“Multinational Research at TNS”

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Global Sector Head

3MC – Panel on Survey Agencies – Survey Agencies as Carriers of Multinational Research
Berlin, 27th 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:

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<th>Political &amp; Social</th>
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<td>Automotive</td>
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<td>FMCG – Worldpanel</td>
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<td>Financial Services</td>
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<td>Healthcare</td>
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<td>Media Intelligence</td>
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<td>Media Audience Measurement</td>
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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
• 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
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!
bedankt!
mercî!
tack!
muchas gracias!
grazie mille!
kiitos!