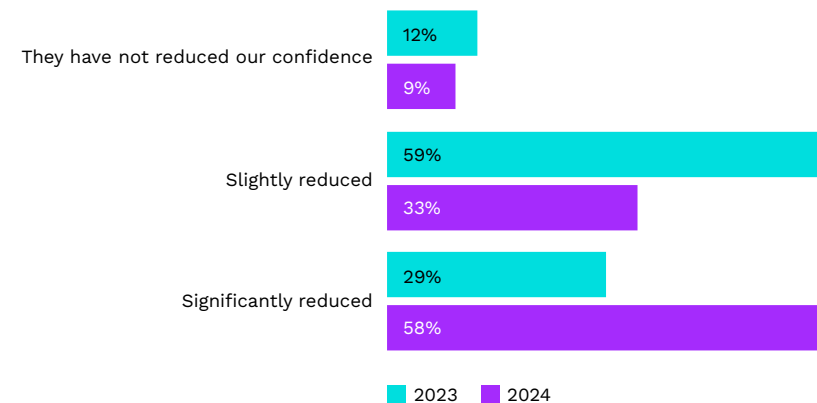
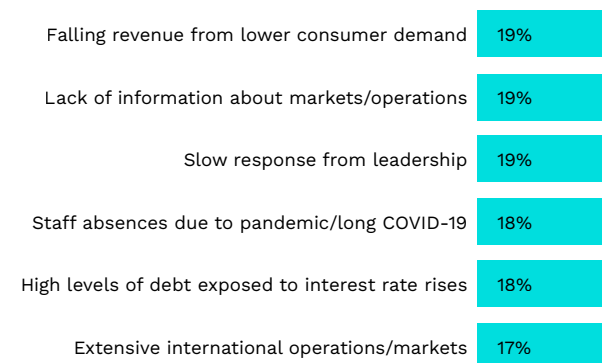


Figure 11

Why have macroeconomics and political tensions reduced your business confidence?



Data & analytics and emerging technologies are top investment priorities as clients seek to update their technology

Though clients in Norway feel that updates are less urgent than the rest of the Nordics, more than 50% of clients in all four countries feel that their technology must be upgraded as soon as possible for their business to survive.

The two highest priority areas of investment are data & analytics and emerging technologies. Clients understand that if they are to become more reliant on AI and machine learning, it has to be grounded in foundations of strong data collection. Therefore, as investment in emerging technology moves forward, they are first and foremost looking to strengthen their data collection functions to ensure that they will see a return on their expenditure.

Although spend may not currently be very high, the priority being given to digital transformation and the exploration of new technologies shows that this will become a fruitful area of consulting work in the coming years. This should be a call to action for firms who are not already seeking to update their capabilities in new and emerging technologies.

Figure 18

In your opinion, does your organisation need to update its technology within the next three years to survive?

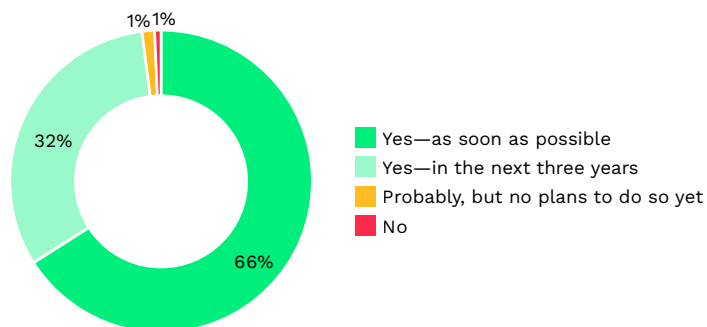
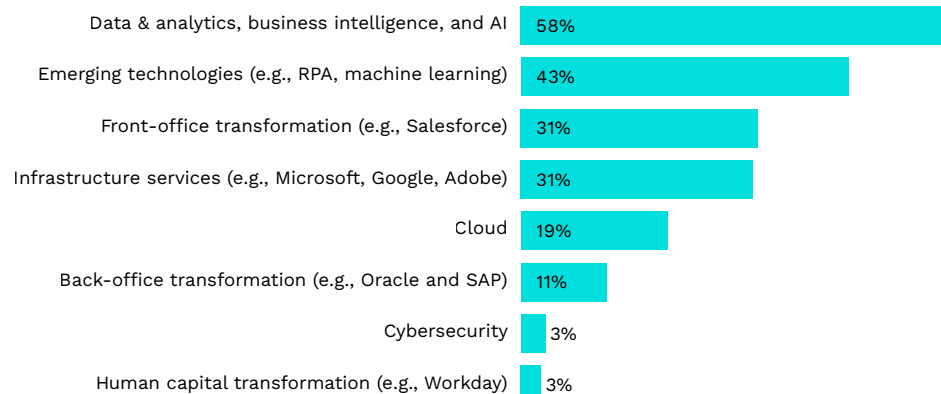


Figure 19

Which two of these areas of investment are the highest priority for your organisation?



4

“The market became more difficult in the second half of the year, and while there were still lots of client opportunities these were smaller in size.”

Petter Vold, PwC Norway

Implications for firms

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Firms should emphasise their expertise and strong account management to win work.....36

Clients will keep spending on external support in 2024 to ensure that key services are upgraded and maintained by industry experts

Although budgets are tight, consulting usage looks set to rise, with 62% of clients we surveyed expecting to use more consulting support in 2024.

Many clients are still struggling with depleted workforces, skill gaps, and the need to update their technology services. As they are seeking to improve their productivity while also having fewer experts and fewer staff in general, they will invest in professional services to provide the requisite expertise and, if necessary, use staff augmentation to fill in key roles.

One such area where clients lack internal expertise is regulation: As the legislative environment picks up pace, particularly in ESG, clients need expert counsel to ensure that they are complying with regulatory bodies.

On top of this, with clients' ambitions coalescing around new technologies and digital transformation, they will require help from technology experts both to provide key services, like managing the data & analytics teams, and to effectively implement technology solutions across the business through the upskilling of internal staff.

As well as needing expertise and staff in key functional areas, many clients want projects completed as quickly and effectively as possible. The harsh macroeconomic environment means that they need to realise fast gains to ensure their financial safety. They are therefore more inclined to turn to professional services firms that have experience with fast implementation (and the case studies to prove it) in order to reduce immediate pressures—and those on the horizon.

Figure 26

How do you think that your organisation's overall use of consultants will change in the next 12 months?

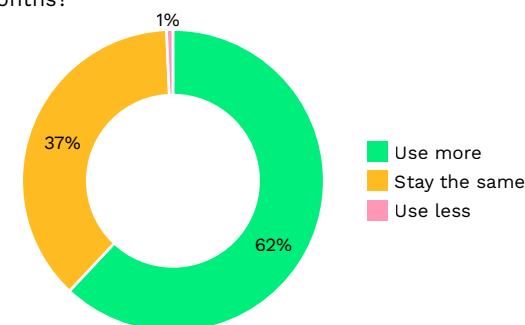


Figure 27

What are the two most important reasons why you expect your overall use of consultants to increase?



5



“ESG initiatives have transitioned from mere rhetoric to a focus on how to derive relevant data, in an automatic and repeatable way.”

Johan Engdahl, KPMG Sweden

Insights from consultants

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6

**“The focus remains on interest rates,
supply chains, inflation, and the
global economy as a whole.”**

Christian Liljeström, KPMG Finland

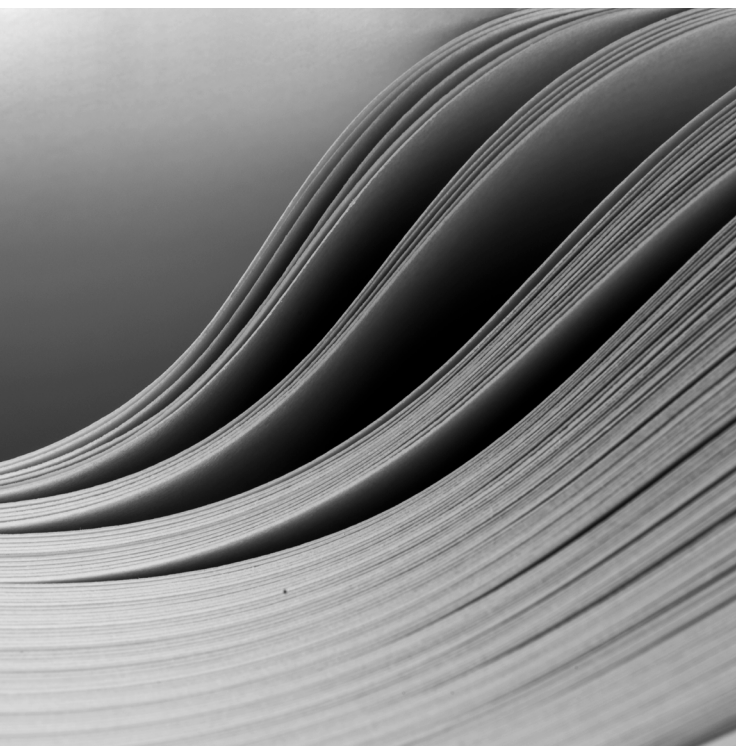
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Our approach to gathering data

The market for professional services is vast and highly dynamic, with deep roots spread out across the business world. The Source MegaModel helps you get to grips with the facts.

The MegaModel is the largest and most comprehensive database of its kind, anywhere in the world. It's used by the world's leading firms to identify where growth is coming from, which markets to invest in, and which sectors are driving demand.



Methodology—The MegaModel

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 euros.

US dollar to British pound US\$1 = £0.80

US dollar to euro US\$1 = €0.92

The data in this report is rounded to the nearest whole number or stated decimal place. As a result, totals may display small discrepancies.

Who did we speak to

Client perspective

We carry out a client survey to help us build a rich picture of how different trends in the Nordics are affecting clients' organisations and their use of consulting. Our survey focuses on trends in the Nordics, providing detailed insights into the nuances of the market. For this, we surveyed 150 senior clients of consulting firms from across the Nordics, all of whom work in organisations with more than 1,000 employees. This survey focuses on the following areas:

- How they expect to use consultants during 2024 and the first half of 2025
- 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.

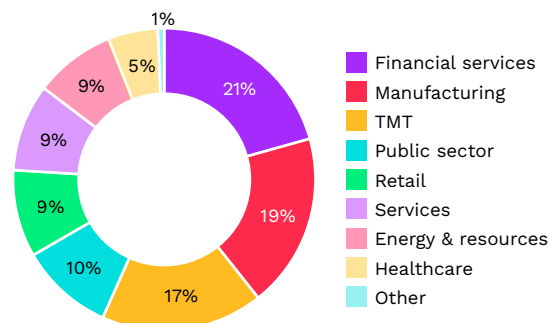
Insights from consultants

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.

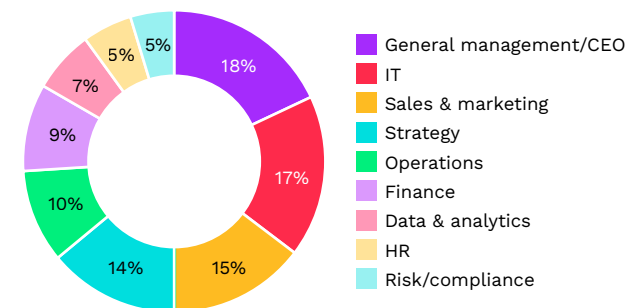
In-depth desk research

We also conducted a thorough PEST analysis in the Nordics 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.

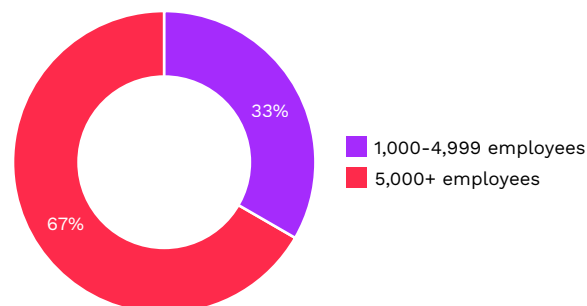
Respondents by sector



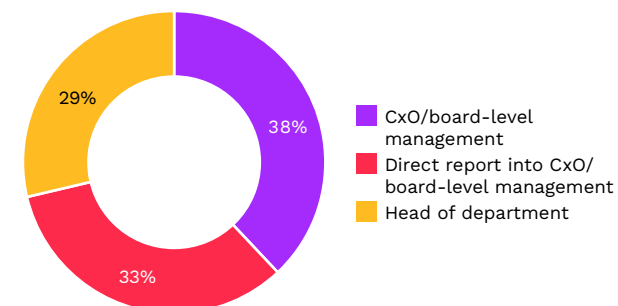
Respondents by function



Respondents by organisation size



Respondents by seniority



Definitions of sectors and services

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.

Services

We've taken the lines of business and capabilities from our taxonomy that broadly align with traditional definitions of consulting and divided them into services 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.

Cybersecurity consulting

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

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.

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.

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.

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.

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.

Meet the expert

Joel Bradbury

Joel is a writer specialising in the analysis of emerging trends within the professional services market. He conducts in-depth research on consulting use globally and in specific geographies and sectors, on topics ranging from crisis response to trends within the nascent sustainability consulting market. His expertise lies in the identification of new ideas and forces shaping the industry, and how they are influencing behaviours within the consulting market.

Joel Bradbury

✉ joel.bradbury@sourceglobalresearch.com



About us

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

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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.

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Source Information Services Ltd
20 Little Britain | London | EC1A 7DH
UK +44 (0) 20 3743 3934
US +1 800 767 8058
info@sourceglobalresearch.com
www.sourceglobalresearch.com

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