September 2014

Perceptions of consulting in Germany

Introduction

Section 1:
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Section 2:
Quality of service

Section 3:
Characteristics of consulting firms

Section 4:
Price and value

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Interactions with consulting firms

Section 6:
Comparing direct and indirect clients

Section 7:
Perceptions of individual firms

About this report

The aim of this report is to analyse:

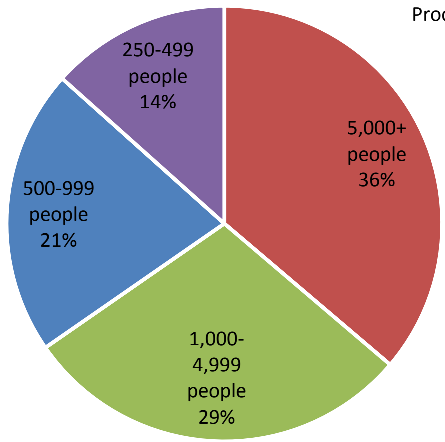
- How senior users of consulting services in Germany view consulting firms.
- Why these executives think what they think and how consulting firms can therefore most effectively influence them. The report is divided into seven sections:
- Sections 2 – 4 seek to understand what people think about consulting firms from three different perspectives: the quality of service they provide (Section 2), the characteristics and behaviours they exhibit (Section 3) and the value they add mapped against the fees they charge (Section 4).
- Sections 5 and 6 analyse the factors which drive these perceptions: Section 5 looks at how people interact with consulting firms and how these interactions influence their thinking; Section 6 looks at how perceptions change as prospects become clients.
- The final section (Section 7) looks at how perceptions vary from firm to firm.

What do executives think?	Why do they think this?	What do they think about your firm?
Section 2: Quality of service	Section 5: Interactions with consulting firms	Section 7: Perceptions of individual firms
Section 3: Characteristics of consulting firms	Section 6: Comparing direct clients with indirect clients	
Section 4: Price and value		

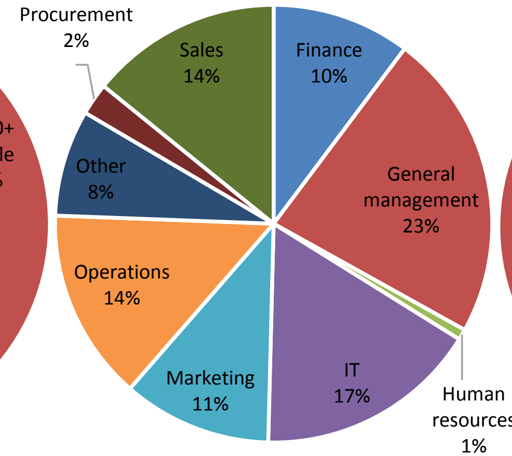
Methodology: our sample and approach

- We surveyed 127 executives in Germany in November and December 2013, all of whom had been responsible for buying substantial volumes of consulting services in the last year.
- Each respondent was asked to provide feedback on three consulting firms, giving us 381 data points in total.
- 42% came from back office functions (operations, finance, IT and HR) while 58% came from front office ones (general management, strategy, marketing and sales)
- The split between direct and indirect clients (a distinction we talk about in the report and discuss in detail in Section 6) was pretty even, too, with only slightly more indirect clients than direct ones.
- Respondents were split across a wide range of sectors, though about two-thirds (65%) came from organisations with more than 1,000 people.

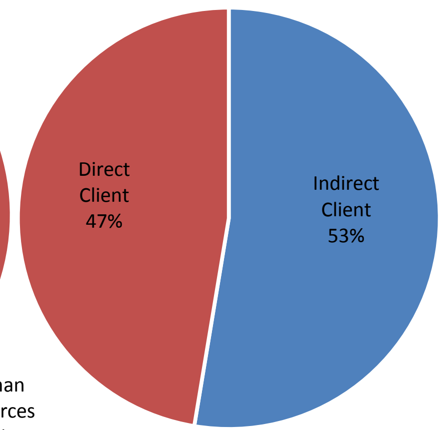
Breakdown of survey sample



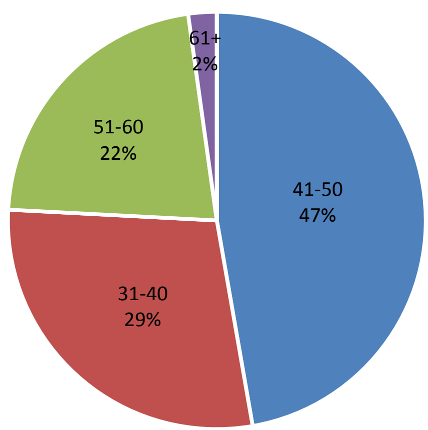
... by size of organisation



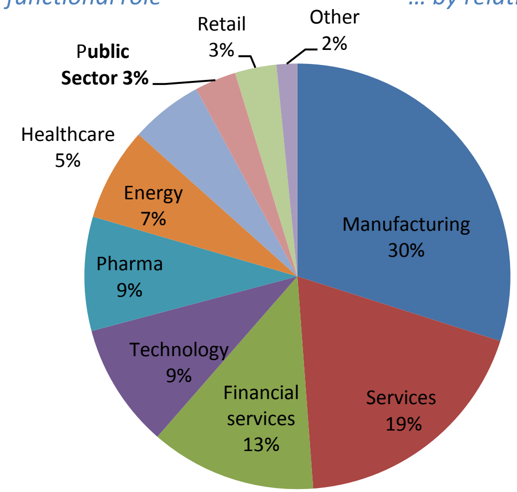
... by functional role



... by relationship



... by age



... by sector

Methodology: segmenting the industry

We asked respondents to rate firms they'd selected, one by one.

To prevent responses being spread over a very large number of firms, respondents were provided with a list of Tier One firms from which they could choose. To look at wider trends, we then aggregated all these responses by segment (see right).

Section 7 of this report summarises the detailed feedback at an individual firm level. However, some firms have been excluded because we didn't have sufficient data for our in depth analysis. Some of those are, however, talked about at a higher level in Section 2.

Firm	Segment	
A.T. Kearney	Strategy	
Accenture	Technology	
Aon Hewitt	HR	Insufficient data
Atos Consulting	Technology	Insufficient data
Bain	Strategy	
BCG	Strategy	
Booz & Company*	Strategy	
Capgemini Consulting	Technology	Insufficient data
Deloitte	Big Four	
EY	Big Four	
Hay Group	HR	Insufficient data
IBM	Technology	
KPMG	Big Four	
McKinsey	Strategy	
Mercer	HR	Insufficient data
Oliver Wyman	HR	Insufficient data
PwC	Big Four	
Roland Berger	Strategy	
TCS	Technology	Insufficient data
Towers Watson	HR	Insufficient data

*The research for this report was completed prior to the official announcement of the new name for Booz & Company (Strategy& - a PwC company)