



Consulting Captains Survey 2016

- Insights from a survey among 150+ CEOs and Partners -



Consulting Captains Survey

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Consulting Captains Survey



The survey was completed by executives of 150+ consulting firms...

- Around 360 consulting firms were invited to participate
- Only 1 executive – CEO, Managing Partner or Partner – was invited per firm
- 156 executives took the time to fill in the survey



- The survey was held in the period between 14 to 20 November 2016

About the study:

The survey and report was conducted by Consultancy.nl, supported by the ROA

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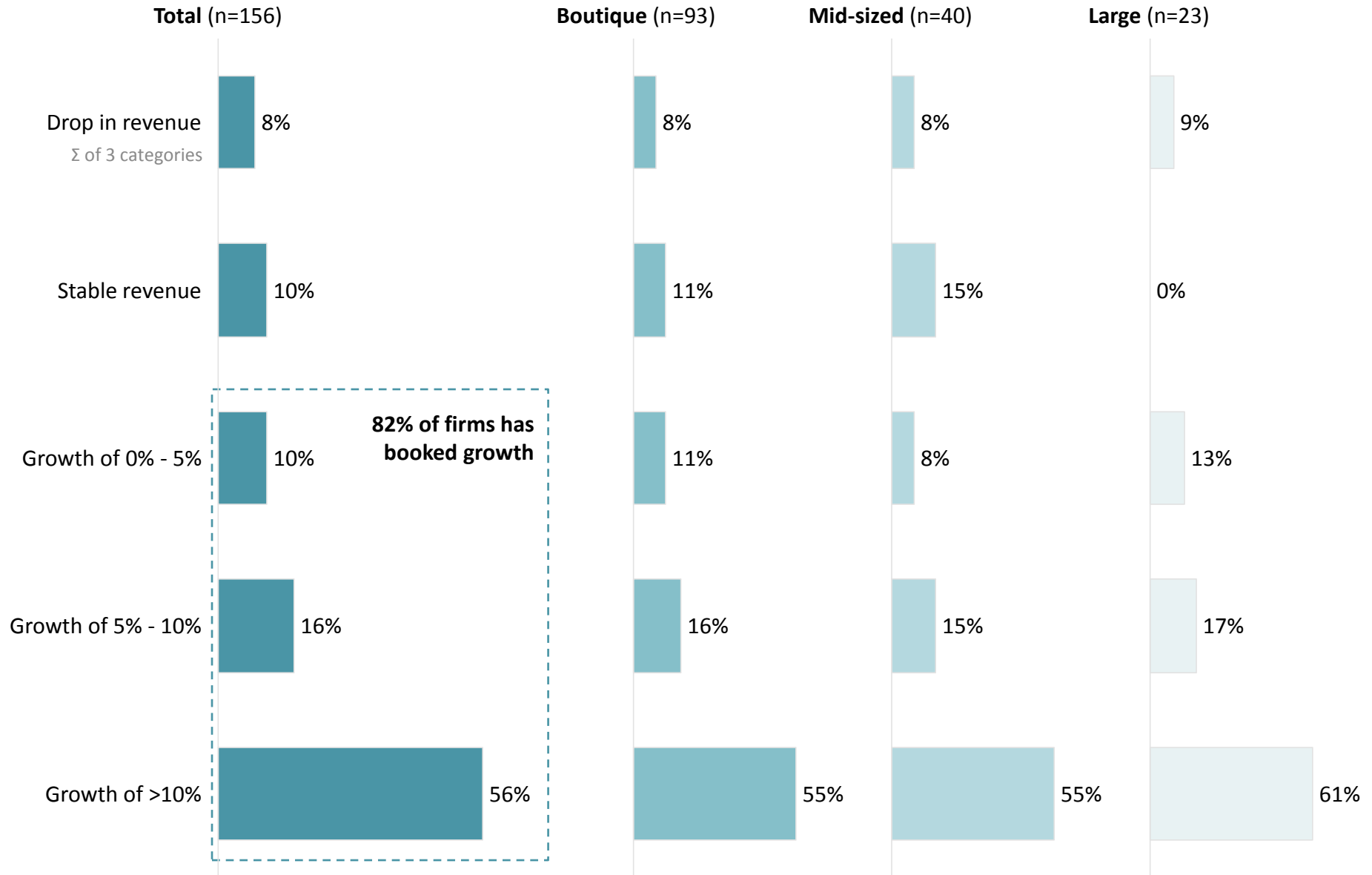
Supported by:



Revenue development

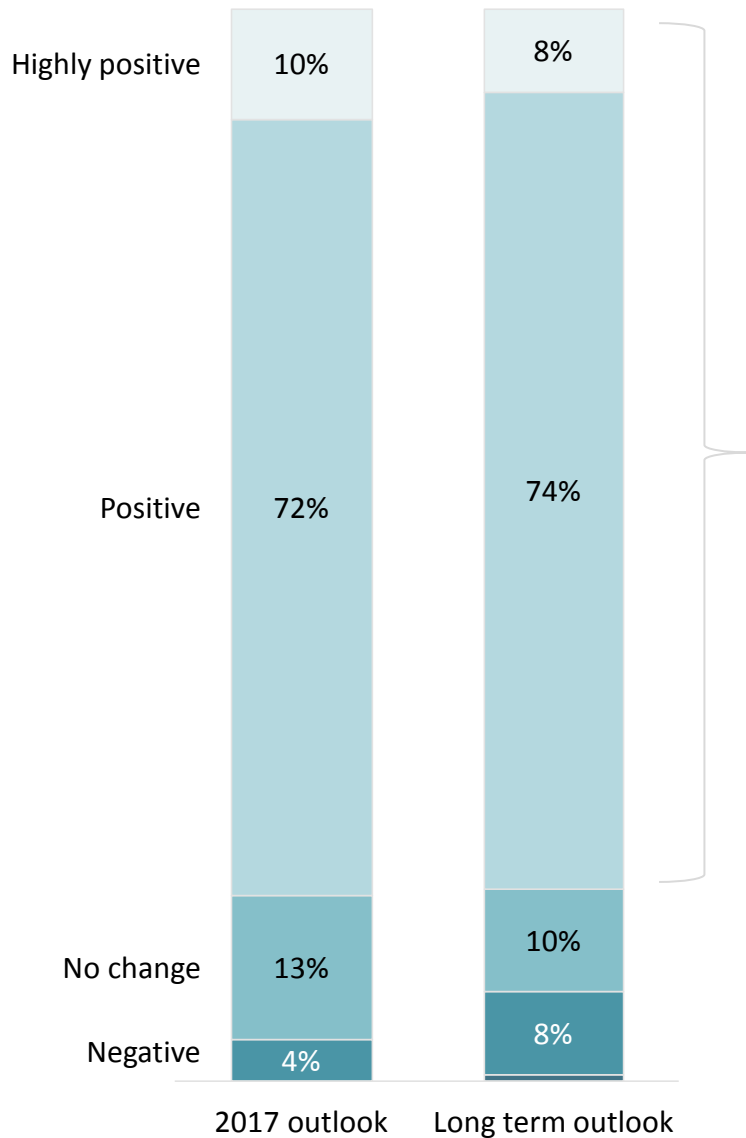


8 out of 10 firms booked growth over the past year, more than half markedly...

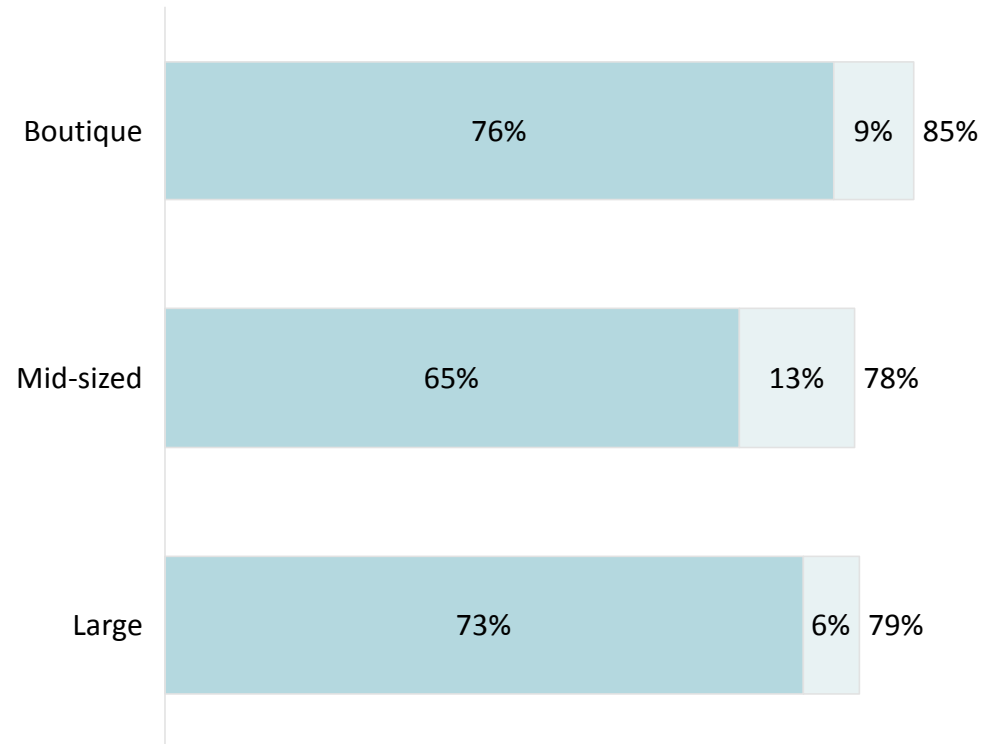


Market expectations

Sentiment among >80% of executives is positive, with little differences over time...



Boutiques are across the short and long term the most positive

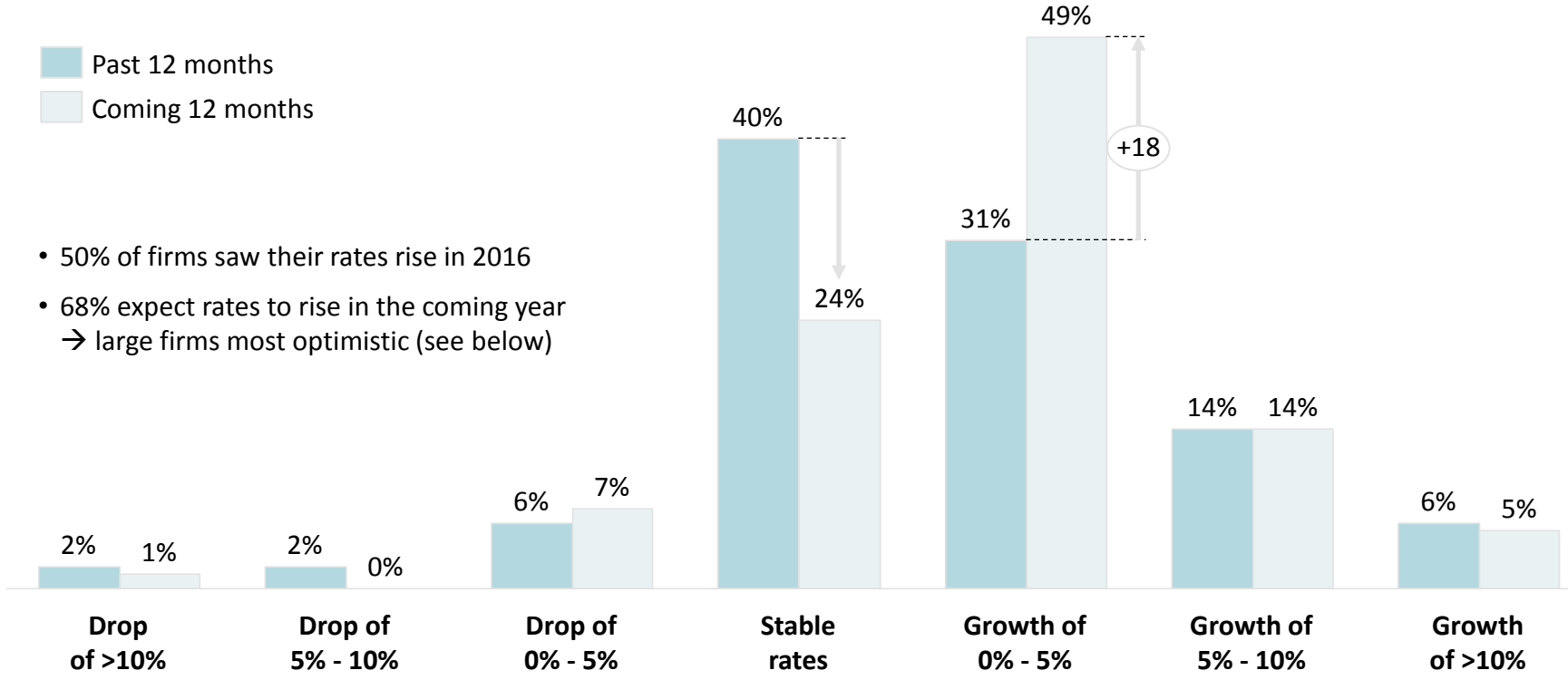


Results mirror other recent studies conducted on sentiment in the sector

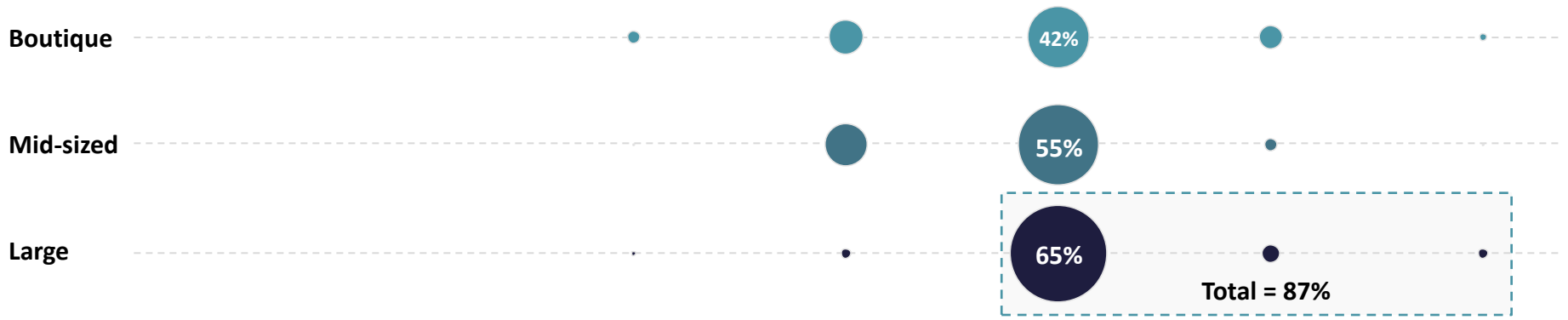
- Source Global Research
- Interim Management Index
- Rotterdam School of Management + Amsterdam Business School

Consulting fees

7 out of 10 executives believe that hourly rates will rise, large firms most optimistic...

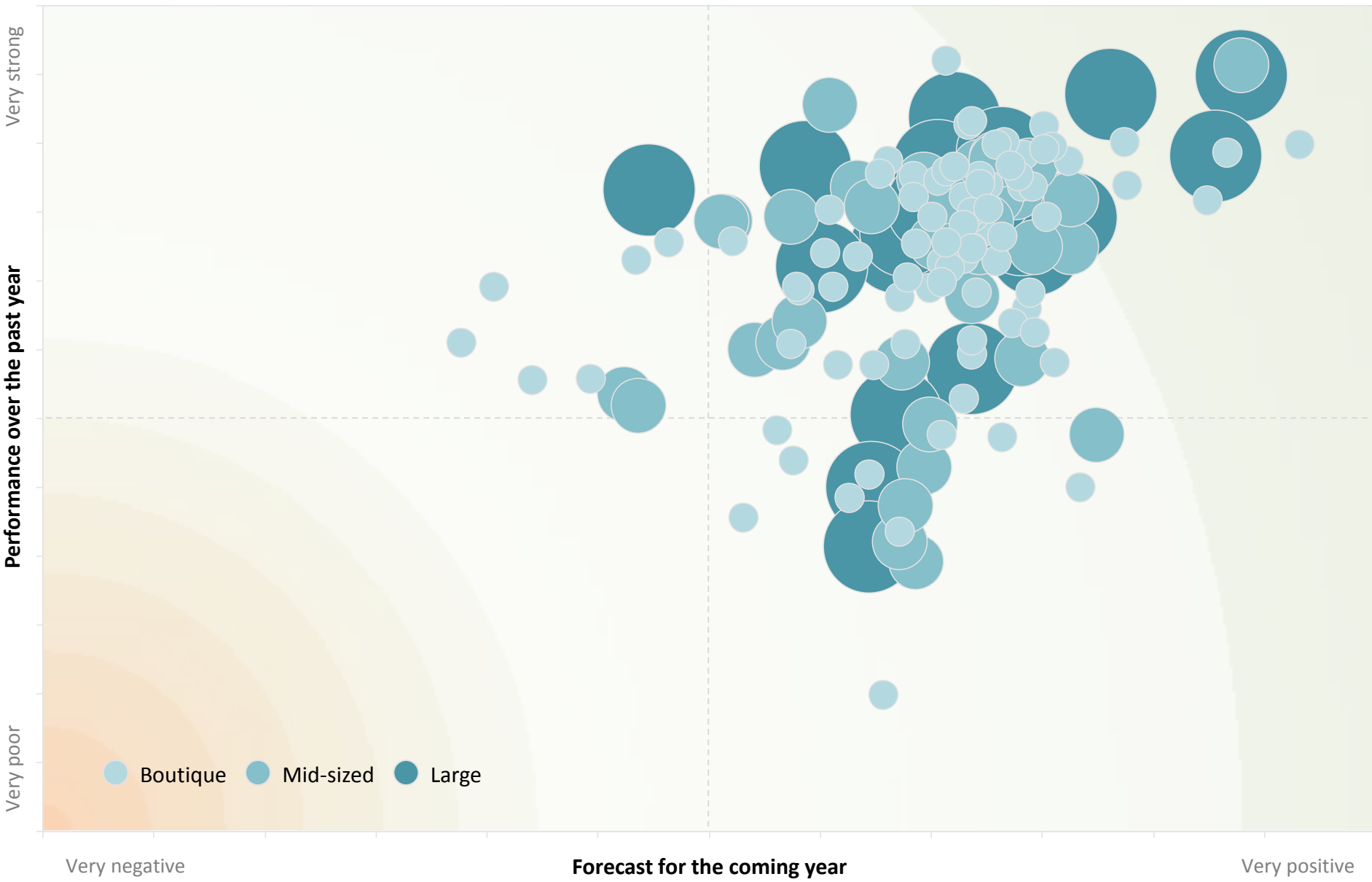


- 50% of firms saw their rates rise in 2016
- 68% expect rates to rise in the coming year
→ large firms most optimistic (see below)



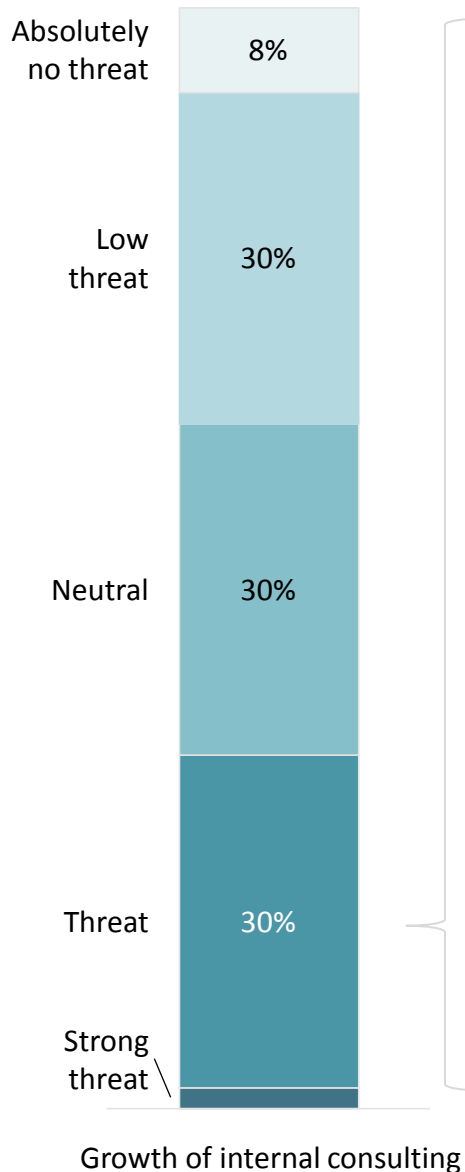
Last year + coming year

The picture is rosy: firms are concentrated in the most positive quadrant...

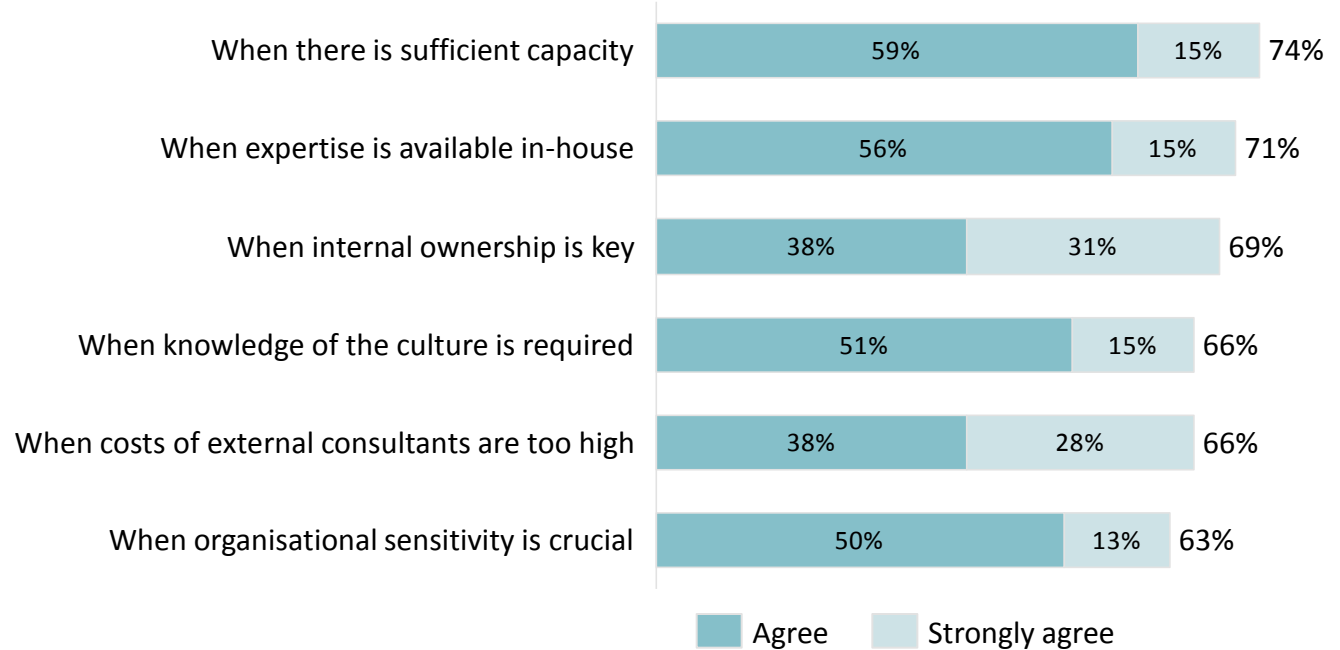


Changing landscape

Growth of internal consulting teams seen as largest threat to consultancy landscape...



What are the main reasons for organisations to use internal consulting teams?



Indications from the other side of table may place the threat in a different perspective:



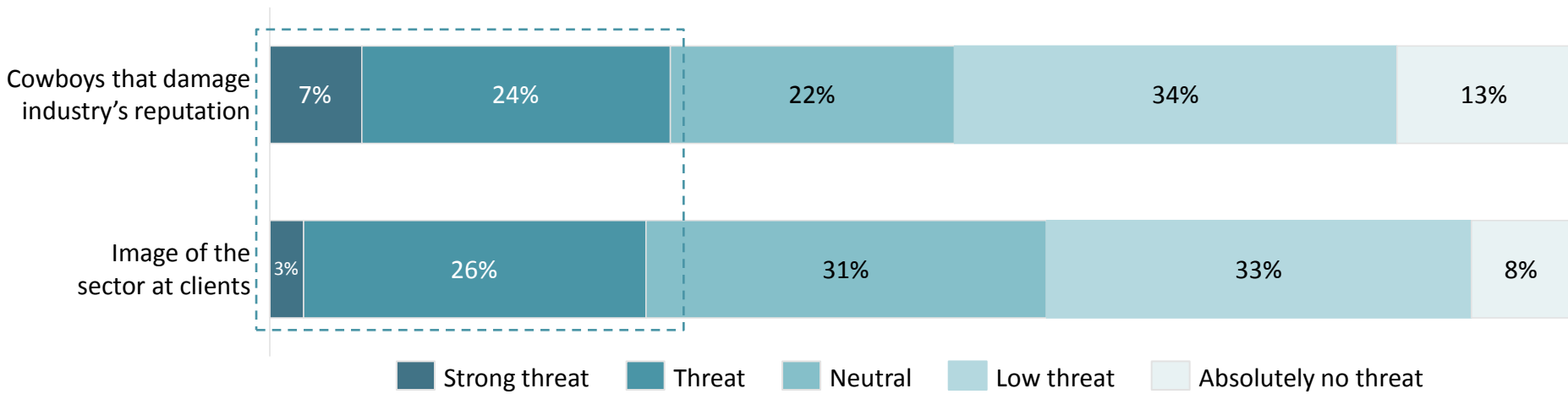
Focus is more on optimisation on resources, growing quality and internal knowledge

Changing landscape

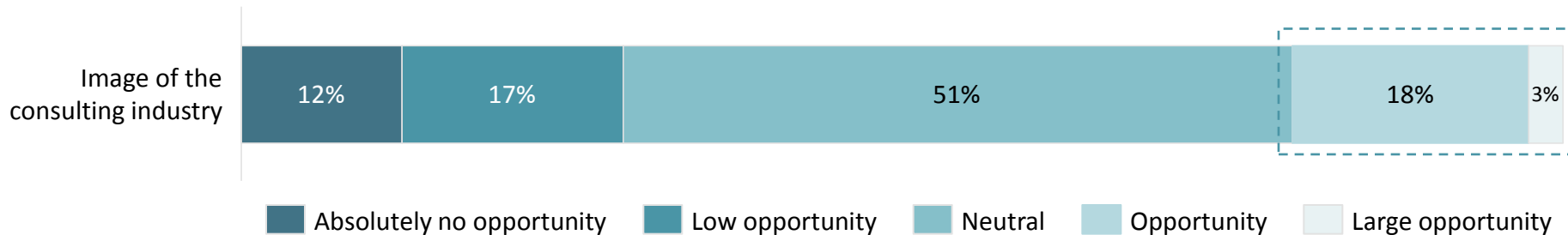


Image of the industry and reputation damage are second most cited threat ...

- Nearly a third of executives from all types of firms generally agree that image and reputation are serious threats

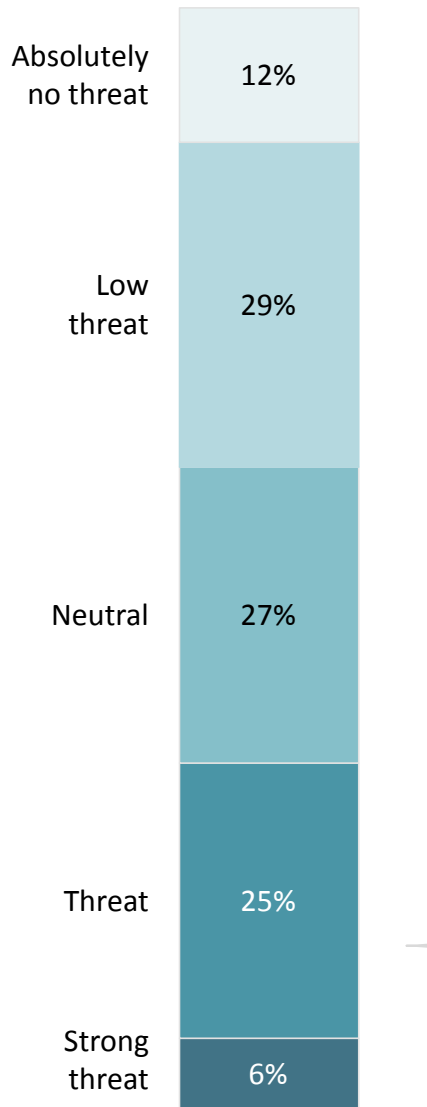


- Yet at the same time they also, roughly evenly across firm type, agree that image is not a large opportunity
- Only 21% rank the consulting industry's image as an opportunity, the lowest score of the 10 dimensions surveyed



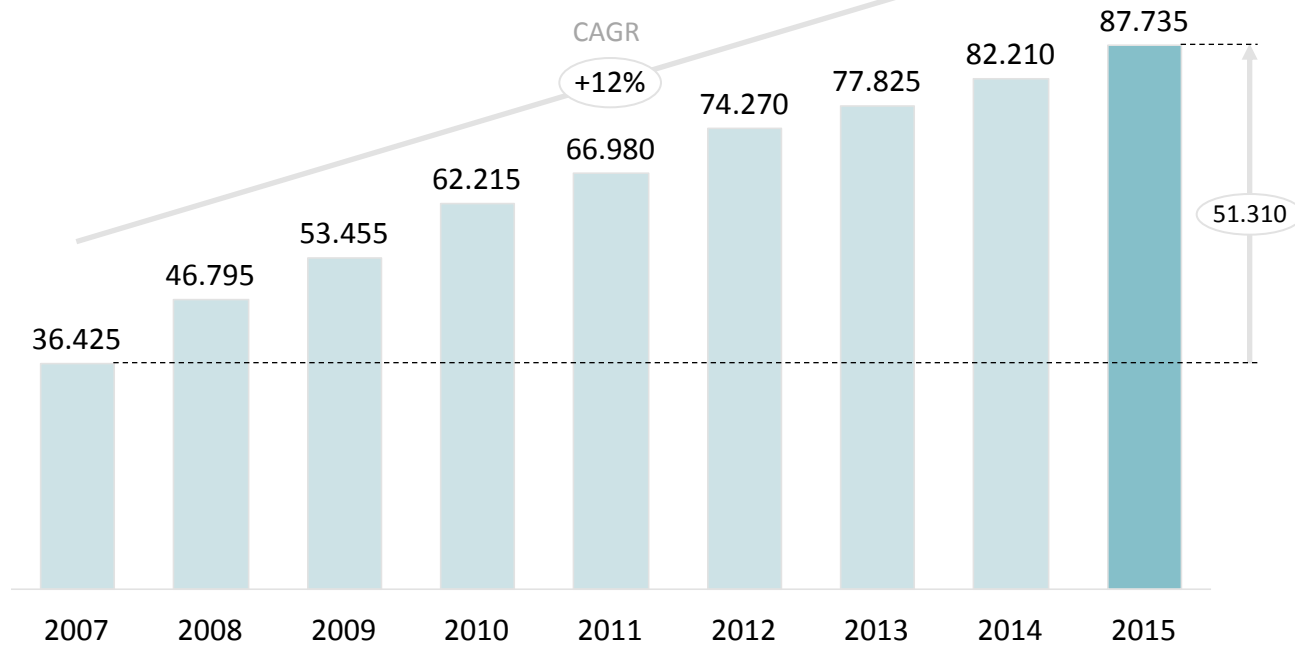
Changing landscape

Gig economy: 1 out of 3 executives see freelancers as a risk for consulting firms...



Rise of freelancers

In part the result of the spectacular growth of the number of freelancers...
+ a range of other factors



So who are more worried about the gig economy?

- Boutiques more concerned; large firms less worried
- Firms that perform below the average in fee growth feel more threatened by freelancers
- There too is a (slight) pattern with revenues: better performing firms are less concerned

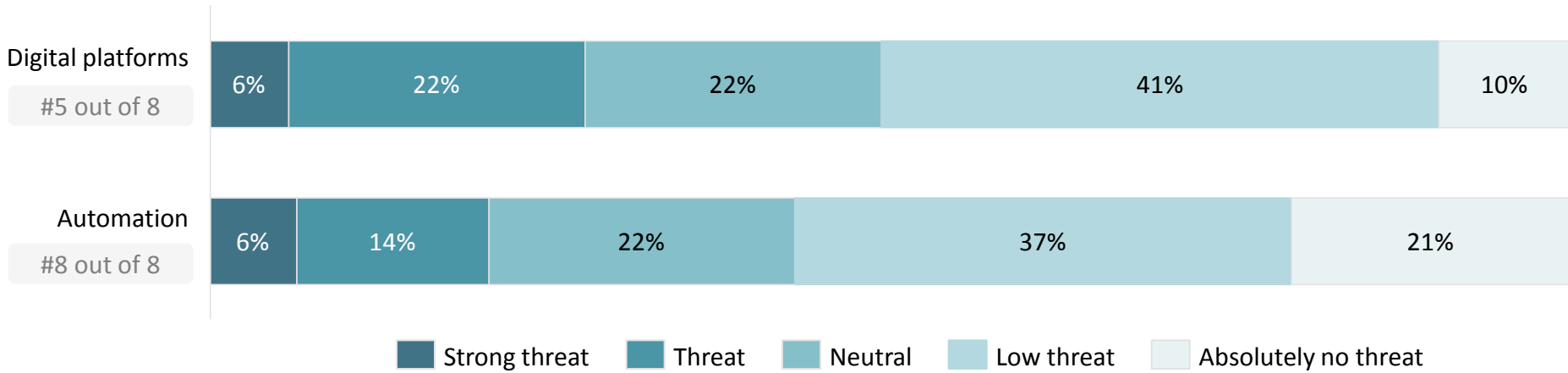
However, at the same time, 57% see working with freelancers as an opportunity

Changing landscape

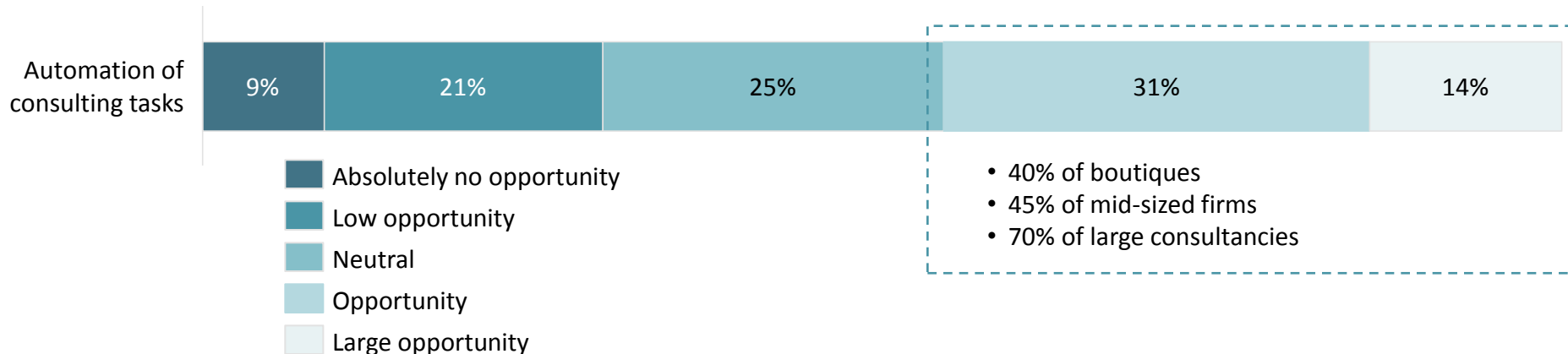


Automation is perceived as a relatively low threat, embrace it to unlock value...

- The disruption is evident: digital is reshaping business models and labour market across sectors
- Despite the 'threats', executives surveyed rate digital and automation among the lowest fears...



- Instead, nearly half of the executives (45%) state that digitisation of consultancy tasks is an opportunity



Changing landscape

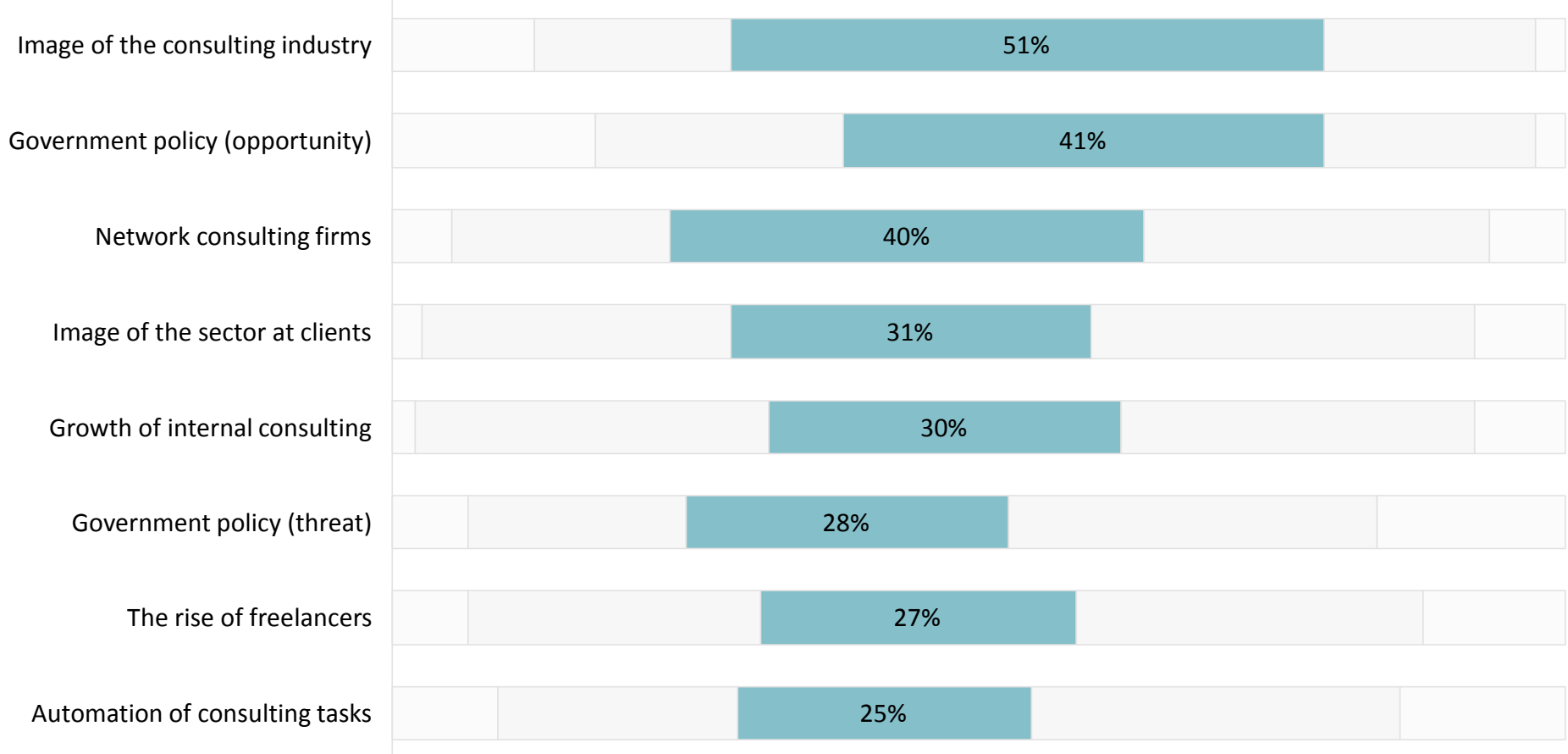


The ambiguity of the unknown...

- The relatively high share of ambiguity in responses is noteworthy
- On average, more than a quarter (26%) of the executives are 'neutral' to threats and/or opportunities raised

Top eight statements with the highest degree of ambiguity:

Neutral



Priorities for 2017



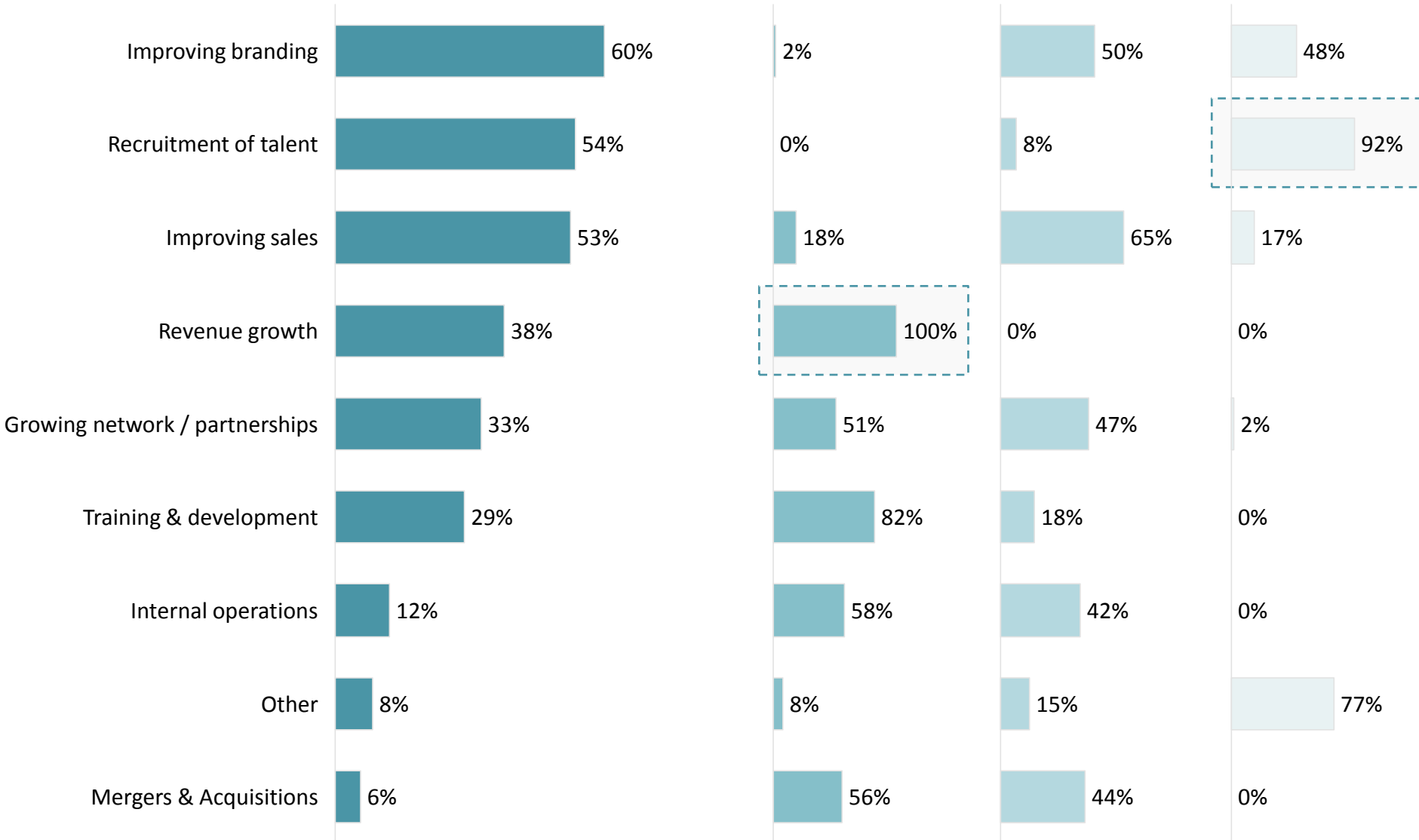
Branding and talent are overall the top priorities, but preferences differ widely...

Top priorities

1st choice

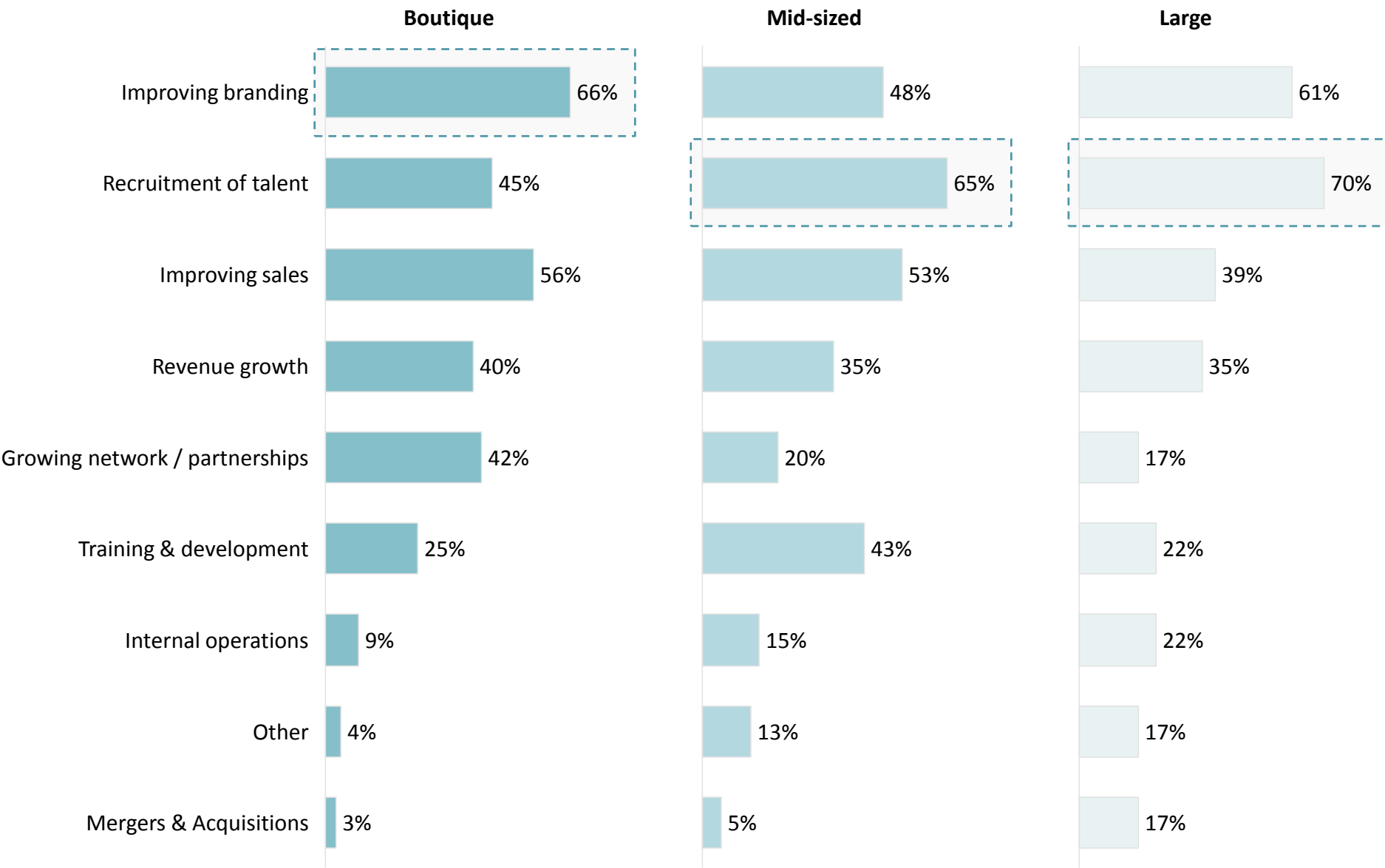
2nd choice

3rd choice



Priorities for 2017

Next year's priorities differ across types of consulting firms...

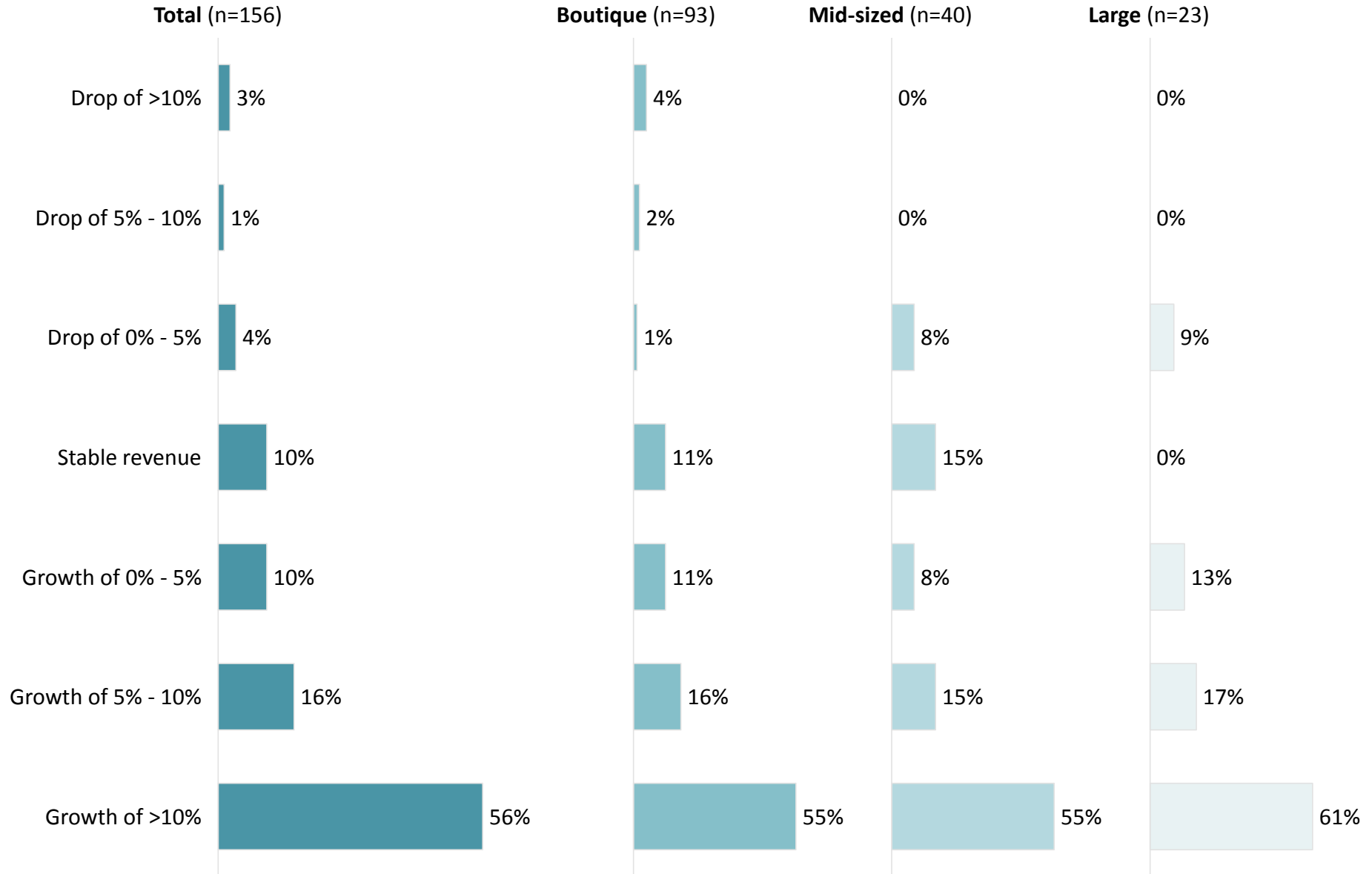


– Appendix –

Revenue development



8 out of 10 firms booked growth over the past year, more than half markedly...

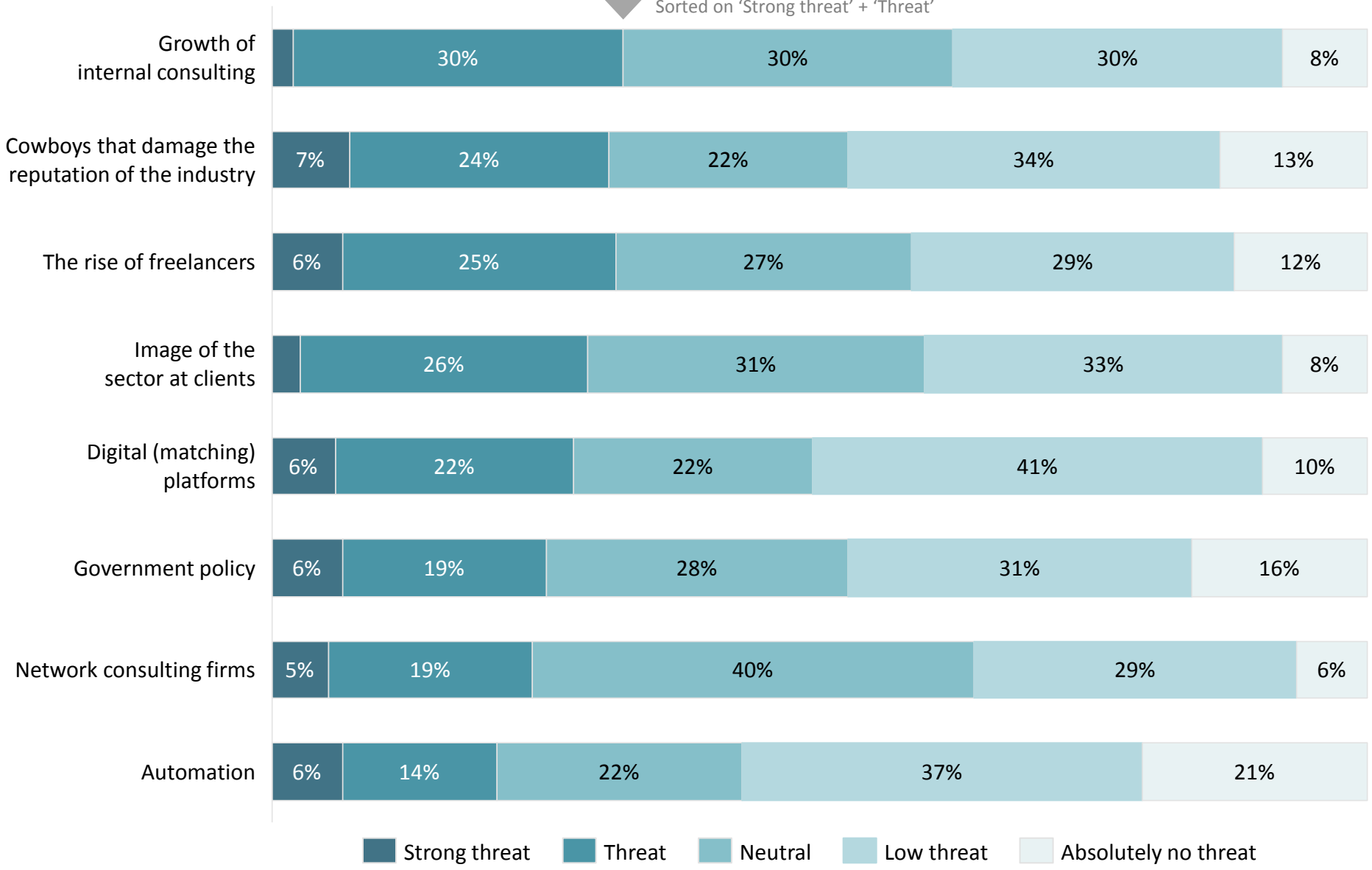


Main threats

Internal consulting, cowboys and freelancers seen as main threats in landscape...

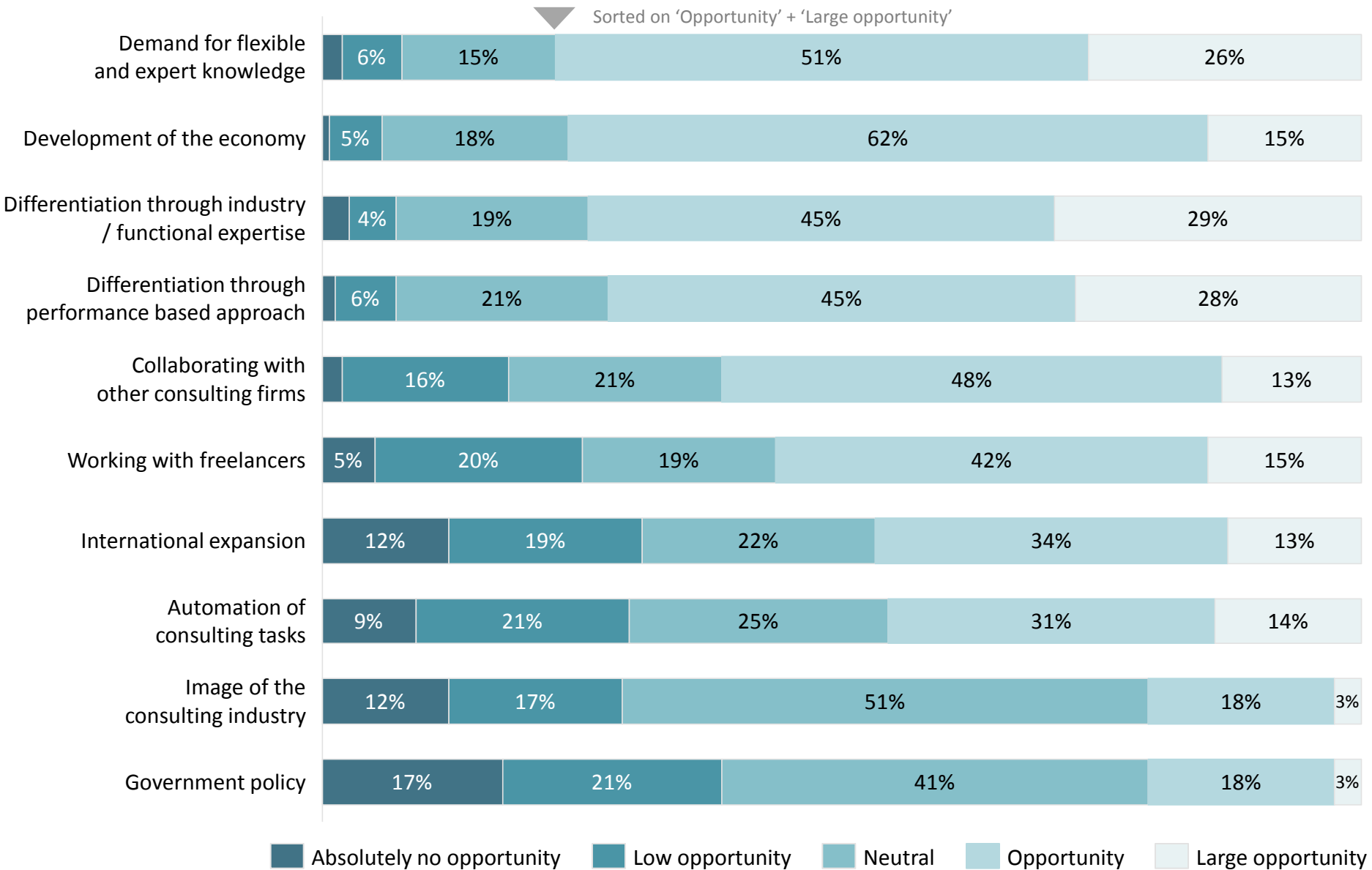


Sorted on 'Strong threat' + 'Threat'



Main opportunities

Economic factors, differentiation and collaboration are top opportunities...

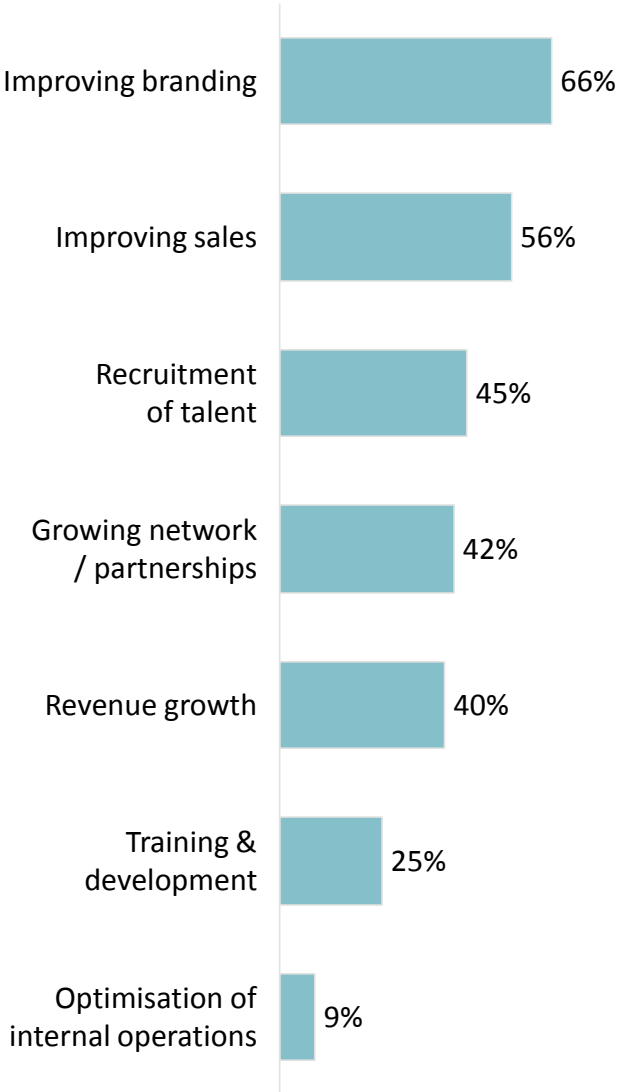


Priorities for 2017

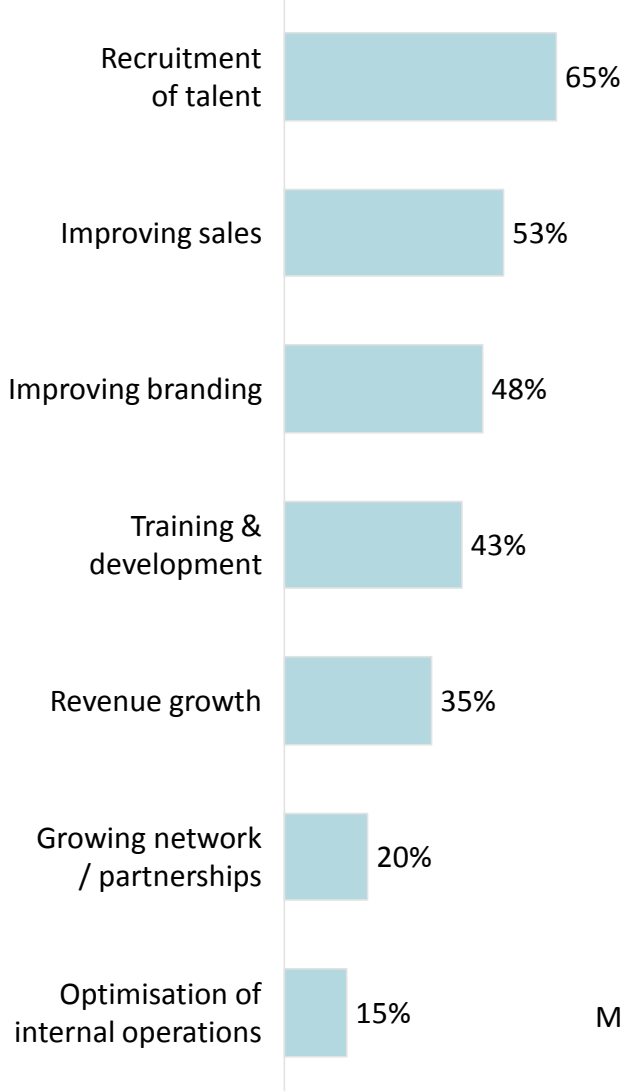
Firm size has an impact on priorities...



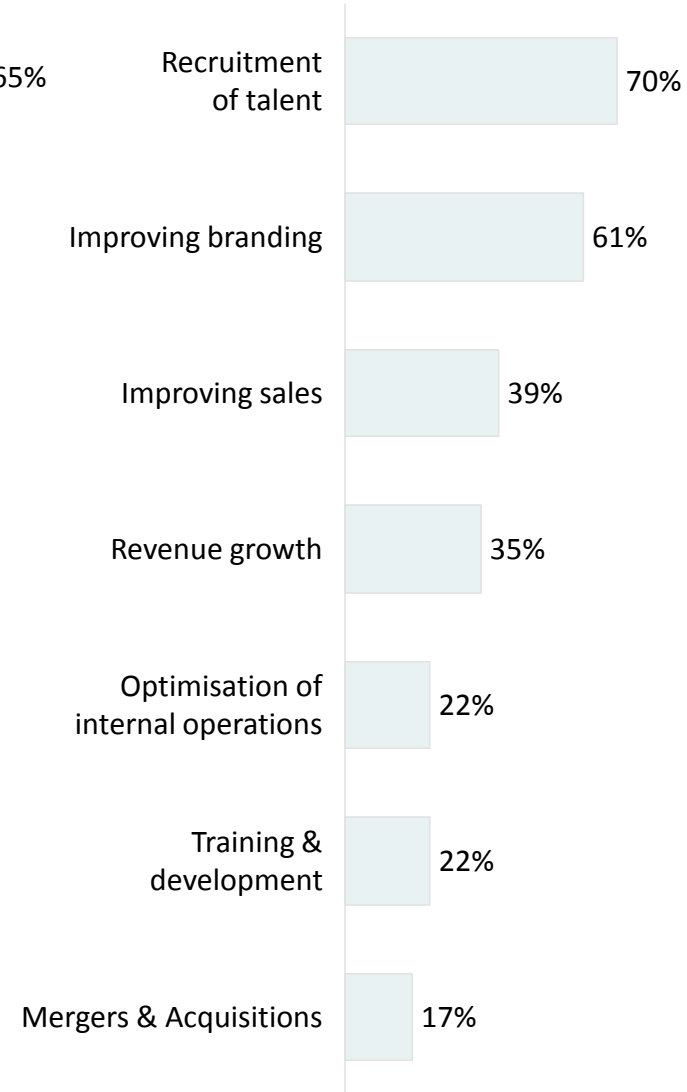
Boutique (n=93)



Mid-sized (n=40)



Large (n=23)



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Businessmodellen in consultingsector gaan flink op de schop



McKinsey: 130.000 banen in retail verdwijnen door IT en concurrentie



Rijksoverheid kiest zeven bureaus voor organisatieadvieswerk



EY neemt OC&C Strategy Consultants Benelux over



Benchmarkonderzoek naar salarissen in consultancy van start



De 10 belangrijkste M&A adviseurs en advocaten van dit jaar



Interview met Haseena Khodadin, Senior Consultant bij EY FAAS FSO



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