

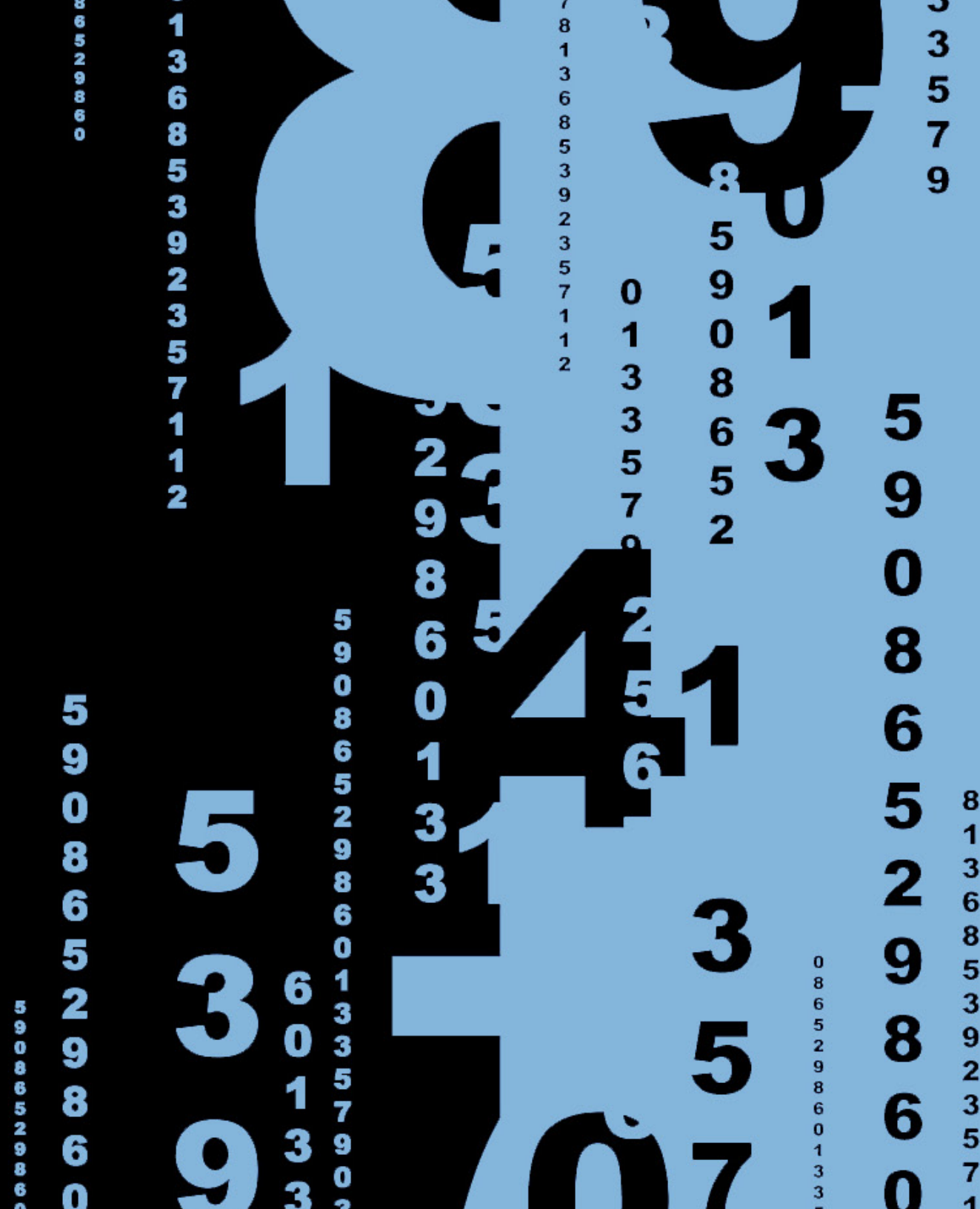
BY THE NUMBERS

AESC State of the Profession
Annual Report 2022

The 2021 Year in Review and
Member Outlook for the Year Ahead

By the Association of Executive Search & Leadership Consultants (AESC)

AESC Members-Only Insight





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About the Report

The age of the Great Reset and the Great Resignation has proven to be a fruitful yet demanding climate for the executive search and leadership consulting profession. In an environment of accelerated change on a global scale, 2021 was a year of intense demand for our profession's services. As a result, the profession experienced record growth. Heightened demand has continued into Q2 as companies invest in leaders, teams and culture for the post-COVID era.

2021 was the strongest year on record for executive search and leadership consulting. No other year, including those following right after the Great Recession, has had the same level of growth in the 30 years AESC has been tracking performance data for the profession. Part of that demand certainly stems from the fallout of COVID-19 which led to the Great Resignation, with many executives leaving the workforce altogether or embarking on entirely new ventures. But the greatest driver is a mass societal shift, a great, complex time of intense change which, perhaps accelerated by COVID-19, was already brewing before the global outbreak.

A powerful convergence of digital transformation, the drive for diversity equity and inclusion, and a new focus on ESG, combined with both a societal and organizational restructuring following the pandemic, means organizations are focused on driving change. They seek new, agile leaders who can constantly adapt and foster innovation for a new era of business. Fueled by a heightened awareness of talent retention amid the Great Resignation, they are investing more in teams and culture. Nearly all AESC members are now providing some form of leadership consulting services beyond executive search, all driven by client demand.

While current demand is strong and financially rewarding for most firms, with it comes new complexities. Talent both within and outside the profession is in short supply. Executive search

consultants are taking on more searches on average with shallower talent pools. Assignments are harder. Opportunities for leadership consulting continues to grow. Assessments have become more critical and succession planning is on the minds of CEOs and Boards.

Even with these new challenges, the profession has never been stronger nor the opportunities greater. The following annual report, our AESC State of the Executive Search and Leadership Consulting Profession study along with our AESC Member Outlook, provides insight into how our profession performed throughout 2021 and how our services continue to evolve to meet client demand. We look at the financial performance of the profession globally and across industries and geographies and share a forecast from our members around the world predicting trends for the year ahead.

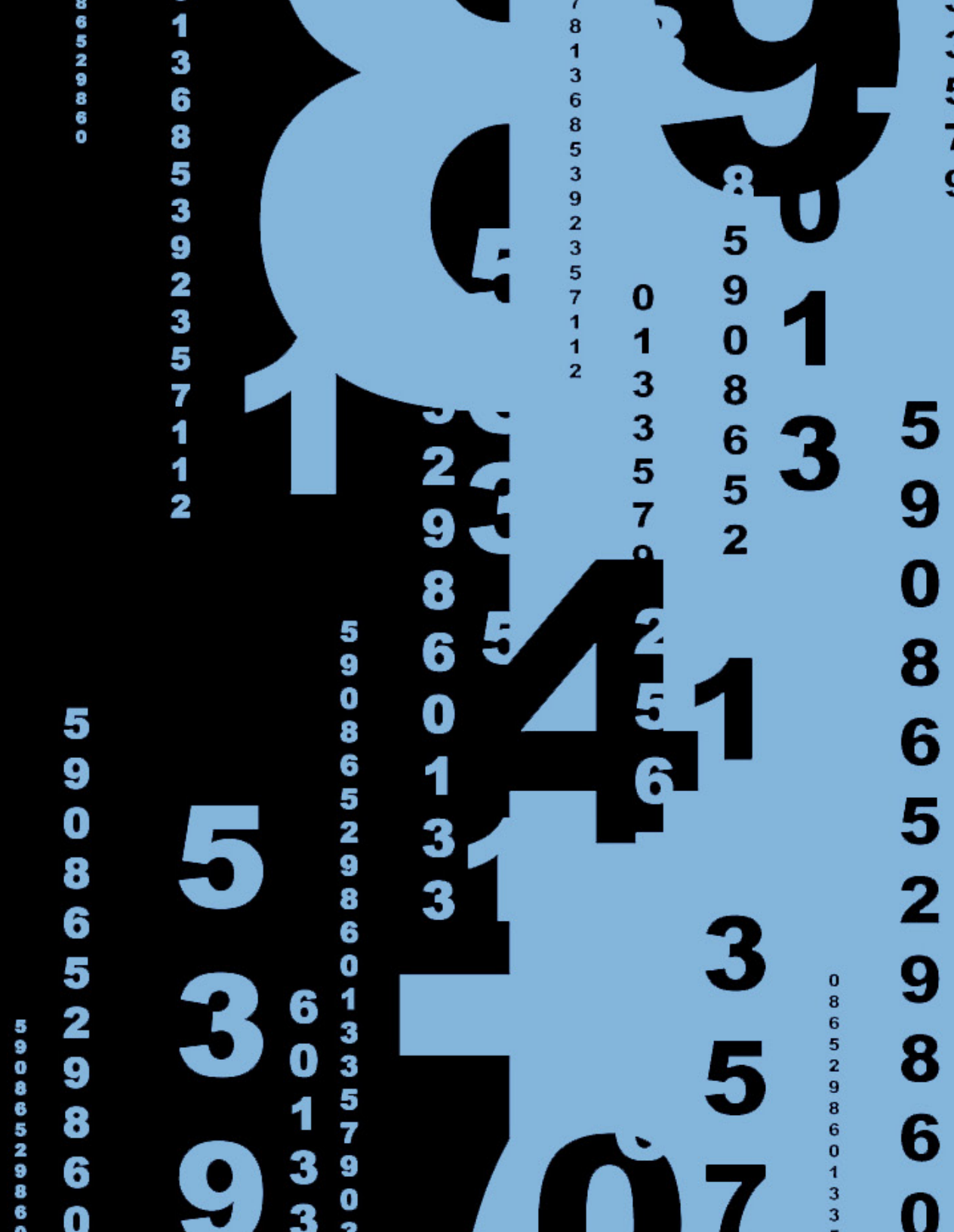
AESC is dedicated to strengthening leadership worldwide. We are committed to the success of our members and providing valuable insight on our profession. As a promise to our members, we Shape. Connect. Educate.

Thanks to everyone who made this report possible.



Karen Greenbaum
AESC President & CEO
May 2022

2021 Performance

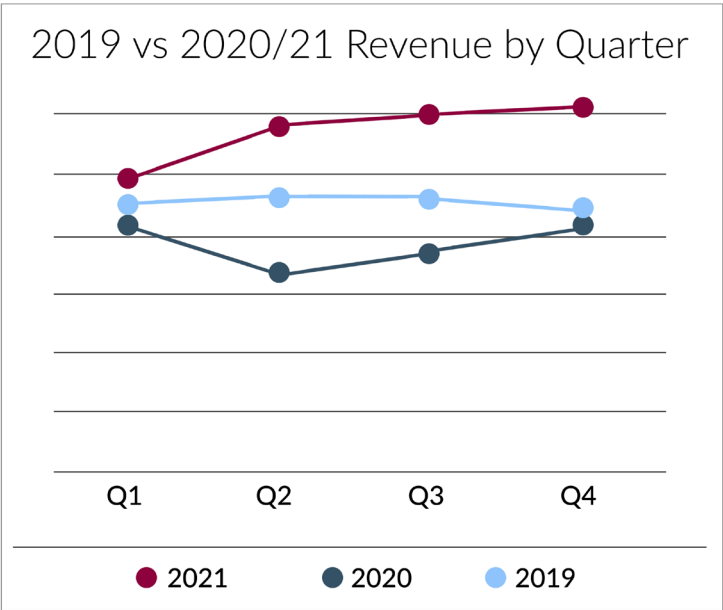


An historic growth year for executive search and leadership consulting.

Our AESC State of the Executive Search and Leadership Consulting Profession data reveals that by the end of 2021, estimated global revenues for the executive search and leadership consulting profession*, across all lines of business, grew 42% year-over-year to reach \$20B USD, the strongest year-over-year growth in the 30 years AESC has analyzed growth in the profession.

By Q4 of 2020, the profession was back to pre-pandemic levels. Growth has accelerated from there.

*The following analysis is based on data provided by participating AESC Member firms. (See page 47.)

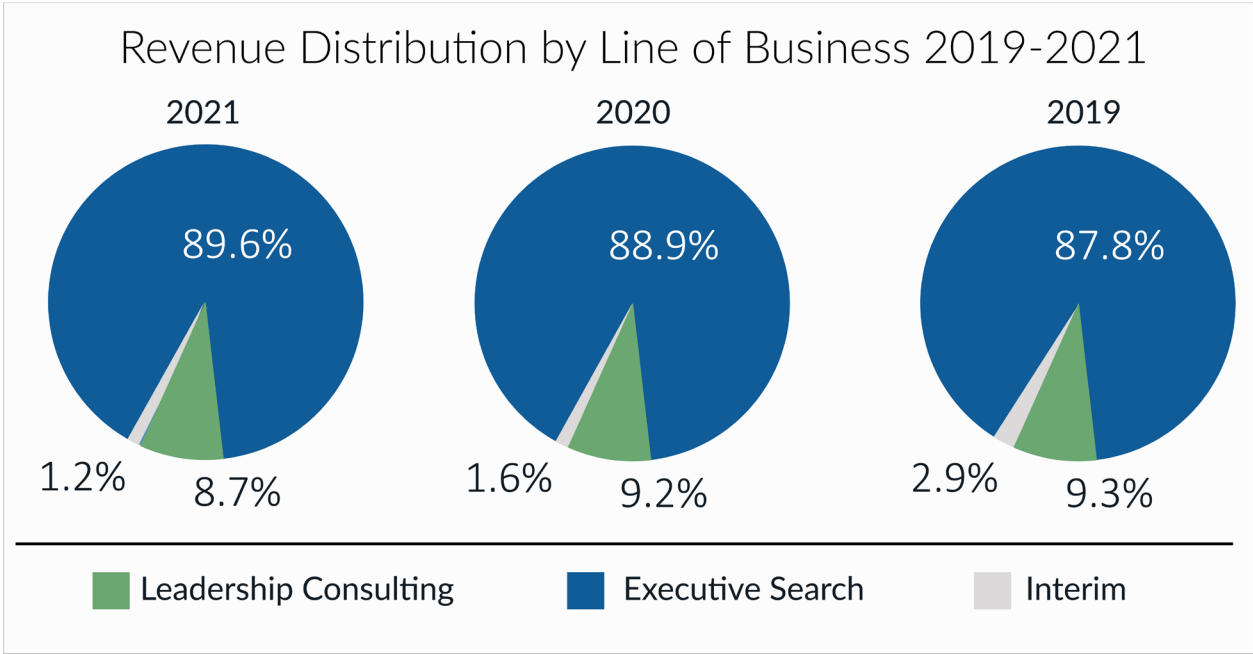
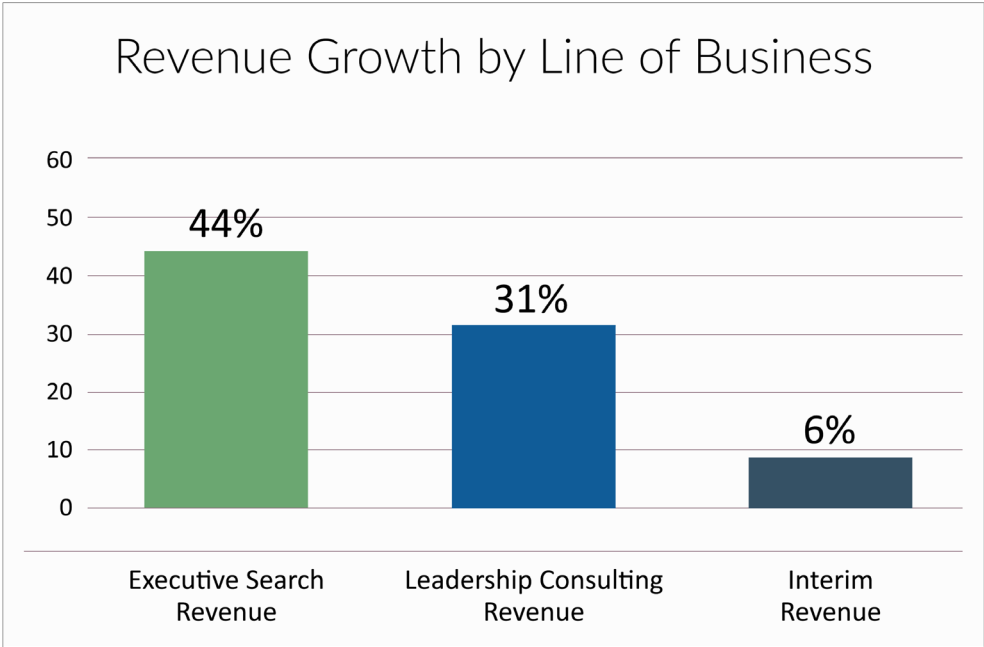


Revenues for both executive search and leadership consulting experienced massive gains in 2021.

Despite the difficulties during the first half of 2020, 2021 was an unprecedented rebound for the profession. Both executive search and leadership consulting revenues grew at record rates. At 2021 year-end, leadership consulting grew by 31% and comprised 8.7% of global revenues. Executive search revenues grew 44% and comprised 89.6% of revenues compared to 87.8% two years prior.

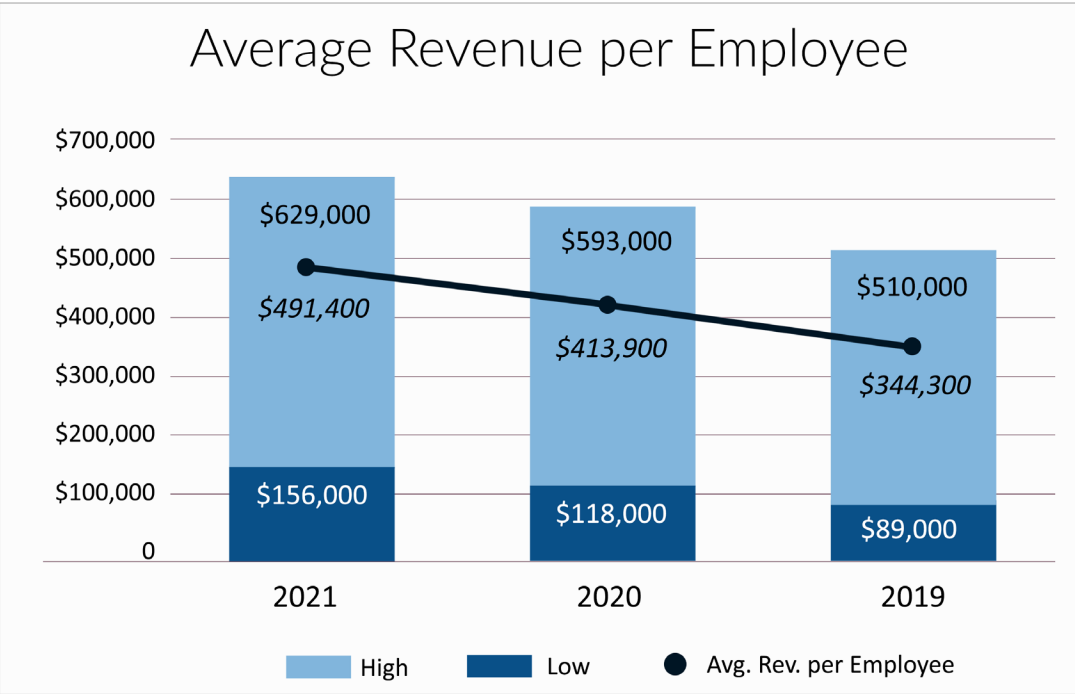
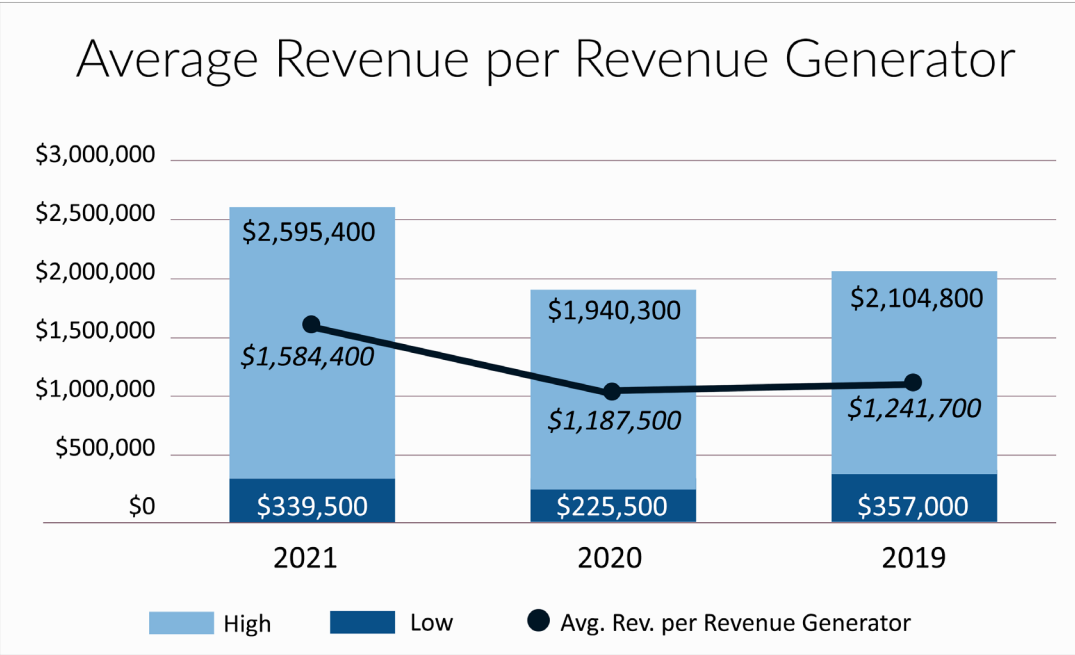
Interim management grew by 6%* and accounted for 1.2% of revenues. While Interim revenue grew at a slower rate on average, those firms with substantial investment in Interim services grew significantly.

**For example, Heidrick & Struggles' acquisition of Business Talent Group last year is a testament to the growing on-demand, project-based, and interim executive talent space, and a key example of how some firms are investing in this business in significant new ways. For other firms with smaller or minimal investment in Interim, those revenues were either flat or declined year-over-year.*



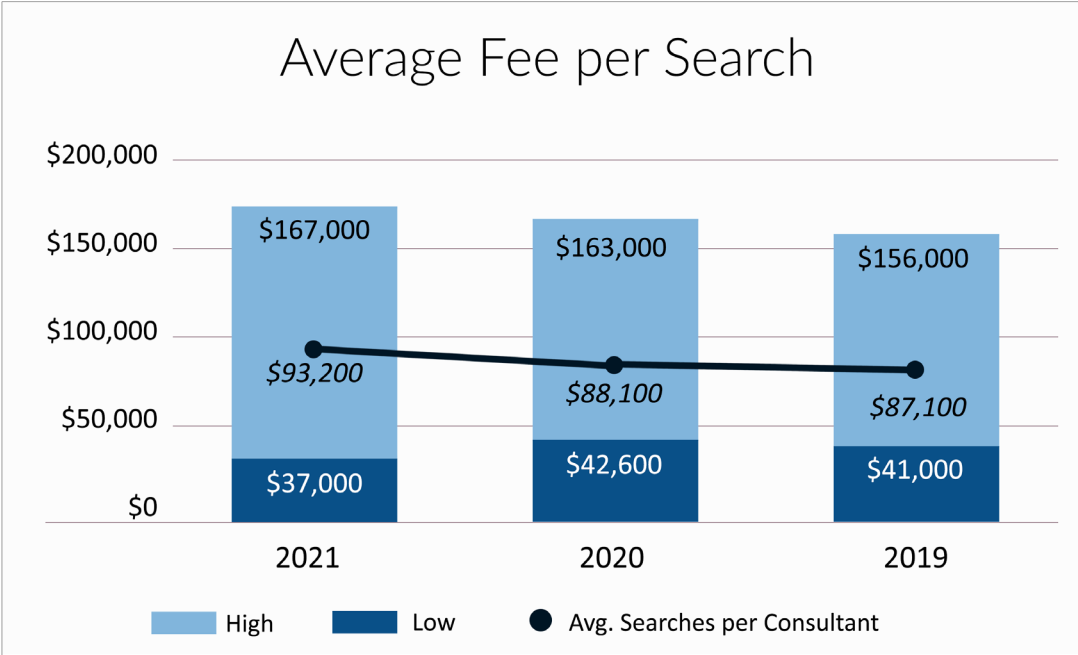
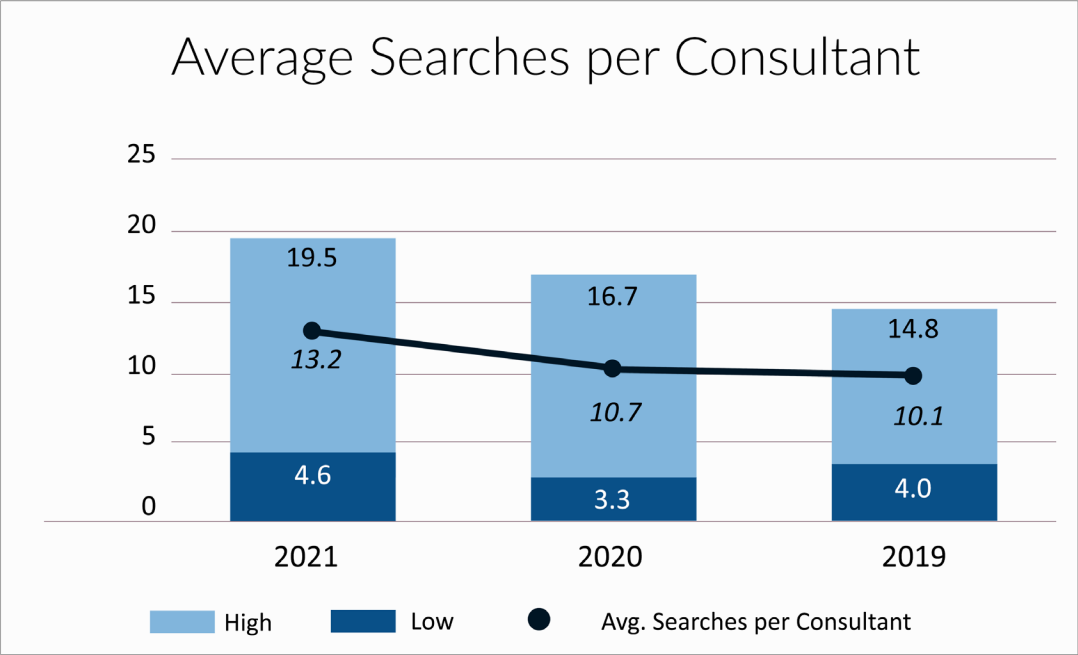
As total revenues increased, average revenues per revenue generator and employee also grew.

Due to the historic demand for services, an overall revenue increase for the profession is reflected in the year-on-year average revenue per revenue generator and average revenue per employee also increased.



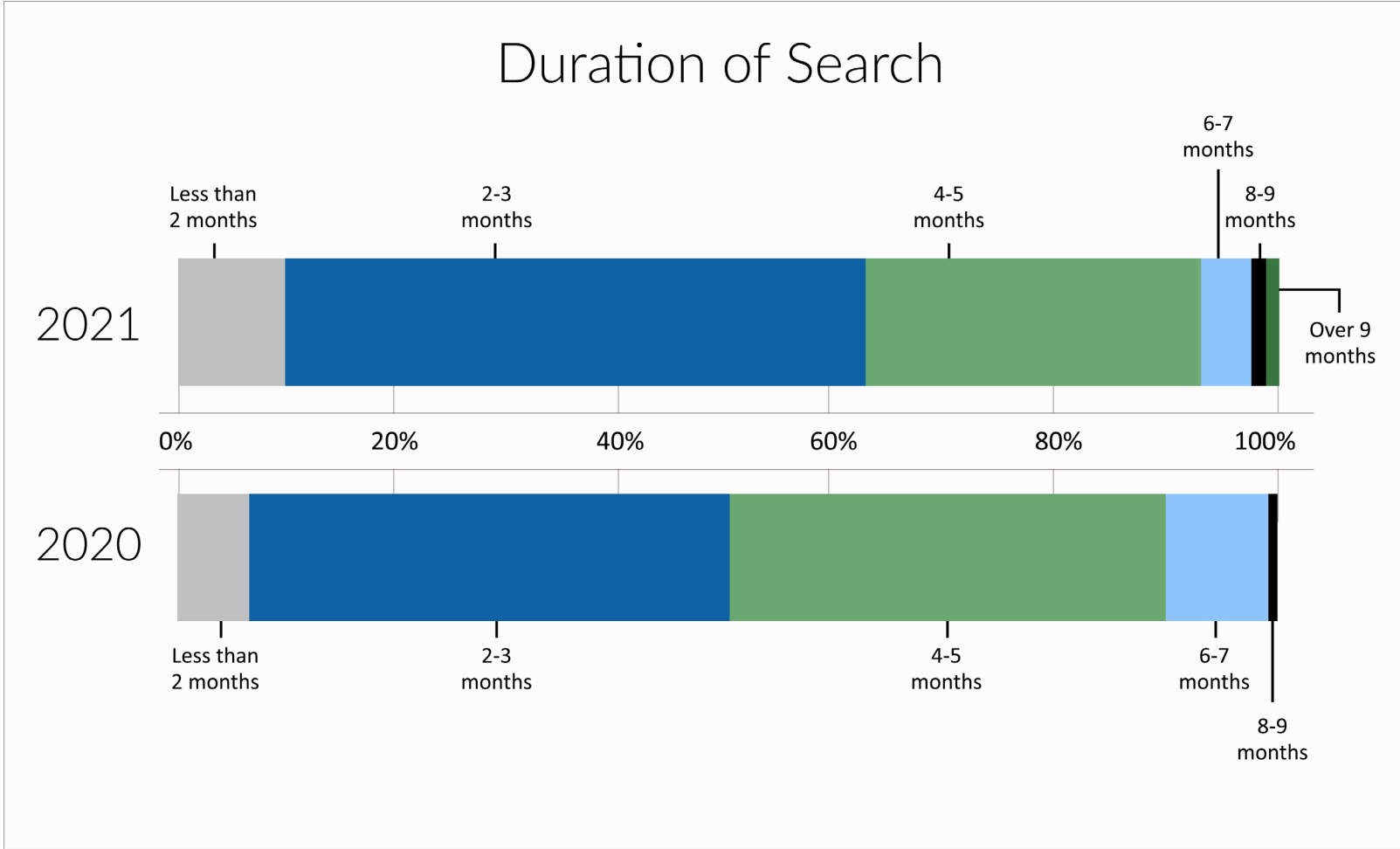
Average searches and fees both increase.

Due to increased demand, consultants are taking on more searches and the average fee per search increased.



Time to complete a search decreased in 2021.

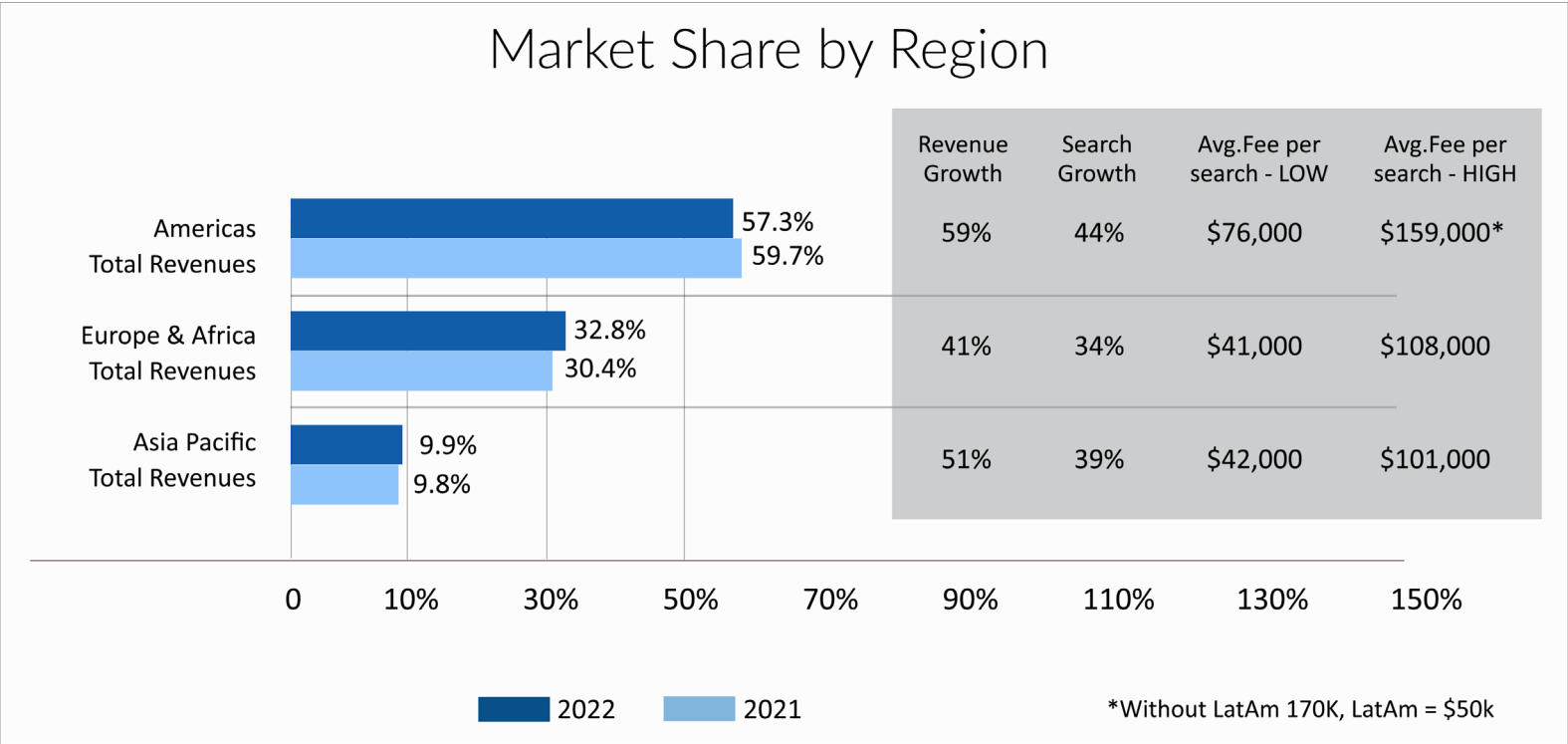
As consultants are conducting more searches on average, they also complete them faster. The average time to completion decreased in 2021 compared to 2020.



The greatest regional gains in market share came from North America in 2021.

By the end of 2021, North America accounted for about 60% of the revenues within the profession. Europe lost market share, down from a third in 2020 to 30% in 2021.

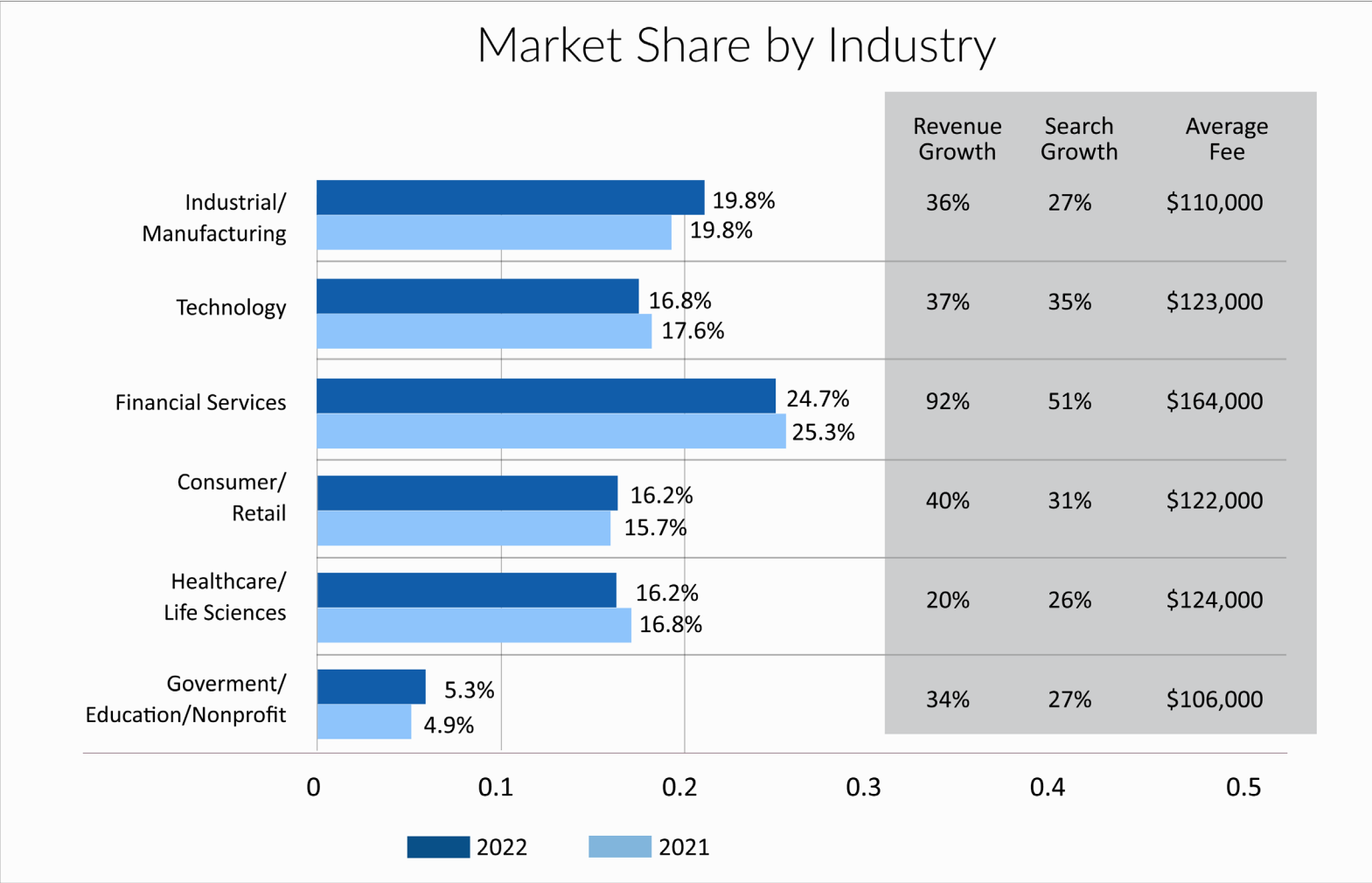
The average search fee is also highest in North America, with Europe and Asia Pacific sharing similar average search fees.



Financial Services led in volume of searches and revenue growth in 2021.

While both revenues and the volume of executive searches grew across all industries in 2021 by at least 20%, the most growth occurred in the Financial Services sector with 92% revenue growth and searches growing by 51%. Searches within the Financial Services sector also commanded the greatest fees, with an average fee of \$164,000 USD.

Financial Services accounts for the greatest market share within the profession (25%), followed by Industrial/Manufacturing (20%).



1 GLOBAL FORCES

- COVID-19
- Disrupted Travel/Mobility
- Accelerating Rate of Change
- Digital Transformation
- Declining Trust in Institutions
- Ukraine
- Stakeholder Activism
- Focus on Wellness
- Climate Change
- Digital Connectivity

Key Themes Impacting the Profession

2 BUSINESS IMPLICATIONS

- Purpose Driven Leadership
- Rising Trust in Business vs. Institutions
- Digital Commerce
- 24/7 Connection to Customers
- Supply Chain Disruptions
- Demand for DEI
- Rise of ESG
- Sustainability on the Board & C-suite Agenda
- Investment in Corporate Wellness
- Investment in Talent & Culture
- Taking Stances on Social/Political Issues
- Partnership Ecosystems

3 EXECUTIVE SEARCH & LEADERSHIP CONSULTING TRENDS

- Virtual Search & Onboarding
- Talent Shortage Creates “Candidate Market”
- Demand for Diverse Talent
- More Hybrid Roles Where Location Flexibility is Key
- Demand for Digital Transformation Across all Functions
- Links Between Culture, Attraction and Retention
- Focus on Sustainability
- Shortage of Talent in our Profession

- Investment in our Own Talent
- Assessment – virtual environment has strengthened need for in-depth assessment
- Board Search & Board Effectiveness Continues to Grow
- CEO Succession is a Rapidly Growing Service
- Private Equity Investments Creating New Opportunities for PE Firms & Portfolio Companies
- On Demand Talent – Growing Significantly for Those Who Have a Significant Presence



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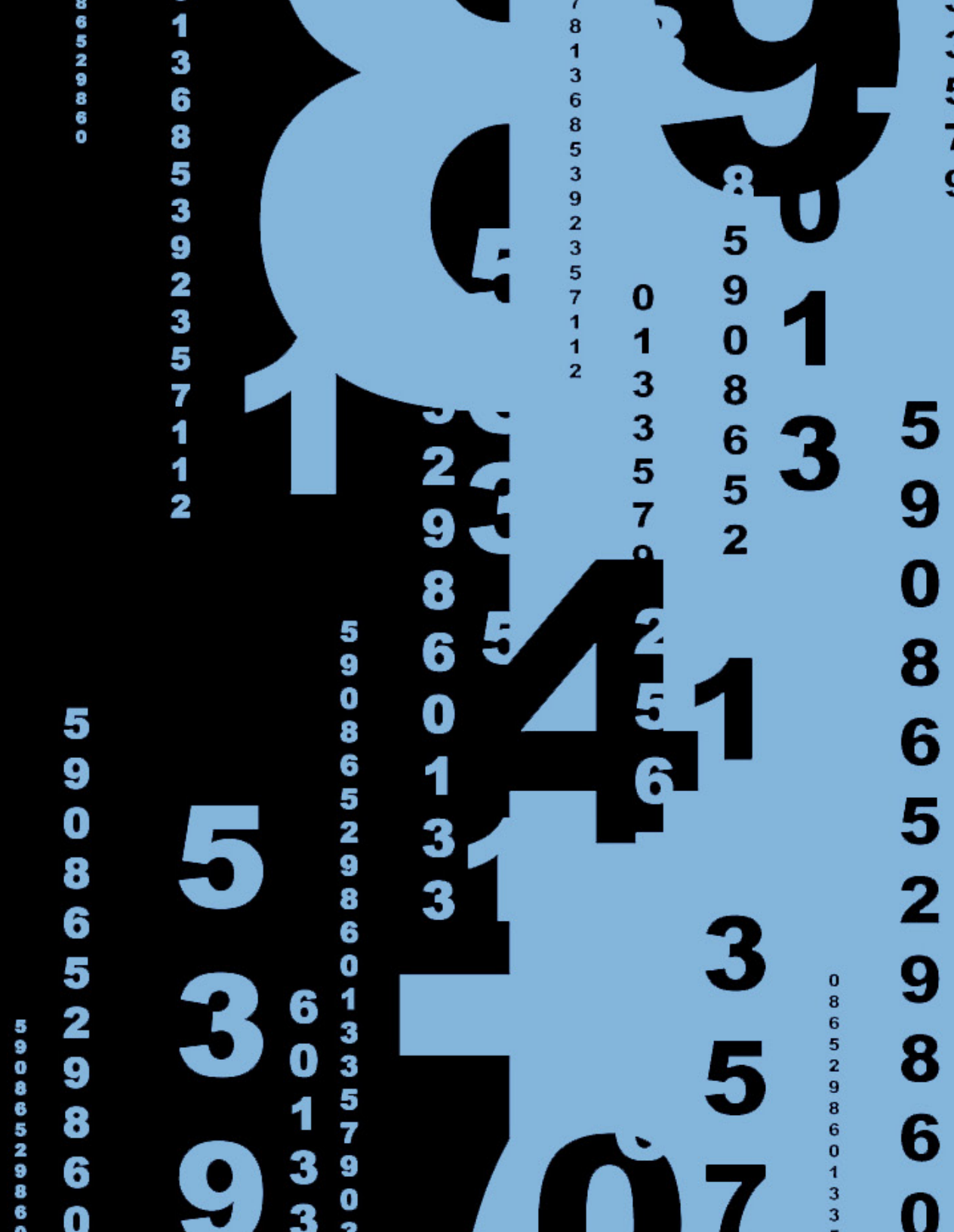
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The Year Ahead— A View from Firm Leaders

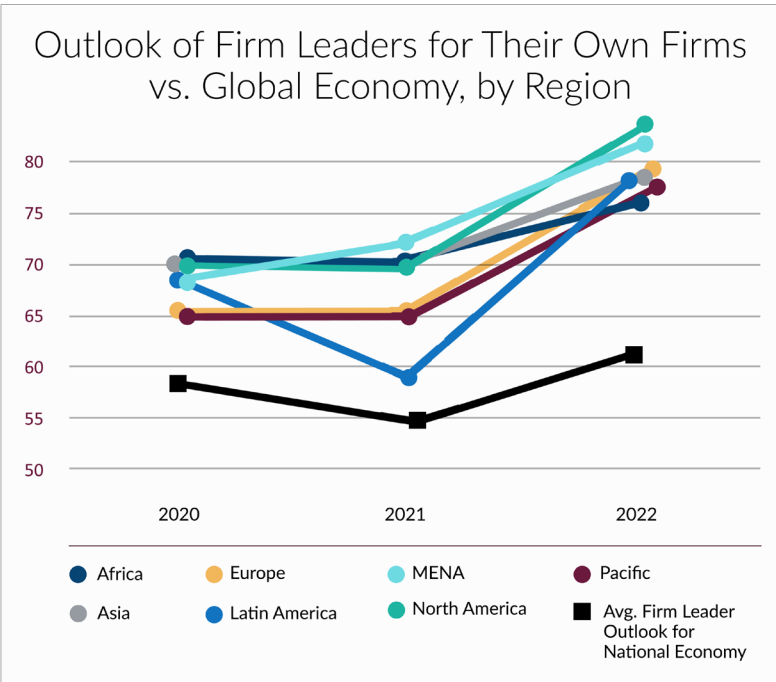
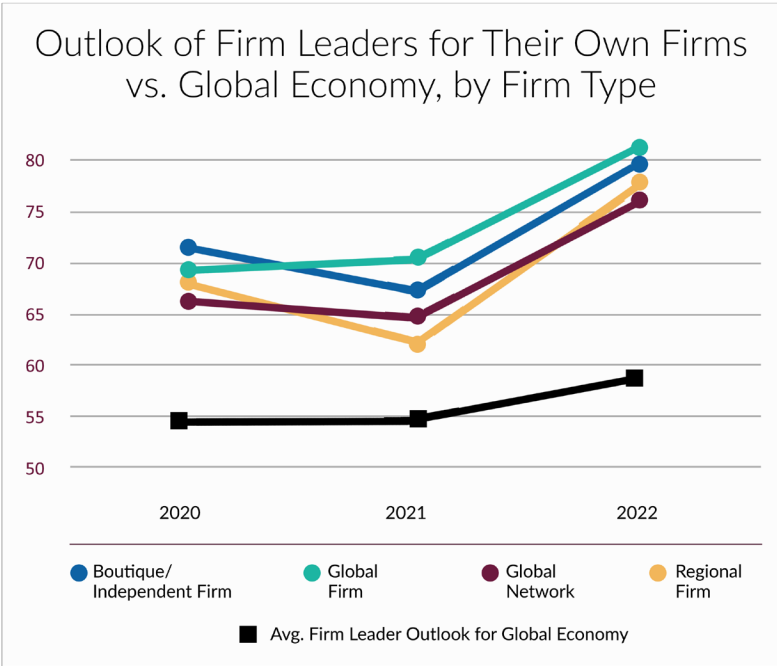


Firm leaders more optimistic about their firms vs. the global economy or their national economy.

We asked more than 400 leaders of AESC member executive search and leadership consulting firms to share with us their forecast for their own firms in the year ahead.

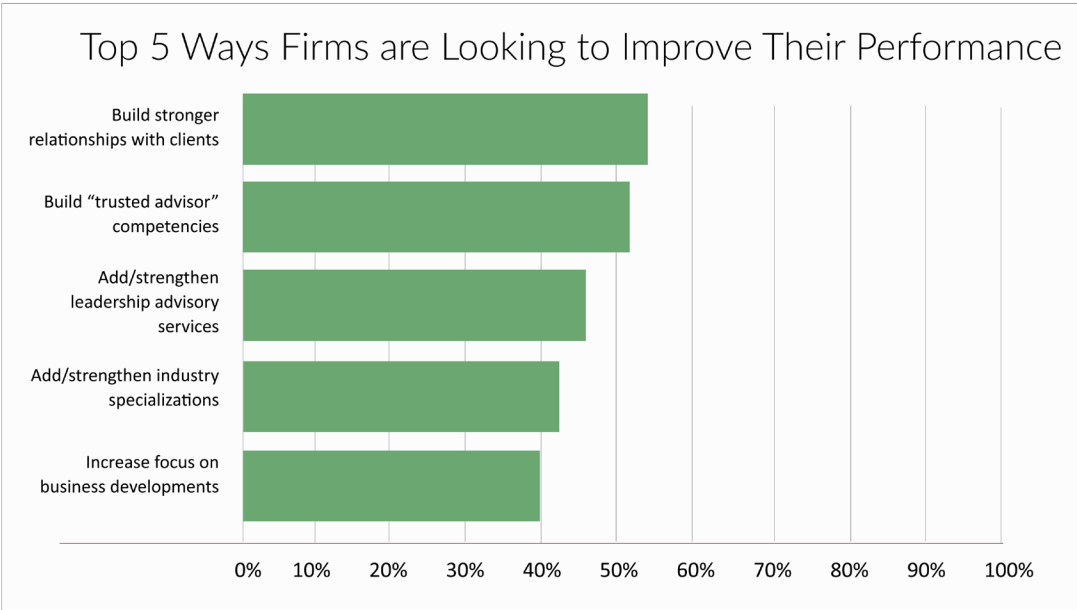
Firm leaders, as they have consistently for the past three years, shared a significantly more positive outlook for their firms than the global economy or their national economies.

By region, firm leaders in North America shared the most optimistic outlook for their firms, whereas leaders in other regions were closely aligned in their outlook for the year ahead.

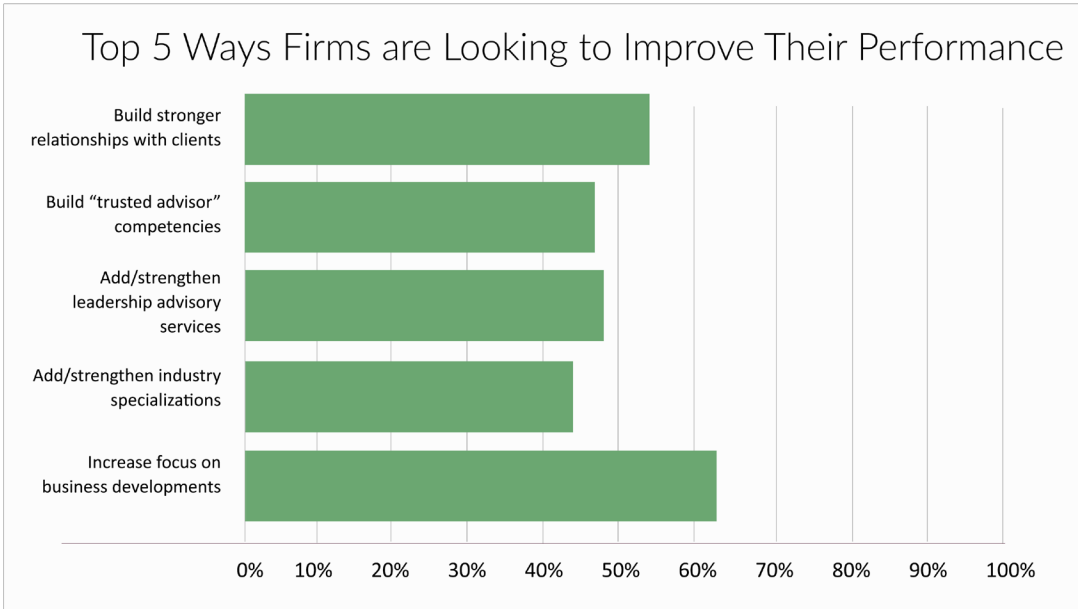


Strengthening client relationships is the top business priority among AESC members.

While firm leaders ranked increasing focus on business development as their no. 1 priority last year coming out of the slowdown from the first year of the pandemic, now after a strong year of growth, firm leaders are more highly prioritizing their relationships with their clients, improving their competencies and building out their services. Business development is still important but with the heightened demand from clients seeking post-COVID change and the Great Resignation fueling demand for executive search, it ranks at the bottom of the top 5 list of priorities this year.



2022



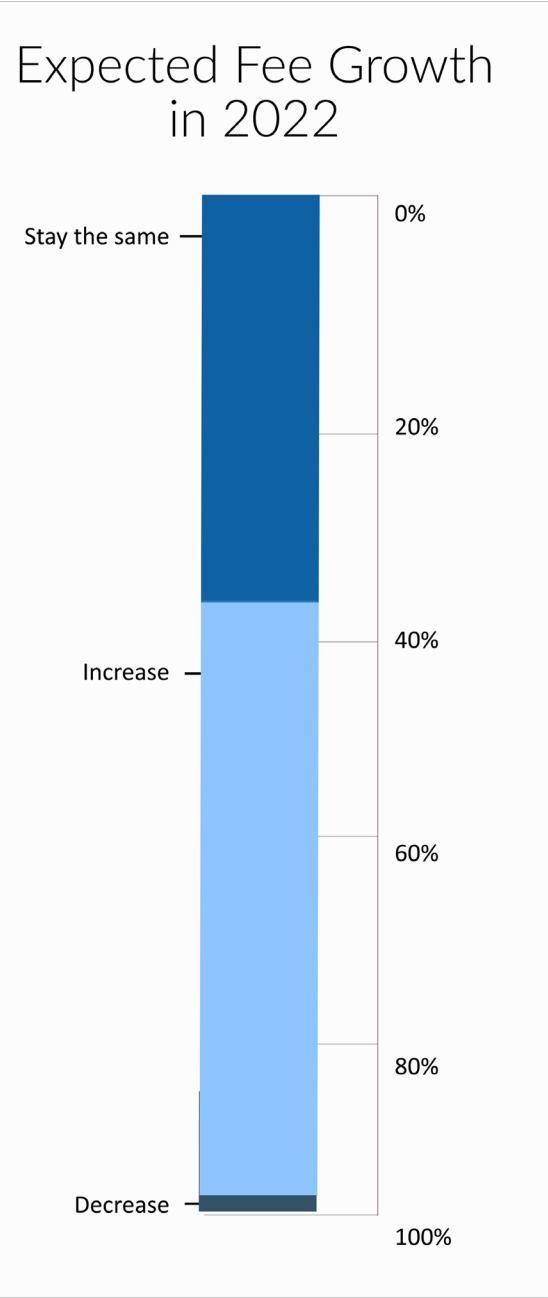
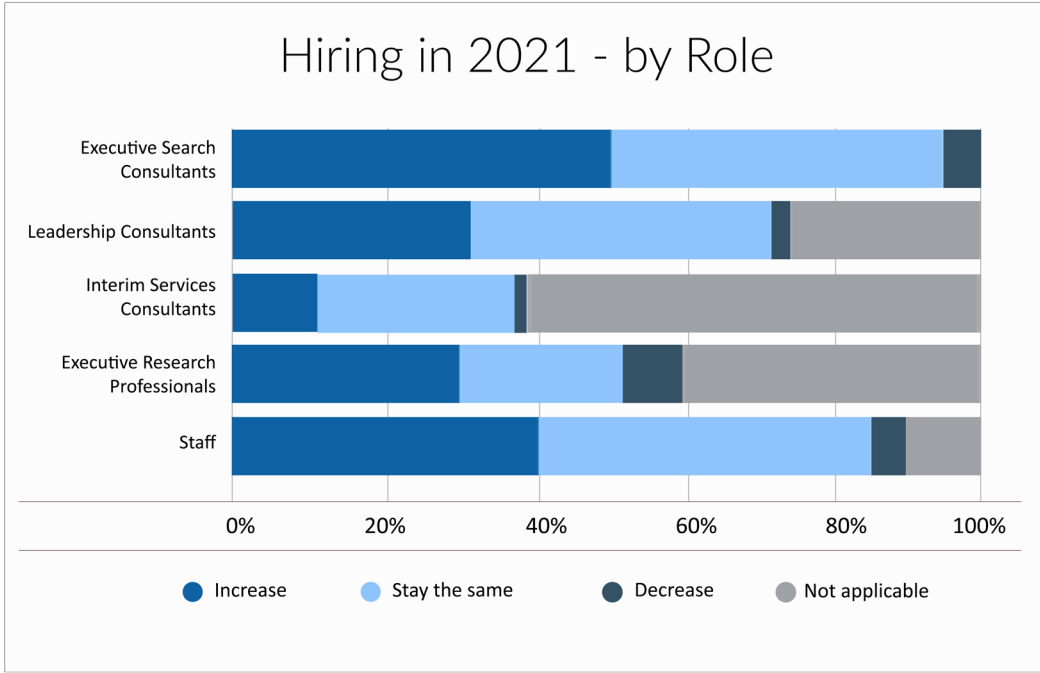
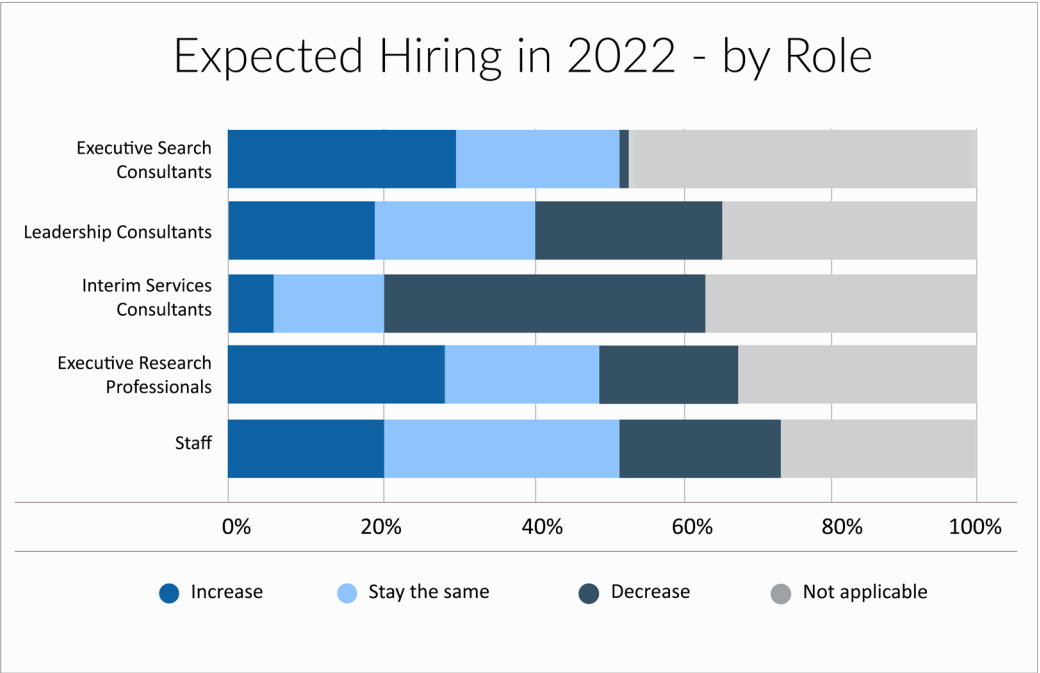
2021

Hiring within the profession declines for all roles.

While about a third of firm leaders plan to hire more consultants and researchers this year, this is a decline from the 50% who were hiring for these roles last year. Nearly one half of firm leaders plan to decrease interim hires this year, which suggests the interim spike immediately following the pandemic may be starting to wane.

While hiring trends may seem at odds with the continued great demand for services, there may be more uncertainty on the horizon in the minds of firm leaders compared to last year, which may be influencing hiring within the profession for the year ahead.

The majority (59%) of AESC members expected no significant change in fees last year. This year, more than a half expect their fees to increase. Only 3% expect a decline in fees this year.

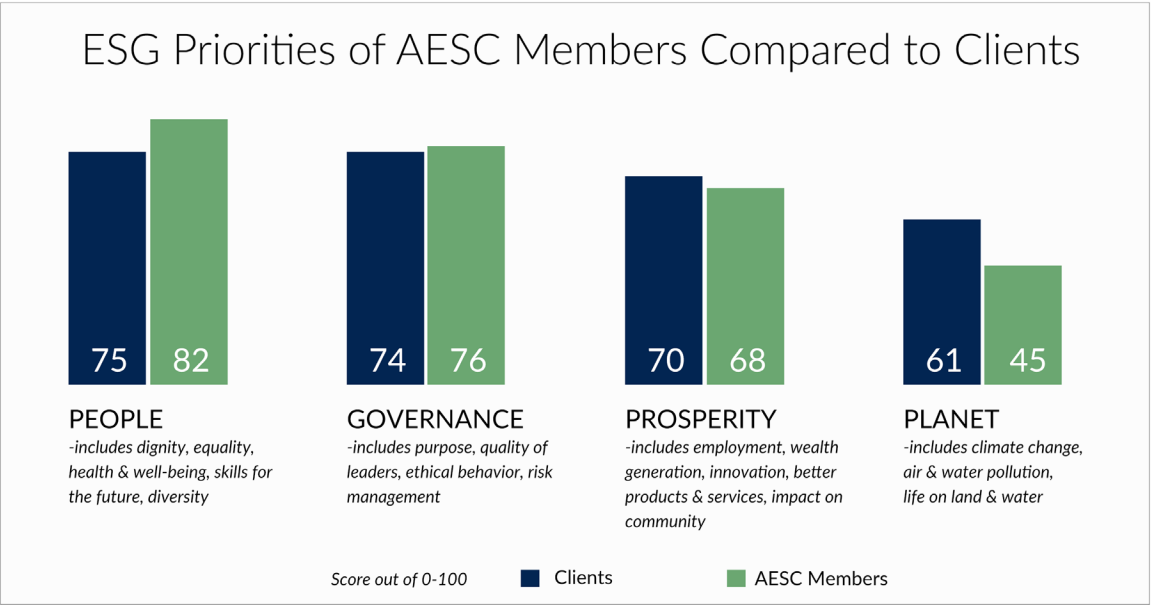
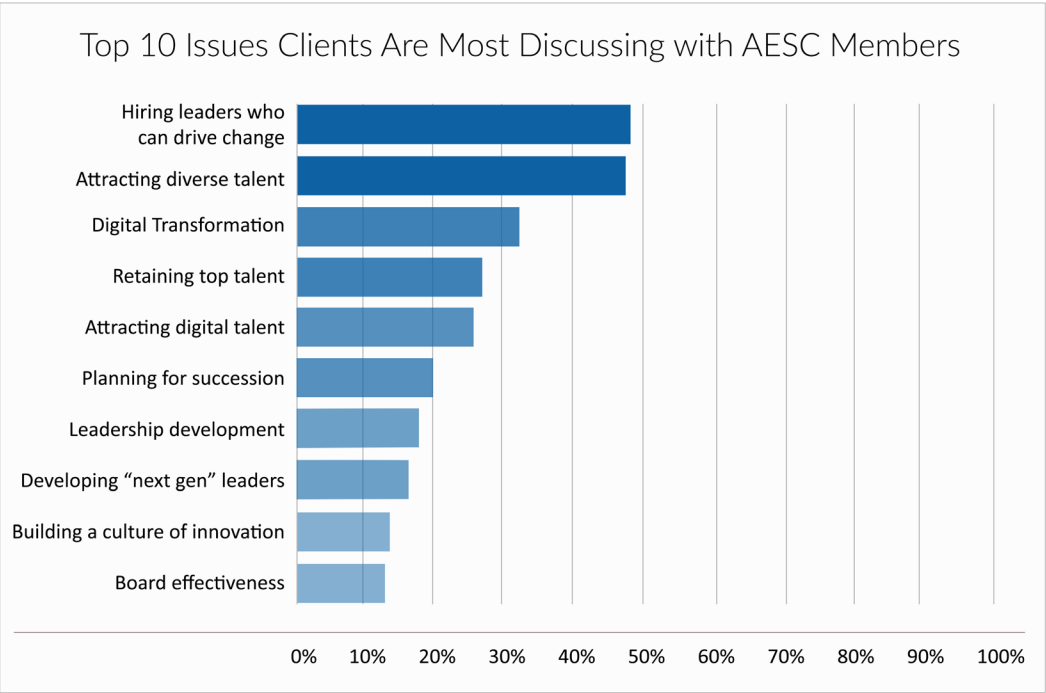


Amid the Great Resignation, retaining talent becomes a bigger focus for clients.

Like last year, hiring leaders who can drive change tops the list of issues clients are most discussing with AESC members. Our current era is one of massive change with both digital technology and the reset following the COVID-19 pandemic accelerating the rate of change.

Attracting diverse and digital talent remains a priority for clients, with digital transformation along with retaining top talent entering the top 5 list of client concerns. Retaining top talent moved from no. 8 last year to no. 4 this year, revealing the heightened focus on retention in the wake of the Great Resignation.

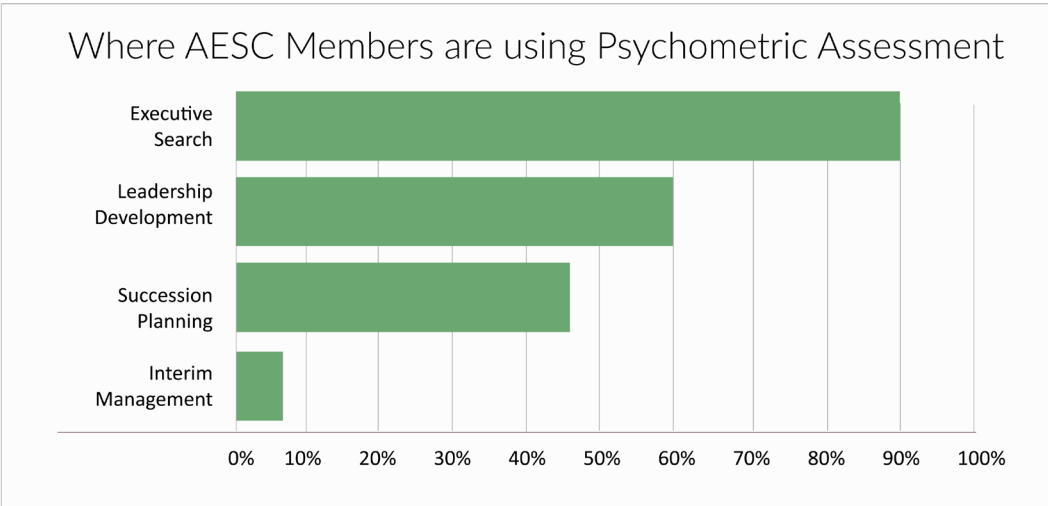
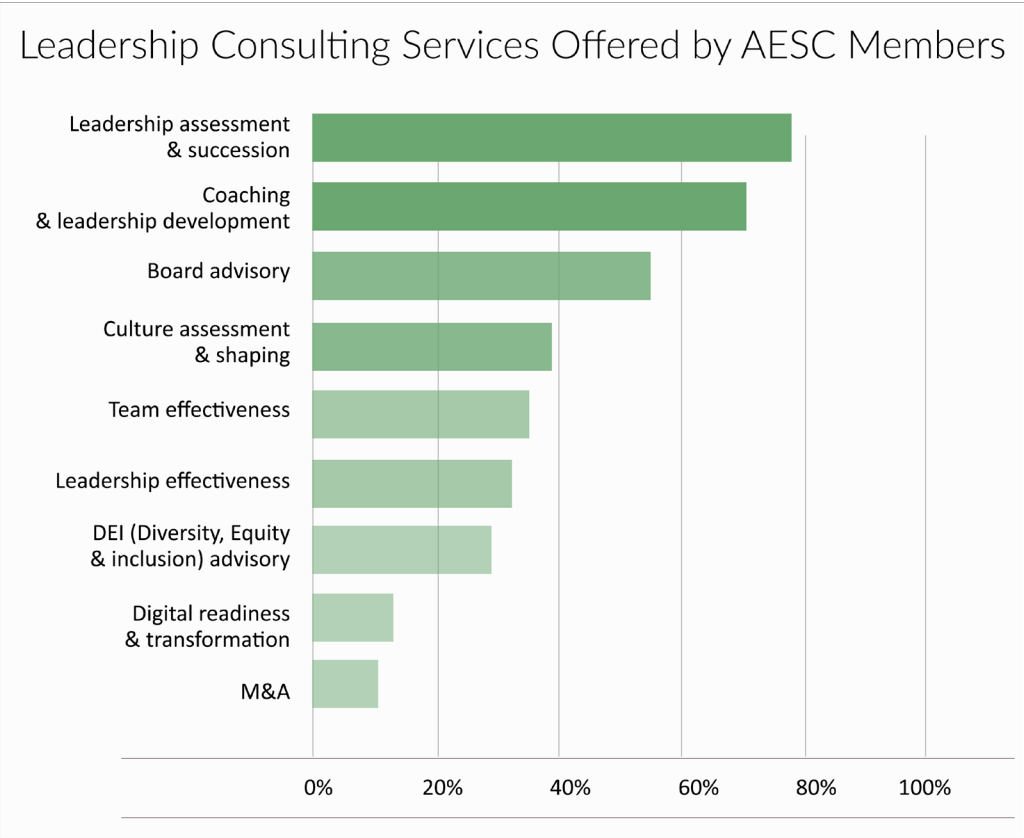
AESC members mostly align with clients in how they are prioritizing ESG-related issues. The one exception is environmental sustainability. On a scale of 100, AESC members rate it 45 compared to clients who gave it an average score of 61. While clients have more work to do in this area, we as a profession need to catch up as sustainability becomes a greater focus.



In addition to Executive Search, a majority of AESC member firms offer Assessment and Coaching & Leadership Development services.

More than half of AESC members offer Board Advisory as a standalone service. Only about a third of AESC member firms offer culture assessment as its own service, while about a quarter offer DEI consulting services. Few AESC members are offering services in Digital Readiness or M&A.

Nearly all AESC member firms are using psychometric assessments in Executive Search, with some being used in Leadership Development and Succession Planning. Few psychometric assessments are being used for Interim Executive services.

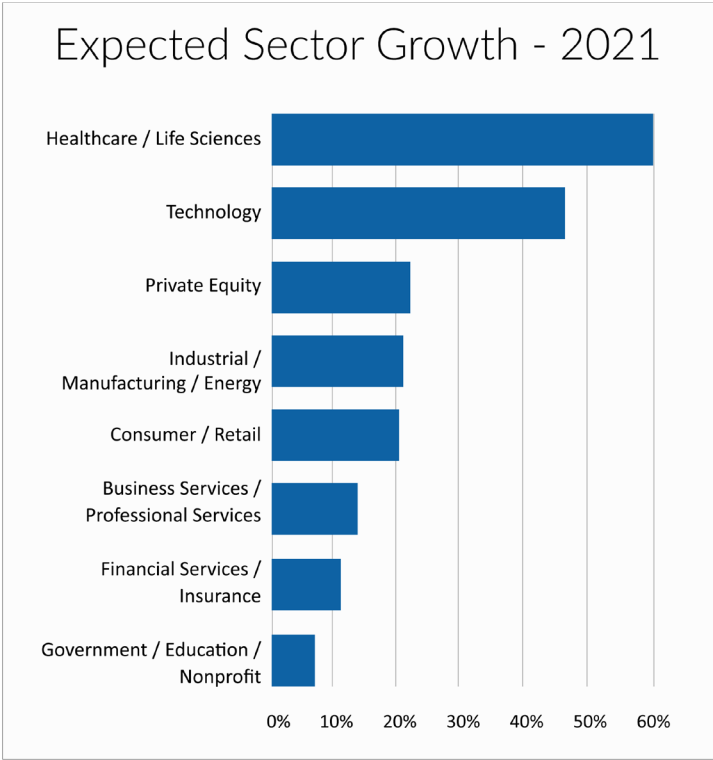
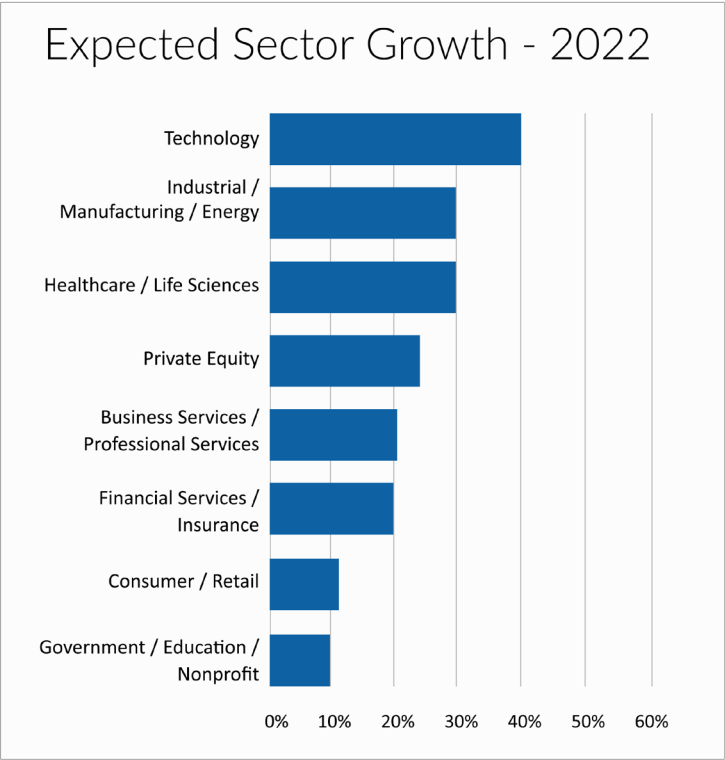
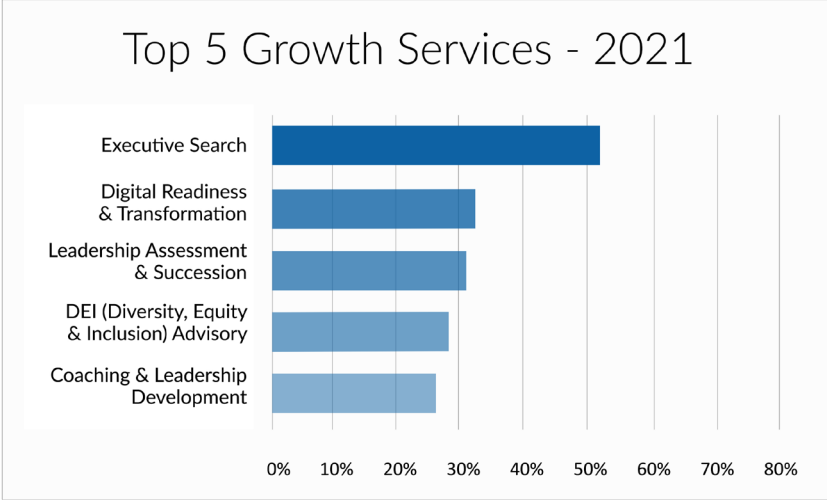
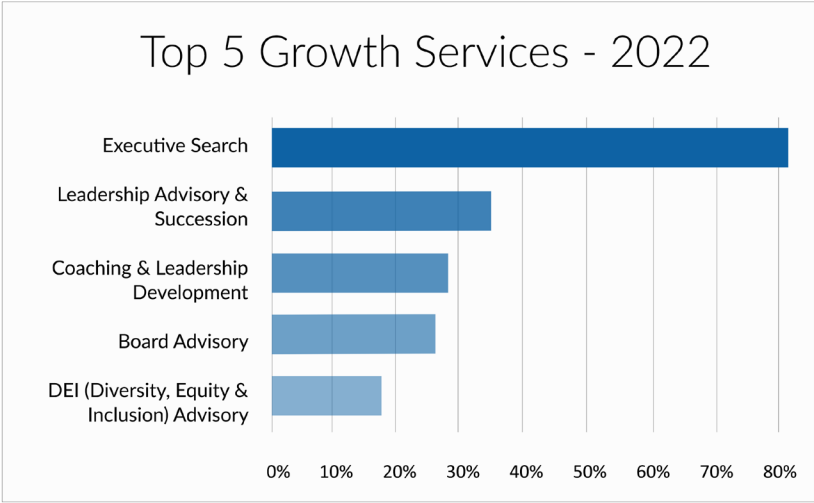


Growth for Executive Search expected to continue this year.

2021 was a record year for growth in Executive Search. Firm leaders expect continued growth through this year with 81% rating it the no. 1 service for growth in the year ahead. Digital readiness & transformation fell off the top 5 list of growth services for this year.

With clients continuing to place enhanced focus on DEI strategies within their organizations, more AESC members see DEI consulting as a growth service compared to last year. DEI only ranked as a top 5 growth service for North America last year, but this year, firm leaders in Asia, Europe and Latin America include it in their top 5. It did not rank as a top 5 growth service among AESC members in Africa, the Middle East or the Pacific.

Technology leads as the top growth sector this year. With supply chains and energy sources disrupted, there are new opportunities for growth in the Industrial/Manufacturing/Energy sector, which climbed to no. 2 compared to no. 4 last year.

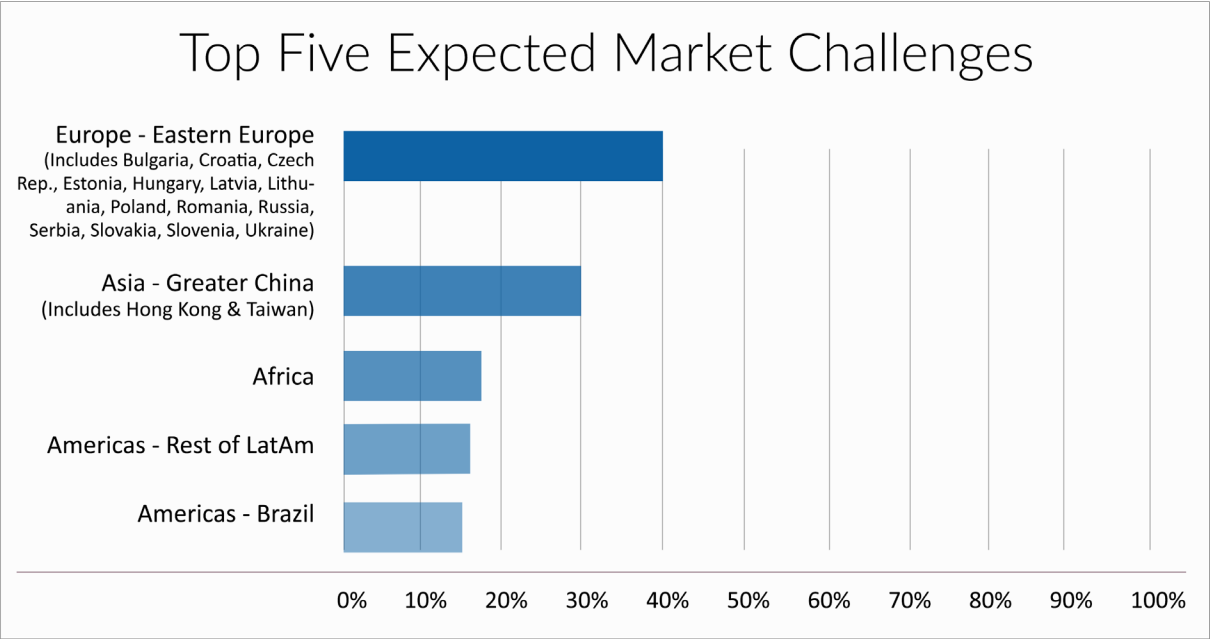
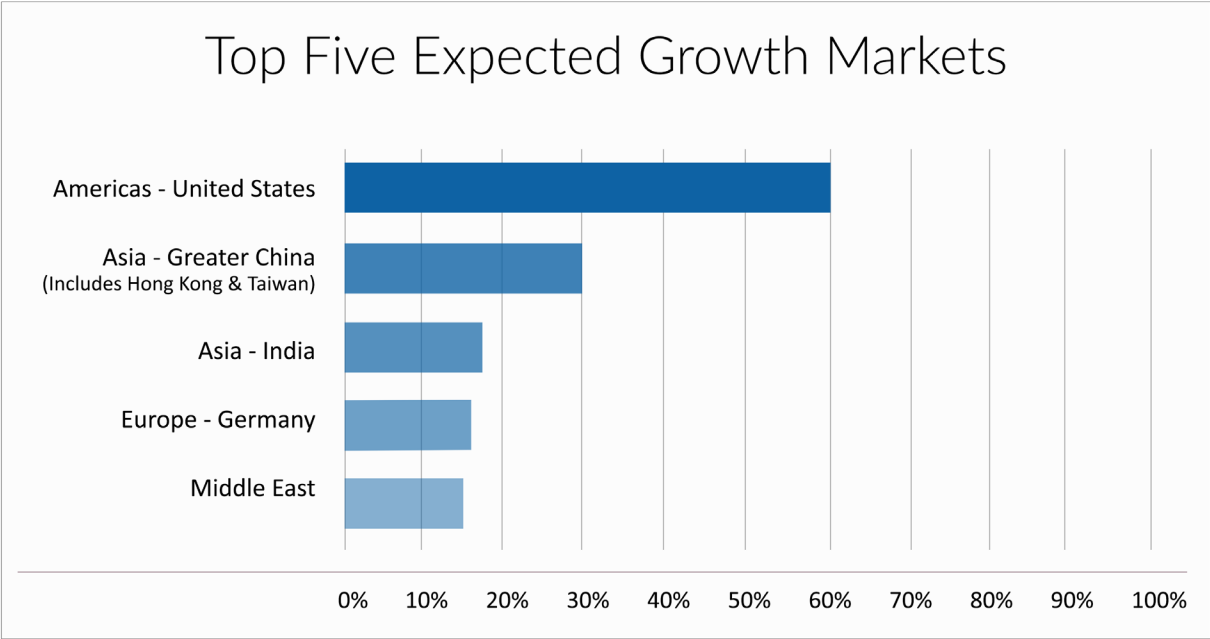


The United States tops the list of expected growth markets in 2022.

The United States tops the list of growth markets for this year, surpassing China which held the spot last year. According to AESC members globally, two out of the top three growth markets for the year are in Asia—Greater China (no. 2) and India, which climbed to no. 3 from no. 5 last year. The top 5 is rounded out by Germany (no. 4) and the Middle East at no. 5 which did not make the list of expected growth markets last year. Southeast Asia (no. 3 last year) fell from the top 5 list this year.

Due to Russia’s war with Ukraine*, AESC members ranked Eastern Europe as the most challenged market for the year ahead, which did not make the list of most challenged markets last year. China also made the list of challenged markets this year (no. 2) and also did not appear on the list last year. China also ranks at the same time as a no. 2 growth market for the year.

*Half of the survey responses were completed before the invasion of Ukraine.



A woman in silhouette is looking out over a city skyline at sunrise. The scene is bathed in a warm, golden light. The woman's hair is styled in a short, curly bob. The city skyline features several prominent skyscrapers, including the Empire State Building. The overall mood is one of hope and opportunity.

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Thank you to AESC for recognizing our commitment to the community. And thanks to the medical community that led us through the height of the pandemic and continues to serve us all today.



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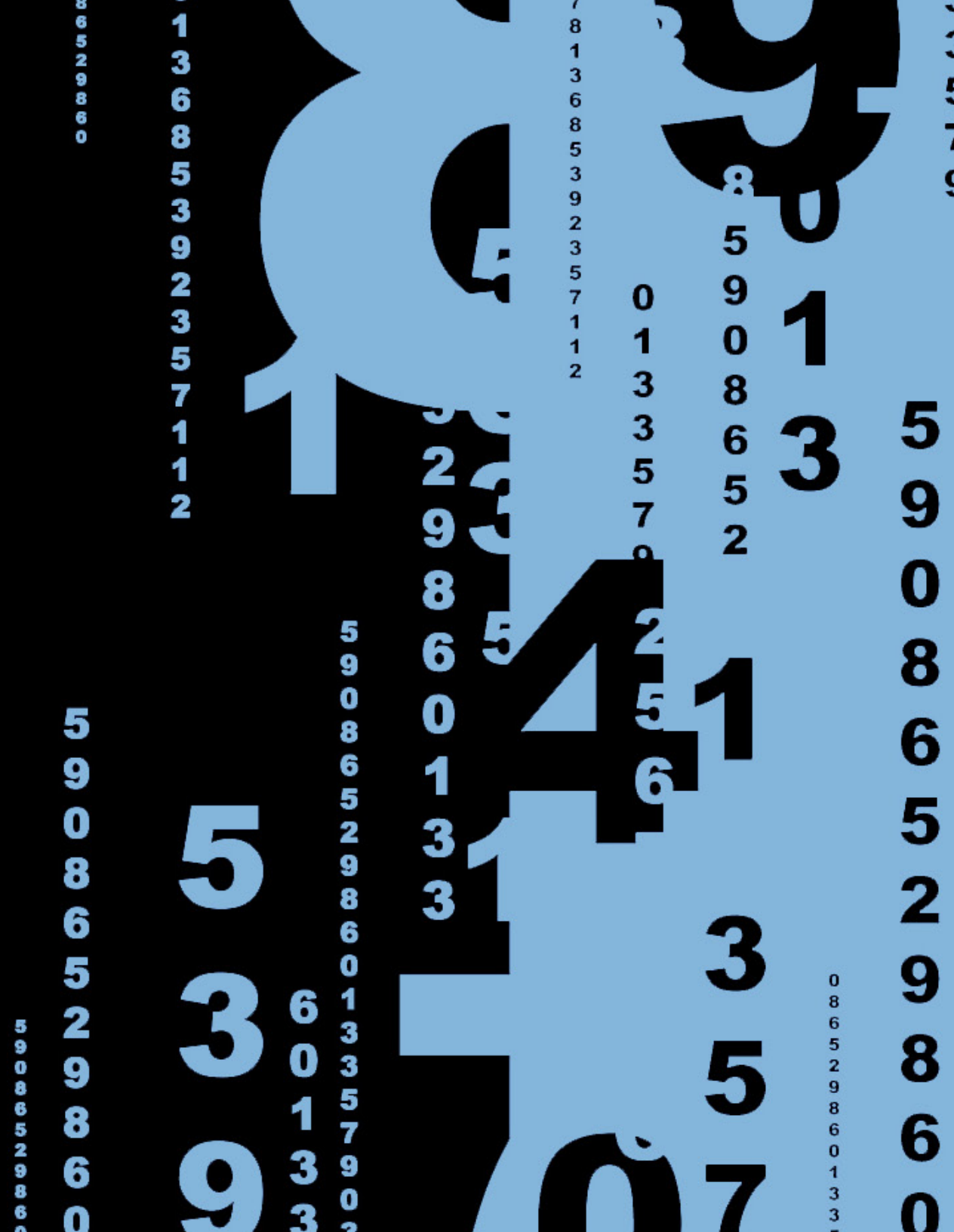
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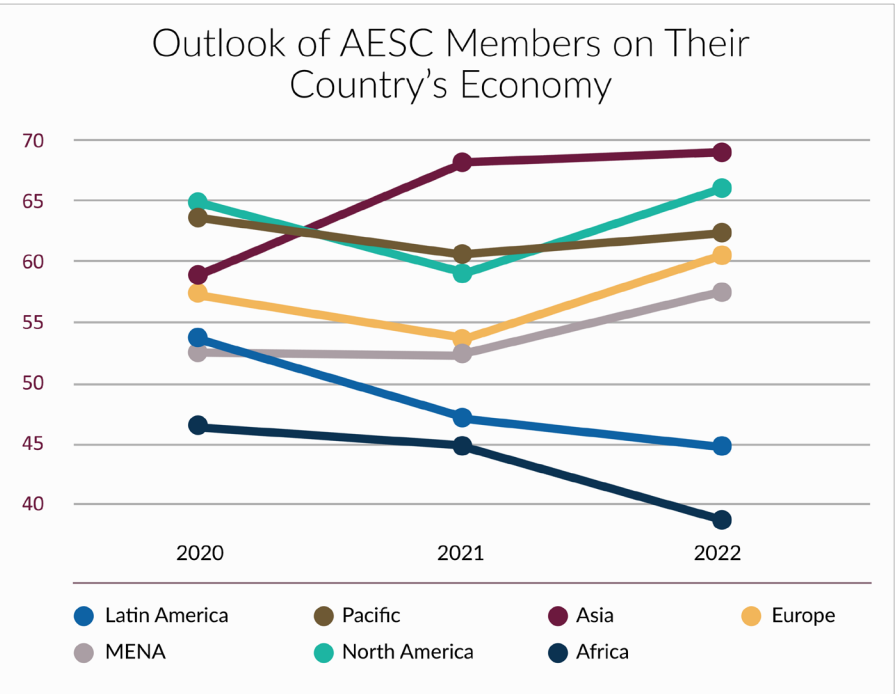
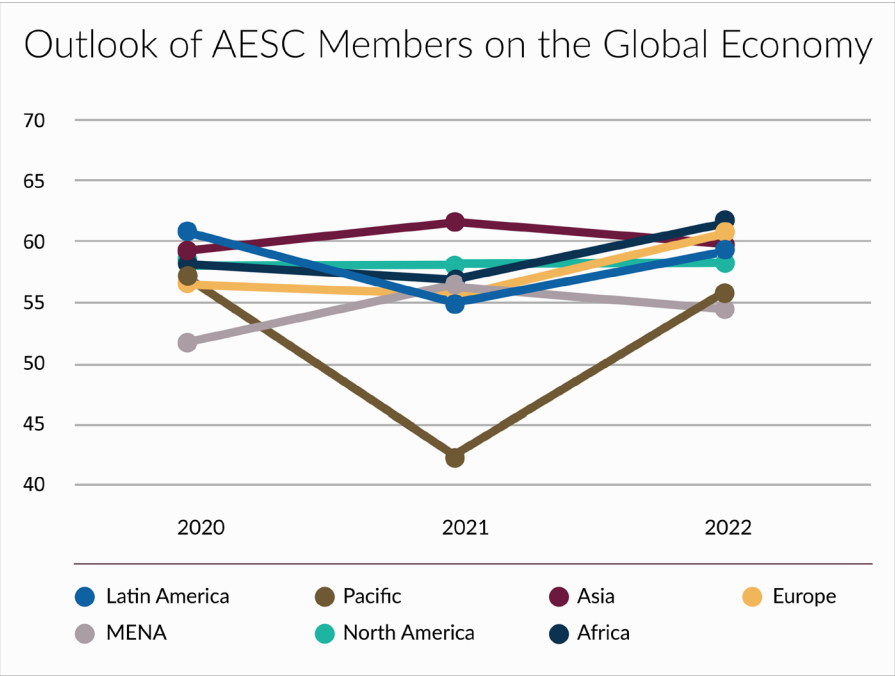
AESC Member Outlook



Economic outlook trends upward for most AESC members in 2022.

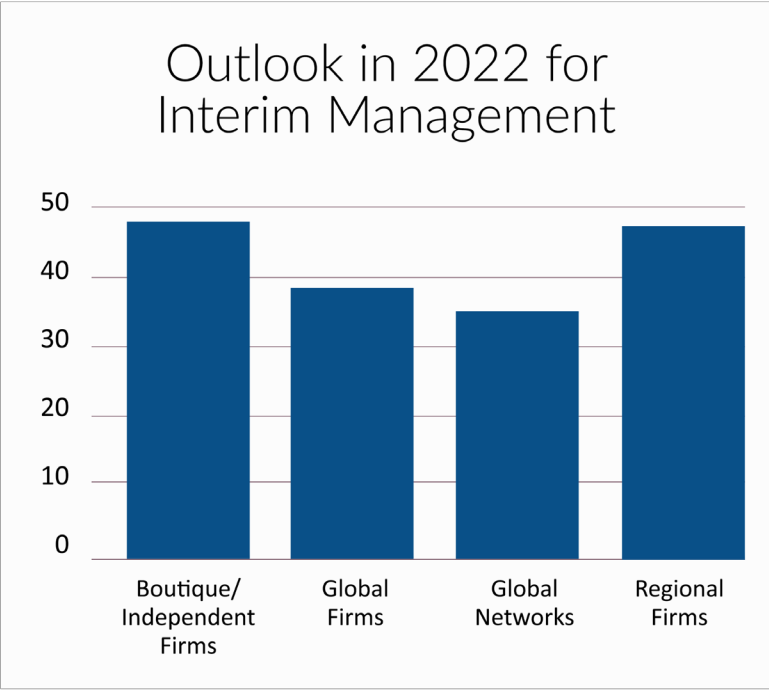
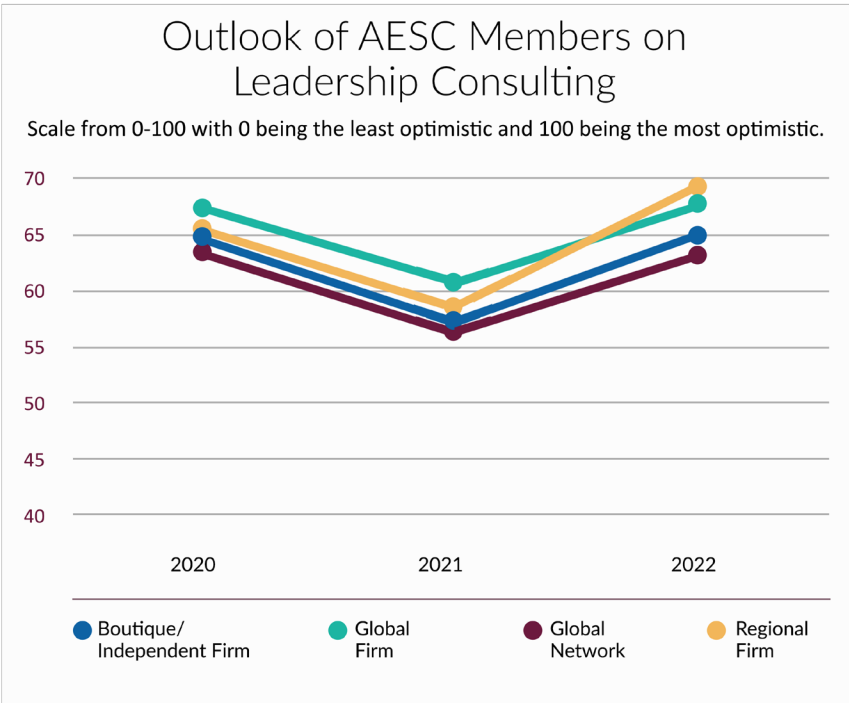
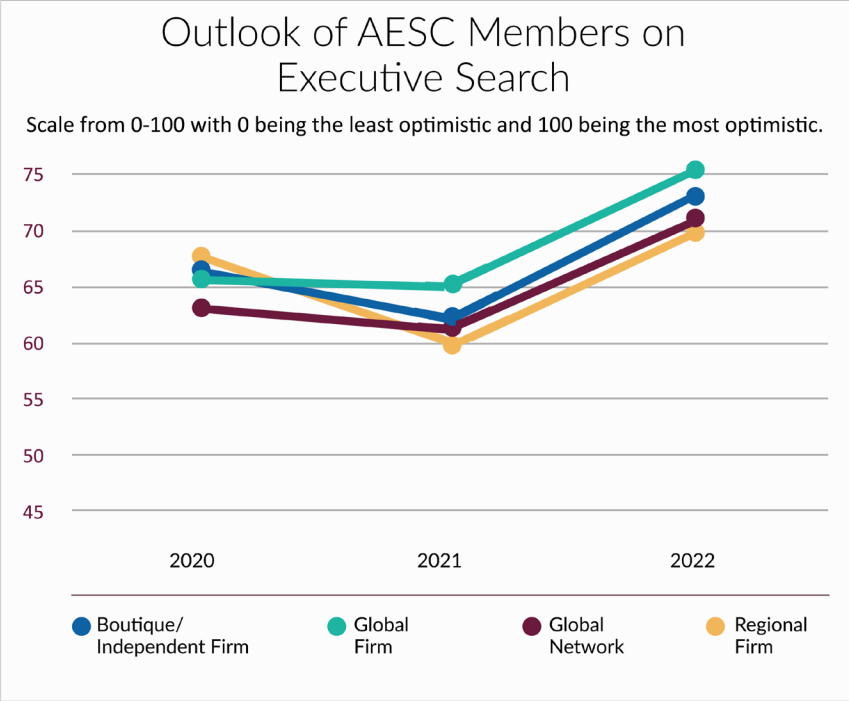
In general, AESC members have a more positive outlook for both the global economy and their country's economy this year compared to last year. This trend carries across regions with the exception of slight dips for Asia and MENA. On a scale of 100, AESC members globally rated the global economy 4 points higher than last year—60 compared to 56.

When it comes to outlook for their national economies, only AESC members in Africa and Latin America rated their outlook slightly lower this year. The greatest differences come from AESC members in Europe and North America who scored the outlook for their national economies 8 points higher than last year.



AESC members are optimistic about the economic growth of the profession.

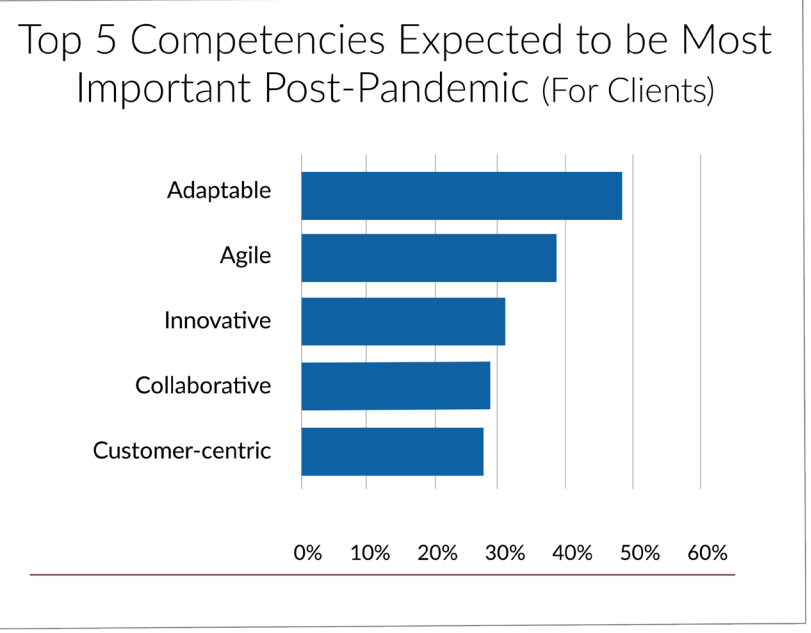
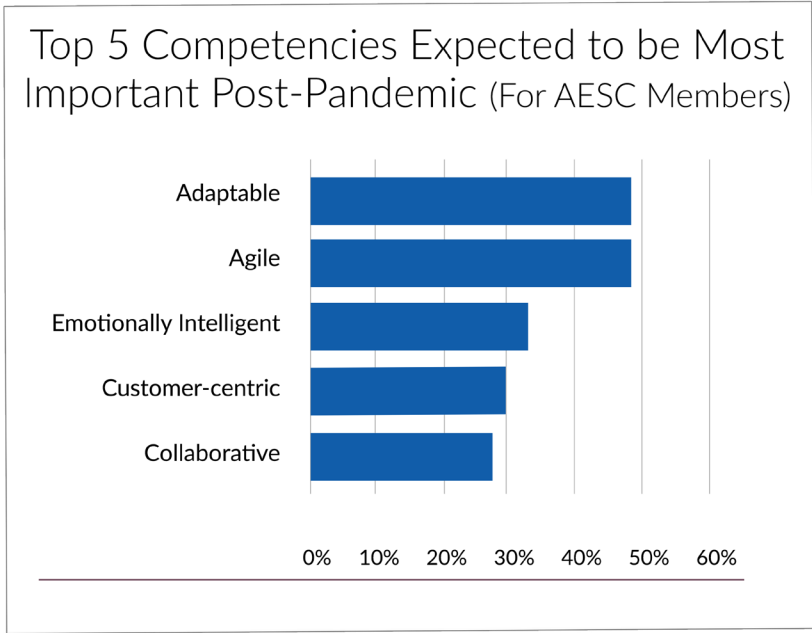
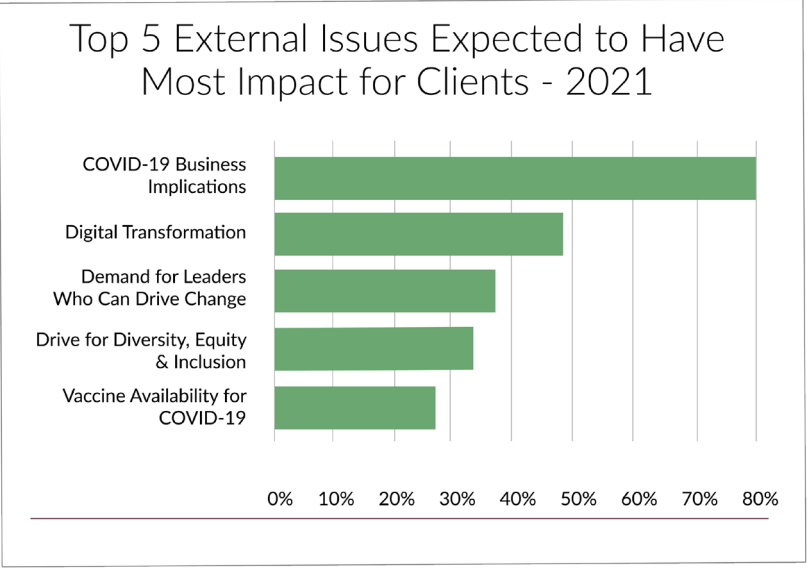
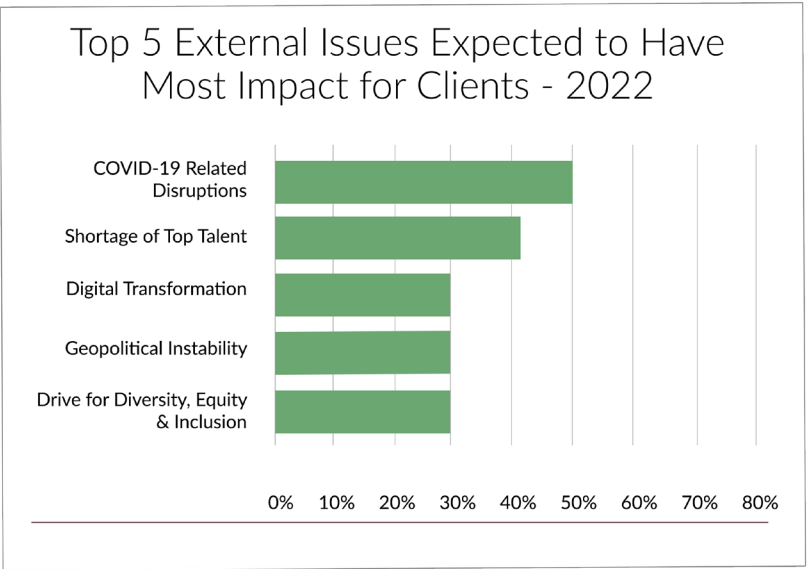
When it comes to the economic outlook for the profession itself, AESC members are optimistic. AESC members from global firms to boutiques all share a greater outlook for Executive Search this year, 10 points greater or more than last year for most. The outlook for Leadership Consulting is also more positive this year. For those who have invested significantly in Interim and on-demand executive services, the outlook is also positive.



COVID-19 disruptions top the list of external issues still impacting clients.

While much of the world is in a recovery phase from the global COVID-19 pandemic that has impacted the globe since early 2020, disruptions from the pandemic continue to present new challenges for clients. The shakeup from both COVID and the Great Resignation have presented a severe shortage of talent for key executive roles. Many of those roles, driven by digital technology, did not exist even just a few years ago, so finding the right and available—and increasingly diverse—talent presents clients with a level of competition not previously known.

AESC members agree with clients on the most important competencies for a post-pandemic environment—adaptable and agile. AESC members, however, rank emotional intelligence and customer-centricity as more important in their roles than do clients. Clients rank innovation as a top 5 competency whereas it does not make the list for AESC members.



An historic talent shortage presents an immense opportunity and challenge for the profession.

AESC members rank the talent shortage as both the no. 1 opportunity and the no. 1 challenge for this year. Several forces are colliding which present immense opportunity for the profession—the COVID-19 reset, fallout from the Great Resignation, and an intense demand for both digital and diverse talent. These forces led to record growth in the profession last year with continued momentum throughout this year. While ESG continues to grow as a focus for clients, it ranked as the no.10 opportunity for the profession this year. This is an area more AESC members may want to look for opportunities as clients invest in ESG as a strategic priority for their organizations.

While there is massive opportunity, there are also new challenges. The evolving VUCA business environment, rapid acceleration of digital technology and the Russian war in Ukraine all present new disruptions and uncertainty. AESC members also rank being slow to adapt and change as a top 5 risk for the profession this year.

Top 5 Opportunities for the Profession		
	2022	2021
1	Talent Shortage	Leadership Consulting
2	Change Management	Change Management
3	Advisor Relationships	Advisor Relationships
4	DEI	Digital Transformation
5	Leadership Consulting	DEI
10	* ESG	

Top 5 Challenges for the Profession		
	2022	2021
1	Talent Shortage	COVID-19
2	VUCA	Economic Outlook
3	Geopolitics	Fee Erosion
4	Slow to Adapt/Change	Digitization
5	Digitization	Internal Talent Aquisition

Digital technology and ESG drive demand for trending and emerging roles.

Digital acceleration has created demand for C-level technology-related roles for a decade, but since the global pandemic, this demand has reached levels of intensity previously unseen. From Chief Transformation Officers to Chief AI Officers, the C-suite is increasingly digital-focused.

ESG is also a driver of new C-level positions. AESC members see a heightened demand for Chief Sustainability Officers and Chief Diversity Officers, and emerging demand for Chief Wellness Officers.

Emerging Executive Roles According to AESC Members





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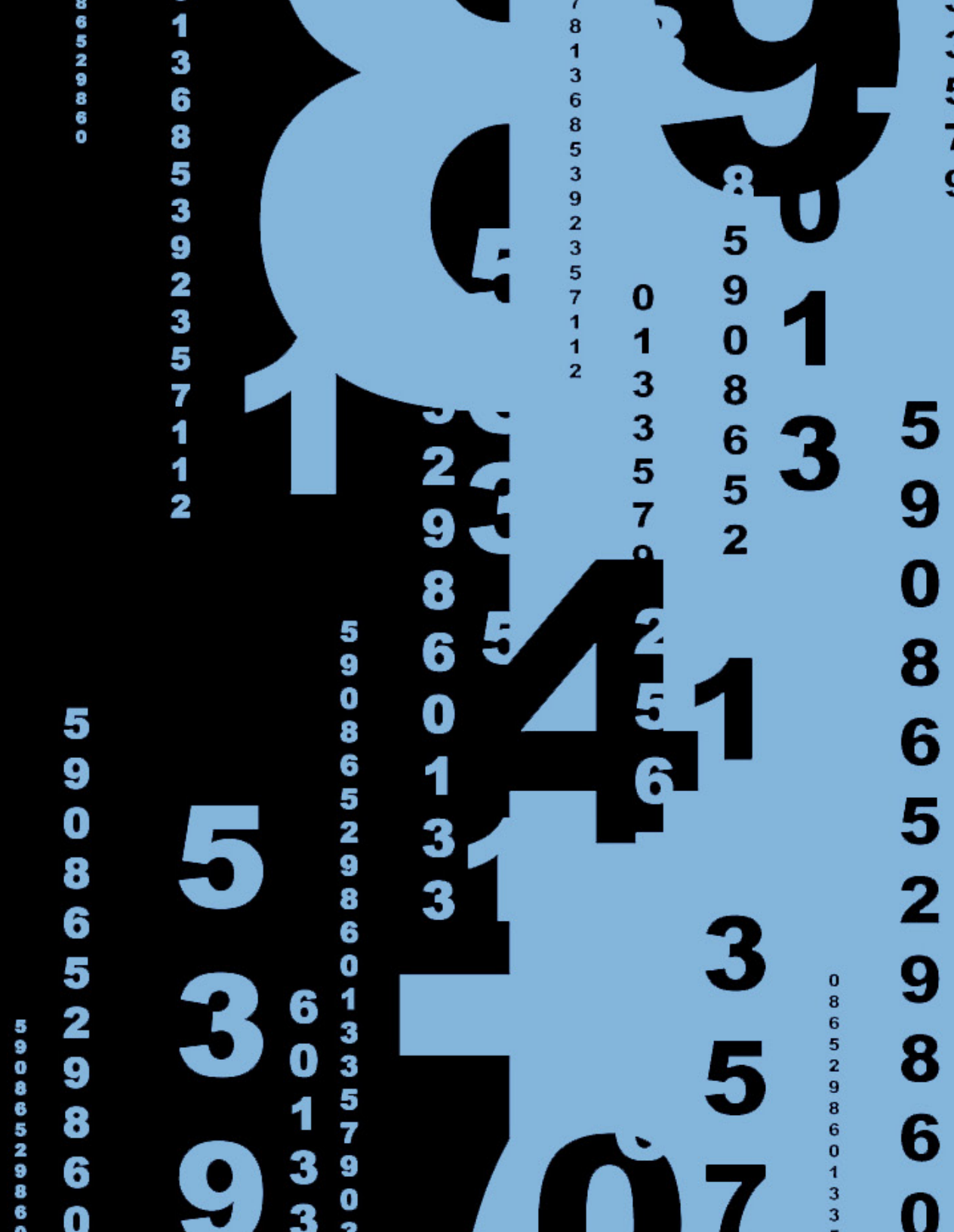
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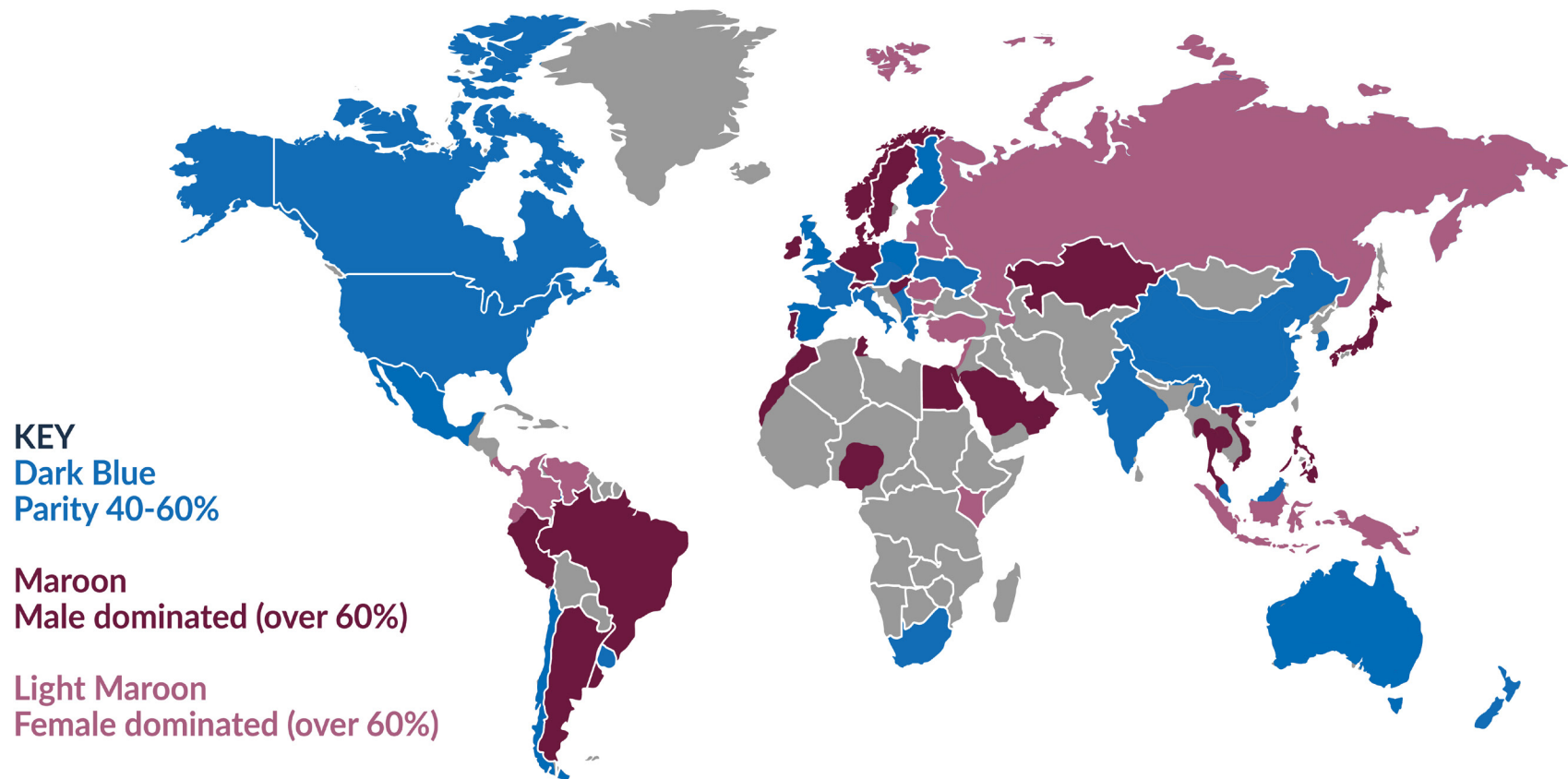
Diversity in 2022



Gender parity within the profession represented in most geographic regions.

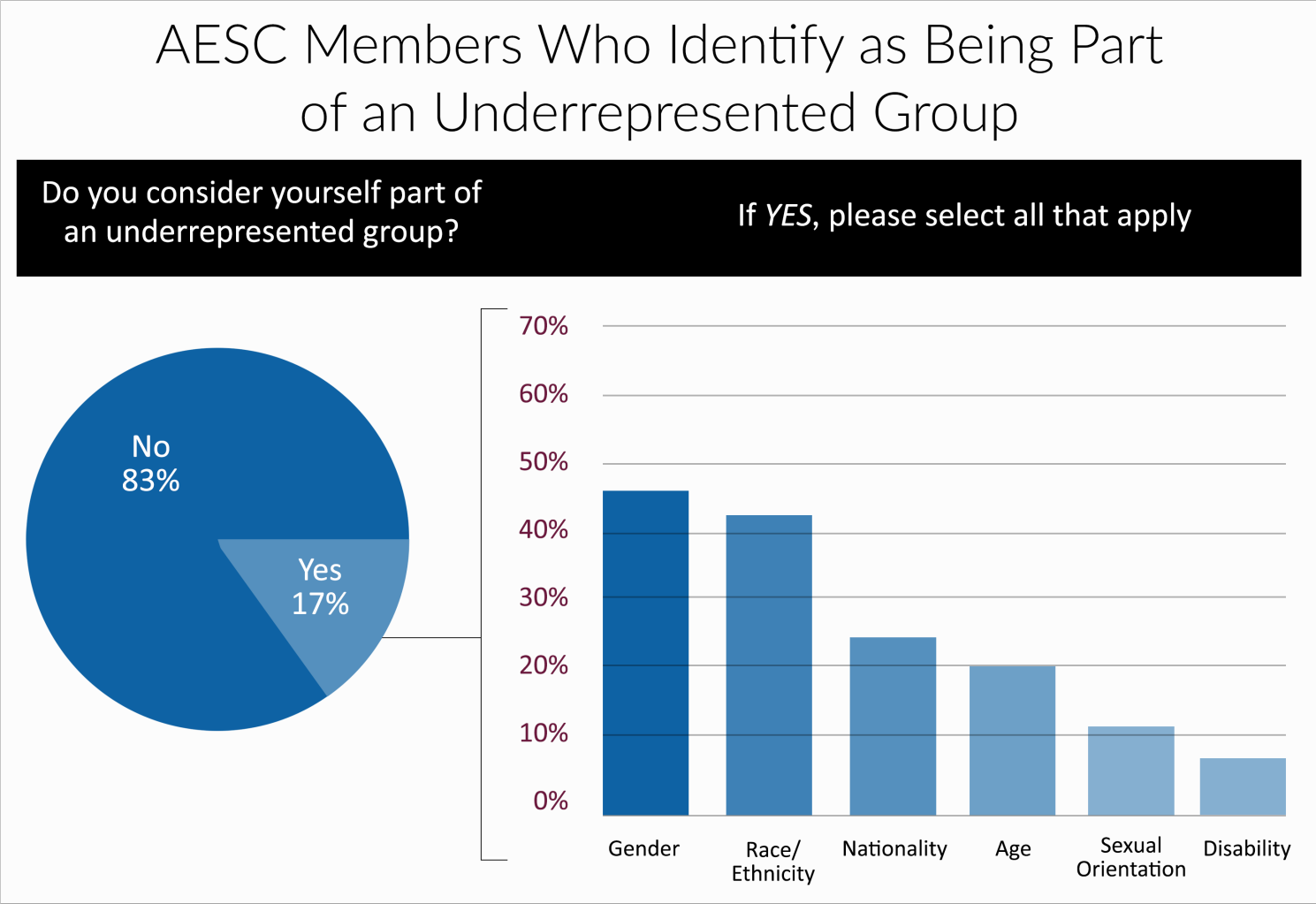
Europe and the Middle East are the least gender diverse regions within the profession. Asia is at near parity for both management and partner/consultant level. North America, Latin America, the Pacific and Africa represent the most gender diverse regions within the profession.

Gender Balance of AESC Members by Country



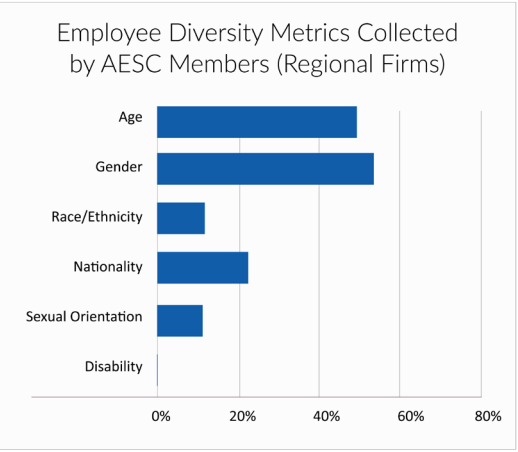
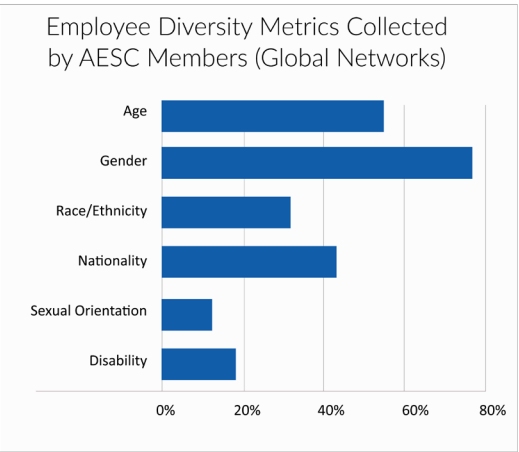
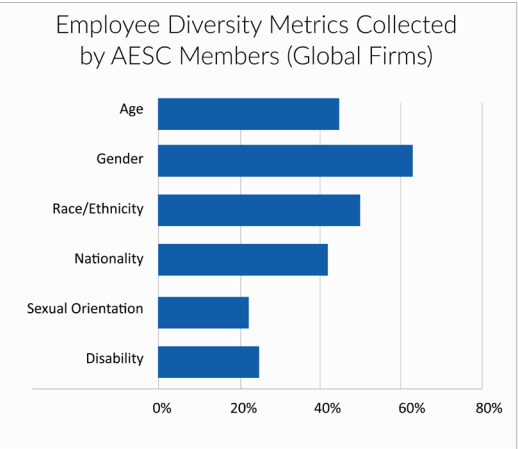
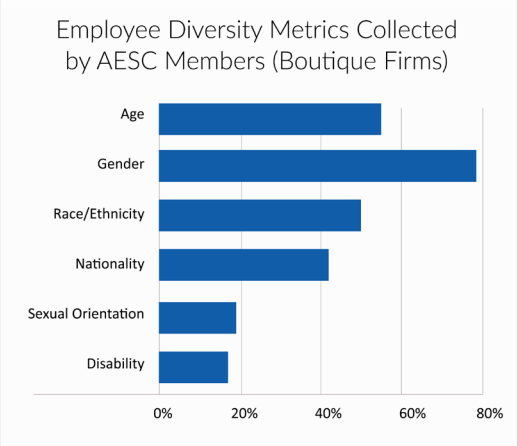
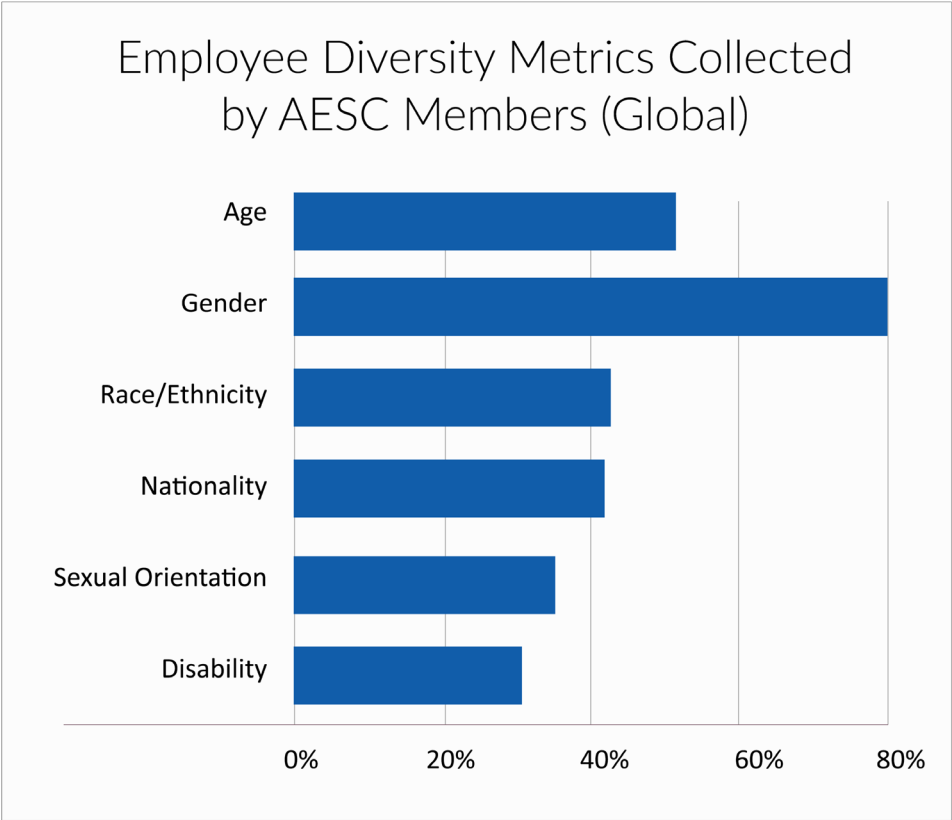
The profession trends more diverse overall, but there is more work to be done.

Based on survey respondents, an estimated one in five individuals in the profession consider themselves underrepresented based on gender, race & ethnicity, nationality, age, sexual orientation or disability.



Less than half of AESC members are collecting employee diversity data beyond gender or age.

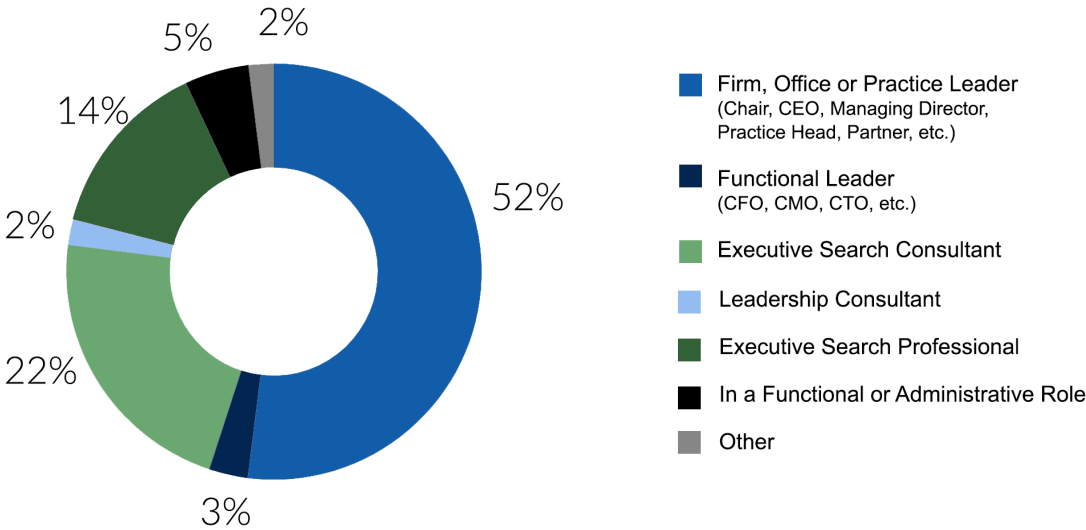
According to firm leaders, a majority of AESC member firms are collecting employee gender data, while about half are collecting age data. More than a third collect employee data for race/ethnicity and nationality. Few AESC members are collecting employee diversity data based on sexual orientation or disability.



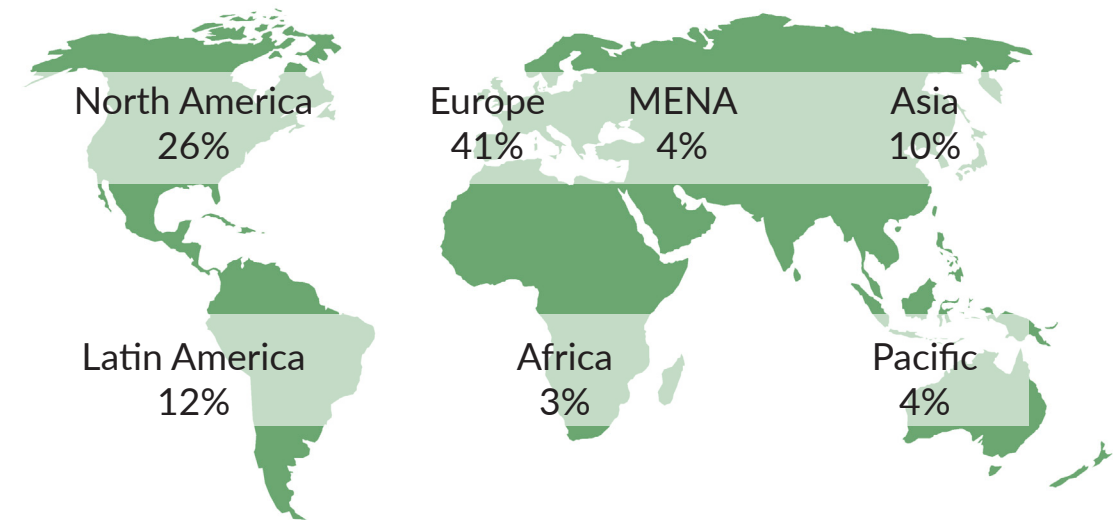
Demographics



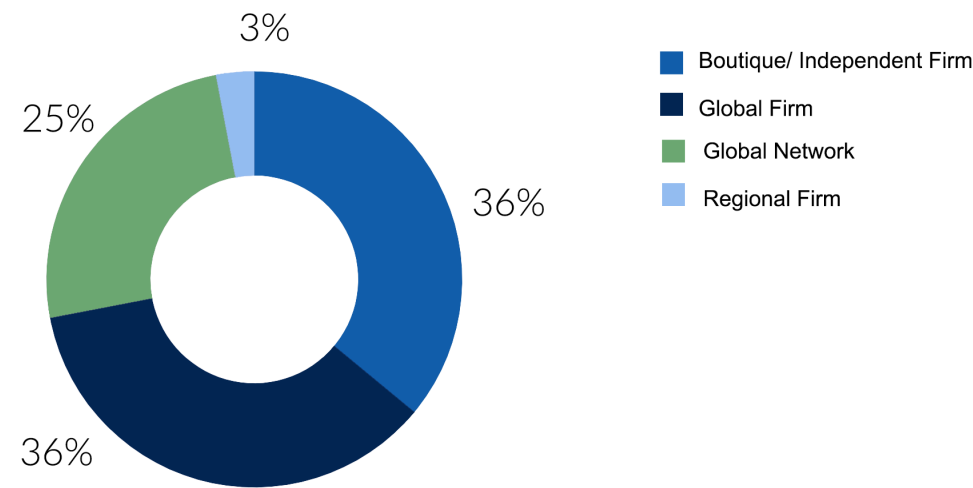
Respondents by Role



Respondents by Region



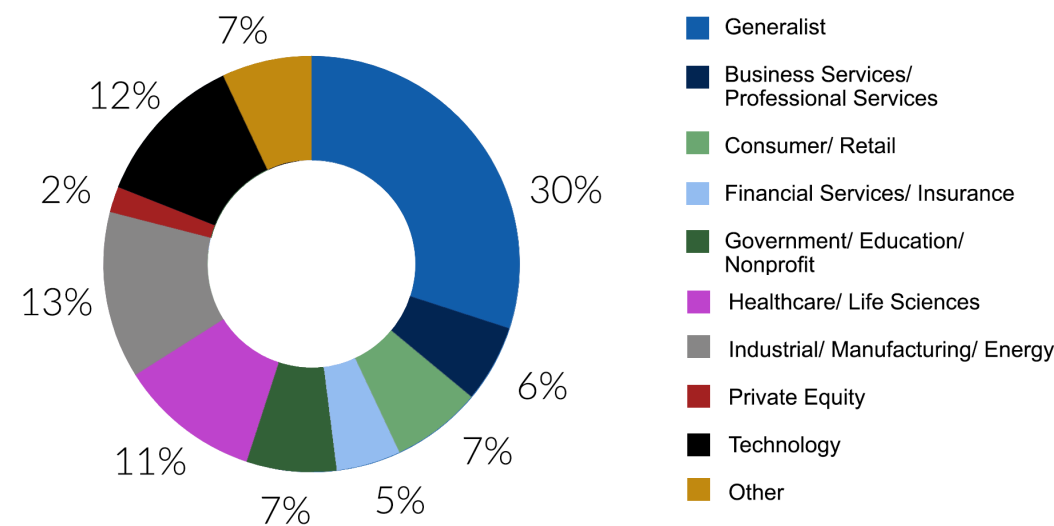
Respondents by Firm Type



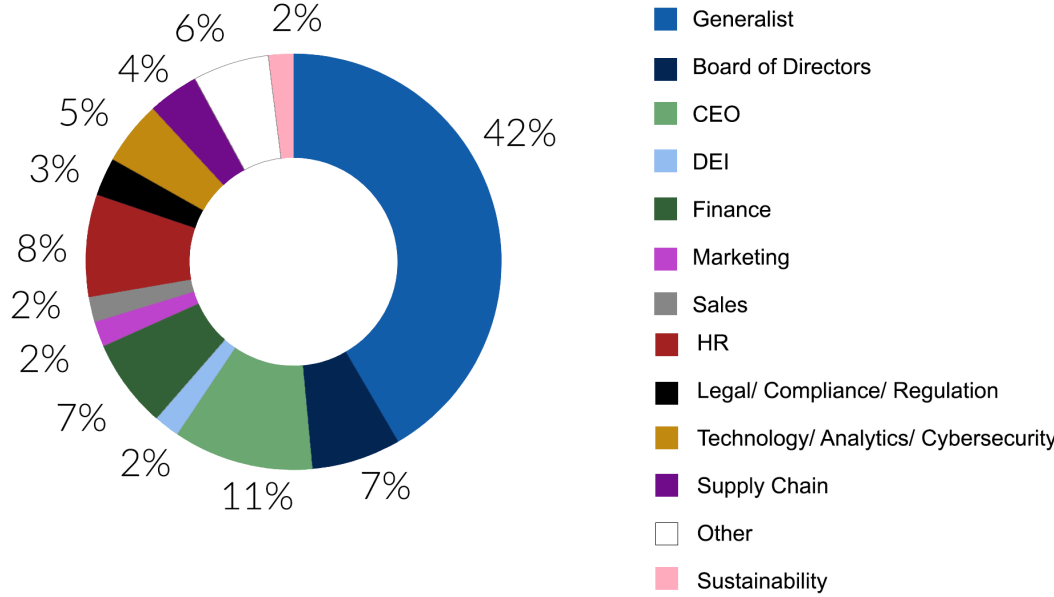
Thank you to the following firms for providing additional data that informed our study.

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- Heidrick & Struggles
- Odgers Berndtson
- Panorama
- Russell Reynolds Associates
- Sheffield Haworth
- Signium
- Spencer Stuart
- Stanton Chase
- WittKieffer

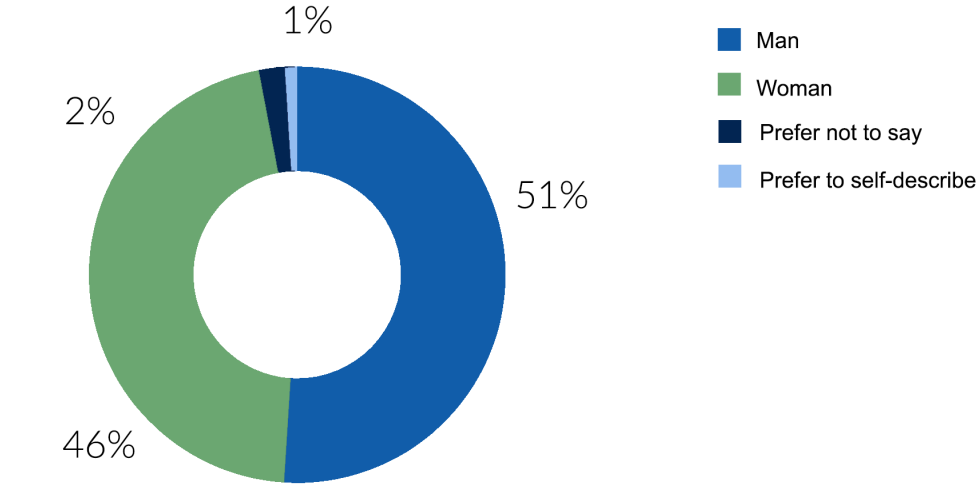
Respondents by Industry



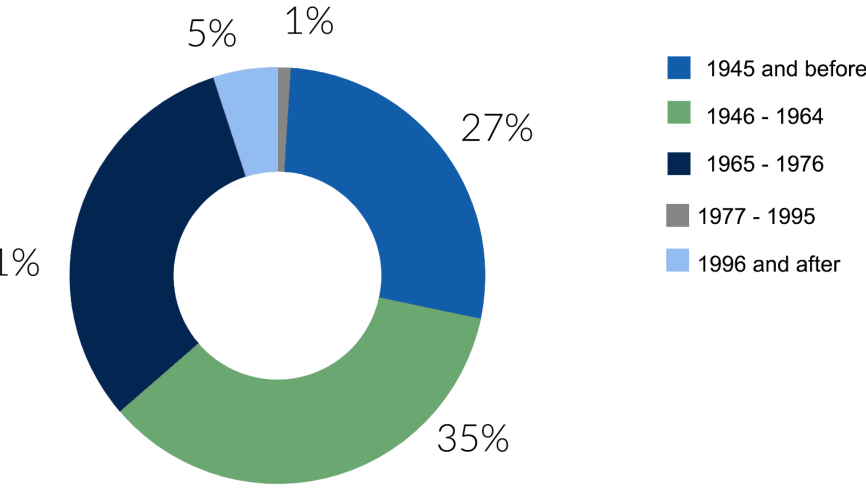
Respondents by Function

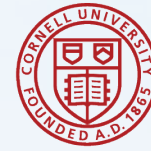


Respondents by Gender



Respondents by Age





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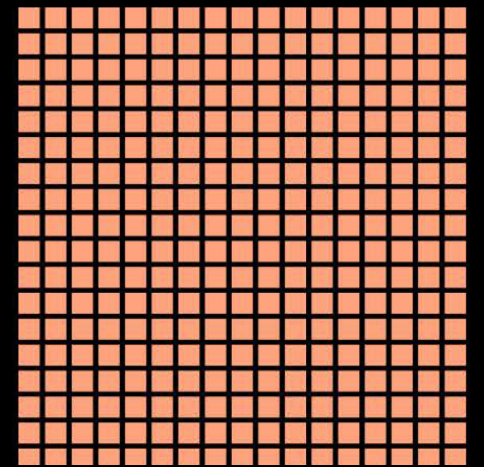
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