



NATIONAL CENTER FOR
THE MIDDLE MARKET

PROFESSIONAL SERVICES

MIDDLE MARKET INDICATOR

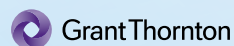


4Q | 2016

IN COLLABORATION WITH



THE OHIO STATE UNIVERSITY
FISHER COLLEGE OF BUSINESS



Professional Services' Revenue Growth vs. National

10.2%

PROFESSIONAL SERVICES' MIDDLE MARKET GROWTH OVER THE PAST 12 MONTHS

6.9% Past 12 Months National

8.5%

PROFESSIONAL SERVICES' MIDDLE MARKET GROWTH OVER THE NEXT 12 MONTHS

5.5% Next 12 Months National

Professional Services' Employment Growth vs. National

7.3%

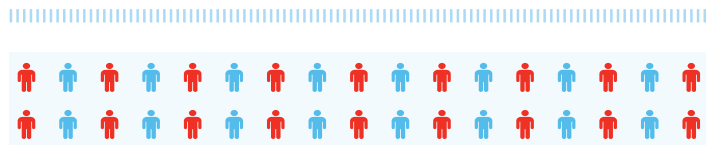
PROFESSIONAL SERVICES' MIDDLE MARKET GROWTH OVER THE PAST 12 MONTHS

5.4% Past 12 Months National

5.1%

PROFESSIONAL SERVICES' MIDDLE MARKET GROWTH OVER THE NEXT 12 MONTHS

3.4% Next 12 Months National



Professional Services' Top Internal Challenges Over The Next 3 Months



STAFF/EMPLOYEES

48%



BUSINESS GROWTH

34%



COSTS

23%

VS. NEXT 12 MONTHS

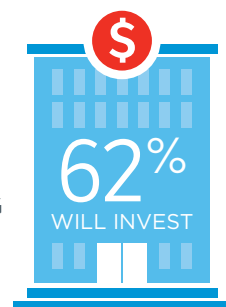
STAFF/EMPLOYEES
37%

BUSINESS GROWTH
16%

COSTS
13%

Preparing for Growth Through Capital Investment

MIDDLE MARKET COMPANIES IN PROFESSIONAL SERVICES ARE SENDING A STRONG MESSAGE THAT THEY ARE POISED TO INVEST.



Professional Services' Middle Market Defined

ANNUAL REVENUE
\$10 MM-\$1 B



REPRESENTS

0.4%

OF ALL PROFESSIONAL SERVICES COMPANIES

MORE THAN
10,600
BUSINESSES



EMPLOYS

22.6%

OF THE PROFESSIONAL SERVICES WORKFORCE

GENERATING
\$414B
IN ANNUAL REVENUE



GENERATES

27.1%

OF ALL PROFESSIONAL SERVICES BUSINESS REVENUE

Source: 2014 D&B Data

Professional Services' Percentage of Revenues Around the World



UNITED STATES

83.3%

CANADA/MEXICO

9.9%

EUROPE

4.9%

ASIA

4.7%

LATIN AMERICA

1.4%

MIDDLE EAST

1.0%

AFRICA

0.3%

OTHER

0.0%