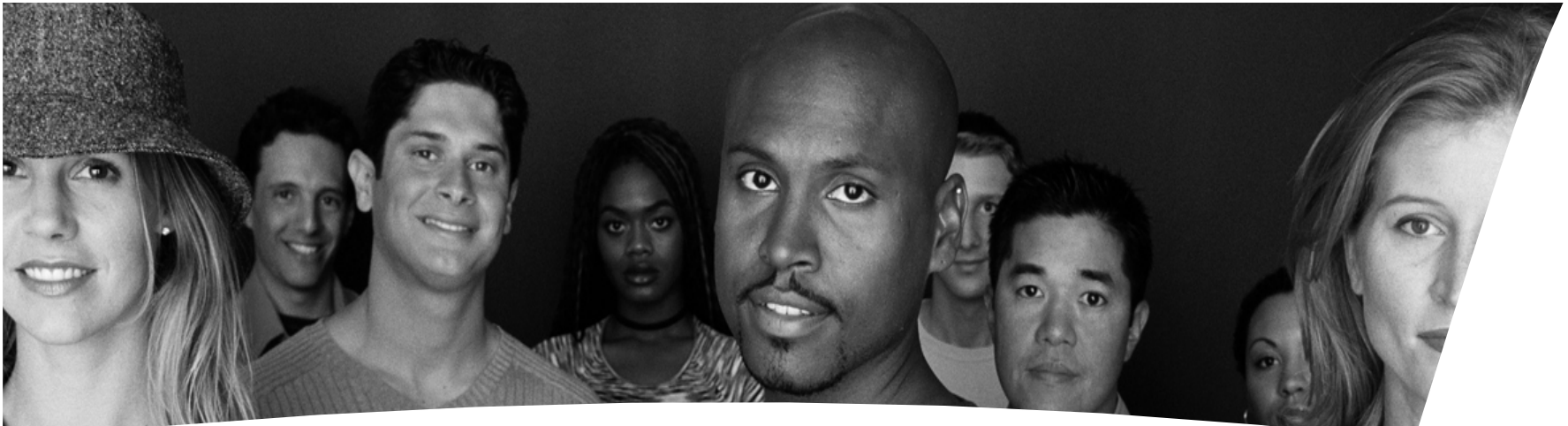


“Multinational Research at TNS”



3mc2008 – Proceedings ©



Leendert de Voogd
Global Sector Head

3MC – Panel on Survey Agencies – Survey Agencies as Carriers of Multinational Research
Berlin, 27^h of June 2008

Some Key Facts about TNS



The TNS Group

- World's largest *ad hoc* research provider
- More than 150 offices in 80+ countries across the five continents
- Permanent staff of 14 000 full time employees
- Over 1.5 billion euros of revenue in 2007

The TNS Group

- **Providing a full spectrum of areas**

Our
Expertise Sectors
are

Political & Social

Automotive

FMCG – Worldpanel

Financial Services

Healthcare

Media Intelligence

Technology

Media Audience Measurement

The TNS Group

- **Some of our P&S clients commissioning MCPs**

A
Wide Variety
of P&S Clients

International Institutions

Research Institutes & Academic Research Groups

Associations & Non-Profit Organizations

The TNS Group

- **Some of our P&S clients commissioning MCPs**



The Place of MCPs within TNS

- **MCP = 25% of TNS total Revenue**
 - **+ 9% growth**
 - **85% of the Automotive sector**
 - **20% of the P&S sector**
- **Our target: 30% by 2010**



The testimony of TNS capabilities

- **The Standard Eurobarometer:**
 - Frame-work contract used by the European Commission
 - 50 million euros over 4 years
 - 34 different countries/territories
 - About 160 000 face-to-face int. / year
 - 46 different languages
 - Random multi-stage sampling
 - 45mn – 1h questionnaires



Our understanding of MCPs



The key principles to International research

- Too often, international studies are regarded as the sum of national studies conducted in different countries.
- The key principles of our philosophy:

Consistency

Replicability

Reliability

Timely

**Cost
effectiveness**

The key principles to International research

- Centralisation of the processes is extremely important (methodology, briefing, communication, data processing, checking and editing, reporting...)
- Decentralisation of the fieldwork. The “One agency per Country to cover”:
 - Problem of non-native speaking interviewers
 - Adaptation of master questionnaire to local needs
- Operations and scientific committees have to be put in place (external and internal experts to TNS).

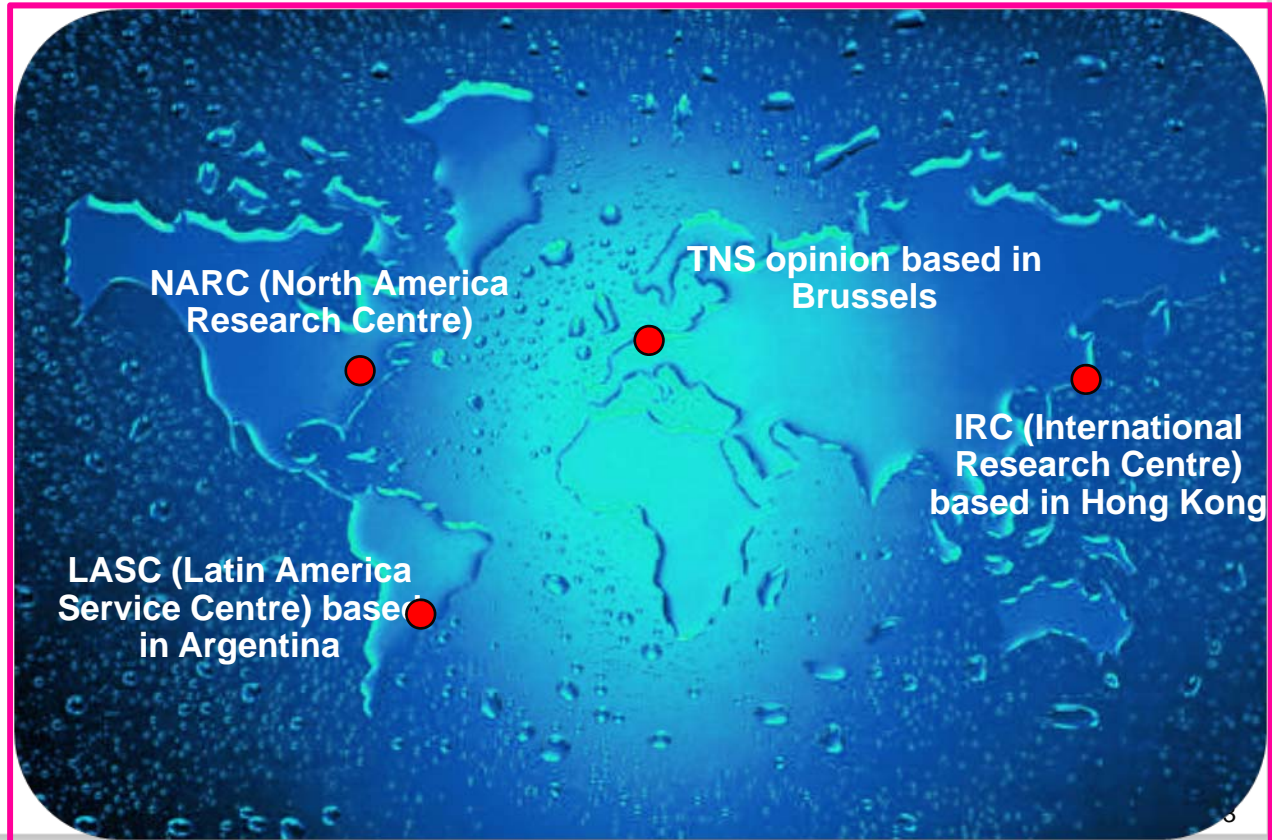
The key principles to International research

- “Coordination” is the key word here:
Coordination, from our point of view, is the best guarantee given to the homogeneous application of survey requirements in all countries and hence ensuring the consistency and comparability of the final results both in time and between countries.

To coordinate is to organise
by creating synergies

Our MCPs Hubs

- TNS has created centres of excellence for managing multi-country projects in each region with the objective of proactively servicing global clients.
- These centres are staffed, trained and resourced with 'best in class' people, systems and tools to ensure delivery of seamless global research.



3 characteristics of our MCPs Hubs

- Single point of contact:
 - One key contact, one email address, one phone number, one time-zone, one language
 - Advice on best approach from a regional, big-picture perspective thanks to their experience in all methodologies
 - Unique responsible for the execution of the work performed locally

3 characteristics of our MCPs Hubs

- Expertise in international survey design:
 - Assist in multi-language questionnaire development
 - Set the sampling definition, design and procedures thanks to an international sociodemographic database
 - Pre-test in a multi-language environment

3 characteristics of our MCPs Hubs

- Animate the network:
 - Acquire a good knowledge of “what is happening there”; nothing can be taken for granted. You have to go local!
 - The integration level of a network (procedures, communications, information,...)
 - Rely on national expertise (for national relevancy of some topics or concepts,...)
 - Share experience and feedback
 - Definition of strict homogeneous reporting rules

tnsTM political & social

tnsTM political & social

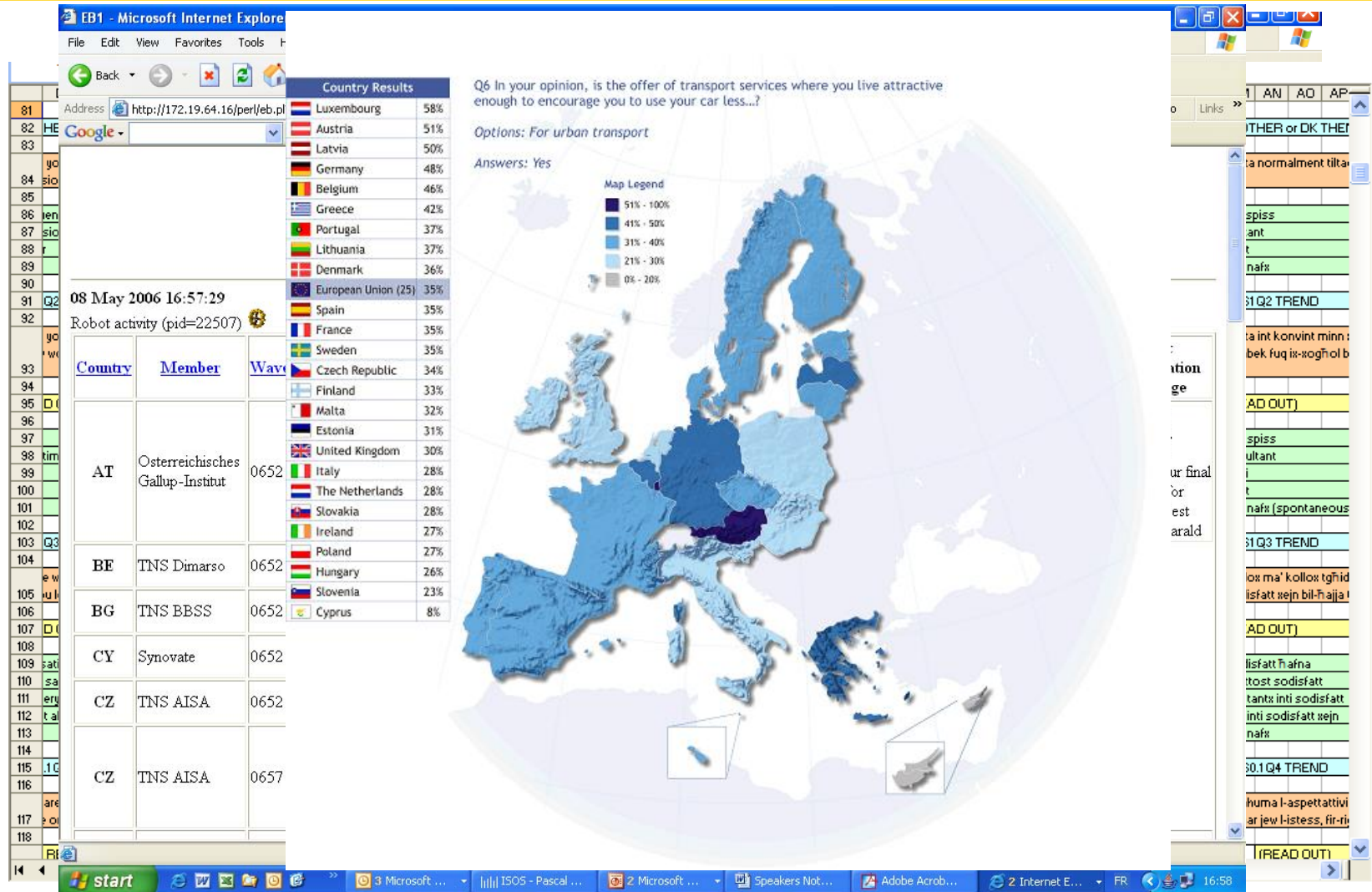
Our coordination tools



Our coordination tools

- Our R&D teams are constantly developing new coordination tools or improving current ones, the aim being to win in terms of quality and efficiency:
 - Communication platforms (Extranets)
 - Online Translation tools
 - Online Progress tracker
 - Automatic data checking tools
 - Multilanguage Graphic Tool...

Our coordination tools



thank you!

vielen Dank!

merci!

bedankt!

tack!

muchas gracias!

grazie mille!

kiitos!