

EXTRACT

Market Trends

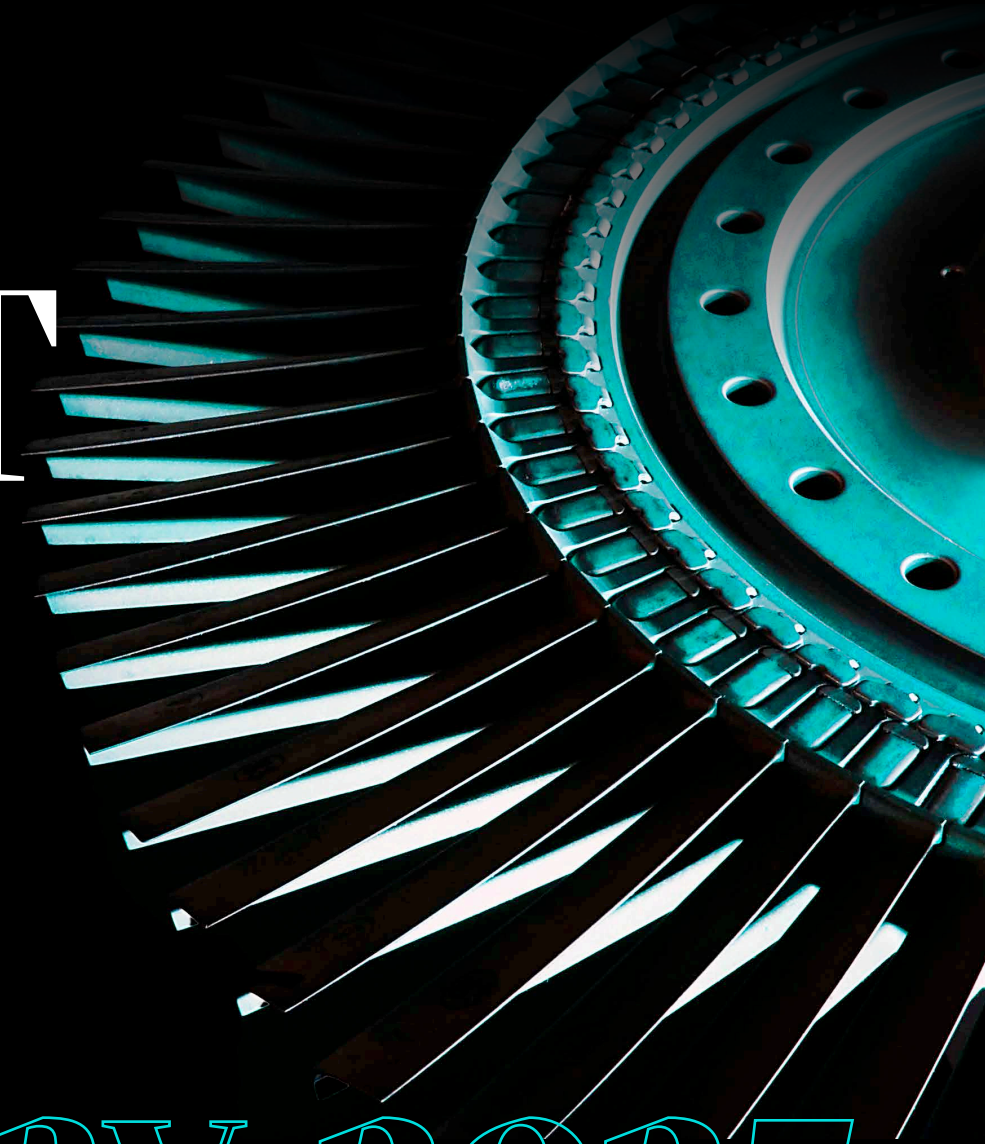


# MARKET

The East Asia Consulting  
Market in 2025

Report

May 2025



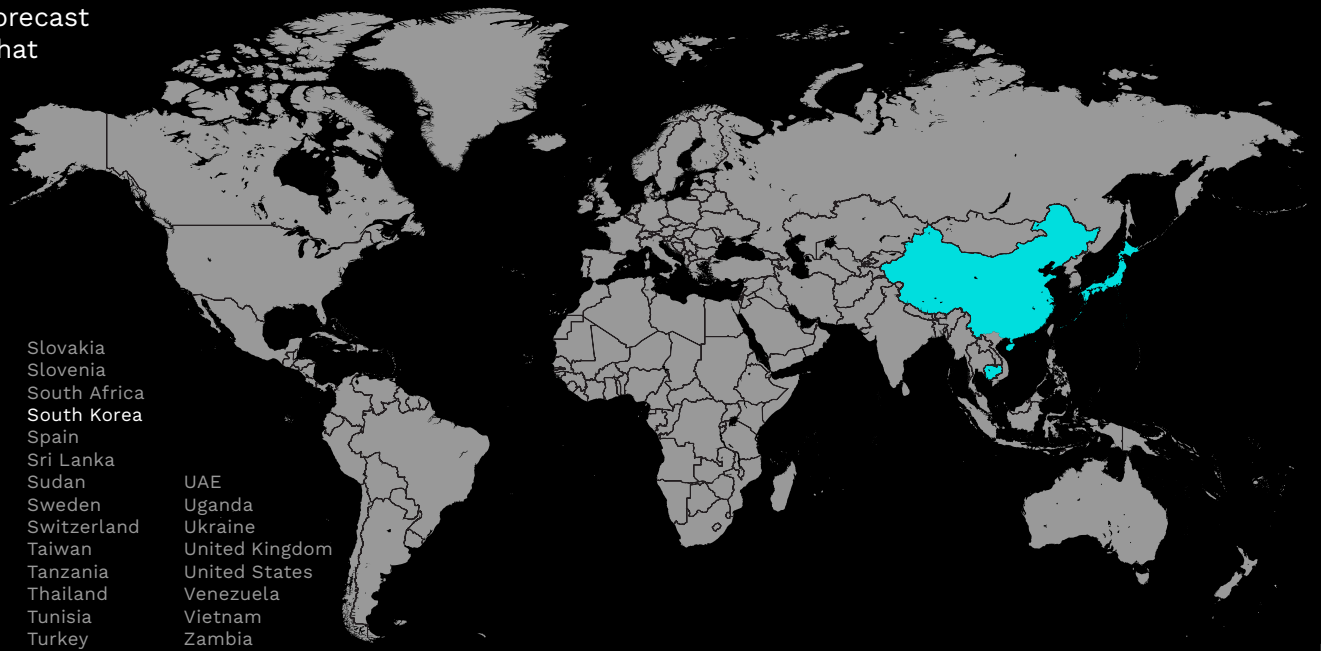
# What's included in this report

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

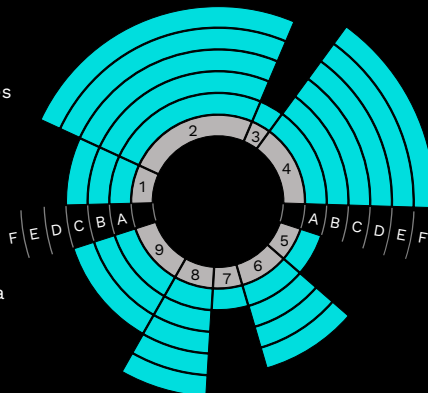
Albania	Chile	Greece	Libya	Pakistan	Slovakia
Algeria	China	Hong Kong	Luxembourg	Papua New Guinea	Slovenia
Angola	Colombia	Hungary	Malaysia	Peru	South Africa
Argentina	Côte d'Ivoire	India	Mexico	Philippines	South Korea
Australia	Croatia	Indonesia	Morocco	Poland	Spain
Austria	Cyprus	Iran	Mozambique	Portugal	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	Saudi Arabia	Taiwan
Brazil	Finland	Japan	North Macedonia	Serbia	Tanzania
Bulgaria	France	Kenya	Norway	Singapore	Thailand
Cameroon	Germany	Kuwait	Oman		Tunisia
Canada	Ghana	Lebanon			Turkey
					UAE
					Uganda
					Ukraine
					United Kingdom
					United States
					Venezuela
					Vietnam
					Zambia



## Sector model

### Sectors

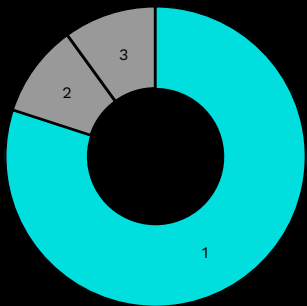
- 1 Energy & resources
- 2 Financial services
- 3 Healthcare
- 4 Manufacturing
- 5 Pharma & life sciences
- 6 Public sector
- 7 Retail
- 8 Services
- 9 Technology, media & telecoms



### Sub-sectors

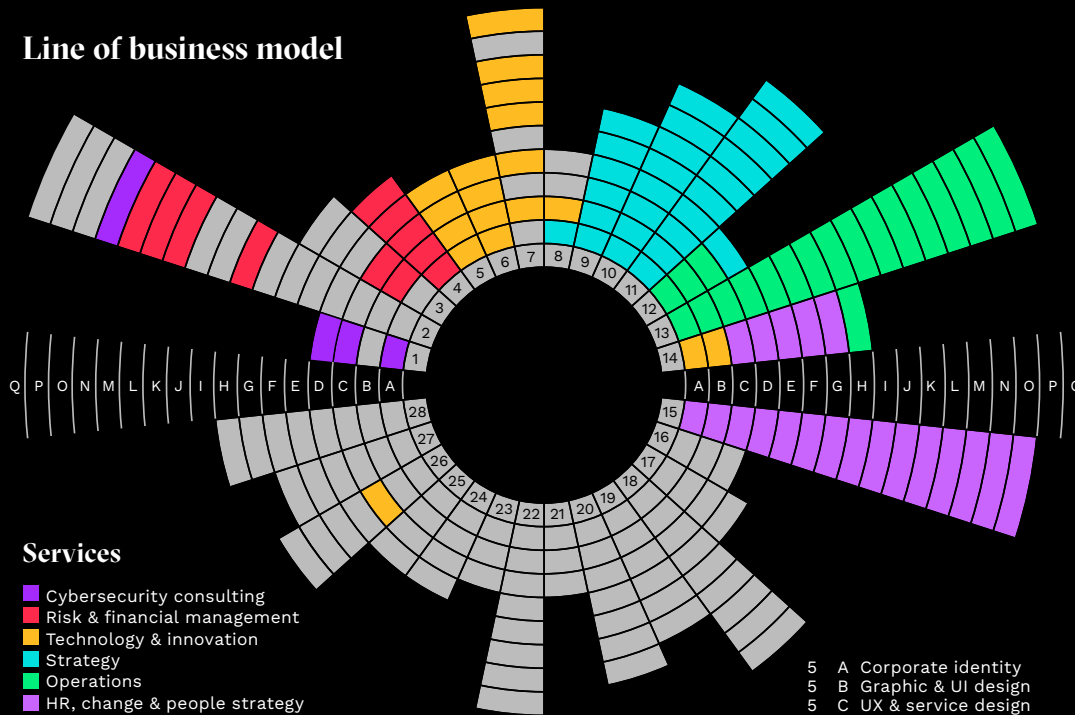
- |                                      |                             |                       |
|--------------------------------------|-----------------------------|-----------------------|
| 1 A Energy                           | 4 A Aerospace               | 8 A Business services |
| 1 B Primary 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

- Cybersecurity
- Risk
- Forensic
- Financial management
- Design & UX
- Innovation
- Technology
- Data & analytics
- Research
- Deals
- Strategy
- Real estate
- Operations
- Sustainability
- HR & change
- Architecture
- Audit & assurance
- Business process outsourcing
- Civil engineering
- Legal
- Litigation
- Marketing & creative
- Network engineering
- Product engineering & R&D
- Recruitment
- Software engineering
- System integration
- Tax

## Capabilities

- A Cybersecurity advice
- B Cybersecurity implementation
- C Cybersecurity incident response
- D Penetration testing & wargaming
- A Risk governance
- B Actuarial
- C Compliance risk
- D Crisis & reputation management
- E Environmental risk
- F Financial assurance
- G Internal audit
- H Operational risk
- I Physical security solutions
- J Physical security strategy
- K Programme risk
- L Responding to regulation
- M Risk management
- N Technology & security risk services
- O Third-party assurance
- P Transactions-related risk
- Q Treasury risk
- A Anti-corruption services
- B eDiscovery
- C Forensic accounting
- D Forensic technology solutions
- E Fraud mitigation
- F Investigation services
- A Budgeting/financial planning process
- B Debt advisory
- C Finance function
- D Financial advisory
- E Financial restructuring & insolvency

- A Corporate identity
- B Graphic & UI design
- C UX & service design
- D Customer journey & UX benchmarking
- A Ideation
- B Innovation management
- C Innovation strategy
- D Strategies for growth from innovation
- A AI advice & implementation
- B Cloud advice
- C Cloud implementation
- D ERP consulting
- E Geospatial advice & implementation
- F IT strategy, planning & review
- G IT training
- H Programme management
- I Robotics advice & implementation
- J Vendor selection
- A Advanced analytics
- B Data visualisation, business intelligence & semantic layer
- C Data warehousing & database management
- D Machine learning
- A Customer feedback
- B Customer segmentation
- C Employee feedback
- D Environmental & social impact research
- E Macro/microeconomic research
- F Market research
- A Capital allocation strategy
- B Commercial due diligence & valuation
- C Financial due diligence
- D M&A transaction strategy
- E Operational due diligence
- F Portfolio & investment strategy
- G Public-private partnerships
- H Technology due diligence

- A Business & financial modelling
- B Category management
- C Channel management
- D Corporate recovery & turnaround
- E Corporate restructuring
- F Corporate strategy
- G Market analysis & strategy
- H Policy formulation
- I Pricing
- J Strategic sourcing/offshoring services
- A Corporate, occupier services & facilities management
- B Integrated real estate developer services
- C Real estate deal/transaction services
- D Real estate strategy
- A Benchmarking
- B Business continuity & recovery
- C Cost cutting
- D Customer service
- E Distribution strategy
- F Lean & Six Sigma
- G Operational review
- H Outsourcing advice
- I Post-M&A integration
- J Process design, re-engineering & automation
- K Procurement/purchasing
- L Property & estate management
- M Sales & distribution planning
- N Sales force effectiveness
- O Supply chain management
- P Target operating model
- A Clean technology
- B Green IT
- C Purpose-led strategy & change
- D Resource-efficiency implementation
- E Resource-efficiency strategy
- F Social impact & trust
- G Sustainable investment
- H Sustainable supply chain
- A Benefits, compensation & pensions, excluding actuarial & investment advice
- B Change management
- C Diversity & inclusion
- D Employee engagement
- E Governance & board effectiveness
- F HR strategy & effectiveness
- G Leadership
- H Organisational design & culture
- I Organisational training & development
- J Outplacement
- K Pension fund evaluation & advice
- L Performance management
- M Stakeholder management
- N Talent management
- O Team effectiveness & collaboration
- A Exterior building design
- B Interior building design
- C Landscape design
- A Accounting operations assurance
- B Accounting systems assurance
- C Corporate reporting
- D IFRS & regulatory reporting
- A Contact center outsourcing
- B Document management outsourcing
- C Finance accounting outsourcing
- D Human resources outsourcing

- E IT outsourcing
- F Other outsourcing
- G Payroll outsourcing
- H Regulation & remediation outsourcing
- I Supply chain management & distribution outsourcing
- A Building & engineering analytics
- B Engineering project management
- C Infrastructure design
- D International development
- E Transport infrastructure, planning & engineering
- F Urban design & planning
- A Corporate & transaction law
- B Criminal law
- C Digital & technology law
- D Domestic & family law
- E Intellectual property law
- F International trade, regulatory & government law
- G Labour & employment law
- A Dispute advisory services
- B Expert witness
- C Trial services
- A Brand activation
- B Brand strategy
- C Creative production
- D Customer relationship management
- E Marketing & communication production
- F Marketing & communication strategy
- G Marketing mix optimisation
- H Public relations & affairs
- A Network installation
- B Network optimisation
- C Network strategy & architecture
- A Physical product quality assurance & testing
- B Physical product R&D
- C Product & industrial design
- D Technical feasibility assessment, prototyping & mock-ups
- A Contract staffing supply
- B Executive interim
- C Executive search
- D Talent sourcing
- A Application development
- B Digital product quality assurance & testing
- C DevOps
- D Digital product R&D
- E IoT and connected devices
- F Solution architecture
- G Virtual, augmented, and mixed reality
- A Functional & industry application integration
- B Microsoft
- C Oracle
- D Salesforce
- E SAP
- F Workday
- A Corporate tax
- B Global employer/mobility services
- C Indirect tax
- D International tax
- E Private wealth tax
- F Tax dispute resolution & controversy
- G Transaction tax
- H Transfer pricing

# Contents

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.

1

## 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 19-32

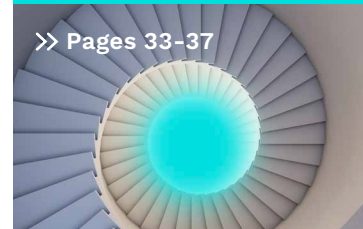


4

## Implications for firms

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

>> Pages 33-37



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.

>> Pages 38-45



## About this report

>> Pages 46-52

## About us and other reports

>> Pages 53-54



1



**“In 2025, the emphasis has shifted to a more forward-looking angle. While project sizes may not necessarily be increasing, there is a stronger focus on transformation agendas, together with digital.”**

**James Zheng, KPMG China**

## What really matters

Three things for a firm to act on .....6

The big answers... on the East Asia consulting market.....9

# 2

## Clients in East Asia are interested in investing in technology, but different types of technology across the different countries.



of clients in China are already  
deploying GenAI

All clients are scaling up their spending on digital technology, but this increased investment is focused on different areas. Reflecting their economic uncertainty, clients in Japan are more likely to invest in cybersecurity, prioritising robust data protection measures and risk mitigation strategies. Cybersecurity and data & analytics are similarly top priorities for clients in South Korea, who are also prioritising cloud spending.

Meanwhile, clients in China are directing their investments toward generative AI and data & analytics, leveraging advanced machine learning models to drive innovation and optimise business operations. Access to improved data is critical for clients across the region, because of its compounding advantages: Stronger data tools allow clients to make more out of new emerging technologies such as generative AI.

Generative AI is a key area for clients across our Market Trends programme, and clients in China and South Korea were particularly excited by the possibilities it offers, with 29% of clients in China and 25% of clients in South Korea already deploying generative AI across their businesses. Clients in Japan, however, are still at the exploratory stage, and may need convincing that the benefits of the technology outweigh the risks.

## 2



**“Across the whole region, clients are eager to spend on technology and cybersecurity. They see digital transformation and emerging technologies as two of their top priorities and are investing significantly in these areas.”**

Peter Curry, Source

## Market overview

The East Asia consulting market in numbers .....	12
The East Asia consulting market size and growth by country .....	13
The East Asia consulting market by service .....	14
The East Asia consulting market by sector .....	15
The East Asia market is slowly emerging from a period of stagnation ....	16
Strategy and technology consulting remain the largest service lines, but cybersecurity is forecast to grow the fastest.....	17
Financial services and manufacturing are the largest sectors, but both are forecast to stagnate in China.....	18



# 3



**“We’ve seen a high level of demand from our clients to help them solve the most pressing operating problems and restructure their businesses to meet the challenging macroeconomic environment.”**

Xuong Liu, Alvarez & Marsal

## Client priorities

What are clients’ top needs and priorities?.....	20
Where are clients set to invest? .....	24
Use of consultants .....	29



# What are clients' top needs and priorities?

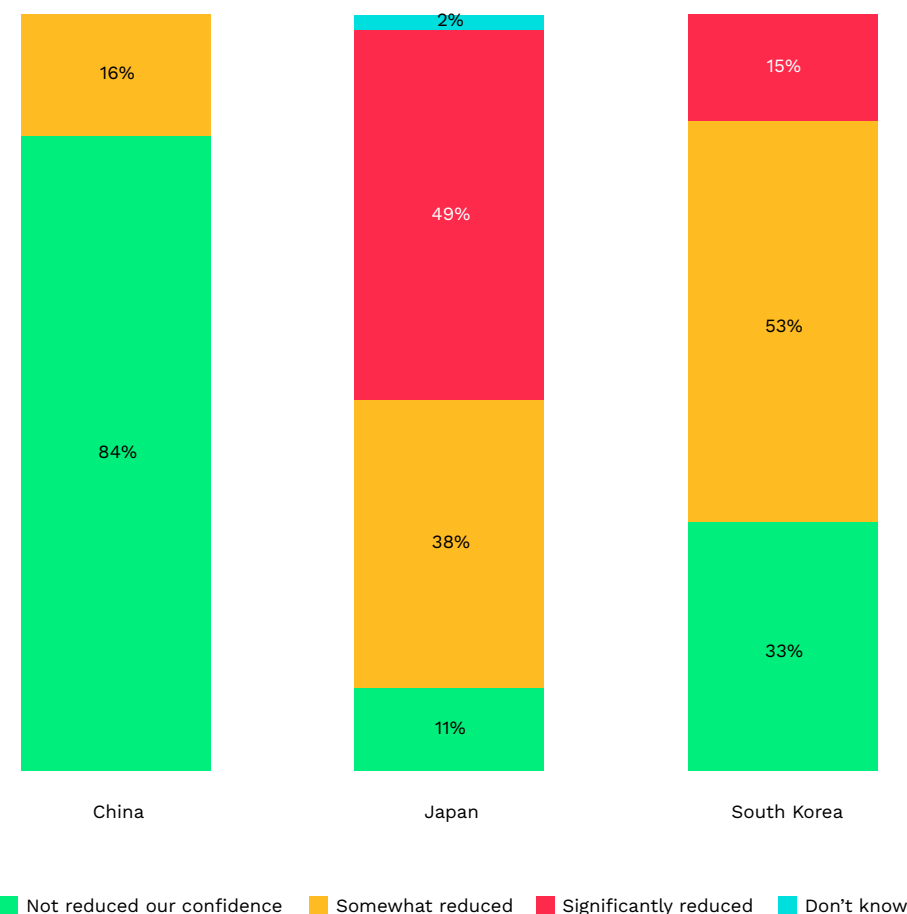
## Clients in China are significantly more confident about the macroeconomic situation than clients from Japan and South Korea

The vast majority (84%) of clients in China said that their confidence had not been reduced by macroeconomic tensions, compared to only 33% of clients in South Korea and 11% in Japan. Our interviews with consulting leaders in the region suggest that confidence in China is linked to government reliance, with clients often feeling assured that the government will support them if there are significant market difficulties.

Across our Market Trends programme, our research tends to find that it is clients at the extremes of confidence levels that spend the most on external support. However, this doesn't seem to be the case for China, where despite high confidence, consulting market growth is expected to be relatively slow, at around 2%.

**Figure 8**

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



## All clients are increasing their spending in digital technology and plan to continue doing so

Clients across East Asia have been increasing their spending on digital technology over the last year, and this trend shows no sign of abating over the next 18 months. Clients expressed an interest in spending even more in future: While 22% said they considerably increased their digital spend last year, 27% plan on significantly increasing investment in the next 18 months.

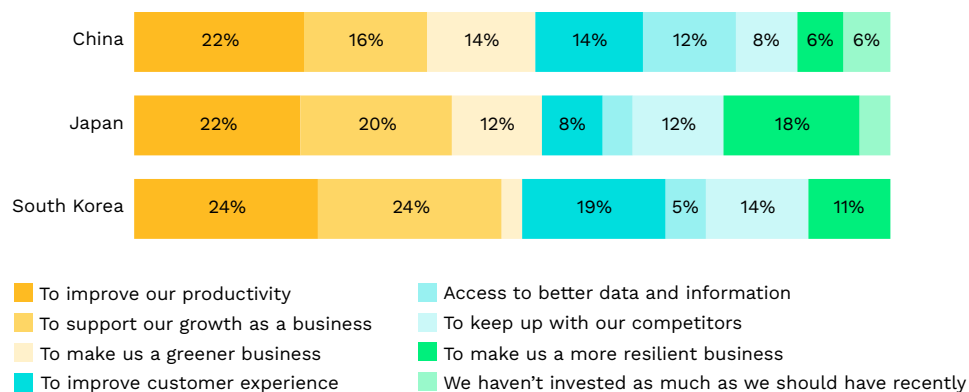
When we asked clients why they were increasing their spending, the two primary reasons for clients in all three countries were improving productivity and supporting growth as a business. Beyond that, the picture is more complicated.

Customer experience was the next main motivator for clients in China (14%) and South Korea (19%) to increase their digital technology investment. Digital technology can help automate early parts of customer service experiences, allowing businesses to triage their customers and utilise their customer service resources more efficiently.

Clients in Japan, however, were more focused on business resilience, with 18% of clients giving this as the main reason for increased investment (after productivity and growth). Clients in Japan likely feel that their technology capabilities are lagging, and they need to invest in digital transformation to shore up their businesses.

**Figure 17**

What is the main reason for the increased investment in digital technology in the next 18 months?

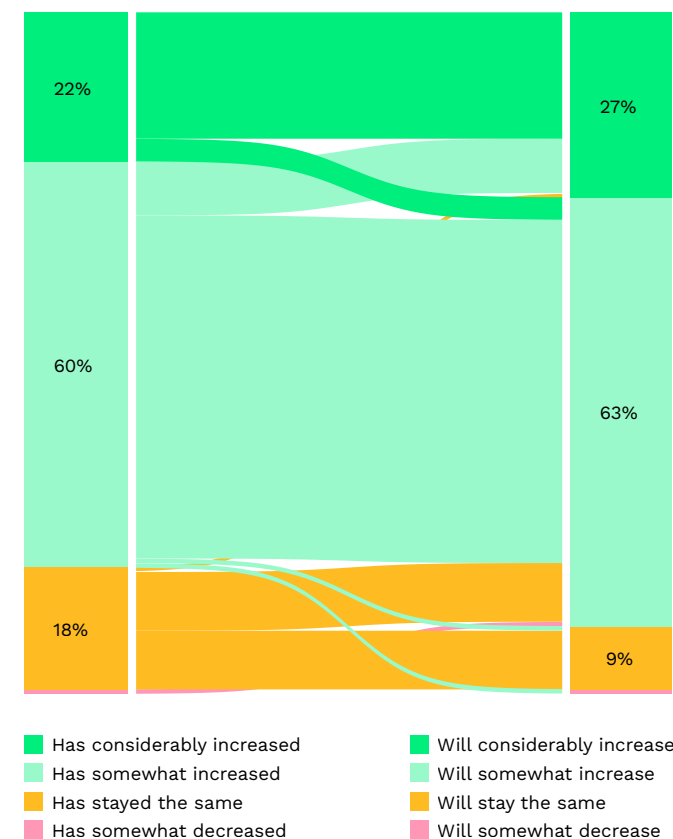


**Figure 16**

How clients' spending on digital technology has changed in the last year compared to their expectations in the next 18 months

How has your organisation's investment in digital technology changed in the last year?

How do you expect your organisation's investment in digital technology to change in the next 18 months?



Firms can tailor their offerings when it comes to digital technology depending on the country they are operating in, but it is important not to lose track of the fact that clients primarily want productivity improvements and growth, and other spending areas will likely be secondary.

## Clients are not finding it hard to recruit talent with the skills they need most, namely technology and business strategy

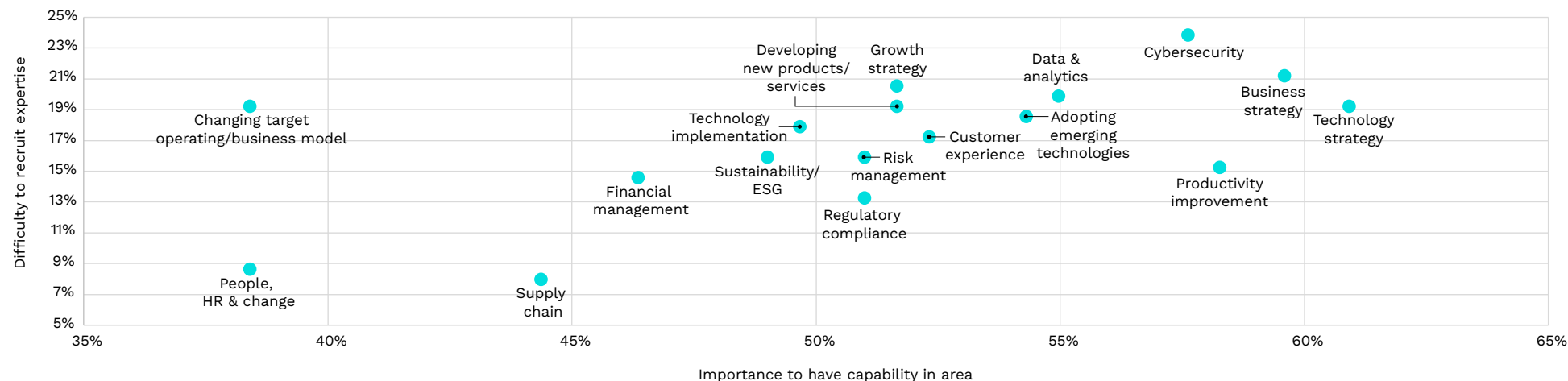
Clients in East Asia know that they will need strategy capabilities in their workforce. Around 60% of clients mentioned a need for employees experienced in business and technology strategy in their workforce. In addition, 60% of clients in Japan mentioned that growth strategy was an important area for them to have capability in.

Critically, only around 20% of clients were finding it hard to recruit in these areas. Firms can obviously pitch work towards businesses who are struggling to recruit in such areas but shouldn't expect to see many of these clients.

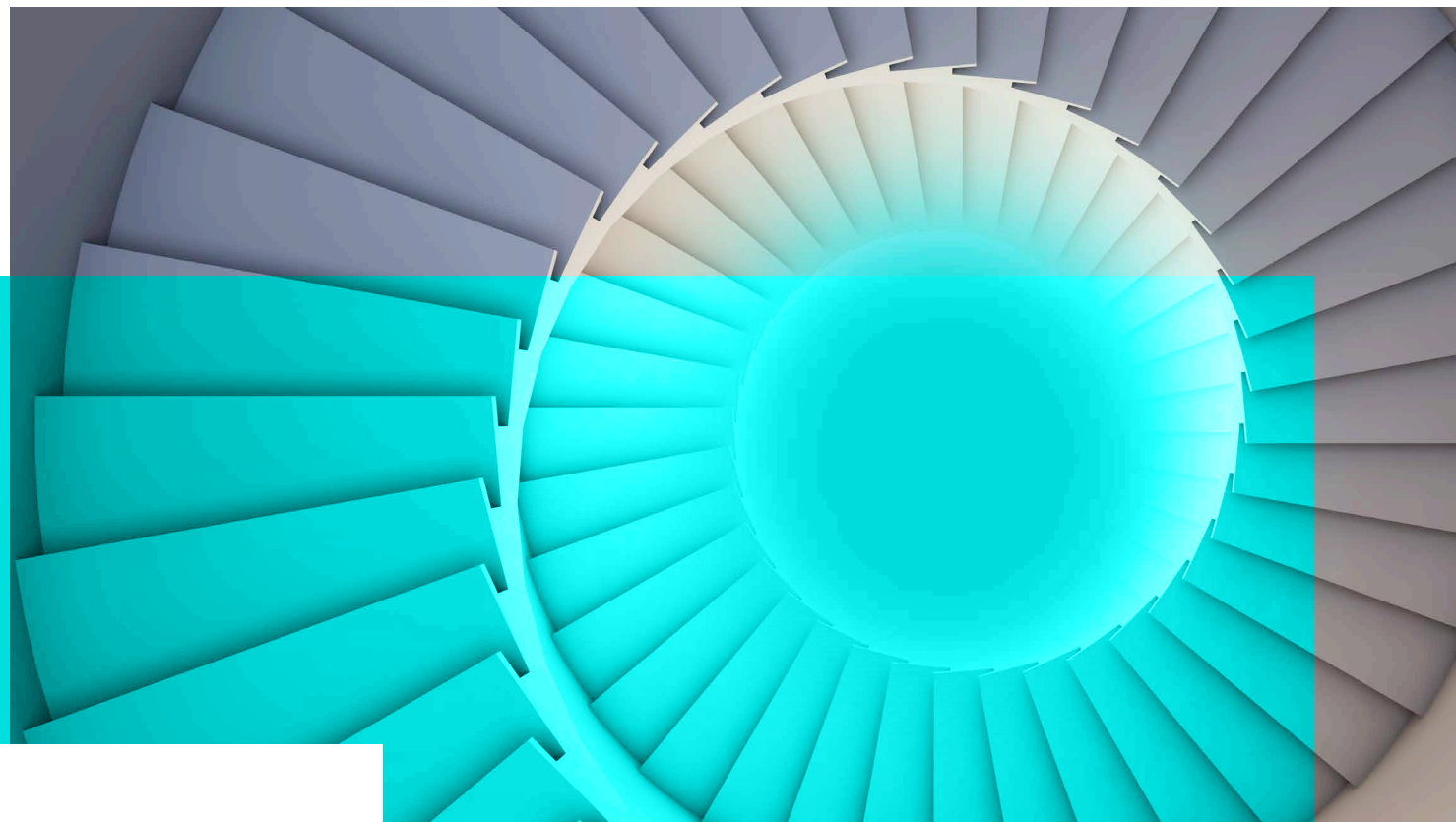
It is worth flagging that despite the introduction of tariffs on Asian economies by the US administration, this hasn't produced significant demand for new supply chain expertise yet. Only 44% of clients across East Asia felt that talent experienced in the complexities of supply chain restructuring is important, a figure much lower than most other skills areas we asked about, and only a small portion of clients felt that such expertise is difficult to find. Firms should deliberate carefully on an approach centred around helping clients manage new tariffs.

**Figure 25**

Difficulty to recruit skills compared to importance of having capability in these areas







**“Transformation in particular is a very hot topic. Clients have too many issues to take care of to do it all internally.”**

Masaki Yasui, PwC

## Implications for firms

Around half of clients across East Asia are looking to use more consulting services over the next year ..... 34

Clients are increasingly relying on firms to provide growth and business strategy and cybersecurity support, while moving regulatory work in-house .....36

Over half of clients expect prices to increase, and only around a tenth of clients expect prices to go down ..... 37

## 5



## Insights from consultants

**“Our role as consultants remains crucial in adding value, so many management discussions are centered around how we can effectively integrate AI into our processes.”**

**Takuya Iwasaki, KPMG Japan**

<b>Robert Hah, Managing Director &amp; Greater China Lead, Strategy &amp; Consulting, Accenture .....</b>	<b>39</b>
<b>Takuya Iwasaki, Partner, KPMG Japan.....</b>	<b>40</b>
<b>Xuong Liu, Managing Director &amp; Asia Practice Co-Lead – Global Transaction Advisory Group, Alvarez &amp; Marsal.....</b>	<b>41</b>
<b>Gwang Rim Yi, Korea Consulting Markets &amp; Technology Platform Leader, EY.....</b>	<b>42</b>
<b>Michael Teubenbacher, CEO, CPC .....</b>	<b>43</b>
<b>Masaki Yasui, CEO, PwC Consulting LLC.....</b>	<b>44</b>
<b>James Zheng, Head of Consulting, Partner, KPMG China.....</b>	<b>45</b>

6

**“There’s an evolution in consulting:  
It’s becoming important to not  
just advise but to execute and  
show value.”**

Robert Hah, Accenture

## About this report

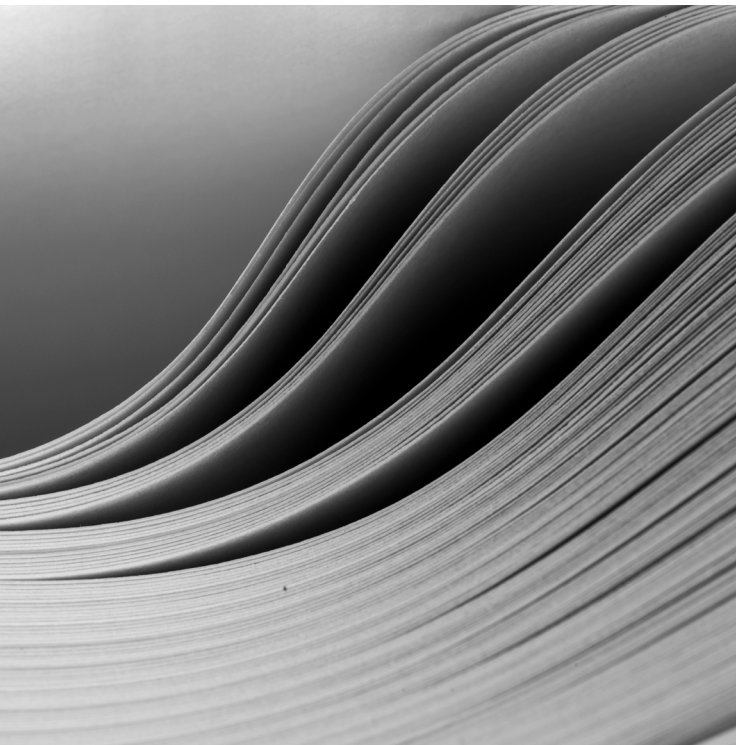
Our approach to gathering data.....	47
Methodology—The MegaModel.....	47
Who did we speak to .....	48
Definitions of sectors and services.....	49
Contributors .....	51
Meet the expert.....	52
About us.....	53
Publication schedule for 2025 .....	54



# 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 US dollars.

US dollar to British pound US\$1 = £0.78

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 East Asia are affecting clients' organisations and their use of consulting. Our survey focuses on trends in East Asia, providing detailed insights into the nuances of the market. For this, we surveyed 151 senior clients of consulting firms from across East Asia, 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 2025 and the first half of 2026
- 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.

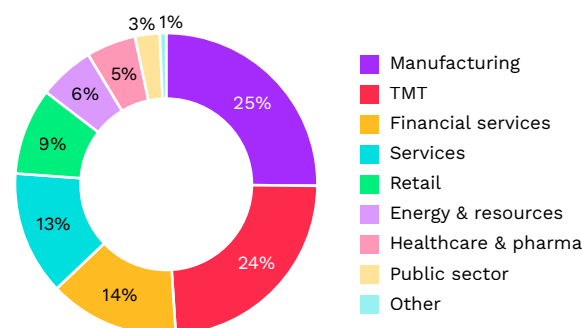
## Insights from consultants

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.

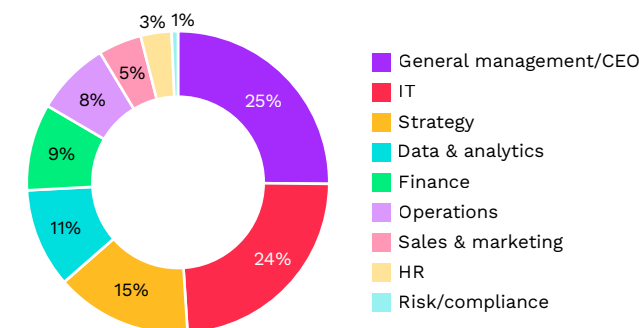
## In-depth desk research

We also conducted a thorough PEST analysis in East Asia 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.

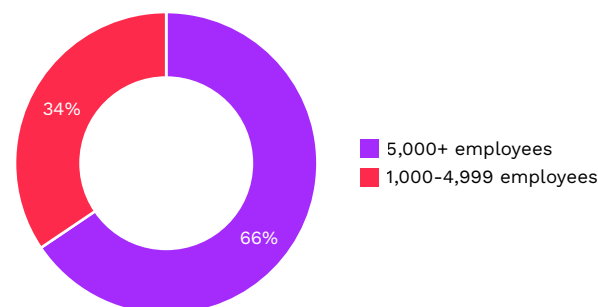
Respondents by sector



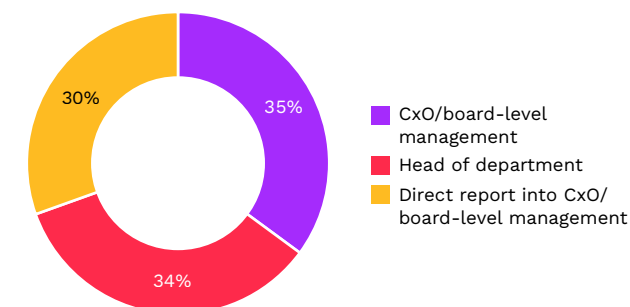
Respondents by function



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 & life sciences

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.

# Contributors

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

Name	Job title	Organisation
Robert Hah	Managing Director & Greater China Lead, Strategy & Consulting	Accenture
Takuya Iwasaki	Partner	KPMG Japan
Xuong Liu	Managing Director & Asia Practice Co-Lead – Global Transaction Advisory Group	Alvarez & Marsal
Gwang Rim Yi	Korea Consulting Markets & Technology Platform Leader	EY
Michael Teubenbacher	CEO	CPC
Masaki Yasui	CEO	PwC Consulting LLC
James Zheng	Head of Consulting, Partner	KPMG China

# Meet the expert

## Peter Curry

Peter is a Senior Research Analyst at Source. He is part of the Market Trends team, leveraging insights from his multidisciplinary background to help give people the information they need to make the right decisions. Before joining Source, he completed a Masters in Cognitive Neuroscience and worked as podcast producer across a wide variety of topics, including history and mental health.

### Peter Curry

✉ [peter.curry@sourceglobalresearch.com](mailto:peter.curry@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 3743 3934  
US +1 800 767 8058  
[info@sourceglobalresearch.com](mailto:info@sourceglobalresearch.com)  
[www.sourceglobalresearch.com](http://www.sourceglobalresearch.com)

© Source 2025

Source Information Services Ltd and its agents have used their best efforts in collecting the information published in this report. Source Information Services Ltd does not assume, and hereby disclaims, any liability for any loss or damage caused by errors or omissions in this report, whether such errors or omissions result from negligence, accident, or other causes.

# Publication schedule for 2025

2025		Market Trends Reports	Market Trends Briefings	Client Perceptions Studies	Emerging Trends Programme	White Space Reports	White Space Insights
Q1	January	Forecasts for 2025 UK US GCC France		UK US GCC France			Featured thought leadership (monthly) Quarterly webinar series
	February				ET1		
	March					Quality Ratings Report (QRR)	
Q2	April	Nordics DACH Australia East Asia South East Asia Africa	India South America	Germany Australia China Japan Retail Energy & Resources Financial Services Technology, Media & Telecoms	ET2		Featured thought leadership (monthly) Quarterly webinar series
	May						
	June				ET3	Client Perceptions of Thought Leadership	
Q3	July	Energy & Resources Financial Services Technology, Media & Telecoms Sustainability	Healthcare & Pharma	Risk Tax			Featured thought leadership (monthly) Quarterly webinar series
	August				ET4		
	September					Thought Leadership Innovation	
Q4	October	Tax Risk Technology Planning for Growth in 2026	Public Sector	Audit Technology	ET5		Featured thought leadership (monthly) Quarterly webinar series
	November						
	December				ET6	Hot Topic Report	